ISG Provider Lens™

Public Cloud – Services & Solutions

Consulting and Transformational Services for Midmarket

U.K. 2021
Quadrant
Report

A research report comparing provider strengths, challenges and competitive differentiators

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About this Report

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The research and analysis presented in this report includes research from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of July 2021, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

All revenue references are in U.S. dollars ($US) unless noted.

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ISG Provider Lens™

ISG Provider Lens™

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EXECUTIVE SUMMARY

The increasing adoption of cloud services is expected to be the primary driver of IT market growth in the U.K. Enterprises are adopting cloud technology at a faster and higher rate than small businesses. Infrastructure as a service (IaaS) has drawn the interest of IT decision-makers, particularly in small and medium enterprises (SMEs), and is expected to be the region's leading client category. Furthermore, ever-increasing government cloud spending is a crucial element driving market growth, as public sector cloud adoption lags behind the private sector.

Businesses in the U.K. are increasingly embracing a cloud-first strategy, with an increasing number of organisations anticipating a time when they would migrate all their IT assets to the cloud. While small businesses can take the natural step of removing depreciated hardware assets and completely moving to the cloud, large organisations, with significant infrastructure investments, may find it difficult to make this move rapidly. As a result, "cloud everything" will be out of reach for some time. ISG expects majority of businesses to maintain hybrid IT setups. The momentum of cloud adoption will continue as cloud users increasingly migrate portions of their estates to the cloud and consequently take on more complex migration projects.

Rise in outcome based and gain sharing model: Time and material (T&M) and key responsibility area (KRA) matrices have traditionally been used by IT service providers to determine price for services, based on effort. Such service models are being set aside because they do not consider business outcomes or risk ownership. While fines are imposed based on established service level agreements (SLAs) in specific service scenarios, such as managed services, these SLAs are often defined based on predictable results and manageable risks. There has been a change from an input-based pricing model to an output-based pricing strategy. Customers simply pay for the results obtained throughout the engagement. Such a relationship exists when a service provider collaborates with a customer as a co-innovator and business partner. This trend is expected to continue as organisations face fierce competition in the global market, and IT spend becomes more strategic rather than commoditized for utilising a set of services.

Transformation-led IT outsourcing deals: It has been observed that the companies across verticals are outsourcing their multicloud and classic data centres to global and regional IT service providers. By selecting the right technology and business partner, these firms want to focus on their core business functions and business expansion plan with digital services adoption. The deals that have been announced in the recent past have been a combination of rebadge of employees, in-flight digital consulting projects and core IT components. The finding during the study reveals that cost reduction is, once again, the primary motivator for U.K. businesses to outsource, with a third of all businesses planning to outsource more. According to the research, cloud service provider satisfaction is also greater than the percentage of respondents that are satisfied with their IT service providers.

Strategic focus on increasing cloud adoption: The government's goal is to build a world-class digital economy that benefits everyone and strengthens the economy in the long run.

Several components of the digital transformation process are driven by execution. Building a world-class digital ecosystem, improving digital skills access for all U.K. businesses, and making the region the most suited location for digital business is all a part of this plan. AWS, Azure, and Google Cloud Platform are becoming increasingly important in the public sector and enterprise clients' digitalisation journeys.

Increased use of public cloud services in the U.K.: Businesses in the U.K. are realising the value of cloud services and solutions in meeting customer needs. A growing number of businesses are focused on implementing a multicloud approach to develop cloud-native solutions. Small and medium-sized businesses (SMBs) are adopting cloud-native solutions and transformation strategies at an increasing rate. The cloud platforms AWS, Azure, and Google are the main drivers of enterprise digital transformation. As hyperscalers provide a wide range of services and platform enablement to businesses, CTOs in the U.K. are considering them for R&D engagements to push various product services in the region.

Pandemic has pushed CXOs to adopt cloud as a mainstream solution: Since the beginning of the pandemic, there has been a massive shift in consumer buying behaviour, from physical to digital. This change in consumer buying patterns has pushed CXOs to adopt the cloud as a mainstream solution from multiple dimensions. In order to stay competitive in the global market, the majority of the companies, across verticals, have increased their cloud spend and workload migration to the cloud.

Demand for integrated AI-led cloud managed services: Multicloud managed services continue to grow as companies are adopting a multicloud approach to drive their digital transformation journeys. Midsize and small service providers, with their unique service offerings, have gained traction by winning public cloud managed services contracts. Early entrants have an advantage here, but small and midsize providers are gaining traction with their unique offerings in public cloud managed services for multicloud environments. Several small providers are being acquired by large system integrators to either eliminate the competition or to acquire their niche capabilities or client segments. This consolidation and shrinkage in the managed service provider market will prevail as technologies evolve. Public cloud providers have MSP certifications that every other system integrator is striving to acquire. Service providers are also differentiating themselves by creating proprietary offerings, bringing in vertical-specific expertise or establishing strategic partnerships with public cloud providers.

Multicloud has become the new normal: Enterprises do not wish to limit themselves to just one hyperscalers as each one has certain exclusive strengths, either in terms of vertical solutions or prices and other factors. When enterprises embark on their cloud journeys, they want to try out their vision with each hyperscaler in order to pick the right partner, and not just a commodity service provider, for success. Most enterprises have been using a multicloud environment. This trend is expected to surge irrespective of the enterprise size. However, there are some barriers to a multicloud setup. Orchestration involves several moving parts in a complex setup to be operated in a public cloud environment. Many users find it difficult to manage multicloud environments and are increasingly adopting various tools to handle this complexity, but these are not mature enough. Other barriers include vendor lock-in by the public cloud provider and interoperability between two or more public cloud providers.

Introduction

Simplified illustration

Public Cloud – Services and Solutions 2021	
Consulting and Transformational Services for Large Accounts	Consulting and Transformational Services for Midmarket
Managed Public Cloud Services for Large Accounts	Managed Public Cloud Services for Midmarket
Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services

Source: ISG 2021

Definition

In the last financial year, the increase in public cloud adoption among enterprises was mainly triggered by the COVID-19 pandemic, along with other factors, such as the growing digital transformation engagements, increasing recognition of the importance of cyber security and expanding remote working environments. The increased maturity of the cloud industry made a major impact on both enterprises and IT service providers, with both buyers and consumers witnessing a huge shift the buying behaviour, from physical to digital. For enterprises, this has also impacted business models, requiring digital initiatives and recognizing the need to address governance, risk and compliance norms. Considering the widespread adoption of the as-a-service model, enterprises need to continuously evaluate cloud service providers, globally, mainly due to growing security concerns and the dynamic nature of the business landscape. Enterprises continue to seek providers that can act as strategic partners in carrying out cloud transformation

Definition (cont.)

engagements on major hyperscalers (AWS, Microsoft Azure and Google Cloud Platform). The provider will also continue to manage the workloads on an on-going basis, and help enterprises control, optimise and manage cloud expenses though FinOps strategies.

ISG reports a strong demand for digital transformation engagements, which, in turn, is driving global contracts for cloud products and services, including infrastructure-as-a-service (IaaS) and platform-as-a-service (PaaS). According to the latest 2Q21 ISG Index™, the global market has grown 32 percent in combined market annual contract value (ACV) to reach its current value of US$19.1 billion year-over-year, while the as-a-service ACV has increased by 25 percent to reach US$11.2 billion in the same period. Also, the IaaS market grew by 29 percent to reach US$15.3 billion, while the SaaS market grew by 15 percent to reach US$5.7 billion in the first half of 2021.

The ISG Provider Lens™ study offers the following to IT-decision makers:

- Strengths and weaknesses of relevant providers.
- A differentiated positioning of providers based on competitive strength and portfolio attractiveness.
- A perspective on several markets, including global, the U.S., the U.K., Germany, Switzerland, France, the Nordics and Brazil.

This study serves as the basis for important decision-making in terms of positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also leverage information from these reports to evaluate current vendor relationships and potential engagements.

Definition (cont.)

Scope of the Report

The Public Cloud – Solutions & Service Partners 2020 U.K. report will assist buyers while reviewing a significant cloud transformation strategy and the capabilities of service providers in numerous geographies. Enterprise clients will also benefit from the study because it incorporates ISG's strengths in global sourcing advisory, contract knowledge databases, regional research, and expertise in technology ecosystems and innovations.

This study includes various reports from seven quadrants that cover cloud service models. Not all quadrants are covered in each geography. Coverage depends on provider responses, participation and relevance. Quadrants that are not covered in a region may be covered in future studies. The geographic report areas include the U.S., the U.K., Germany, Switzerland, the Nordics, France, Brazil and Latin America (LATAM).

Consulting and Transformation for Large Accounts: This quadrant assesses a service provider's ability to offer cloud assessment, advisory, workload migration and cloud consulting to large businesses. The enterprises are subject to strict regulations that can complicate engagements. They typically have more than 5,000 employees and a revenue of more than US$1 billion.

Consulting and Transformation for Midmarket: This quadrant assesses a service provider's ability to provide cloud assessment, advisory workload migration and continuous service transformation for public cloud to midsize businesses. The enterprise client typically has fewer than 5,000 employees or generates less than US$1 billion in revenue.

Managed Public Cloud Services for Large Accounts: This quadrant assesses a service provider's ability to provide multicloud managed services for large businesses. The enterprises are subject to strict regulations that can complicate engagements. They typically have more than 5,000 employees and a revenue of more than US$1 billion.

Managed Public Cloud Services for Midmarket: This quadrant assesses a service provider's ability to provide multicloud managed services for public cloud for midsize businesses. The enterprise client typically has fewer than 5,000 employees or generates less than US$1 billion in revenue.

Hyperscale Infrastructure and Platform Services: Providers in this quadrant offer virtual compute resources, middleware and software on a public cloud. Clients consume infrastructure and platform (micro)services as an on-demand and a web-centric service. Typical services in the IaaS segment are compute services, storage and network resources, where all are provided in a virtual or containerized software-defined manner and rounded up by serverless architectures.

Definition (cont.)

SAP HANA Infrastructure Services: This quadrant examines cloud infrastructures best suited to host SAP software portfolio, with focus on SAP S/4HANA workloads and large-scale HANA databases. Participating vendors offer hyperscale IaaS — including infrastructure operations, facilities, provisioning and scaling capacity — in a pay-as-you-go model. IaaS tools should include data migration, system imaging, backup, restore, disaster recovery, resource usage monitoring and management dashboards. Tools can be part of the standard IaaS offering or be provided by partners in a marketplace.

Provider Classifications

The provider position reflects the suitability of IT providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions IT providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between US$20 million and US$999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with 5,000 or more employees or revenue above US$1 billion, with activities worldwide and globally distributed decision-making structures.

Provider Classifications

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly.

Leader

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Product Challenger

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Market Challenger

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

Contender

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/ services and follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Provider Classifications (cont.)

Each ISG Provider Lens™ quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star. Number of providers in each quadrant: ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

Rising Star

Rising Stars have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not In

The service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

Public Cloud – Services & Solutions - Quadrant Provider Listing 1 of 4

	Consulting and Transformational Services for Large Accounts	Consulting and Transformational Services for Midmarket	Managed Public Cloud Services for Large Accounts	Managed Public Cloud Services for Midmarket	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
3stepIT	Not In	Contender	Not In	Not In	Not In	Not In
Accenture	Leader	Not In	Leader	Not In	Not In	Not In
Acora	Not In	Not In	Not In	Contender	Not In	Not In
Alibaba	Not In	Not In	Not In	Not In	Contender	Not In
ANS	Not In	Contender	Not In	Not In	Not In	Not In
Aptum	Not In	Not In	Not In	Contender	Not In	Not In
Atos	Leader	Not In	Leader	Not In	Not In	Not In
AWS	Not In	Not In	Not In	Not In	Leader	Leader
Birlasoft	Not In	Not In	Contender	Not In	Not In	Not In
CANCOM (Telefonica Tech)	Market Challenger	Leader	Product Challenger	Leader	Not In	Not In
Capgemini	Leader	Not In	Leader	Not In	Not In	Not In
Claranet	Product Challenger	Leader	Rising Star	Leader	Not In	Not In
Cloudreach	Product Challenger	Product Challenger	Market Challenger	Leader	Not In	Not In
Coforge	Product Challenger	Leader	Product Challenger	Leader	Not In	Not In

Public Cloud – Services & Solutions - Quadrant Provider Listing 2 of 4

	Consulting and Transformational Services for Large Accounts	Consulting and Transformational Services for Midmarket	Managed Public Cloud Services for Large Accounts	Managed Public Cloud Services for Midmarket	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
Cognizant	Leader	Not In	Product Challenger	Not In	Not In	Not In
Computacenter	Market Challenger	Leader	Rising Star	Leader	Not In	Not In
DXC	Product Challenger	Not In	Product Challenger	Not In	Not In	Not In
Ensono	Product Challenger	Leader	Market Challenger	Leader	Not In	Not In
Fujitsu	Leader	Not In	Leader	Not In	Not In	Not In
Google	Not In	Not In	Not In	Not In	Leader	Market Challenger
HCL	Leader	Not In	Leader	Not In	Not In	Not In
Hexaware	Product Challenger	Leader	Product Challenger	Leader	Not In	Not In
IBM	Leader	Not In	Leader	Not In	Product Challenger	Product Challenger
Infosys	Leader	Not In	Leader	Not In	Not In	Not In
Jisc	Not In	Contender	Not In	Contender	Not In	Not In
Lemongrass Consulting	Not In	Market Challenger	Not In	Market Challenger	Not In	Not In
Logicalis	Not In	Product Challenger	Not In	Market Challenger	Not In	Not In
Logicata	Not In	Market Challenger	Not In	Product Challenger	Not In	Not In

Public Cloud – Services & Solutions - Quadrant Provider Listing 3 of 4

	Consulting and Transformational Services for Large Accounts	Consulting and Transformational Services for Midmarket	Managed Public Cloud Services for Large Accounts	Managed Public Cloud Services for Midmarket	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
LTI	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Not In	Not In
Microland	Contender	Product Challenger	Contender	Product Challenger	Not In	Not In
Microsoft	Not In	Not In	Not In	Not In	Leader	Leader
Mindtree	Product Challenger	Rising Star	Product Challenger	Rising Star	Not In	Not In
Mphasis	Contender	Product Challenger	Contender	Product Challenger	Not In	Not In
N-iX	Not In	Rising Star	Not In	Not In	Not In	Not In
Oneadvanced	Not In	Not In	Not In	Product Challenger	Not In	Not In
Oracle	Not In	Not In	Not In	Not In	Product Challenger	Not In
OVHcloud	Not In	Not In	Not In	Not In	Contender	Contender
Protera	Not In	Market Challenger	Not In	Contender	Not In	Not In
Pythian	Not In	Contender	Not In	Market Challenger	Not In	Not In
Rackspace Technology	Rising Star	Leader	Leader	Leader	Not In	Not In
SAP	Not In	Not In	Not In	Not In	Not In	Product Challenger
Six Degrees	Not In	Contender	Not In	Not In	Not In	Not In

Public Cloud – Services & Solutions - Quadrant Provider Listing 4 of 4

	Consulting and Transformational Services for Large Accounts	Consulting and Transformational Services for Midmarket	Managed Public Cloud Services for Large Accounts	Managed Public Cloud Services for Midmarket	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
Slalom	Not In	Product Challenger	Not In	Product Challenger	Not In	Not In
Sopra Steria	Product Challenger	Product Challenger	Not In	Not In	Not In	Not In
SysGroup	Contender	Contender	Contender	Not In	Not In	Not In
TCS	Leader	Not In	Leader	Not In	Not In	Not In
Tech Mahindra	Product Challenger	Leader	Product Challenger	Rising Star	Not In	Not In
transputec	Not In	Not In	Not In	Contender	Not In	Not In
T-Systems	Product Challenger	Not In	Not In	Not In	Not In	Contender
Unisys	Product Challenger	Product Challenger	Product Challenger	Leader	Not In	Not In
Version 1	Contender	Not In	Contender	Not In	Not In	Not In
Virtusa	Not In	Not In	Not In	Contender	Not In	Not In
Virtustream	Not In	Not In	Not In	Not In	Not In	Product Challenger
Wipro	Leader	Not In	Leader	Not In	Not In	Not In
Zensar	Not In	Not In	Product Challenger	Product Challenger	Not In	Not In

Public Cloud – Services & Solutions Quadrants

ENTERPRISE CONTEXT

Consulting and Transformational Services for Midmarket

This quadrant is relevant to midsized enterprises in the U.K. that are evaluating consulting and transformation service providers. In this quadrant report, ISG lays out the current market positioning of these providers in the U.K. and how they can address key challenges in midsized enterprises' migration journeys to the public cloud environment.

Enterprises are shifting toward the public cloud working with consulting and transformation service providers to overcome the difficulties such as assessing the workloads, change management, a shortage of talented specialists or skill gaps, and uncertainties about integration of existing infrastructure. In 2021, however, the urge to move workloads to the public cloud has become more pressing than ever, and many enterprises are accelerating their digital transformation focused on customer experience. This report can help with choosing the right provider to overcome the challenges and address the difficulties mentioned.

For enterprises, the benefits of working with consulting and transformation service providers include experienced workload assessment, transformation roadmaps, advisory on workload migration, re-architecture of legacy applications, integration of automation capabilities, optimizing cloud governance. Enterprises embracing the shift toward the cloud are looking for multicloud solutions to achieve their business goals.

Midmarket clients have fewer complex requirements and smaller-scale projects than large enterprises, and they prefer providers with strong local delivery capabilities and high integration capabilities. Most midsized clients look for service providers with consulting and migration capabilities and the ability to offer a ready-to-use framework and cultural integration in the transformation journey.

Enterprises in the U.K. are building the strategy towards technical investments required due to the Brexit process. Consulting and transformation service providers can help them by creating a framework for workload migration based on a thorough understanding of the operating environment in the U.K. and data protection regulations. The regulatory push toward hybrid and multi-cloud environments os increasing among U.K. enterprises.

ISG sees that enterprises are increasingly shifting their focus from lift and shift toward long-term application modernization, hence re-architecture, code reviews and cloud-native environments are on the rise in the U.K. Most U.K. enterprises are willing to invest in migration but looking for providers with expertise in optimized cloud governance in the areas of cost and resource management.

IT leaders should read this report to better understand the relative strengths and weaknesses of consulting and transformation service providers, as well as to help them lead the digital transformation drive in their enterprises.

Software development and technology leaders should read this report to understand the positioning of consulting and transformation service providers, learn how those providers' offerings can impact an enterprise's ongoing transformation initiatives, and discover the benefits they can achieve by moving to the cloud.

Sourcing, procurement, and vendor management professionals should read this report to develop a better sense of the current landscape of consulting and transformation service providers in the U.K.

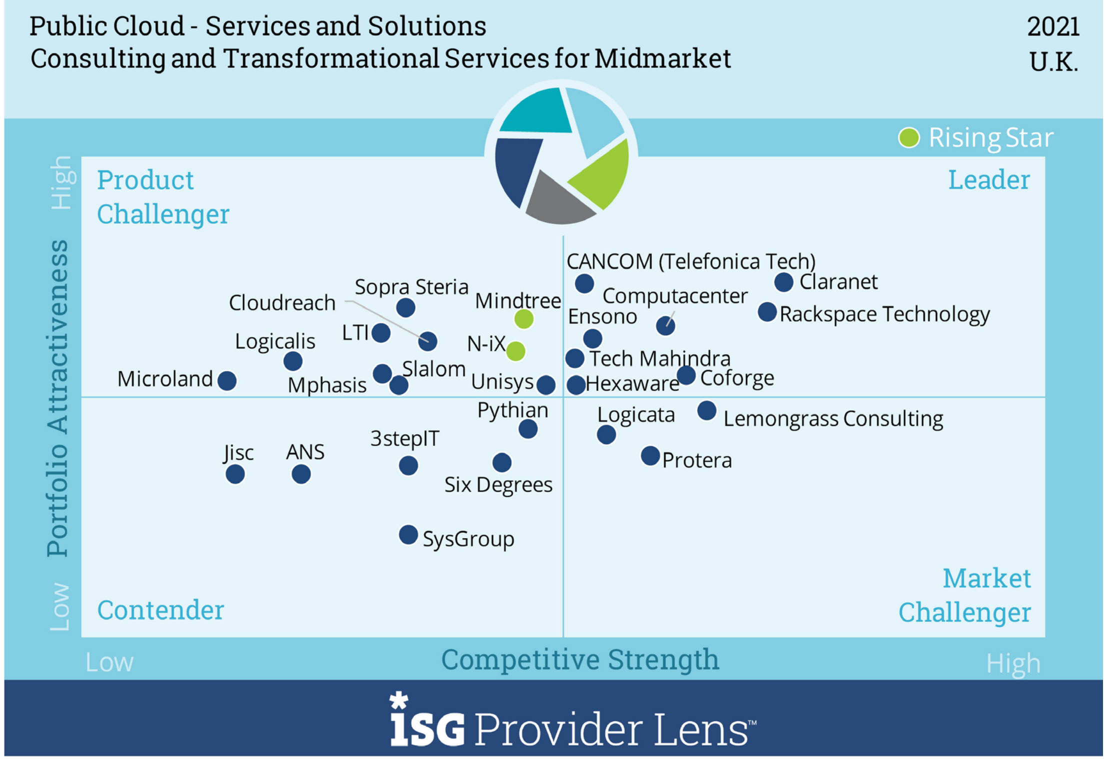
CONSULTING AND TRANSFORMATIONAL SERVICES FOR MIDMARKET

Definition

This quadrant assesses service providers or service integrators that offer consulting and transformation services for public cloud engagements. The public cloud enables enterprises to achieve agility and scalability without the need to invest in their own infrastructure, which makes it an integral aspect of digital transformation. Participating service providers have partnerships with public cloud infrastructure providers to offer ideation of multicloud programs, industry cloud solutions and manage customer-specific complexities of adopting and deploying public cloud solutions. These providers have highly skilled developers and software architects who leverage design thinking, SCRUM initiatives and short work cycles to meet growing customer demands.

Provider services typically include the following:

- **Consulting services:** Consultants design a business case for cloud; assess a workload for migration; build a transformation roadmap, which includes addressing risk and compliance issues; and advise on migrating applications from the existing environment to a public cloud.



Source: ISG Research 2021

CONSULTING AND TRANSFORMATIONAL SERVICES FOR MIDMARKET

Definition (cont.)

- **Transformation services:** Cloud experts design and build cloud architecture/environments and migrate and integrate applications to harness cloud computing features and benefits.
- **Governance, risk and compliance services:** Cloud experts design frameworks, policies, processes and functions to ensure that enterprise cloud workloads are run in a secure and compliant environment, regardless of location. As governance, risk and compliance has become a mainstream requirement from a CXO's office, the industry expects these to be an integral part of transformation engagements.

Eligibility Criteria

- Methods and frameworks to analyse a client's IT landscape and help them avoid additional technical debts and realize value in their IT spending.
- Experience in planning and implementation of multicloud services for major industry verticals.
- Application migration experience (templates, automation engines and many more techniques) in conjunction with cloud-native application development for brownfield workloads.
- Hyperscale-provider-related partner program certifications.
- Robust APIs for application and service integration in public cloud.
- Ability to drive governance, risk and compliance for large transformation programs.
- Migration through cloud native application development for brownfield workloads.

CONSULTING AND TRANSFORMATIONAL SERVICES FOR MIDMARKET

Observations

Enterprise clients and SMBs in the U.K. expect system integrators to introduce differentiators for digital transformation. Public cloud transformation is not only limited to driving digital business excellence, but also includes innovation, products and revenue. Over the next few years, U.K. enterprises will focus on increasing investments and they expect public cloud transformation to continue bringing in more agility alongside an increase their global market share. At the same time, enterprises continue to outsource and insource hybrid IT.

Irrespective of the sourcing strategy and model adoption, public cloud transformations will continue with a great focus from CTO and CIO offices. Most U.K. IT service providers are developing AI- and machine-learning-led automated cloud transformation services, in conjunction with change management services, for their clients.

Of the 49 companies included in this study, 27 have qualified for this quadrant, of which eight are Leaders and two are Rising Stars.

- **CANCOM** has sold its U.K. and Ireland business to Madrid-based technology services company, Telefonica Tech, for a sum of €398 million (£338.74 million).
- **Claranet** offers modular cloud assessment, migration and transformation services to accelerate the cloud journey for its clients.
- **Computacenter** has acquired AWS Migration Competency accreditation. This distinction is in recognition of Computacenter's experience and skill in assisting clients with successful AWS migrations, and it applies to all phases of complex migration projects, including discovery, planning, migration and operations.
- **Coforge's** cloud-consulting services enable clients to identify suitable opportunities to leverage cloud-computing services and realise sustainable business benefits.
- **Ensono**, to support clients' transformation roadmaps, has aligned its cloud strategy with a multicloud portfolio, migration, managed specialty mainframe and migration capabilities.
- Carlyle has emerged as the favoured bidder for **Hexaware**, a $3 billion IT services firm owned by Baring Private Equity Asia.

CONSULTING AND TRANSFORMATIONAL SERVICES FOR MIDMARKET

Observations (cont.)

- Pret A Manger, situated in the U.K., has awarded **Tech Mahindra** a five-year digital contract.
- **Rackspace Technology** provides a broad public cloud solution, full cloud lifecycle support and unified multicloud management services.
- **N-iX** (Rising Star) has become the only Ukraine-based company to obtain the Amazon API gateway delivery designation.
- **Mindtree** (Rising Star) enables businesses to swiftly transition to the cloud and scale in a factory-based approach, ensuring efficiency and flexibility to meet changing business requirements.

CANCOM (TELEFÓNICA TECH)

Overview

CANCOM provides assessment, planning, modernisation and migration to operation and innovation. CANCOM UK & Ireland accounted for a revenue of €155 million in 2020. In 2021, Telefónica Tech acquired CANCOM UK&I, to become a leader in cloud and digital services in Europe. CANCOM UK&I has a broad and strong digital services portfolio, including professional services and managed services in advanced IT, cyber security and multicloud solutions, which will strengthen Telefonica's digital services.

Strengths

Acquired by Telefónica Tech: Telefónica Tech has agreed to buy CANCOM UK&I for €398 million, from CANCOM Group. Telefónica Tech's continued focus on both an organic and an inorganic growth strategy is allowing it to cement its position as the world's leading digital transformation organisation.

Consulting led transformation engagement: CANCOM delivers architecture optimisation consultation, migration, and strategy based on the demands of a client. This ensures that IT services are continuously modernised and connected with cloud services. The firm also provides strategic guidance on cloud infrastructure design, principles, tools, and guidelines.

Comprehensive cloud services: With an array of public cloud services, for consulting and transformation, CANCOM's cloud management technologies enable clients' multicloud journeys. It also takes a customised approach that focusses on a client's vertical-specific needs.

Caution

CANCOM should concentrate on expanding its cloud portfolio and building a strong brand around its cloud offerings. It could also expand its operations across verticals.

2021 ISG Provider Lens™ Leader

CANCOM has become one of the niche cloud transformation and managed services providers in the U.K. market. It has broadened its presence in the region with the acquisition of local providers.

COMPUTACENTER

Overview

Computacenter is a U.K.-based IT services company, headquartered in Hatfield. The company has 10 locations in the U.K. from which it offers cloud transformation, consulting and multicloud managed services. The organisation has a large pool of employees trained in niche technologies to serve clients across verticals. The firm has transformed its overall cloud transformation and multicloud managed services portfolio.

Caution

Computacenter should focus on increasing its midmarket client base in the public cloud transformation segment.

Strengths

Strong public cloud service provider certification: It has competency accreditations from AWS, Google Cloud, and Microsoft Azure. The company has 10 years of expertise, working with both public and private clients; its domain knowledge helps companies speed their cloud transformation.

Strategic alignment with cloud providers: The organisation is aligned to the business of the large hyperscalers. In the last four quarters, Computacenter has increased the number of its certified and trained experts and has achieved specific competencies to work with clients across verticals.

Total cost of economics with FinOps approach: Clients leverage Computacenter's digital advisory and consulting services to predict multiyear operating and capital expenditures. They can use the overall cloud economics process to find suitable tools, structure, platform and talent mapping strategy.

2021 ISG Provider Lens™ Leader

Computacenter paves the way to a robust IT infrastructure that is adapted to each client's unique needs and objectives.

CLARANET

Overview

Claranet offers modernising and running critical applications, data and infrastructure. Headquartered in London, it also has a presence across France, Germany, The Netherlands, Portugal, Spain, Italy and Brazil. Claranet is a Microsoft Gold Partner and an Azure Expert MSP; an AWS Premier Consulting Partner, Migration Consulting Partner and MS; and a Google Premier Partner. The organisation has specific, joint go-to-market activities with Microsoft Azure and AWS.

Strengths

Custom cloud migration and assessment services: Claranet has niche local experts, across the cloud spectrum, offering their expertise in terms of services and domain experience. It offers proven, tailored migration strategies and capabilities to ensure the lowest risk for clients' business-critical applications.

Cloud native and agile development: The company offers modular application assessment and migration services to its midsize clients. This includes a service assessment framework, platform cost modelling and a secure-by-design blueprint for smooth migration.

Niche expertise in serverless design: Claranet has the ability to support end-to-end process and development lifecycle around serverless applications. It can re-factor applications to run as serverless, and can build greenfield serverless solutions in the U.K.

Caution

Claranet should focus on establishing brand credibility for its accelerators across verticals and increase its client base in the midmarket in the U.K.

2021 ISG Provider Lens™ Leader

With its significant pool of subject matter experts in the region, Claranet has established itself as a cloud consulting and transformation services provider specialist.

COFORGE

Overview

Coforge is an India-based multinational IT company, based in Noida, India. The company provides niche digital transformation services in the U.K. market. It has clients in travel and transportation, banking and financial services, insurance, manufacturing and media verticals, offering a range of services, including cloud consulting, transformation and migration.

Caution

In the U.K. market, Coforge should focus on growing its customer base across verticals. It could also rebrand its cloud services to improve its credibility among advisors and businesses.

Strengths

IT landscape assessment and consulting services: Coforge's assessment tools assist clients in developing a clear cloud adoption roadmap that includes precise time and cost projections. Its Cloud Maturity Assessment Framework also aids businesses in combining disparate workloads.

Multicloud solution with rich self-service: The firm’s multicloud orchestration solution, CloudPixy™, is a one-stop-shop for all cloud administration needs of clients. Its integrated approach aids in the management of a multicloud ecosystem that combines infrastructure, data, applications, and business processes seamlessly. It takes a customer through the entire cloud transition process, from discovery to optimisation, through code rather than manual processes and delivers with single-pane-of-glass dashboarding.

Cloud migration framework and services: Coforge provides a 10-step cloud migration solution with focussed automation capabilities. Clients can also benefit from ITIL-compliant continuous delivery in development, testing, and operations.

2021 ISG Provider Lens™ Leader

Coforge, with its deep business understanding in selected verticals and maturing cloud services portfolio, has emerged as a robust cloud consulting and transformation services provider in the region.

ENSONO

Overview

Ensono offers cloud consulting and migration services to various clouds, and is headquartered in Illinois. The company is an Advanced Consulting Partner with AWS, a Microsoft Azure Gold Partner and a Google Cloud Partner. The company holds Azure Expert MSP and AWS MSP certifications.

Caution

From the standpoint of a public cloud consulting and transformation services, the company should rebrand its marketing plan to develop a stronger perception among business advisors, analysts and CXO groups.

Strengths

Mainframe to multicloud migration provider: Ensono has a decade of experience moving and maintaining huge, complex mainframe workloads, and it has assisted clients in successfully transferring their old mainframe workloads to the cloud.

Bolstered cloud capabilities through acquisition: Ensono has acquired Amido, a cloud-native consultancy company, in the U.K. This acquisition has strengthened its presence in the region in the application stack development space.

Intelligent cloud solution: The company's consulting and transformation services are constructed to help customers realize the full potential of cloud services from multiple dimensions.

2021 ISG Provider Lens™ Leader

Ensono is evolving into a real hybrid IT and cloud transformation provider, assisting customers in choosing the best path for digital transformation.

HEXAWARE

Overview

Hexaware is a global IT services company, headquartered in Navi Mumbai, India. The company has an office in London to provide managed public cloud services in the region. In the U.K., Hexaware has trained and certified cloud professionals across hyperscalers for managed public cloud services. The company holds an Azure Expert MSP certification.

Strengths

Cloudify everything: Hexaware's outcome-driven strategy, Cloudify Everything®, enables enterprises to realise the benefits of cloud transformation through automation, managed services, blueprints for developing cloud infrastructures and cultural change. Cloud services at Hexaware are powered by their proprietary Amaze™ suite. Amaze™ delivers up to 70% automation in migration activities with about 40% TCO reduction.

Advisory and consulting led application assessment services: Hexaware's cloud foundational maturity assessment process analyses, scores, and makes suggestions to help enterprises achieve the appropriate degree of cloud readiness. The company provides over 500 recipes, blueprints and templates for design and architecture that help clients implement cloud faster, as well as integration tools to provide modular architectures.

Acquisition bolsters cloud service offering: Hexaware’s acquisition of Mobiquity has bolstered its overall cloud transformation and digital capabilities, enabling cloud transformation for its clients.

Caution

Hexaware has headroom to increase its clientele in the cloud transformation and digital business segment. Also, the firm should focus on increasing niche cloud SMEs in the region.

2021 ISG Provider Lens™ Leader

Hexaware's complete cloud portfolio has been revamped, which accelerates and enables large-scale cloud migration and transformation roadmaps for clients Its Amaze™ suite delivers approximately 70% automated cloud migration and a 40% TCO reduction.

TECH MAHINDRA

Overview

Tech Mahindra is an IT services company, headquartered in Pune, India. The company has six offices across the U.K. to offer cloud consulting and transformation services. Its cloud services include cloud strategy, transformation, migration, integrated cloud managed services and industry- and domain-specific solutions.

Strengths

Cloud consulting and transformation services: Tech Mahindra specialises in enabling hybrid, multicloud and non-linear growth for clients, enhancing their cloud experience and accelerating their digital transformation. It provides a full portfolio of services, spanning the entire lifespan of their cloud journey, including strategic guidance and tactical approaches for cloud adoption in public, private, and hybrid settings.

Cloud migration framework: Tech Mahindra's managed Platform for Adaptive Cloud (Managed Platform for Adaptive Cloud) and expedited Cloud Migration Framework, along with patented technologies and industry experience, assist businesses in migrating to the cloud, while maintaining effective IT infrastructure management.

Convergence of vertical and horizontal technologies: The firm offers deep convergence between operational and IT technologies, which enables its clients to craft the right business strategy and avail the appropriate multicloud services.

Caution

Tech Mahindra has the headroom to increase its client base across verticals in the region.

Also, the firm should focus on acquiring a cloud-native firm in the region to bolster its presence in consulting and transformation segment.

2021 ISG Provider Lens™ Leader

Tech Mahindra has improvised its overall cloud capabilities, along with hyperscalers partnerships, to drive the digital transformation journey of its clients.

RACKSPACE TECHNOLOGY

Overview

Rackspace Technology is a global multicloud services company, headquartered in Texas. The company has offices in Hayes and Cardiff in the U.K. It has more than 1,100 employees, serving clients across Europe, Middle East and Africa. The organisation has successfully achieved hyperscaler accreditations with a large number of industry competencies.

Strengths

Cloud consulting and IT application assessment: Data architects from Rackspace participate in onsite workshop, using data and analytics tool stacks. In addition, the company uses analytics and big data concepts, evaluates best practices, and develops proofs of concept or prototypes to help clients speed their cloud journey.

Application rationalisation and migration framework: The firm has an established methodology for application migrations. Its migration framework analyses the best migration technique for each application, following which it builds the target architecture before planning and executing the transition to a new stable state. Rackspace leverages an industrialised migration factory strategy to help clients gain confidence and momentum, where they use blueprints of best practices to construct appropriate workflows and quality controls.

Cloud architects and consultants: Rackspace has a large pool of niche experts that are hyperscale-certified in the region. It also has cloud-native resources, working in conjunction with cloud consultants that provide best-of-breed architecture to enterprise clients across verticals.

Caution

Rackspace Technology should focus on increasing its client base across verticals in the region. The firm has not announced any net new deals in the recent past.

2021 ISG Provider Lens™ Leader

Rackspace Technology professionals tailor solutions to specific client requirements. Its cloud-agnostic ecosystem evaluates clients' existing systems, determines their business goals and creates ideal future-state reference data architecture.

RISING STAR: MINDTREE

Overview

Mindtree is a global IT service provider, headquartered in Bengaluru, India. The company offers cloud consulting and transformation services to small and midsize clients and has an office in London. Mindtree has over $15 million revenues from cloud consulting services in the U.K. Also, the company has a strong presence in the business services and software space and is well qualified to offer cloud consulting services.

Strengths

Innovation hub and London headquarter: Mindtree’s Digital Pumpkin innovation hub, at its European headquarters in London, was established with the goal of assisting clients in discovering and designing their route to digital transformation. By combining the cloud, big data, IoT, AI, machine learning and conversational platforms, the interactive hub can help customers speed their digital transformation.

Bolstered hyperscalers strategy: Mindtree has improvised on its overall cloud providers’ partnerships, globally. It has achieved vertical and technology certifications that ensure that its clients accrue deeper business and technology value.

Continuous expansion in the U.K. market: With its recently opened European headquarters in London, the organisation’s leadership is committed to increasing niche local talent base.

Caution

Mindtree's comprehensive cloud transformation portfolio, as well as its specialty talent expansion in the U.K. market, should be prioritized.

2021 ISG Provider Lens™ Rising Star

To accelerate the digital transformation path of its clients, Mindtree has restructured its cloud services portfolio, investment and local innovation centre.

RISING STAR: N-IX

Overview

N-iX is a global IT company with more than 19 years of experience as a reliable technology partner for innovative companies across North America, the U.K. and the German-speaking countries. The company has more than 1,600 experienced IT specialists working within offices in eight locations across Europe and the U.S. Most of the specialists are in two major IT hubs in Ukraine: Lviv and Kyiv. It is an AWS advance consulting partner, Microsoft Gold Partner with Cloud Platform competency, and a Google Cloud Partner with over 100 certified and accredited cloud experts.

Strengths

Cloud native services: Clients leverages the N-iX ecosystem and consulting service to determine the optimal cloud migration strategy with the help of its solution architects, business analysts, and UI/UX designers. The firm's overall solution enables clients to tap into the full potential of cloud-native application development of any complexity and size.

Data and DevOps services to drive cloud journey: The firm chalks out robust data-centric cloud assessment journeys for its clients. Its cloud assessment exercise drives maximum value from clients' investments in cloud-native applications.

Cost optimisation and enhanced security: By detecting mismanaged resources, eliminating waste, conserving capacity for large discounts and rightsizing computing services to scale, the firm helps clients reduce total spend on cloud-native apps. The firm uses best practices in data security and threat intelligence.

Caution

The firm has a headroom to increase its client base in the segment of cloud advisory, consulting and migration services.

2021 ISG Provider Lens™ Rising Star

N-iX puts data at the core of business and cloud-native transformation services, which helps clients to harness the power of data and create a high computing business application.

Methodology

METHODOLOGY

The research study "ISG Provider Lens™ 2021 Public Cloud – Services & Solutions, U.K." analyzes the relevant software vendors/service providers in the U.K. market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

The study was divided into the following steps:

1. Definition of 2021 Public Cloud – Services & Solutions, U.K. market
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & use cases
4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)
5. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
6. Use of the following key evaluation criteria:
   - Strategy & vision
   - Innovation
   - Brand awareness and presence in the market
   - Sales and partner landscape
   - Breadth and depth of portfolio of services offered
   - Technology advancements

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At ISG, Manoj Chandra Jha is primarily responsible for research projects and working on the ISG Provider Lens™ (IPL) program. He actively contributes to gathering service provider intelligence through both primary and secondary research. He is responsible for writing thought leadership reports and papers on briefings provided by the service providers. Manoj also writes blogs on trending topics, specifically on cutting-edge technology. He has executed several client requests for research and consulting assignments across industries, predominantly in IT, manufacturing and insurance. He has handled client communication for the team, managing the client right from onboarding to understanding their custom research requests to scheduling briefing calls. In addition, he has been closely involved with the quadrant studies around cloud services and the data centre outsourcing market.

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Katharina Kummer is a research analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on Public Cloud Transformational Services, Private Hybrid Cloud Data Center, Data Analytics, Microsoft Ecosystem and Cloud Native – Container Services. Her areas of expertise lie in cloud, data centers, cloud native services, digital linguistics and NLP. Katharina develops content from an enterprise perspective and author the global summary report. Along with this, she supports the lead analysts in the research process and ad-hoc research assignments and writes articles about niche technologies, market trends and insights.

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Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor. Now as a research director, principal analyst and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

ISG Provider Lens™ | Quadrant Report
November 2021

ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 700 clients, including more than 75 of world's top 100 enterprises, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis. Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,300 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data. For more information, visit www.isg-one.com.

ISG Provider Lens™

Public Cloud – Services & Solutions

Managed Public Cloud Services for Midmarket

U.K. 2021 Quadrant Report

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

claranet

November 2021

About this Report

Information Services Group Inc. is solely responsible for the content of this report. Unless otherwise cited, all content, including illustrations, research, conclusions, assertions and positions contained in this report were developed by, and are the sole property of Information Services Group Inc.

The research and analysis presented in this report includes research from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of July 2021, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

All revenue references are in U.S. dollars ($US) unless noted.

The lead author for this report is Manoj Chandra Jha. The editors are Ipshita Sengupta and Grant Gross. The research analyst is Katharina Kummer and the data analyst is Vijayakumar Goud. The Quality and Consistency Advisor is Anthony Drake.

ISG Provider Lens

ISG Provider Lens™

ISG Provider Lens™ delivers leading-edge and actionable research studies, reports and consulting services focused on technology and service providers' strengths and weaknesses and how they are positioned relative to their peers in the market. These reports provide influential insights accessed by our large pool of advisors who are actively advising outsourcing deals as well as large numbers of ISG enterprise clients who are potential outsourcers.

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EXECUTIVE SUMMARY

The increasing adoption of cloud services is expected to be the primary driver of IT market growth in the U.K. Enterprises are adopting cloud technology at a faster and higher rate than small businesses. Infrastructure as a service (IaaS) has drawn the interest of IT decision-makers, particularly in small and medium enterprises (SMEs), and is expected to be the region's leading client category. Furthermore, ever-increasing government cloud spending is a crucial element driving market growth, as public sector cloud adoption lags behind the private sector.

Businesses in the U.K. are increasingly embracing a cloud-first strategy, with an increasing number of organisations anticipating a time when they would migrate all their IT assets to the cloud. While small businesses can take the natural step of removing depreciated hardware assets and completely moving to the cloud, large organisations, with significant infrastructure investments, may find it difficult to make this move rapidly. As a result, "cloud everything" will be out of reach for some time. ISG expects majority of businesses to maintain hybrid IT setups. The momentum of cloud adoption will continue as cloud users increasingly migrate portions of their estates to the cloud and consequently take on more complex migration projects.

Rise in outcome based and gain sharing model: Time and material (T&M) and key responsibility area (KRA) matrices have traditionally been used by IT service providers to determine price for services, based on effort. Such service models are being set aside because they do not consider business outcomes or risk ownership. While fines are imposed based on established service level agreements (SLAs) in specific service scenarios, such as managed services, these SLAs are often defined based on predictable results and manageable risks. There has been a change from an input-based pricing model to an output-based pricing strategy. Customers simply pay for the results obtained throughout the engagement. Such a relationship exists when a service provider collaborates with a customer as a co-innovator and business partner. This trend is expected to continue as organisations face fierce competition in the global market, and IT spend becomes more strategic rather than commoditized for utilising a set of services.

Transformation-led IT outsourcing deals: It has been observed that the companies across verticals are outsourcing their multicloud and classic data centres to global and regional IT service providers. By selecting the right technology and business partner, these firms want to focus on their core business functions and business expansion plan with digital services adoption. The deals that have been announced in the recent past have been a combination of rebadge of employees, in-flight digital consulting projects and core IT components. The finding during the study reveals that cost reduction is, once again, the primary motivator for U.K. businesses to outsource, with a third of all businesses planning to outsource more. According to the research, cloud service provider satisfaction is also greater than the percentage of respondents that are satisfied with their IT service providers.

Strategic focus on increasing cloud adoption: The government's goal is to build a world-class digital economy that benefits everyone and strengthens the economy in the long run.

Several components of the digital transformation process are driven by execution. Building a world-class digital ecosystem, improving digital skills access for all U.K. businesses, and making the region the most suited location for digital business is all a part of this plan. AWS, Azure, and Google Cloud Platform are becoming increasingly important in the public sector and enterprise clients' digitalisation journeys.

Increased use of public cloud services in the U.K.: Businesses in the U.K. are realising the value of cloud services and solutions in meeting customer needs. A growing number of businesses are focused on implementing a multicloud approach to develop cloud-native solutions. Small and medium-sized businesses (SMBs) are adopting cloud-native solutions and transformation strategies at an increasing rate. The cloud platforms AWS, Azure, and Google are the main drivers of enterprise digital transformation. As hyperscalers provide a wide range of services and platform enablement to businesses, CTOs in the U.K. are considering them for R&D engagements to push various product services in the region.

Pandemic has pushed CXOs to adopt cloud as a mainstream solution: Since the beginning of the pandemic, there has been a massive shift in consumer buying behaviour, from physical to digital. This change in consumer buying patterns has pushed CXOs to adopt the cloud as a mainstream solution from multiple dimensions. In order to stay competitive in the global market, the majority of the companies, across verticals, have increased their cloud spend and workload migration to the cloud.

Demand for integrated AI-led cloud managed services: Multicloud managed services continue to grow as companies are adopting a multicloud approach to drive their digital transformation journeys. Midsize and small service providers, with their unique service offerings, have gained traction by winning public cloud managed services contracts. Early entrants have an advantage here, but small and midsize providers are gaining traction with their unique offerings in public cloud managed services for multicloud environments. Several small providers are being acquired by large system integrators to either eliminate the competition or to acquire their niche capabilities or client segments. This consolidation and shrinkage in the managed service provider market will prevail as technologies evolve. Public cloud providers have MSP certifications that every other system integrator is striving to acquire. Service providers are also differentiating themselves by creating proprietary offerings, bringing in vertical-specific expertise or establishing strategic partnerships with public cloud providers.

Multicloud has become the new normal: Enterprises do not wish to limit themselves to just one hyperscalers as each one has certain exclusive strengths, either in terms of vertical solutions or prices and other factors. When enterprises embark on their cloud journeys, they want to try out their vision with each hyperscaler in order to pick the right partner, and not just a commodity service provider, for success. Most enterprises have been using a multicloud environment. This trend is expected to surge irrespective of the enterprise size. However, there are some barriers to a multicloud setup. Orchestration involves several moving parts in a complex setup to be operated in a public cloud environment. Many users find it difficult to manage multicloud environments and are increasingly adopting various tools to handle this complexity, but these are not mature enough. Other barriers include vendor lock-in by the public cloud provider and interoperability between two or more public cloud providers.

Introduction

Simplified illustration

Public Cloud – Services and Solutions 2021	
Consulting and Transformational Services for Large Accounts	Consulting and Transformational Services for Midmarket
Managed Public Cloud Services for Large Accounts	Managed Public Cloud Services for Midmarket
Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services

Source: ISG 2021

Definition

In the last financial year, the increase in public cloud adoption among enterprises was mainly triggered by the COVID-19 pandemic, along with other factors, such as the growing digital transformation engagements, increasing recognition of the importance of cyber security and expanding remote working environments. The increased maturity of the cloud industry made a major impact on both enterprises and IT service providers, with both buyers and consumers witnessing a huge shift the buying behaviour, from physical to digital. For enterprises, this has also impacted business models, requiring digital initiatives and recognizing the need to address governance, risk and compliance norms. Considering the widespread adoption of the as-a-service model, enterprises need to continuously evaluate cloud service providers, globally, mainly due to growing security concerns and the dynamic nature of the business landscape. Enterprises continue to seek providers that can act as strategic partners in carrying out cloud transformation

Definition (cont.)

engagements on major hyperscalers (AWS, Microsoft Azure and Google Cloud Platform). The provider will also continue to manage the workloads on an on-going basis, and help enterprises control, optimise and manage cloud expenses though FinOps strategies.

ISG reports a strong demand for digital transformation engagements, which, in turn, is driving global contracts for cloud products and services, including infrastructure-as-a-service (IaaS) and platform-as-a-service (PaaS). According to the latest 2Q21 ISG Index™, the global market has grown 32 percent in combined market annual contract value (ACV) to reach its current value of US$19.1 billion year-over-year, while the as-a-service ACV has increased by 25 percent to reach US$11.2 billion in the same period. Also, the IaaS market grew by 29 percent to reach US$15.3 billion, while the SaaS market grew by 15 percent to reach US$5.7 billion in the first half of 2021.

The ISG Provider Lens™ study offers the following to IT-decision makers:

- Strengths and weaknesses of relevant providers.
- A differentiated positioning of providers based on competitive strength and portfolio attractiveness.
- A perspective on several markets, including global, the U.S., the U.K., Germany, Switzerland, France, the Nordics and Brazil.

This study serves as the basis for important decision-making in terms of positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also leverage information from these reports to evaluate current vendor relationships and potential engagements.

Definition (cont.)

Scope of the Report

The Public Cloud – Solutions & Service Partners 2020 U.K. report will assist buyers while reviewing a significant cloud transformation strategy and the capabilities of service providers in numerous geographies. Enterprise clients will also benefit from the study because it incorporates ISG's strengths in global sourcing advisory, contract knowledge databases, regional research, and expertise in technology ecosystems and innovations.

This study includes various reports from seven quadrants that cover cloud service models. Not all quadrants are covered in each geography. Coverage depends on provider responses, participation and relevance. Quadrants that are not covered in a region may be covered in future studies. The geographic report areas include the U.S., the U.K., Germany, Switzerland, the Nordics, France, Brazil and Latin America (LATAM).

Consulting and Transformation for Large Accounts: This quadrant assesses a service provider's ability to offer cloud assessment, advisory, workload migration and cloud consulting to large businesses. The enterprises are subject to strict regulations that can complicate engagements. They typically have more than 5,000 employees and a revenue of more than US$1 billion.

Consulting and Transformation for Midmarket: This quadrant assesses a service provider's ability to provide cloud assessment, advisory workload migration and continuous service transformation for public cloud to midsize businesses. The enterprise client typically has fewer than 5,000 employees or generates less than US$1 billion in revenue.

Managed Public Cloud Services for Large Accounts: This quadrant assesses a service provider's ability to provide multicloud managed services for large businesses. The enterprises are subject to strict regulations that can complicate engagements. They typically have more than 5,000 employees and a revenue of more than US$1 billion.

Managed Public Cloud Services for Midmarket: This quadrant assesses a service provider's ability to provide multicloud managed services for public cloud for midsize businesses. The enterprise client typically has fewer than 5,000 employees or generates less than US$1 billion in revenue.

Hyperscale Infrastructure and Platform Services: Providers in this quadrant offer virtual compute resources, middleware and software on a public cloud. Clients consume infrastructure and platform (micro)services as an on-demand and a web-centric service. Typical services in the IaaS segment are compute services, storage and network resources, where all are provided in a virtual or containerized software-defined manner and rounded up by serverless architectures.

Definition (cont.)

SAP HANA Infrastructure Services: This quadrant examines cloud infrastructures best suited to host SAP software portfolio, with focus on SAP S/4HANA workloads and large-scale HANA databases. Participating vendors offer hyperscale IaaS — including infrastructure operations, facilities, provisioning and scaling capacity — in a pay-as-you-go model. IaaS tools should include data migration, system imaging, backup, restore, disaster recovery, resource usage monitoring and management dashboards. Tools can be part of the standard IaaS offering or be provided by partners in a marketplace.

Provider Classifications

The provider position reflects the suitability of IT providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions IT providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between US$20 million and US$999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with 5,000 or more employees or revenue above US$1 billion, with activities worldwide and globally distributed decision-making structures.

Provider Classifications

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly.

Leader

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Product Challenger

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Market Challenger

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

Contender

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/ services and follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Provider Classifications (cont.)

Each ISG Provider Lens™ quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star. Number of providers in each quadrant: ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

Rising Star

Rising Stars have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not In

The service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

Public Cloud – Services & Solutions - Quadrant Provider Listing 1 of 4

	Consulting and Transformational Services for Large Accounts	Consulting and Transformational Services for Midmarket	Managed Public Cloud Services for Large Accounts	Managed Public Cloud Services for Midmarket	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
3stepIT	Not In	Contender	Not In	Not In	Not In	Not In
Accenture	Leader	Not In	Leader	Not In	Not In	Not In
Acora	Not In	Not In	Not In	Contender	Not In	Not In
Alibaba	Not In	Not In	Not In	Not In	Contender	Not In
ANS	Not In	Contender	Not In	Not In	Not In	Not In
Aptum	Not In	Not In	Not In	Contender	Not In	Not In
Atos	Leader	Not In	Leader	Not In	Not In	Not In
AWS	Not In	Not In	Not In	Not In	Leader	Leader
Birlasoft	Not In	Not In	Contender	Not In	Not In	Not In
CANCOM (Telefonica Tech)	Market Challenger	Leader	Product Challenger	Leader	Not In	Not In
Capgemini	Leader	Not In	Leader	Not In	Not In	Not In
Claranet	Product Challenger	Leader	Rising Star	Leader	Not In	Not In
Cloudreach	Product Challenger	Product Challenger	Market Challenger	Leader	Not In	Not In
Coforge	Product Challenger	Leader	Product Challenger	Leader	Not In	Not In

Public Cloud – Services & Solutions - Quadrant Provider Listing 2 of 4

	Consulting and Transformational Services for Large Accounts	Consulting and Transformational Services for Midmarket	Managed Public Cloud Services for Large Accounts	Managed Public Cloud Services for Midmarket	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
Cognizant	Leader	Not In	Product Challenger	Not In	Not In	Not In
Computacenter	Market Challenger	Leader	Rising Star	Leader	Not In	Not In
DXC	Product Challenger	Not In	Product Challenger	Not In	Not In	Not In
Ensono	Product Challenger	Leader	Market Challenger	Leader	Not In	Not In
Fujitsu	Leader	Not In	Leader	Not In	Not In	Not In
Google	Not In	Not In	Not In	Not In	Leader	Market Challenger
HCL	Leader	Not In	Leader	Not In	Not In	Not In
Hexaware	Product Challenger	Leader	Product Challenger	Leader	Not In	Not In
IBM	Leader	Not In	Leader	Not In	Product Challenger	Product Challenger
Infosys	Leader	Not In	Leader	Not In	Not In	Not In
Jisc	Not In	Contender	Not In	Contender	Not In	Not In
Lemongrass Consulting	Not In	Market Challenger	Not In	Market Challenger	Not In	Not In
Logicalis	Not In	Product Challenger	Not In	Market Challenger	Not In	Not In
Logicata	Not In	Market Challenger	Not In	Product Challenger	Not In	Not In

Public Cloud – Services & Solutions - Quadrant Provider Listing 3 of 4

	Consulting and Transformational Services for Large Accounts	Consulting and Transformational Services for Midmarket	Managed Public Cloud Services for Large Accounts	Managed Public Cloud Services for Midmarket	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
LTI	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Not In	Not In
Microland	Contender	Product Challenger	Contender	Product Challenger	Not In	Not In
Microsoft	Not In	Not In	Not In	Not In	Leader	Leader
Mindtree	Product Challenger	Rising Star	Product Challenger	Rising Star	Not In	Not In
Mphasis	Contender	Product Challenger	Contender	Product Challenger	Not In	Not In
N-iX	Not In	Rising Star	Not In	Not In	Not In	Not In
Oneadvanced	Not In	Not In	Not In	Product Challenger	Not In	Not In
Oracle	Not In	Not In	Not In	Not In	Product Challenger	Not In
OVHcloud	Not In	Not In	Not In	Not In	Contender	Contender
Protera	Not In	Market Challenger	Not In	Contender	Not In	Not In
Pythian	Not In	Contender	Not In	Market Challenger	Not In	Not In
Rackspace Technology	Rising Star	Leader	Leader	Leader	Not In	Not In
SAP	Not In	Not In	Not In	Not In	Not In	Product Challenger
Six Degrees	Not In	Contender	Not In	Not In	Not In	Not In

Public Cloud – Services & Solutions - Quadrant Provider Listing 4 of 4

	Consulting and Transformational Services for Large Accounts	Consulting and Transformational Services for Midmarket	Managed Public Cloud Services for Large Accounts	Managed Public Cloud Services for Midmarket	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
Slalom	Not In	Product Challenger	Not In	Product Challenger	Not In	Not In
Sopra Steria	Product Challenger	Product Challenger	Not In	Not In	Not In	Not In
SysGroup	Contender	Contender	Contender	Not In	Not In	Not In
TCS	Leader	Not In	Leader	Not In	Not In	Not In
Tech Mahindra	Product Challenger	Leader	Product Challenger	Rising Star	Not In	Not In
transputec	Not In	Not In	Not In	Contender	Not In	Not In
T-Systems	Product Challenger	Not In	Not In	Not In	Not In	Contender
Unisys	Product Challenger	Product Challenger	Product Challenger	Leader	Not In	Not In
Version 1	Contender	Not In	Contender	Not In	Not In	Not In
Virtusa	Not In	Not In	Not In	Contender	Not In	Not In
Virtustream	Not In	Not In	Not In	Not In	Not In	Product Challenger
Wipro	Leader	Not In	Leader	Not In	Not In	Not In
Zensar	Not In	Not In	Product Challenger	Product Challenger	Not In	Not In

Public Cloud – Services & Solutions Quadrants

ENTERPRISE CONTEXT

Managed Public Cloud Services for Midmarket

Enterprises increasing the adoption of cloud native, DevOps and IoT technologies and looking for service providers with expertise in re-architecture and re-platforming of existing applications in a cloud native environment. Using public cloud managed services can help enterprises with implementing cloud-native solutions leveraging containers and serverless functions to achieve cost efficiency. U.K. enterprises are looking for cloud agnostic solutions for multicloud environments. Midsized enterprises have fewer complex requirements and smaller-scale projects than large enterprises, and they prefer providers with strong niche offerings with competitive pricing and high integration capabilities.

ISG observes that enterprises are trying to move to an automation-centric operations model for managing their multicloud environments. Enterprises will get the benefit of the MSPs' automation and AI capabilities to monitor their infrastructure for proactive responses, predict the failures and reduce maintenance costs. This will reduce the overheads in maintenance and monitoring of cloud native applications. Most of the U.K. enterprises invest in self-service or auto-heal capabilities for their ticket generating requests. Also, enterprises in the U.K. focus on financial management, cloud governance, brokerage and autonomous support functions.

The COVID-19 crisis has created an increased demand for enterprises to focus more on business continuity and disaster recovery in their public cloud managed services. There are several such cloud offerings that target specific verticals based on the needs of individual industries. Also, enterprises are increasingly looking for innovative pricing models such as outcome-based or consumption-based models.

IT leaders should read this report to better understand the relative strengths and weaknesses of managed service providers, as well as how MSPs' approaches to the market can impact enterprise public cloud strategies, improve business agility and reduce total cost of ownership.

Software development and technology leaders should read this report to understand the positioning of managed service providers and learn how MSP offerings can impact the ongoing development of an enterprise's software products.

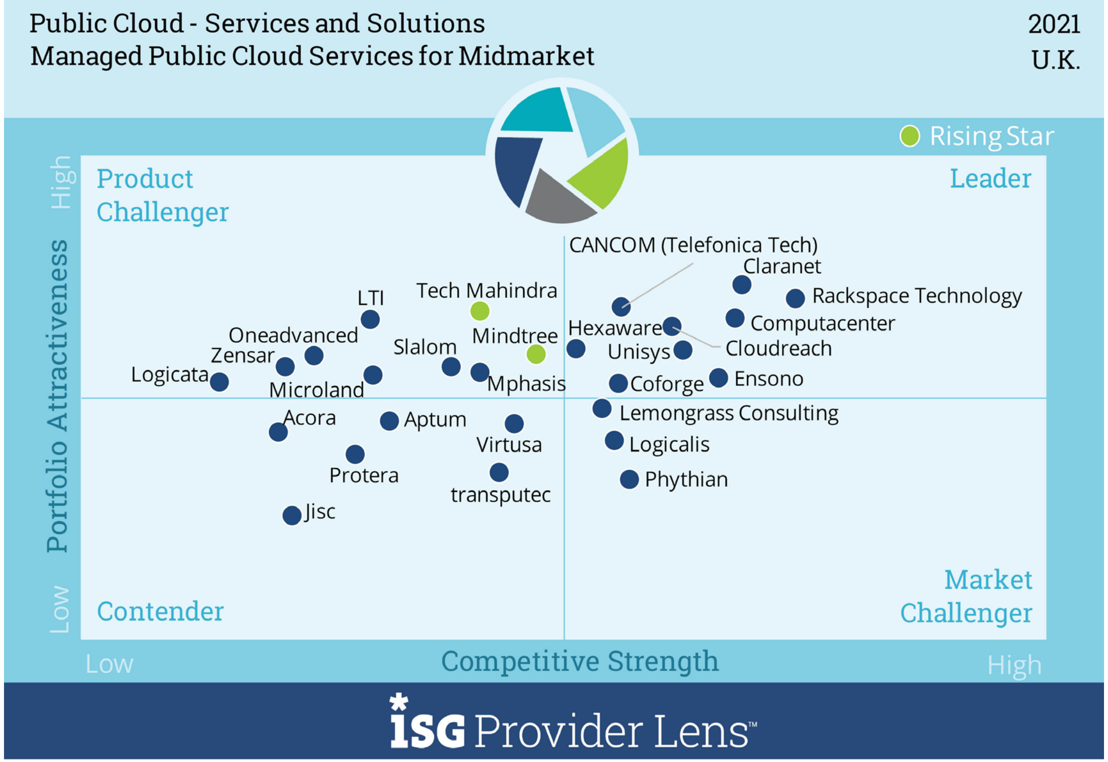
Sourcing, procurement, and vendor management professionals should read this report to develop a better sense of the current landscape of managed service providers in the U.K.

MANAGED PUBLIC CLOUD SERVICES FOR MIDMARKET

Definition

This quadrant assesses service providers and service integrators that offer managed public cloud infrastructure and application services. Managed service providers of public cloud offer professional and managed services on top of public cloud IaaS providers/hyperscalers (AWS, Microsoft Azure, Google Cloud Platform) through a DevOps- and DevSecOps-centric approach and help enterprise build a robust CI/CD pipeline with strong container management capabilities. Under the managed public cloud services umbrella, a provider is responsible for providing site reliability engineering and business resiliency.

Broadly, these services include cloud services lifecycle management, real-time and predictive analysis, and monitoring and managing a customer's public and multicloud environment, with the aim to maximize the performance of workloads in the cloud, reduce costs and ensure compliance and security. Typically, specially developed or licensed cloud management platforms and tools are used to serve customers with maximum automation and provide the necessary transparency on the managed cloud resource pool, in terms of capacity utilization and



Source: ISG Research 2021

MANAGED PUBLIC CLOUD SERVICES FOR MIDMARKET

Definition (cont.)

costs, including self-service administration. In addition to the technical services a provider offers dashboards to analyse and forecast financial impacts and propose optimization of the services.

Provider services typically include the following:

- Professional services for the management and monitoring of CPU, storage, memory, databases, and operating systems as standalone or micro services or virtual machine and container services.
- Operating system, middleware and application upgrade services.
- Cloud infrastructure management platform for cloud-cost management (charge back and show back), identity management and IT service management.
- Monitoring, logging, patching, and predictive analytics services to guarantee performance and security improvements throughout a container lifecycle to enable continuous integration and delivery.
- Governance and compliance management, along with a robust cyber security framework and platform for securing client data in multiple geographies.
- Support services such as incident management, configuration, security services and automation setup.

MANAGED PUBLIC CLOUD SERVICES FOR MIDMARKET

Eligibility Criteria

- Operational excellence and well-defined professional services.
- Experience in building and managing public and multicloud environments, along with expertise in managing configurations of platforms and systems as well as that of containers.
- Financial dashboards and cost analysis tools, providing visibility of variable costs associated with cloud providers through FinOps ecosystem.
- Support for software code development and cloud-native and legacy system integration by leveraging DevOps, API-enabled automation and cloud analytics services.
- Robust cyber security managed services offering.
- Partnerships with relevant public cloud providers and respective managed-service-provider certificates for AWS, Microsoft Azure, GCP, or others.

Observations

In the U.K., organisations are focussing on standardising their multicloud and managed public cloud services. Concurrently, they are striving to make the most of their capital and operational expenditures. As majority of the enterprises fail to optimise the cost of cloud services and, consequently, do not achieve the anticipated benefits, IT service providers that have a good cloud management platform, expertise to automate manual operations, and can offer integrated cloud managed services are highly sought after in the region.

The global IT services industry has observed an increased adoption of managed public cloud services in the U.K. On a pragmatic front, IT service providers and enterprises, across verticals, are undergoing consulting led transformation, and are seeking managed cloud support post this transformation. The increase in cloud adoption demands the availability of cutting-edge technology skills in the U.K., a strong cloud management platform and a possibility of jointly developing innovative solutions in a cloud-native model.

The majority of the Leaders in this quadrant are capable of assisting midsize enterprise clients with cloud management and orchestration platform to support multicloud workloads. Nine of the 27 providers that qualified for this quadrant have been designated as Leaders, while two are Rising Stars.

MANAGED PUBLIC CLOUD SERVICES FOR MIDMARKET

Observations (cont.)

- **CANCOM (Telefornica Tech)** offers the right multicloud services with strategic consulting and system integration services capabilities.
- **Claranet** has expanded its cloud portfolio and achieved multiple managed cloud provider accreditation.
- **Cloudreac**h is emerging as a robust, multicloud managed services provider with its managed services framework.
- **Computacenter** is continuously increasing its automation capabilities in the context of cloud managed services.
- **Coforge** has enhanced its overall cloud capabilities by establishing a technology partner ecosystem.
- **Hexaware's** cloud managed and operations services are highly integrated and provide clients with Agile operations.
- **Rackspace Technology** has rebranded its overall cloud services strategy, which is now aligned to the demands of enterprise clients in the U.K.
- **Unisys** offers industrialised tools, processes and methodologies that enable organisations to maximise performance and optimise costs across cloud and data centre environments.
- **Ensono** has a broad range of capabilities that help clients to accelerate their digital transformation.
- **Mindtree** (Rising Star) offers an automated view of applications and infrastructure layer with MWATCH, its real-time monitoring platform that assesses performance and utilisation to deliver value and insights.
- **Tech Mahindra** (Rising Star) has been consistently enhancing its cloud capabilities in the U.K.

CANCOM (TELEFONICA TECH)

Overview

CANCOM provides multicloud managed services with its rich domain experience in the U.K. CANCOM UK & Ireland accounted for a revenue of €155 million in 2020. In 2021, Telefónica Tech acquired CANCOM UK&I to become a Leader in cloud and digital services in Europe. CANCOM UK&I has 600 professionals with a broad and strong digital services portfolio, including professional services and managed services in advanced IT, cyber security and multicloud solutions. CANCOM is an Azure Expert MSP with around 17 competencies.

Strengths

Acquired by Telefonica Tech: Telefónica Tech has agreed to buy CANCOM UK&I for €398 million, from CANCOM Group. Telefónica Tech's continued focus on both an organic and an inorganic growth strategy is allowing it to cement its position as the world's leading digital transformation organisation.

Comprehensive cloud managed services offering: CANCOM's cloud services include cloud brokerage, security services and systems management and monitoring. Its modular approach enables clients to accelerate their cloud journey. The firm has a strong consultation background in multicloud, hybrid IT, managed services and modern workplace.

Certified Azure expert: The firm is a certified Microsoft azure expert for managed services. The accreditation is a reflection of the firm's commitment to its clients to optimise their managed cloud workload.

Caution

CANCOM should focus on increasing its hyperscaler accreditations from vertical and solution perspective.

2021 ISG Provider Lens™ Leader

With its focus on growing hyperscalers competencies, CANCOM has established itself as a specialised managed cloud service provider. In a short period of time, the company has established brand credibility in the region, which reflects the commitment of its U.K. leadership to major midmarket clients.

CLARANET

Overview

Claranet provides modernising and running critical applications, data and infrastructure. Headquartered in London, it has a presence across France, Germany, The Netherlands, Portugal, Spain, Italy and Brazil. Claranet is a Microsoft Gold Partner and an Azure Expert MSP; an AWS Premier Consulting Partner, Migration Consulting Partner and MS; and a Google Premier Partner. The organisation has specific, joint go-to-market activities with Microsoft Azure and AWS.

Strengths

Strong cloud portfolio: Claranet models the future state by considering different architectures; the systems that continue to drive business insights through monitoring, reporting and business intelligence; and a migration process sensitive to timescales and required risk mitigation. Claranet's migration process is multi-phased, building a foundational infrastructure and an operating model to support both small- and large-scale migrations.

Proven experience in the U.K.: Claranet is one of the few Azure Expert managed service providers in the U.K. that has received recognition for excellence in working with U.K. enterprises. It also has a Microsoft Gold partnership for small and midmarket cloud solutions.

Consulting led cloud operation: Claranet combines DevOps principles and the execution benefits offered by site reliability engineering. Its CloudOps practice helps make cloud workloads more reliable by applying modern cloud design patterns, using infrastructure as code.

Caution

Claranet should focus on increasing its overall cloud portfolio and competitive strength.

2021 ISG Provider Lens™ Leader

Claranet offers robust cloud operations, FinOps and cloud lifecycle management with niche cloud experts and architects. The firm has enhanced its overall cloud capabilities.

CLOUDREACH

Overview

Cloudreach is a consulting, advisory and managed cloud service provider, headquartered in London. The company has multiple offices in Europe and North America, with employees trained and certified across all three major public cloud platforms. The company has MSP partnership certifications from all three major hyperscalers.

Strengths

Strong hyperscaler accreditations: The firm has increased number of its certifications across hyperscalers. It has also achieved Microsoft Azure advanced specialisation on Kubernetes. The overall competency and certification reflect Cloudreach's capability to accelerate clients' cloud transformation journey.

Domain and technology experience: Cloudreach places much emphasis on an application-first approach, enabling it to make better and more informed decisions on behalf of its clients. It is particularly suited to deliver managed services for DevOps-focussed clients that wish to maximise access to a cloud provider's native tools while enforcing governance.

Migration-led managed service engagements: The company has had considerable success in migration-driven managed cloud service engagements. Cloudreach creates custom cloud services and migration strategies for its clients, and through its cloud services framework. It recommends the best automation technique among cloud service providers.

Caution

Cloudreach should focus on building or white label the multi-cloud management platform. The firm should focus on winning net new clients in the region.

2021 ISG Provider Lens™ Leader

Cloudreach's application and infrastructure managed cloud services have seen much progress. It focuses on DevSecOps to assure the safety and security of each client's environment.

COMPUTACENTER

Overview

Computacenter is a U.K.-based IT services company, headquartered in Hatfield. The company is present in 10 locations in the U.K., andit offers cloud consulting and strategy to manage the multicloud IT landscape of its clients. In the recent past, Computacenter has broadened its accreditations with AWS and Microsoft Azure, enabling enterprise clients to optimise and manage their cloud workload seamlessly.

Strengths

Multicloud managed service: Computacenter's newly redesigned AWS cloud solution blends the company's proven competence as an on-premises IT services provider with AWS' power and reach. With the recent AWS accreditations and integration of existing services, Computacenter works with regulated industries and complex enterprises, where security and large-scale transformations are crucial.

Infrastructure as code: Computacenter leverages Terraform as the standard infrastructure-as-code tool for network, security and virtual instance deployment. The organisation provides out-of-the-box reference architectures for customer landing zones that are used as the foundation. Computacenter also offers custom infrastructure as code solutions based on business needs.

Total cost of economics and FinOps service: Computacenter has transformed its chargeback and showback service, enabling clients' lines of business to better understand consumption patterns and adopt appropriate financial control measures. In addition, Computacenter provides a strategic cloud consumption solution.

Caution

The firm should focus on building or leveraging third-party, AI-led cloud orchestration platforms.

2021 ISG Provider Lens™ Leader

Computacenter has evolved into a specialist cloud managed service and transformation provider for midmarket clients in a variety of industries. The company has the domain and technological expertise to achieve this.

COFORGE

Overview

Coforge is a multinational IT company, based in Noida, India. The company has offices around five locations in the U.K. It has clients in travel and transportation, banking and financial services, insurance, manufacturing and media verticals, offering a range of services, including cloud consulting, transformation and managed services.

Caution

Coforge should focus on onboarding net new clients in the region. Also, the firm should focus on managed-public-cloud-specific deals.

Strengths

Integrated and agile operation excellence: Coforge has a robust, automated operating model, which is tightly integrated in its SysOps, FinOps and SecOps modules. With its intelligent service provider platform, the organisation provides event prediction and self-healing as well as strong data integration capabilities.

Automation capabilities: Coforge offers robust automation and infrastructure-as-code services to its clients that help in automating the majority of the manual tasks. The firm helps in establishing out-of-the-box workflows, which help enterprise to accelerate automation journey.

FinOps-led managed services: Coforge offers cloud managed services with FinOps capabilities. Its FinOps capabilities enable clients to optimise overall cloud expenditures.

2021 ISG Provider Lens™ Leader

Coforge's overall cloud portfolio attractiveness and competitive strength is well recognised among clients. The firm has the potential to increase its cloud market share among midmarket and large clients.

ENSONO

Overview

Ensono offers cloud consulting and migration services and is headquartered in Illinois. The company is an Advanced Consulting Partner with AWS, a Microsoft Azure Gold Partner and a Google Cloud Partner. The company holds Azure Expert MSP and AWS MSP certifications.

Caution

Ensono should focus on redesigning its marketing strategy to build a stronger perception, for its brand, among the advisor, analyst and CXO communities, from a public cloud service provider perspective.

Strengths

Cloud innovation and centre of excellence: Through its cloud platforms and technologies, Ensono's cloud centre of excellence helps clients accelerate their cloud journey. Its innovation centre offers a mix of personalized and self-service experiences to help clients simplify and modernise their IT environments.

Proven player in mainframe migration and managed service in cloud: Ensono has a decade of experience, moving and maintaining large, complex mainframe workloads, and has assisted clients in successfully transitioning their traditional mainframe to the cloud.

Custom cloud solution and services: The consulting and transformation services offered by Ensono are designed to assist customers in realising the full potential of cloud services from a variety of perspectives.

2021 ISG Provider Lens™ Leader

Ensono has improved its overall cloud services portfolio. Its cloud transformation solutions with niche mainframe services enable clients to drive their cloud transformation journey.

HEXAWARE

Overview

Hexaware is a global IT services company, headquartered in Navi Mumbai, India. The company has an office in London to provide managed public cloud services in the region. Hexaware has trained and certified cloud professionals across hyperscalers in the U.K. for managed public cloud services. The company holds an Azure Expert MSP certification.

Strengths

Consulting and FinOps-based managed cloud service: Hexaware's multicloud managed service has an integrated service model. The firm enables its clients to forecast operational and capital expenditure with a financial accounting model.

AI-led cloud management platform: Hexaware's cloud management platform, Tensai, is powered by AI. With out-of-the-box application programming interfaces (APIs), the platform can integrate with third-party monitoring and administration applications. It offers high cognitive and intuitive characteristics, allowing for multicloud operation administration with zero or one touch.

Modular pricing and support model: The organisation provides tailored support and various pricing models to its clientele: outcome based, per-instance per-month, fixed price, and time-and-materials pricing models.

Caution

Hexaware has the potential to grow its share of the cloud managed service industry. It should focus on expanding its pool of experts in the region.

2021 ISG Provider Lens™ Leader

Hexaware has redesigned its tools and accelerators to focus on managed cloud services. Specifically, its Tensai™ suite of products helps customers to build, automate and manage cloud landscapes by bringing in intelligent operations. Correspondingly, its related portfolio and competitiveness have also improved.

RACKSPACE TECHNOLOGY

Overview

Rackspace Technology is a global multicloud services company, headquartered in Texas. The company has offices in Hayes and Cardiff in the U.K. It has MSP certifications across all three major hyperscalers. The company also offers professional services related to designing and building multicloud solutions and cloud-native applications.

Strengths

Elastic engineering: Rackspace Elastic Engineering is a managed support model that gives customers on-demand access to public cloud professionals through recurring sprints that consistently innovate, adapt, and improve client's environments. Rackspace Elastic Engineering includes several service tiers, each with a specific number of monthly hours. This is a unique model that allows clients to plug-in and plug-out based on project needs.

Integrated multicloud managed service platform: Rackspace Fabric™ takes a unified approach to administrative tasks across multicloud environments. While embracing the unique aspects of each cloud, the platform provides integrated invoicing, governance and monitoring services. Furthermore, it ensures a standard for consuming and managing cloud resources from numerous providers, allowing clients to easily harness the cloud's transformative powers.

Custom cloud solution and service: The organisation has a focussed strategy for ongoing service or support, with a range of processes and functions to improve operations and optimise a customer's overall expenses. Rackspace Technology achieves this by leveraging its mature tools stack, niche talent and accreditations with hyperscalers partners.

Caution

Rackspace Technology should improve its cloud management platform, artificial intelligence and machine learning capabilities.

2021 ISG Provider Lens™ Leader

Rackspace Technology has established itself as a thought leader in the cloud managed services market. The organisation's overall portfolio and competitive strength have improved in the U.K.

UNISYS

Overview

Unisys is a global IT services company, headquartered in Pennsylvania. The company offers managed public cloud services to small and midsize enterprises and has offices in Enigma and Leeds in the U.K. Unisys has MSP partnerships with AWS and Azure.

Caution

Unisys should focus on increasing its local niche talent in the U.K. and on acquiring net new clients across verticals in the region.

Strengths

AI-led autonomous managed service operation: Unisys has a strong automation ecosystem with integrated capabilities for self-healing, led by AIOps. Cognitive automation is enabled by its platform that includes predictive analytics and allows for complicated decision-making. The overall platform allows optimised management and monitoring of clients' multicloud services.

CloudForte-led digital transformation services: With a rigorous governance approach, Unisys CloudForte® accelerates clients' digital transformation and maximises innovation. The platform enables clients with self-service blueprints, automated governance and workflow, automated provisioning, security, cost management, reporting and advanced analytics.

Gain sharing and outcome-based engagement: Unisys works with clients with an outcome-based approach, where its earning is linked to a client's business success. It collaborates with clients for vertical-specific solution creation and implementation.

2021 ISG Provider Lens™ Leader

Unisys provides a full-stack cloud offering and takes a modular approach to assisting clients with their digital transformation efforts.

RISING STAR: MINDTREE

Overview

Mindtree is a global IT service provider with its headquarters in Bengaluru, India. The company offers managed public cloud services to small and midmarket clients and has an office in London. Mindtree is an Azure expert MSP-certified provider. It has a strong presence in business services, software and services to offer cloud consulting services.

Strengths

AI-based cloud management platform: Mindtree's MWatch is a platform for managing IT infrastructure and delivering secure services. By integrating the service desk with monitoring tools, MWatch gives a comprehensive picture of its clients' apps and infrastructure. CIOs may use this information to improve IT performance, streamline workflows and cut costs.

Autonomous IT Operation capabilities: Mindtree has enhanced its AI- and machine-learning-based analyser, which enables clients to drive intelligent automation, predictive modelling, auto-triaging and self-healing capabilities. Its AIOps capability helps clients optimise their teams with one-touch and zero-touch automated operations.

Total cost of economics through FinOps framework: The company offers a cloud economics model that provides insights into cloud consumption, and also identifies areas of improvement. Its powerful cloud cost-control methodology enables businesses to determine policy and governance to control multicloud costs.

Caution

The firm should focus on onboarding clients across verticals in the region.

2021 ISG Provider Lens™ Rising Star

Mindtree is emerging as a niche cloud managed service provider in the region. The organisation has robust assessment, migration and cloud capabilities.

RISING STAR: TECH MAHINDRA

Overview

Tech Mahindra is an IT services company, headquartered in Pune, India. The company has six offices in the U.K. to support managed public cloud services. Its clouds services include cloud strategy, transformation, migration, integrated cloud managed services and domain-specific solutions. The company has MSP certifications from AWS and Microsoft Azure.

Caution

Tech Mahindra should focus on increasing its managed public cloud service footprint, across verticals, in the region.

Strengths

Intelligent cloud operation platform: For seamless operations and reduced costs, Tech Mahindra's iCOPS platform for Intelligent Cloud Operations and Subscription Management services gives a unified view of hybrid and multicloud operations. The overall solution enables clients to adopt FinOps culture and smart cloud workload orchestration practices.

Cloud strategy led managed service alignment: Tech Mahindra helps clients define, craft and build the right cloud adoption strategy to achieve business objectives and outcomes.

2021 ISG Provider Lens™ Rising Star

Tech Mahindra offers multicloud managed services through its proprietary platform, framework and FinOps capabilities.

Methodology

METHODOLOGY

The research study "ISG Provider Lens™ 2021 Public Cloud – Services & Solutions, U.K." analyzes the relevant software vendors/service providers in the U.K. market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

The study was divided into the following steps:

1. Definition of 2021 Public Cloud – Services & Solutions, U.K. market
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & use cases
4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)
5. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
6. Use of the following key evaluation criteria:
   - Strategy & vision
   - Innovation
   - Brand awareness and presence in the market
   - Sales and partner landscape
   - Breadth and depth of portfolio of services offered
   - Technology advancements

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ISG Provider Lens™ | Quadrant Report
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ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 700 clients, including more than 75 of world's top 100 enterprises, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis. Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,300 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data. For more information, visit www.isg-one.com.

ISG Provider Lens™

Public Cloud – Services & Solutions

Managed Public Cloud Services for Large Accounts

U.K. 2021 Quadrant Report

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

claranet

November 2021

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The research and analysis presented in this report includes research from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of July 2021, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

All revenue references are in U.S. dollars ($US) unless noted.

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ISG Provider Lens™

ISG Provider Lens™

ISG Provider Lens™ delivers leading-edge and actionable research studies, reports and consulting services focused on technology and service providers' strengths and weaknesses and how they are positioned relative to their peers in the market. These reports provide influential insights accessed by our large pool of advisors who are actively advising outsourcing deals as well as large numbers of ISG enterprise clients who are potential outsourcers.

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EXECUTIVE SUMMARY

The increasing adoption of cloud services is expected to be the primary driver of IT market growth in the U.K. Enterprises are adopting cloud technology at a faster and higher rate than small businesses. Infrastructure as a service (IaaS) has drawn the interest of IT decision-makers, particularly in small and medium enterprises (SMEs), and is expected to be the region's leading client category. Furthermore, ever-increasing government cloud spending is a crucial element driving market growth, as public sector cloud adoption lags behind the private sector.

Businesses in the U.K. are increasingly embracing a cloud-first strategy, with an increasing number of organisations anticipating a time when they would migrate all their IT assets to the cloud. While small businesses can take the natural step of removing depreciated hardware assets and completely moving to the cloud, large organisations, with significant infrastructure investments, may find it difficult to make this move rapidly. As a result, "cloud everything" will be out of reach for some time. ISG expects majority of businesses to maintain hybrid IT setups. The momentum of cloud adoption will continue as cloud users increasingly migrate portions of their estates to the cloud and consequently take on more complex migration projects.

Rise in outcome based and gain sharing model: Time and material (T&M) and key responsibility area (KRA) matrices have traditionally been used by IT service providers to determine price for services, based on effort. Such service models are being set aside because they do not consider business outcomes or risk ownership. While fines are imposed based on established service level agreements (SLAs) in specific service scenarios, such as managed services, these SLAs are often defined based on predictable results and manageable risks. There has been a change from an input-based pricing model to an output-based pricing strategy. Customers simply pay for the results obtained throughout the engagement. Such a relationship exists when a service provider collaborates with a customer as a co-innovator and business partner. This trend is expected to continue as organisations face fierce competition in the global market, and IT spend becomes more strategic rather than commoditized for utilising a set of services.

Transformation-led IT outsourcing deals: It has been observed that the companies across verticals are outsourcing their multicloud and classic data centres to global and regional IT service providers. By selecting the right technology and business partner, these firms want to focus on their core business functions and business expansion plan with digital services adoption. The deals that have been announced in the recent past have been a combination of rebadge of employees, in-flight digital consulting projects and core IT components. The finding during the study reveals that cost reduction is, once again, the primary motivator for U.K. businesses to outsource, with a third of all businesses planning to outsource more. According to the research, cloud service provider satisfaction is also greater than the percentage of respondents that are satisfied with their IT service providers.

Strategic focus on increasing cloud adoption: The government's goal is to build a world-class digital economy that benefits everyone and strengthens the economy in the long run.

Several components of the digital transformation process are driven by execution. Building a world-class digital ecosystem, improving digital skills access for all U.K. businesses, and making the region the most suited location for digital business is all a part of this plan. AWS, Azure, and Google Cloud Platform are becoming increasingly important in the public sector and enterprise clients' digitalisation journeys.

Increased use of public cloud services in the U.K.: Businesses in the U.K. are realising the value of cloud services and solutions in meeting customer needs. A growing number of businesses are focused on implementing a multicloud approach to develop cloud-native solutions. Small and medium-sized businesses (SMBs) are adopting cloud-native solutions and transformation strategies at an increasing rate. The cloud platforms AWS, Azure, and Google are the main drivers of enterprise digital transformation. As hyperscalers provide a wide range of services and platform enablement to businesses, CTOs in the U.K. are considering them for R&D engagements to push various product services in the region.

Pandemic has pushed CXOs to adopt cloud as a mainstream solution: Since the beginning of the pandemic, there has been a massive shift in consumer buying behaviour, from physical to digital. This change in consumer buying patterns has pushed CXOs to adopt the cloud as a mainstream solution from multiple dimensions. In order to stay competitive in the global market, the majority of the companies, across verticals, have increased their cloud spend and workload migration to the cloud.

Demand for integrated AI-led cloud managed services: Multicloud managed services continue to grow as companies are adopting a multicloud approach to drive their digital transformation journeys. Midsize and small service providers, with their unique service offerings, have gained traction by winning public cloud managed services contracts. Early entrants have an advantage here, but small and midsize providers are gaining traction with their unique offerings in public cloud managed services for multicloud environments. Several small providers are being acquired by large system integrators to either eliminate the competition or to acquire their niche capabilities or client segments. This consolidation and shrinkage in the managed service provider market will prevail as technologies evolve. Public cloud providers have MSP certifications that every other system integrator is striving to acquire. Service providers are also differentiating themselves by creating proprietary offerings, bringing in vertical-specific expertise or establishing strategic partnerships with public cloud providers.

Multicloud has become the new normal: Enterprises do not wish to limit themselves to just one hyperscalers as each one has certain exclusive strengths, either in terms of vertical solutions or prices and other factors. When enterprises embark on their cloud journeys, they want to try out their vision with each hyperscaler in order to pick the right partner, and not just a commodity service provider, for success. Most enterprises have been using a multicloud environment. This trend is expected to surge irrespective of the enterprise size. However, there are some barriers to a multicloud setup. Orchestration involves several moving parts in a complex setup to be operated in a public cloud environment. Many users find it difficult to manage multicloud environments and are increasingly adopting various tools to handle this complexity, but these are not mature enough. Other barriers include vendor lock-in by the public cloud provider and interoperability between two or more public cloud providers.

Introduction

Simplified illustration

Public Cloud – Services and Solutions 2021	
Consulting and Transformational Services for Large Accounts	Consulting and Transformational Services for Midmarket
Managed Public Cloud Services for Large Accounts	Managed Public Cloud Services for Midmarket
Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services

Source: ISG 2021

Definition

In the last financial year, the increase in public cloud adoption among enterprises was mainly triggered by the COVID-19 pandemic, along with other factors, such as the growing digital transformation engagements, increasing recognition of the importance of cyber security and expanding remote working environments. The increased maturity of the cloud industry made a major impact on both enterprises and IT service providers, with both buyers and consumers witnessing a huge shift the buying behaviour, from physical to digital. For enterprises, this has also impacted business models, requiring digital initiatives and recognizing the need to address governance, risk and compliance norms. Considering the widespread adoption of the as-a-service model, enterprises need to continuously evaluate cloud service providers, globally, mainly due to growing security concerns and the dynamic nature of the business landscape. Enterprises continue to seek providers that can act as strategic partners in carrying out cloud transformation

Definition (cont.)

engagements on major hyperscalers (AWS, Microsoft Azure and Google Cloud Platform). The provider will also continue to manage the workloads on an on-going basis, and help enterprises control, optimise and manage cloud expenses though FinOps strategies.

ISG reports a strong demand for digital transformation engagements, which, in turn, is driving global contracts for cloud products and services, including infrastructure-as-a-service (IaaS) and platform-as-a-service (PaaS). According to the latest 2Q21 ISG Index™, the global market has grown 32 percent in combined market annual contract value (ACV) to reach its current value of US$19.1 billion year-over-year, while the as-a-service ACV has increased by 25 percent to reach US$11.2 billion in the same period. Also, the IaaS market grew by 29 percent to reach US$15.3 billion, while the SaaS market grew by 15 percent to reach US$5.7 billion in the first half of 2021.

The ISG Provider Lens™ study offers the following to IT-decision makers:

- Strengths and weaknesses of relevant providers.
- A differentiated positioning of providers based on competitive strength and portfolio attractiveness.
- A perspective on several markets, including global, the U.S., the U.K., Germany, Switzerland, France, the Nordics and Brazil.

This study serves as the basis for important decision-making in terms of positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also leverage information from these reports to evaluate current vendor relationships and potential engagements.

Definition (cont.)

Scope of the Report

The Public Cloud – Solutions & Service Partners 2020 U.K. report will assist buyers while reviewing a significant cloud transformation strategy and the capabilities of service providers in numerous geographies. Enterprise clients will also benefit from the study because it incorporates ISG's strengths in global sourcing advisory, contract knowledge databases, regional research, and expertise in technology ecosystems and innovations.

This study includes various reports from seven quadrants that cover cloud service models. Not all quadrants are covered in each geography. Coverage depends on provider responses, participation and relevance. Quadrants that are not covered in a region may be covered in future studies. The geographic report areas include the U.S., the U.K., Germany, Switzerland, the Nordics, France, Brazil and Latin America (LATAM).

Consulting and Transformation for Large Accounts: This quadrant assesses a service provider's ability to offer cloud assessment, advisory, workload migration and cloud consulting to large businesses. The enterprises are subject to strict regulations that can complicate engagements. They typically have more than 5,000 employees and a revenue of more than US$1 billion.

Consulting and Transformation for Midmarket: This quadrant assesses a service provider's ability to provide cloud assessment, advisory workload migration and continuous service transformation for public cloud to midsize businesses. The enterprise client typically has fewer than 5,000 employees or generates less than US$1 billion in revenue.

Managed Public Cloud Services for Large Accounts: This quadrant assesses a service provider's ability to provide multicloud managed services for large businesses. The enterprises are subject to strict regulations that can complicate engagements. They typically have more than 5,000 employees and a revenue of more than US$1 billion.

Managed Public Cloud Services for Midmarket: This quadrant assesses a service provider's ability to provide multicloud managed services for public cloud for midsize businesses. The enterprise client typically has fewer than 5,000 employees or generates less than US$1 billion in revenue.

Hyperscale Infrastructure and Platform Services: Providers in this quadrant offer virtual compute resources, middleware and software on a public cloud. Clients consume infrastructure and platform (micro)services as an on-demand and a web-centric service. Typical services in the IaaS segment are compute services, storage and network resources, where all are provided in a virtual or containerized software-defined manner and rounded up by serverless architectures.

Definition (cont.)

SAP HANA Infrastructure Services: This quadrant examines cloud infrastructures best suited to host SAP software portfolio, with focus on SAP S/4HANA workloads and large-scale HANA databases. Participating vendors offer hyperscale IaaS — including infrastructure operations, facilities, provisioning and scaling capacity — in a pay-as-you-go model. IaaS tools should include data migration, system imaging, backup, restore, disaster recovery, resource usage monitoring and management dashboards. Tools can be part of the standard IaaS offering or be provided by partners in a marketplace.

Provider Classifications

The provider position reflects the suitability of IT providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions IT providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between US$20 million and US$999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with 5,000 or more employees or revenue above US$1 billion, with activities worldwide and globally distributed decision-making structures.

Provider Classifications

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly.

Leader

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Product Challenger

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Market Challenger

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

Contender

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/ services and follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Provider Classifications (cont.)

Each ISG Provider Lens™ quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star. Number of providers in each quadrant: ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

Rising Star

Rising Stars have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not In

The service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

Public Cloud – Services & Solutions - Quadrant Provider Listing 1 of 4

	Consulting and Transformational Services for Large Accounts	Consulting and Transformational Services for Midmarket	Managed Public Cloud Services for Large Accounts	Managed Public Cloud Services for Midmarket	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
3stepIT	Not In	Contender	Not In	Not In	Not In	Not In
Accenture	Leader	Not In	Leader	Not In	Not In	Not In
Acora	Not In	Not In	Not In	Contender	Not In	Not In
Alibaba	Not In	Not In	Not In	Not In	Contender	Not In
ANS	Not In	Contender	Not In	Not In	Not In	Not In
Aptum	Not In	Not In	Not In	Contender	Not In	Not In
Atos	Leader	Not In	Leader	Not In	Not In	Not In
AWS	Not In	Not In	Not In	Not In	Leader	Leader
Birlasoft	Not In	Not In	Contender	Not In	Not In	Not In
CANCOM (Telefonica Tech)	Market Challenger	Leader	Product Challenger	Leader	Not In	Not In
Capgemini	Leader	Not In	Leader	Not In	Not In	Not In
Claranet	Product Challenger	Leader	Rising Star	Leader	Not In	Not In
Cloudreach	Product Challenger	Product Challenger	Market Challenger	Leader	Not In	Not In
Coforge	Product Challenger	Leader	Product Challenger	Leader	Not In	Not In

Public Cloud – Services & Solutions - Quadrant Provider Listing 2 of 4

	Consulting and Transformational Services for Large Accounts	Consulting and Transformational Services for Midmarket	Managed Public Cloud Services for Large Accounts	Managed Public Cloud Services for Midmarket	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
Cognizant	Leader	Not In	Product Challenger	Not In	Not In	Not In
Computacenter	Market Challenger	Leader	Rising Star	Leader	Not In	Not In
DXC	Product Challenger	Not In	Product Challenger	Not In	Not In	Not In
Ensono	Product Challenger	Leader	Market Challenger	Leader	Not In	Not In
Fujitsu	Leader	Not In	Leader	Not In	Not In	Not In
Google	Not In	Not In	Not In	Not In	Leader	Market Challenger
HCL	Leader	Not In	Leader	Not In	Not In	Not In
Hexaware	Product Challenger	Leader	Product Challenger	Leader	Not In	Not In
IBM	Leader	Not In	Leader	Not In	Product Challenger	Product Challenger
Infosys	Leader	Not In	Leader	Not In	Not In	Not In
Jisc	Not In	Contender	Not In	Contender	Not In	Not In
Lemongrass Consulting	Not In	Market Challenger	Not In	Market Challenger	Not In	Not In
Logicalis	Not In	Product Challenger	Not In	Market Challenger	Not In	Not In
Logicata	Not In	Market Challenger	Not In	Product Challenger	Not In	Not In

Public Cloud – Services & Solutions - Quadrant Provider Listing 3 of 4

	Consulting and Transformational Services for Large Accounts	Consulting and Transformational Services for Midmarket	Managed Public Cloud Services for Large Accounts	Managed Public Cloud Services for Midmarket	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
LTI	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Not In	Not In
Microland	Contender	Product Challenger	Contender	Product Challenger	Not In	Not In
Microsoft	Not In	Not In	Not In	Not In	Leader	Leader
Mindtree	Product Challenger	Rising Star	Product Challenger	Rising Star	Not In	Not In
Mphasis	Contender	Product Challenger	Contender	Product Challenger	Not In	Not In
N-iX	Not In	Rising Star	Not In	Not In	Not In	Not In
Oneadvanced	Not In	Not In	Not In	Product Challenger	Not In	Not In
Oracle	Not In	Not In	Not In	Not In	Product Challenger	Not In
OVHcloud	Not In	Not In	Not In	Not In	Contender	Contender
Protera	Not In	Market Challenger	Not In	Contender	Not In	Not In
Pythian	Not In	Contender	Not In	Market Challenger	Not In	Not In
Rackspace Technology	Rising Star	Leader	Leader	Leader	Not In	Not In
SAP	Not In	Not In	Not In	Not In	Not In	Product Challenger
Six Degrees	Not In	Contender	Not In	Not In	Not In	Not In

Public Cloud – Services & Solutions - Quadrant Provider Listing 4 of 4

	Consulting and Transformational Services for Large Accounts	Consulting and Transformational Services for Midmarket	Managed Public Cloud Services for Large Accounts	Managed Public Cloud Services for Midmarket	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
Slalom	Not In	Product Challenger	Not In	Product Challenger	Not In	Not In
Sopra Steria	Product Challenger	Product Challenger	Not In	Not In	Not In	Not In
SysGroup	Contender	Contender	Contender	Not In	Not In	Not In
TCS	Leader	Not In	Leader	Not In	Not In	Not In
Tech Mahindra	Product Challenger	Leader	Product Challenger	Rising Star	Not In	Not In
transputec	Not In	Not In	Not In	Contender	Not In	Not In
T-Systems	Product Challenger	Not In	Not In	Not In	Not In	Contender
Unisys	Product Challenger	Product Challenger	Product Challenger	Leader	Not In	Not In
Version 1	Contender	Not In	Contender	Not In	Not In	Not In
Virtusa	Not In	Not In	Not In	Contender	Not In	Not In
Virtustream	Not In	Not In	Not In	Not In	Not In	Product Challenger
Wipro	Leader	Not In	Leader	Not In	Not In	Not In
Zensar	Not In	Not In	Product Challenger	Product Challenger	Not In	Not In

Public Cloud – Services & Solutions Quadrants

ENTERPRISE CONTEXT

Managed Public Cloud Services for Large Accounts

This quadrant is relevant to large enterprises in the U.K. that are evaluating public cloud managed service providers (MSPs). In this quadrant report, ISG lays out the current market positioning of these providers in the U.K. and how they interact with key challenges in large enterprises' infrastructure management in the public cloud environment. These providers manage client workloads on third-party, public cloud, hyperscale environments so enterprises can focus on other tasks.

Enterprises are increasing the adoption of cloud native, DevOps and IoT technologies and looking for service providers with expertise in re-architecture and re-platforming of existing applications in a cloud native environment. Using public cloud managed services can help enterprises with implementing cloud-native solutions leveraging containers and serverless functions to achieve cost efficiency. U.K. enterprises are looking for cloud agnostic solutions for multicloud environments.

ISG observes that enterprises are trying to move to an automation centric operations model for managing their multicloud environments. Enterprises will get the benefit of the MSPs' automation and AI capabilities to monitor their infrastructure for proactive responses, predict the failures and reduce maintenance costs. This will reduce the overheads in maintenance and monitoring of cloud native applications. Most of the U.K. enterprises invest in self-service or auto-heal capabilities for their ticket generating requests. Also, enterprises in the U.K. focus on financial management, cloud governance, brokerage and autonomous support functions.

The COVID-19 crisis has created an increased demand for enterprises to focus more on business continuity and disaster recovery in their public cloud managed services. There are several such cloud offerings that target specific verticals based on the needs of individual industries. Also, enterprises are increasingly looking for innovative pricing models such as outcome-based or consumption-based models.

IT leaders should read this report to better understand the relative strengths and weaknesses of managed service providers, as well as how the MSPs' approaches to the market can impact enterprise public cloud strategies, improve business agility and reduce total cost of ownership.

Software development and technology leaders should read this report to understand the positioning of managed service providers and learn how MSP offerings can impact ongoing development of an enterprise's software products.

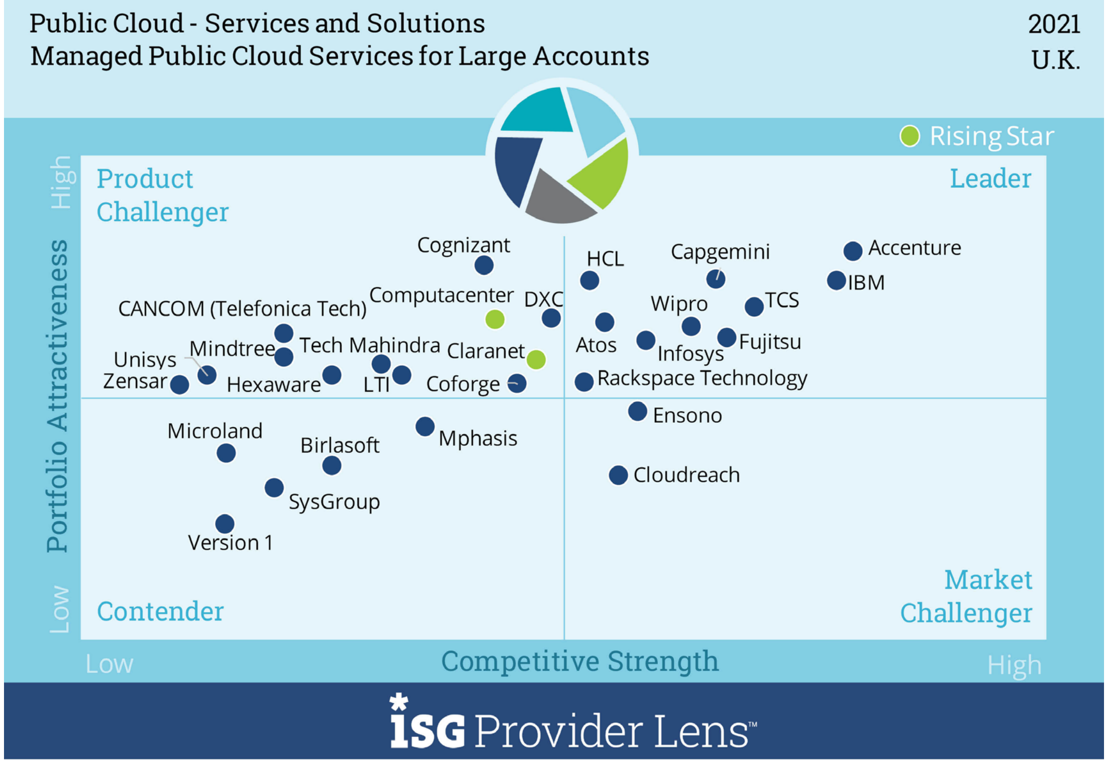
Sourcing, procurement, and vendor management professionals should read this report to develop a better sense of the current landscape of managed services providers in the U.K.

MANAGED PUBLIC CLOUD SERVICES FOR LARGE ACCOUNTS

Definition

This quadrant assesses service providers and service integrators that offer managed public cloud infrastructure and application services. Managed service providers of public cloud offer professional and managed services on top of public cloud IaaS providers/hyperscalers (AWS, Microsoft Azure, Google Cloud Platform) through a DevOps- and DevSecOps-centric approach and help enterprise build a robust CI/CD pipeline with strong container management capabilities. Under the managed public cloud services umbrella, a provider is responsible for providing site reliability engineering and business resiliency.

Broadly, these services include cloud services lifecycle management, real-time and predictive analysis, and monitoring and managing a customer's public and multicloud environment, with the aim to maximize the performance of workloads in the cloud, reduce costs and ensure compliance and security. Typically, specially developed or licensed cloud management platforms and tools are used to serve customers with maximum automation and provide the necessary transparency on the managed cloud resource pool, in terms of capacity



Source: ISG Research 2021

MANAGED PUBLIC CLOUD SERVICES FOR LARGE ACCOUNTS

Definition (cont.)

utilization and costs, including self-service administration. In addition to the technical services a provider offers dashboards to analyse and forecast financial impacts and propose optimization of the services.

Provider services typically include the following:

- Professional services for the management and monitoring of CPU, storage, memory, databases, and operating systems as standalone or micro services or virtual machine and container services.
- Operating system, middleware and application upgrade services.
- Cloud infrastructure management platform for cloud-cost management (charge back and show back), identity management and IT service management.
- Monitoring, logging, patching, and predictive analytics services to guarantee performance and security improvements throughout a container lifecycle to enable continuous integration and delivery.
- Governance and compliance management, along with a robust cyber security framework and platform for securing client data in multiple geographies.
- Support services such as incident management, configuration, security services and automation setup.

MANAGED PUBLIC CLOUD SERVICES FOR LARGE ACCOUNTS

Eligibility Criteria

- Operational excellence and well-defined professional services.
- Experience in building and managing public and multicloud environments, along with expertise in managing configurations of platforms and systems as well as that of containers.
- Financial dashboards and cost analysis tools, providing visibility of variable costs associated with cloud providers through FinOps ecosystem.
- Support for software code development and cloud-native and legacy system integration by leveraging DevOps, API-enabled automation and cloud analytics services.
- Robust cyber security managed services offering.
- Partnerships with relevant public cloud providers and respective managed-service-provider certificates for AWS, Microsoft Azure, GCP, or others.

Observations

The need for public cloud managed services in the U.K. is increasing and businesses are, consequently, increasing their cloud expenditure to build industrial cloud solutions. Also, when using multicloud services, businesses want to make sure they are not spending too much on public cloud. The growing demand for multicloud services and the complexity of on-premises private clouds are compelling businesses to look for integrated multicloud management platform. In order to manage, monitor, and optimise workload, businesses are seeking system integrations to create stable managed service architectures and platforms with AI capabilities.

Almost every industry is embracing digital transformation. Consequently, existing infrastructure and business models are being phased out in favour of new options; businesses that are not embracing digitalisation are becoming obsolete. While the pandemic, company resilience can be established only with digital initiatives at the forefront of all decision-making. Although an increasing number of firms have effectively embraced the changes by liaising with managed service providers, the majority of the enterprises are still struggling. A significant number of enterprises are lagging behind on the adoption of the latest technologies; the ones that have been able to stay ahead of the curve in this game have embraced innovation for their IT departments.

MANAGED PUBLIC CLOUD SERVICES FOR LARGE ACCOUNTS

Observations (cont.)

The majority of Leaders in this quadrant are capable of assisting large businesses with multicloud managed services to optimise cloud workloads. Ten of the 29 providers that qualified for this quadrant have been designated as Leaders, while two are Rising Stars.

- **Accenture** has expanded its cloud first offerings and engineering capabilities in the U.K. with the acquisition of Infinity Work.
- **Atos** has won a digital support contract from U.K. Passport Office.
- **Capgemin**i has been awarded the £600 million contract to host and run London Metropolitan Police's IT infrastructure.
- **Fujitsu** has years of experience in serving the U.K. public sector and has plans to gain SAP and other competencies to offer workload services.
- **HCL** Tech has plans to hire 1,000 technology professionals from in the cloud and AI space in the U.K.
- **Infosys** has plans to hire 1,000 resources in the U.K. to meet the growth surge in the digital space.
- **IBM** partners with the U.K. government on a US$300 million Quantum Computing research initiative.
- **Rackspace Technology** provides Brooks Macdonald with a streamlined and secure private cloud architecture.
- **TCS** has added over 7,000 employees in the U.K., including 1,800 trainees, over the past five years.
- **Wipro** will invest £16million, over the next four years, in a 20,000-square-foot innovation centre that will serve as Wipro's flagship centre in the U.K. and offer technology expertise to companies in both the U.K. and worldwide.
- **Claranet** (Rising Star) has deep roots in providing AI and machine learning services, and more than 150 certified cloud architects and consultants. It also has a deep understanding of Google Cloud Platform and AWS to better serve small and midsize businesses in the region.
- **Computacenter** (Rising Star) is a part of the AWS Well-Architected Partner Program to drive architectural excellence. It has helped clients to realise significant annual savings on their public cloud consumption, thereby supporting overall cost optimisation.

ACCENTURE

Overview

Accenture is a large global IT consulting and services provider with its headquarters in Dublin, Ireland. The company has offices across six locations in the U.K. it has top-tier partnerships with all major hyperscalers and dedicated business groups. Accenture has MSP partnerships with three major hyperscalers.

Strengths

Vendor-neutral managed services: The Accenture Cloud Platform is a vendor-agnostic managed service that enables quick access to cloud technologies, while maintaining effective governance and monitoring. The platform supports private and public cloud technologies from AWS, Microsoft Windows Azure, NTT Communications and Verizon Cloud, among others. Accenture offers a range of cloud services that include strategy consulting, transformation, cloud platform and managed services. The firm supports its clients with AI-led multicloud workload operations, with cloud consumption economics.

Niche cloud platform availability in the region: The organisation has strategic business groups across AWS, Google Cloud Platform and Azure. Its certified employees in Europe work with clients across private and public sectors to craft their digital transformation journey.

Dedicated hyperscalers business unit: Accenture has strategic cloud business units, where each unit is responsible for ensuring that clients derive high business value. The firm has proven experience in optimising and utilising the multicloud environment for a client, from the capital and operational expenditure perspectives.

Caution

Accenture is a high-end service provider with a track record of working with large corporate clients. However, in order to serve midsize clients, the firm needs develop a lightweight portfolio.

2021 ISG Provider Lens™ Leader

Accenture is a leading public cloud managed service provider for enterprises because of its strong alliances, including global business groups with public cloud providers, which leads to co-innovation of innovative solutions.

ATOS

Overview

Atos is a multinational IT service and consulting company, headquartered in Bezons, France. The company has offices across 17 locations in the U.K. to offer managed public cloud services. Atos holds MSP certifications from AWS, Azure and Google cloud.

Strengths

Co-creation and innovation centre: Atos has launched a digital innovation hub in London, in collaboration with Google Cloud, to help businesses speed their AI adoption. The innovation hub includes AI specialists to support private and public sector companies across Europe, and enables stakeholders to collaborate and create new use cases for AI, including industry-specific applications.

Integrated multicloud managed services: Atos' deep capabilities with traditional and cloud-native enable it to support multicloud managed services. It also enables lift-and-shift transitions, application refactoring and application reimplementation, as cloud-native applications, across cloud service providers.

Hyperscalers MSP accreditation: The firm has been successful in achieving managed service provider accreditation across hyperscalers. This helps it to establish credibility among enterprise clients.

Caution

To increase its market share, Atos should focus on onboarding clients across verticals. A recurring income model should also be a priority for the company.

2021 ISG Provider Lens™ Leader

Atos offers integrated multicloud managed services to enterprise clients, which helps them to optimise resources and operational costs.

CAPGEMINI

Overview

Capgemini is an IT consulting, technology, professional, and outsourcing services company, headquartered in Paris. Capgemini U.K. provides managed public cloud services to private and public enterprises. The company has offices in around 13 locations in the U.K., and over 70 clients across industries in the U.K., offering public cloud managed services. The company has MSP certifications from AWS and Azure.

Strengths

Integrated multicloud orchestration services: The Capgemini cloud management platform provides multicloud orchestration and lifecycle management solution. The firm offers FinOps services that enable client to continuous resource and operational expenditure.

Deep automation-driven managed services: To improve operational excellence, Capgemini has developed a unique program for automating tasks. It has been successful in reducing mean time to response (MTTR), by 50 percent, through self-healing, and has resolved 35 percent of incidents through auto-healing. This has resulted in less downtime for clients and improved productivity, along with reduced number of errors.

Cloud centre of excellence: Capgemini has a cloud centre of excellence that helps clients get the maximum value of cloud. It focusses on regional presence along expanding its presence among verticals. The centre of excellence offers a combination of skills focussed on pre-sales, solution architecture on infrastructure and solution architecture on applications and partners.

Caution

Capgemini should focus on increasing its client base across verticals in the region. The firm has not seen momentum in winning net new deals.

2021 ISG Provider Lens™ Leader

Capgemini offers integrated cloud managed services along with robust FinOps capabilities. The firm enables clients to optimise capital and operational expenditure.

FUJITSU

Overview

Fujitsu is a multinational information and communications technology equipment and services corporation, headquartered in Tokyo. The company offers managed public cloud managed services to large multinational clients across the U.K. Fujitsu is an AWS Advanced Consulting Partner and a Gold Partner for Microsoft. The company holds MSP certifications from AWS and Azure.

Strengths

Top-down and bottom-up managed services: Fujitsu offers an integrated application for multicloud workload orchestration. The firm also offers multilayer security solutions and services to help clients to secure their environment from cyberattacks.

Co-creation and industry cloud solution: Fujitsu supports clients with proven cloud solution and industry specific applications. The firm has strategic partnerships with hyperscalers to ideate and create diversified solutions.

Cloud managed services: Fujitsu has achieved accreditation as an AWS managed service partner. Also, the organisation has a robust and expansive multicloud managed services portfolio. Its RunMyProcess DigitalSuite platform, which has received Technology Partner recognition from hyperscalers, helps clients scale applications, independently, through an agile approach.

Caution

To scale and compete with other market Leaders, Fujitsu needs to train and certify more locally available public cloud experts.

2021 ISG Provider Lens™ Leader

Fujitsu offers a differentiated cloud services portfolio, domain experience and niche local talent in the region. Also, the firm has an integrated cloud management platform, which enables clients to manage multicloud workloads.

HCL

Overview

HCL Technologies is a large, multinational IT service provider, headquartered in Noida, India. The company has a strong presence in the U.K. with offices across 12 locations to offer managed public cloud services. The company has top-tier partnerships with AWS, Azure and Google Cloud Platform, with strategic partnerships with other cloud providers. HCL has MSP certification across AWS, Azure and Google Cloud Platform. In 2021, the company announced investments in the U.K. with the hiring of 1,000 technology professionals to support clients in the region and worldwide.

Strengths

Expansion plan in U.K. by adding 1,000 cloud experts: HCL has plans to hire 1,000 technology specialists in the U.K. for clients in the U.K. and the rest of the world. For its London, Greater London and Manchester operations, the firm wants to hire these individuals in the domains of digital transformation, cloud, AI and cyber security.

Cloud-native and FinTech lab in London: The firm's cloud centre of excellence provides cloud transformation services and engineering expertise across sectors to help U.K. businesses drive digital innovation.

Multicloud managed services with proprietary platform: HCL's ElasticOps is an AI-driven cloud operations and managed services offering, powered by DRYiCE™ technology. It allows dynamic and endless scaling of IT services to manage public cloud consumption. The firm also offers infrastructure as code by using Ansible, Terraform and AWS Config for infrastructure provisioning, orchestration and deployment in public cloud managed operations.

Caution

In the U.K., HCL should concentrate on increasing its public sector, travel, and transportation clients. It should also focus on existing and net-new customer growth from net new transformation deals.

2021 ISG Provider Lens™ Leader

HCL offers proven and differentiated AI-led public cloud managed services. Its services overall enable clients to manage multicloud workload lifecycle with proven FinOps capabilities.

INFOSYS

Overview

Infosys is a global IT service provider, headquartered in Bengaluru, India. The company has a presence in three locations in the U.K. Its public cloud managed services revenues were about $100 million in the U.K. The company has the highest level of partnerships with all the hyperscalers and offers vertical-specific solutions. Infosys has over 200 cloud-first solution blueprints, curated from 25,000 cloud assets. It has MSP certifications from all three major hyperscalers.

Strengths

Multicloud orchestration and management: Infosys provides cloud-agnostic management, and monitors multicloud workload through its intuitive and cognitive cloud management platform. Through its autonomous digital IT approach, the platform provides a dynamic decision-support framework, smart brokerage, governance and observability.

Strong hyperscaler capabilities: Infosys has partnerships with hyperscalers, and also with a range of tools vendor for assessment, discovery and application rationalization.

Infosys Cobalt lab: Infosys Cobalt serves clients with its catalogue of over 200 pre-built, cloud-first solution blueprints. The combination of Infosys Cobalt and Infosys' global digital centres enables clients to co-create new solutions and accelerate speed-to-market. The lab also meets regulatory and security compliance, and technical and financial governance are a part of every solution delivered.

Caution

Infosys should focus on onboarding net new clients across private and public sectors and on increasing niche talent in the U.K.

2021 ISG Provider Lens™ Leader

Infosys' multicloud managed services practice ensures that cloud workloads and hosted business-critical applications run smoothly. Together with AI-driven self-healing processes and automation technologies, Infosys fulfils the technological requirements of enterprise workloads.

IBM

Overview

IBM is a global IT service provider, headquartered in New York. The company provides managed public cloud services to large enterprises across the U.K. IBM has an MSP partnership with AWS and a large number of cloud-certified employees across major hyperscalers. It has a cumulative revenue of over US$23 billion from Europe, Middle East and Africa.

Strengths

Vertical-led advisory and consulting expertise: IBM offers cloud transformation services to help businesses migrate to the cloud from any environment, by integrating, administering and optimising across AWS, Microsoft Azure, IBM Cloud® and other cloud providers. To speed up the migration process, it employs a secure architecture. The company also offers orchestration, monitoring, security and automation on many levels, alongside seamless performance in public and private clouds.

Security solution and services to manage multicloud workload: IBM's cloud transformation framework complies with the most stringent security and regulatory guidelines. The firm specialises in creating safe, multicloud environments for both traditional and cloud-native applications, as well as backup and disaster recovery services. It enables cloud-agnostic security that works across on-premises and multicloud settings, such as IBM Cloud, AWS, Azure, and VMware SaaS, with a single pane of glass.

Advisory led cloud transformation services: IBM’s multicloud infrastructure development services create an end-to-end comprehensive strategy, architecture, design, transformation roadmap and standardized delivery building blocks, by integrating tools to support DevOps and containerized workloads. The IBM Garage™ methodology is an AI- and automation-based approach to accelerating the modernization journey. The IBM Cloud Pak™ for Multicloud Management, running on the Red Hat® OpenShift® Container Platform, provides consistent visibility, governance and automation from on-premises to the edge.

Caution

By moving its focus away from major transformative deals and toward better pricing alternatives for a wide variety of customers, IBM may grow its customer base in the U.K. with both large and midsize clients.

2021 ISG Provider Lens™ Leader

Through its complex integration capabilities, IBM provides large-scale clients with cloud consulting and transformation services to aid their digital transformation journey.

RACKSPACE TECHNOLOGY

Overview

Rackspace Technology is a global multicloud services company, headquartered in Texas. The company has offices in Hayes and Cardiff in the U.K. It has MSP certification across all three major hyperscalers. Rackspace Technology has a significant number of trained and certified cloud professionals to provide support for managed public cloud services, globally.

Strengths

Cost and resource optimization: Rackspace Technology's cloud specialists enable clients to re-engineer and architect their infrastructure to meet business goals. The firm's cloud optimisation tooling enables clients to reduce cloud spend and deliver flexibility.

Niche cloud experts and architects: In the U.K., Rackspace Technology has a large pool of hyperscaler specialists that are both trained and certified. It also offers cloud-native resources that work alongside cloud consultants to provide enterprise clients, across sectors, with best-of-breed architecture.

Fabric-led management platform: The firm has developed a fabric technology platform that allows for multi-cloud management and monitoring. Throughout a client's multicloud estate, the fabric platform can provide risk and governance, smart analytics, chargeback and show back. Clients can use Rackspace Fabric to achieve full transformation.

Caution

Rackspace Technology should focus on increasing its clientele in the region though organic and inorganic models. The firm should focus on winning net new deals from the digital transformation perspective.

2021 ISG Provider Lens™ Leader

Rackspace Technology enables clients to speed and simplify transformation by providing customisable and adaptable public cloud services.

TCS

Overview

Tata consultancy services (TCS) is a large global IT service provider, headquartered in Mumbai, India. The organisation has approximately 15 offices in the U.K. TCS offers multicloud managed services, consulting-led migration and total cost of economics services in the region. It offers a wide spectrum of cloud services with predefined blueprints, including solutions that are vertical specific. The firm has a substantial number of niche and cloud-certified talent dedicated to the region.

Strengths

Comprehensive platform ecosystem: TCS' Cloud Exponence platform provides intelligent managed services in hybrid cloud settings. The platform is powered by the company's Machine First™ methodology, which helps reduce cloud management costs and enables a seamless service-assisted IT experience.

Dedicated hyperscalers business units: The firm has announced strategic partnerships with hyperscalers for specific solution enablement. Also, TCS and Google Cloud have agreed to collaborate to develop industry-specific solutions, with a focus on delivering digital customer experiences in retail, as well as for modernising manufacturing processes with AI and linked robots.

Investment in training and certification: TCS has been investing substantially to train and certify a large number of resources in various cloud capabilities, which reflects the organisation’s commitment to prospective and existing clients in the region.

Caution

TCS should focus on increasing its client base in the U.K. public sector and on bringing modularity into its cloud services.

2021 ISG Provider Lens™ Leader

TCS has improved its customer satisfaction score in the region by transforming its cloud managed services portfolio. Furthermore, by continuing to invest in training, it has improved the availability of specialised local talent.

WIPRO

Overview

Wipro is a global IT service provider, headquartered in Bengaluru, India. The company has six offices in the U.K., offering managed public cloud services. Wipro has highest level of partnership with AWS, Azure and Google Cloud Platform and increasing their competencies. The company has MSP certification from all the three major hyperscalers. Wipro has a strong presence in the U.K., with over 100 clients, with revenues of around US$72 million for managed services.

Strengths

FullStride Cloud Services: Wipro FullStride Cloud services combine the complete breadth of Wipro's cloud-related capabilities, solutions and expertise to help clients better orchestrate their cloud journeys. This commitment has strengthened Wipro's base of cloud customers, lending credibility to its investments with partners and hyperscalers and resulted in solutions that help clients achieve faster results.

Integrated multicloud managed services: Wipro was one of the early entrants in multicloud managed services. Over the last few years, it has added multiple features to its cloud management platform. In addition, its digital operation of enterprises is integrated with HOLMES AIOps capabilities. The overall capabilities enable clients with cost optimization, auto-scaling, infrastructure as code and many other features.

Brokerage of cloud service: Wipro's "boundaryless" platform provides cloud service brokerage that aggregates, integrates and customises services across public or private clouds. The firm's digital operation centre offers modular services to enterprises to navigate, consume, extend and maintain cloud services.

Caution

Wipro should concentrate on expanding its public sector client base in the U.K. and on joining the government's G-Cloud 4 and digital services architecture.

2021 ISG Provider Lens™ Leader

Wipro's cloud approach has been transformed by its specialised practices across major hyperscalers. Its entire cloud business revenue in the U.K. has, correspondingly, also increased.

RISING STAR: CLARANET

Overview

Claranet provides modernising and running critical applications, data and infrastructure. Headquartered in London, it has a presence across France, Germany, The Netherlands, Portugal, Spain, Italy and Brazil. Claranet is a Microsoft Gold Partner and an Azure Expert MSP; an AWS Premier Consulting Partner, Migration Consulting Partner and MS; and a Google Premier Partner. The organisation has specific, joint go-to-market activities with Microsoft Azure and AWS.

Strengths

Tools ecosystem to manage multicloud workload: Claranet has a robust tools ecosystem with third-party white-labelled tools that enable its clients to manage multicloud workload with AI capabilities. The overall solution helps its clients to drive the business value creation solutions.

Cloud managed service: The organisation helps its clients make the most of the innovation potential offered by AWS, Google Cloud and Microsoft Azure and takes on the responsibility for the design, operation and continuous development of customer environments. Claranet delivers managed cloud-native applications, allowing considerable freedom to clients by following a complete DevOps paradigm with innovative solutions such as containers and Kubernetes.

Caution

To draw attention in the U.K., Claranet should focus on creating a strong brand presence for its numerous platforms and accelerators. It could also expand its market share among large enterprises, across verticals, with its managed services.

2021 ISG Provider Lens™ Rising Star

Claranet is emerging as a niche transformation, migration and managed cloud service provider. The firm has strengthened its overall positioning in the U.K.

RISING STAR: COMPUTACENTER

Overview

Computacenter is a U.K.-based IT services company, headquartered in Hatfield. The organisation has a presence in 10 locations in the U.K., and it offers cloud consulting and strategy, implements suitable technologies and manages its clients' multicloud IT landscapes. In the recent past, Computacenter has increased its accreditations with AWS and Microsoft Azure, which helps enterprise clients optimise and manage cloud workloads seamlessly.

Strengths

Robust managed cloud services across hyperscalers: Computacenter's public cloud offerings include end-to-end professional and managed services for private and public sector enterprises. The company has redesigned its already comprehensive cloud approach in collaboration with hyperscalers, and has extensive domain knowledge.

Infrastructure as Code and out-of-the-box blueprint services: Computacenter leverages Terraform as the standard -infrastructure-as-code tool for tenancy, network, security and virtual instance deployment. The firm offers ready-to-use reference architectures for client landing zones that serve as the foundation. Computacenter also provides customised Infrastructure as Code solutions to meet specific enterprise requirements.

Caution

Computacenter should focus on increasing its clients from the managed public cloud service deals perspective.

2021 ISG Provider Lens™ Rising Star

Computacenter has improvised on its overall cloud and digital transformation capabilities. The firm has been instrumental in driving multicloud optimisation journey for its clients.

Methodology

METHODOLOGY

The research study "ISG Provider Lens™ 2021 Public Cloud – Services & Solutions, U.K." analyzes the relevant software vendors/service providers in the U.K. market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

The study was divided into the following steps:

1. Definition of 2021 Public Cloud – Services & Solutions, U.K. market
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & use cases
4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)
5. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
6. Use of the following key evaluation criteria:
   - Strategy & vision
   - Innovation
   - Brand awareness and presence in the market
   - Sales and partner landscape
   - Breadth and depth of portfolio of services offered
   - Technology advancements

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