ISG Provider Lens™

Public Cloud - Solutions and Services

Managed Public Cloud Services for Midmarket

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

Unisys

QUADRANT REPORT | DECEMBER 2022 | UK

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Mature and more cost effective than private/hybrid cloud services.

The current public cloud situation in the U.K. can broadly be described as under:

Market looking for IT transformation: Providers in this market offer solutions designed to deliver transformational IT outcomes via cloud-native professional and managed services built exclusively from public hyperscale cloud infrastructure and platform services.

Selecting a public hyperscaler: In the past, enterprises looking to choose a hyperscaler often meant selecting public cloud over a private cloud approach. However, they do not have to choose between public and private clouds now. They can operate multiple (hybrid) cloud services from different providers, using one management platform. Hybrid cloud eliminates the dependence on any single cloud provider and allows for additional flexibility in terms of capabilities and security.

Public and private clouds: The main difference between a public and a private cloud is that a private cloud is completely controlled by a single organisation. On the other hand, a public cloud is a shared subscription service available to other organisations. This often makes public clouds more efficient and affordable as service charges are based on usage. Other differences and criteria to consider include:

Public cloud services have matured

- **On-demand self-service:** Decision of starting and stopping of service must depend on customers without direct interaction.
- **Broad network access:** Services must be available to any device, using any network.
- **Resource pooling:** Providers should create a pool of resources and dynamically allocate it to customers.
- **Rapid elasticity:** The services offered by providers must be easily expandable and quick.
- **Measured services:** Provider must measure service usage and charge accordingly.

Public cloud: Enterprises are increasingly gaining interest in public cloud and are considering it as a strong viable option as most of the earlier concerns such as security and financial controls have been addressed. Charging mechanisms too have improved, with the rise in FinTech companies (FinOps) and their respective offerings, as well as with security and revised ways of working such as DevSecOps.

Hybrid working: As the U.K. business sector recognises the importance of the new normal of hybrid working in the wake of the pandemic, cloud consulting and transformation are taking centre stage. The demand from organisations to transform their business models, especially in the supply chain domain, has resulted in an ongoing increase in demand for cloud consulting, harnessing of technology and services for transforming the business environment within the U.K.

Provider selection: Enterprise clients are looking for a provider with a strong cloud portfolio and proven expertise in the region to help them harness technology to address their business challenges and undertake transformation initiatives. With increasing interest and market offerings in public cloud services, particularly from a security and financial perspective, the decision to use public, private or hybrid cloud services is one of many challenges faced by organisations today.

Provider capability: Both global and regional system integrators have invested heavily in developing advanced cloud management platforms, including factory-based migration solutions to meet the needs of clients undertaking cloud transformation journeys. All the providers in this study have proven methodologies to facilitate the transformation of a client's application portfolio to the public cloud.

Provider relationships: Most providers have established relationships with major hyperscalers, including AWS, Microsoft Azure, Google Cloud Platform, IBM Cloud and Oracle Cloud. They also have relationships with major technology companies such as ServiceNow, Cisco, VMware, Red Hat, Citrix, Lenovo, Nutanix, SAP, Salesforce and Parallels. These relationships have enabled providers to create go-to-market strategies, backed by supplier ecosystems, and specific to client or industry.

Transformation planning: There are differences between the methodologies, frameworks and approaches offered by providers to establish and implement transformation initiatives. The main differences in approach include the number of defined phases that typically vary between three and six, the timescale, priorities, level of focus on technology or the business, innovation, the design of the cloud environment to be used (public, private or hybrid), and the application migration approach.

Application transformation: Application evaluation and transformation planning to the cloud are typically described by the six Rs – retire, retain, rehost, revise, rearchitect, and replace. Providers in this study offer variants of this approach for application transformation – from lift and shift to application modernisation first. Currently, enterprises are favouring an application-modernisation-led transformation to the cloud, as this offers an opportunity to reengineer parts of the IT landscape, reduce technical debt, address business requirements first, reduce technical debt, and use public and/or private cloud as an enabler.

Services portfolio: Providers have also been active in expanding their services portfolio either through acquisition or through the development of new intellectual property, methods and frameworks. Examples include integration of ServiceNow to manage overall services.

Workforce requirements: Many providers face the challenge of lack of qualified and experienced staff, capable of successfully supporting the cloud initiatives of clients. This has compelled some providers to set up specific training and recruiting programmes to address the gap, whilst other providers have acquired companies that have the required skills. There are some initiatives in the U.K. to use crowdsourcing to fill the skill gap, for example, Topcoder, a Wipro crowdsourcing company is a source of skilled labour in the region. This approach enables projects to be staffed with the right skills quickly, in days and not weeks.

Robust platforms: Effective public cloud services include a platform integrated with a set of defined and proven capabilities such as FinOps, DevOps, SecOps and GreenOps. Providers in this study offer platforms to establish and manage transformation programmes and the ongoing operations as a managed service.

Technology integration: Transformation, particularly to a public cloud, offers the opportunity to integrate new technologies and capabilities. This includes AI, containers, security, and blockchain. Providers in this study have proven capabilities in these and other emerging technologies.

Market opportunities: Opportunities for public cloud services continue in the large accounts segment, with a growing demand for public cloud in the midmarket.

M&A: To expand and grow their business, providers are continuing with acquisitions both within the U.K. and the rest of the world. For example, Claranet, a U.K.-based provider, has completed four acquisitions in the last 12 months.

New market entrants: Traditionally, there have been three major public cloud hyperscalers in the U.K., which include AWS, Microsoft Azure and Google Cloud Platform. This situation is now beginning to slowly change with the emergence of new hyperscalers such as Alibaba, Tencent, OVHcloud, IBM Cloud, Oracle Cloud, and SAP Cloud.

Mainframe modernisation: A few providers, such as Coforge, are now offering services to move mainframe workloads to a public cloud environment.

SAP related services: Many providers are now actively offering services to assist clients, both large accounts and midmarket, in moving their SAP system to the public cloud. This includes large HANA databases.

Emergence of 5G: The study has found that Orange Business Services is one of the few providers that is actively considering or using 5G as a part of its methodology and framework for establishing public-cloud-based solutions.

Niche providers: The study has identified that there are several emerging providers that offer specific consulting, transformation and/or managed services on public cloud. For example, Lemon Grass is a U.K.-based global provider that has specific proven expertise in planning and executing the transition of SAP systems to the public cloud.

Providers are promoting their public cloud management platforms

Provider Positioning

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	Consulting and Transformation Services for Large Accounts	Consulting and Transformation 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
Accenture	Leader	Not In	Leader	Not In	Not In	Not In
Acora	Not In	Contender	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	Contender	Not In	Contender	Not In	Not In	Not In
ATEA	Product Challenger	Not In	Not In	Not In	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	Not In	Product Challenger	Not In	Not In
Capgemini	Leader	Not In	Leader	Not In	Not In	Not In

Provider Positioning

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	Consulting and Transformation Services for Large Accounts	Consulting and Transformation 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
CGI	Product Challenger	Not In	Not In	Not In	Not In	Not In
Claranet	Product Challenger	Leader	Leader	Leader	Not In	Not In
Coforge	Product Challenger	Leader	Product Challenger	Leader	Not In	Not In
Cognizant	Leader	Not In	Product Challenger	Not In	Not In	Not In
Computacenter	Market Challenger	Leader	Leader	Leader	Not In	Not In
DXC Technology	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	Leader
HCLTech	Leader	Not In	Leader	Not In	Not In	Not In

Provider Positioning

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	Consulting and Transformation Services for Large Accounts	Consulting and Transformation 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
Hexaware	Product Challenger	Leader	Product Challenger	Leader	Not In	Not In
IBM	Leader	Not In	Not In	Not In	Product Challenger	Product Challenger
Infosys	Leader	Not In	Leader	Not In	Not In	Not In
JISC	Not In	Contender	Not In	Not In	Not In	Not In
Kyndryl	Not In	Not In	Rising Star ★	Not In	Not In	Not In
Lemongrass Consulting	Not In	Market Challenger	Not In	Contender	Not In	Not In
Logicalis	Product Challenger	Product Challenger	Not In	Product Challenger	Not In	Not In
Logicata	Not In	Contender	Not In	Contender	Not In	Not In
LTI	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Not In	Not In
Microland	Product Challenger	Product Challenger	Contender	Product Challenger	Not In	Not In

Provider Positioning

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	Consulting and Transformation Services for Large Accounts	Consulting and Transformation 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
Microsoft	Not In	Not In	Not In	Not In	Leader	Leader
Mindtree	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Not In	Not In
Mphasis	Contender	Product Challenger	Not In	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
Orange Business Services	Not In	Not In	Product Challenger	Not In	Not In	Not In
OVHcloud	Not In	Not In	Not In	Not In	Contender	Contender
Protera	Not In	Contender	Not In	Contender	Not In	Not In
Pythian	Not In	Contender	Not In	Contender	Not In	Not In

Provider Positioning

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	Consulting and Transformation Services for Large Accounts	Consulting and Transformation 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
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
Slalom	Not In	Product Challenger	Not In	Product Challenger	Not In	Not In
Sopra Steria	Product Challenger	Product Challenger	Product Challenger	Not In	Not In	Not In
SysGroup	Not In	Contender	Contender	Not In	Not In	Not In
TCS	Leader	Not In	Leader	Not In	Not In	Not In
Tech Mahindra	Leader	Leader	Product Challenger	Leader	Not In	Not In
Transputec	Not In	Not In	Not In	Contender	Not In	Not In
T-Systems	Contender	Not In	Not In	Not In	Not In	Contender

Provider Positioning

	Consulting and Transformation Services for Large Accounts	Consulting and Transformation 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
Unisys	Contender	Product Challenger	Product Challenger	Leader	Not In	Not In
Version 1	Not In	Contender	Contender	Not In	Not In	Not In
Virtusa	Not In	Contender	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	Product Challenger	Product Challenger	Product Challenger	Not In	Not In

This study focuses on what ISG perceives as most critical in 2022 for **Public Cloud - Solutions and Services**

- **Consulting and Transformation Services for Large Accounts**
- **Consulting and Transformation 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**

Simplified Illustration Source: 2023

Definition

With the pandemic transitioning to the endemic stage enterprises are rapidly increasing their investments in digital transformation engagements, which is leading to an exponential rise in public cloud adoption. Other key reasons for this move are a higher emphasis on cybersecurity, greater push towards IT cost optimization and operational efficiency, and increased deployment of automation tools for data management. The growing maturity of public cloud infrastructure providers have had a major impact on both enterprises and IT service providers, with both witnessing a significant shift in sourcing services, from physical hardware to digital applications/ platforms.

For enterprises, this has also impacted business models that require digital initiatives and aim to address governance, risk, and compliance norms. Given the widespread adoption of the as-a-service model, enterprises should continuously evaluate cloud service providers on a global level mainly due to growing security concerns and the dynamic nature of the business landscape. They continue to seek providers that can act as strategic partners in carrying out cloud transformation engagements on major hyperscalers – AWS, Microsoft Azure and Google Cloud Platform (GCP). These providers will continue to manage workloads on an ongoing basis and help enterprises control, optimise and manage cloud expenses though frameworks such as FinOps.

ISG reports a strong demand for digital transformation engagements and cloud-based XaaS solutions which, in turn, is driving global contracts for cloud products and services, including infrastructure-as-a-service (IaaS), software-as-a-service (SaaS) and platform-as-a-service (PaaS). According to the 1Q 2022 ISG Index™

figures, the global market has grown 31 percent in combined market annual contract value (ACV) to reach its current value of $24 billion year over year, while the XaaS ACV has increased by 43 percent to reach $15.6 billion in the same period. The IaaS spending grew by more than 50 percent to reach $11.7 billion, while the SaaS market grew by 22 percent to reach $3.9 billion.

The ISG Provider Lens™ study offers IT decision makers:

- A differentiated positioning of providers based on competitive strengths and portfolio attractiveness
- Focus on different markets, including the U.S., the U.S. public sector, Germany, Switzerland, the U.K., Nordics, Brazil, Australia, France and global geographies

ISG studies serve as an important decision-making basis for positioning, key relationships, and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their current vendor relationships and potential engagements.

Scope of the Report

In this ISG Provider Lens™ quadrant study, ISG includes the following six quadrants: Consulting and Transformation Services for Large Accounts, Consulting and Transformation Services for Midmarket, Managed Public Managed Public Cloud Services for Large Accounts, Managed Public Cloud Services for Midmarket, Hyperscale Infrastructure and Platform Services and SAP HANA Infrastructure Services.

This ISG Provider Lens™ study offers IT-decision makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments
- Focus on UK market

Our 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 use information from these reports to evaluate their existing vendor relationships and potential engagements.

Provider Classifications

The provider position reflects the suitability of IT Service 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 defined as follows:

Midmarket: Companies with 100 to 4,999 employees or revenues between $20 million and $999 million with central headquarters in the respective country, usually privately owned.

Large Accounts: Multinational companies with more than 5,000 employees or annual revenue above US$1 billion, with activities worldwide and globally distributed decision-making structures.

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. 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).

Provider Classifications: Quadrant Key

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.

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.

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 a follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

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.

★ **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 means 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.

Managed Public Cloud Services for Midmarket

Who Should Read This Section

This quadrant is relevant to midsize enterprises in the U.K. for evaluating managed service providers (MSPs) for public cloud. In this quadrant report, ISG highlights the current market positioning of these providers and shows how they interact with key enterprise infrastructure management challenges in the public cloud environment. These providers manage client workloads on third-party, public cloud and hyperscale environments, enabling enterprises to focus on other tasks.

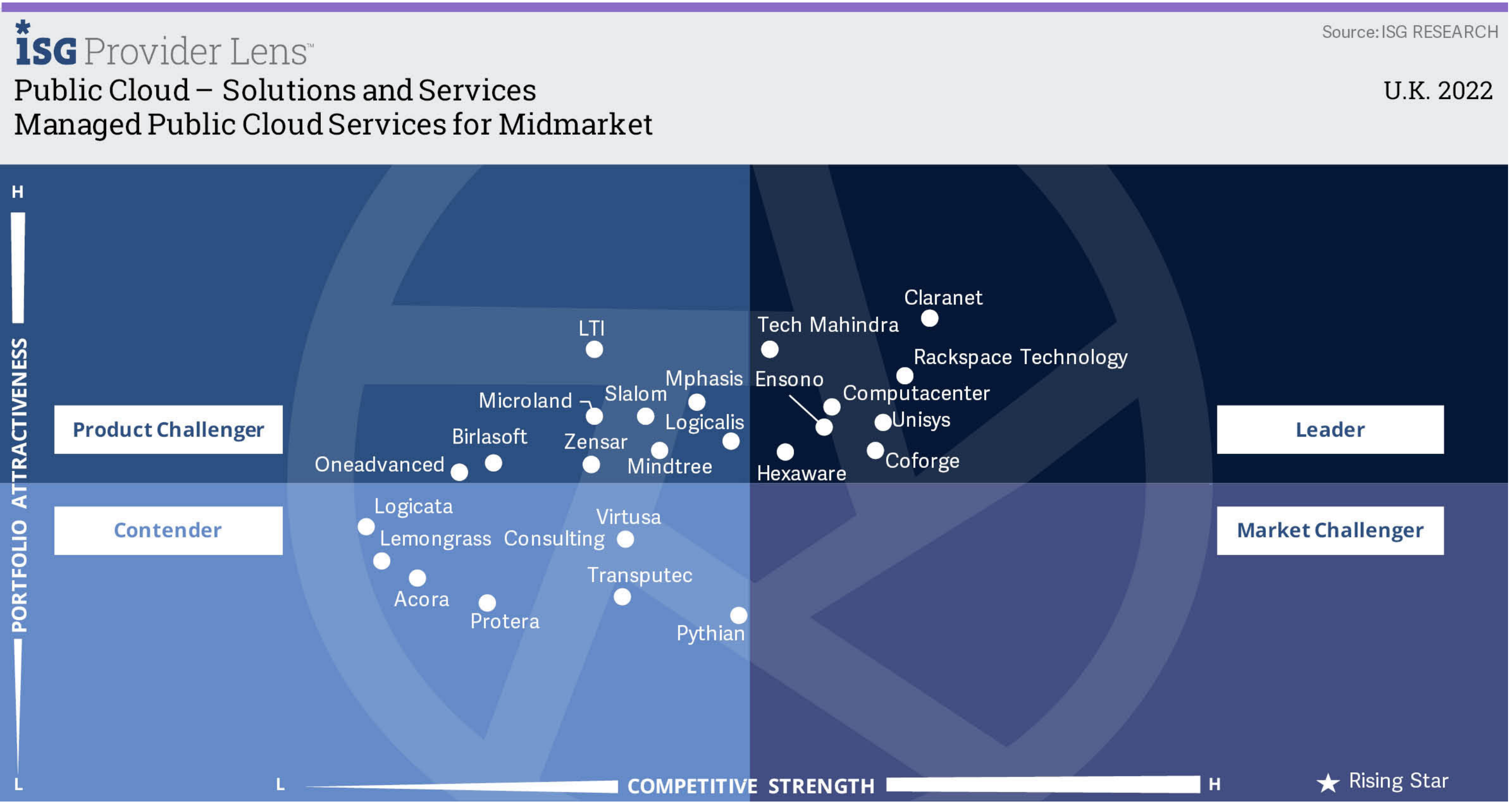
Enterprises increasing the adoption of cloud native, DevOps and IoT technologies are looking for service providers with expertise in re-architecturing and re-platforming existing applications in a cloud-native environment. Using public cloud managed services can help enterprises with implementing cloud-native solutions, leveraging containers and serverless functions to achieve cost efficiency. U.K. enterprises are focussing on cloud-agnostic solutions for multicloud environments. They have less complex and smaller-scale projects compared with large enterprises, and therefore choose providers with niche offerings and affordable pricing. ISG notes that these midsize enterprises are also showing traction towards automation-centric cloud operations.

Enterprises leverage MSPs' automation and AI capabilities for monitoring and predictive maintenance, leading to increased cost savings. This reduces the overhead in maintenance and monitoring of cloud-native applications. Most U.K. enterprises invest in self-service or auto-heal capabilities for their ticket generating requests.

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

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

Software development and technology leaders should read this report to understand the positioning of MSPs and determine how their offerings can impact the ongoing development of an enterprise's software.



This quadrant assesses **IT service providers** that have the proven capability to provide **managed services** on public cloud for the **midmarket.**

Rohan Thomas

Definition

This quadrant assesses service providers and service integrators that offer managed public cloud infrastructure and application services on public cloud infrastructure such as AWS, Microsoft Azure and Google Cloud Platform. They adopt a DevOps and DevSecOps-centric approach to help enterprises 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 (SRE) and business resiliency.

Broadly, these services include cloud services lifecycle management, real-time and predictive analysis, and monitoring and managing of a customer's public and Multicloud environments. The aim is to maximise the performance of workloads in the cloud, reduce costs and ensure compliance and security. Typically, 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 utilisation and costs, including self-service administration. In addition to technical services, a provider offers cloud optimisation capabilities through the FinOps approach and leverages FinOps frameworks. These are used to analyse and forecast financial impacts plus proposed optimisation of cloud resource consumption by bringing in stakeholders from various departments such as engineering or IT, finance, procurement, line of business and executive management.

Provider services typically include the following:

- Professional services for managing and monitoring CPU, storage, memory, databases, and operating systems as standalone or microservices, virtual machines and container services
- Automated upgrade services for operating system, middleware and applications on public cloud infrastructure
- Hybrid cloud infrastructure management platform for cloud-cost management (chargeback and show back), identity management, FinOps and IT service management
- Monitoring, logging, patching and predictive analytics services to improve performance and security improvements throughout a container lifecycle to enable continuous integration and delivery
- Governance and compliance management, along with a robust cybersecurity framework and platform for securing client data in multiple geographies
- Support services such as incident management, configuration, security services and automation setup

Eligibility Criteria

1. **Operational excellence** and well-defined professional services
2. Experience in **building** and **managing public and multi cloud** environments
3. Expertise in managing **configuration and integration of platforms** and systems as well as **containers**
4. **Financial dashboards** and **cost analysis** tools, providing visibility of variable costs associated with cloud providers through the **FinOps** ecosystem
5. Support for **software code development** and **cloud-native** and **legacy system** integration by leveraging **DevOps, API-enabled automation** and **cloud analytics** services
6. Robust **cybersecurity** managed services offering
7. Partnerships with relevant **public cloud providers** and respective managed service provider certificates for **AWS, Microsoft Azure, Google Cloud** or others
8. Industry-specific solutions and practice knowledge of **managing workloads** on public cloud infrastructure

Observations

As businesses recognise the changes in ways of working in the wake of the pandemic and the need to manage costs, there is a concurrent growing interest in changing the approach to delivering IT services.

The demand from organisations to transform their businesses has resulted in an increase in demand for cloud consulting, harnessing of technologies and transformation services. It has been identified that managed services can reduce costs and enable a third party to manage the ongoing service delivery. This can result in a complete transfer of IT assets, including the supporting infrastructure (both IT and non-IT) and the associated portfolio of applications. Options can include the ownership transfer for clients' data centres.

Clients prefer providers with strong expertise and can provide advice and services to help them harness technology, address their business challenges, and plan and execute their transformation initiatives. There is also an interest in public cloud services instead of private cloud services due to better service pricing and market offerings provided by the former, particularly from security (SecOps), systems development (DevOps) and financial (FinOps) perspectives.

Providers that are Leaders in this quadrant and many that are product challengers have local and global capabilities, supported by reference clients and case studies, to provide managed services. These providers continue to invest in expanding the maturity, capability and scope of their cloud management platforms through the development of proprietary offerings or by engaging in acquisitions.

From the 77 companies assessed for this study, 24 have qualified for this quadrant with eight being Leaders

claranet

Claranet continues to grow organically and through acquisitions, and has completed four acquisitions in the last 12 months. It follows rigorous security, performance and availability standards, using AIOps, FinOps and cybersecurity tools.

Coforge

Coforge has a strong portfolio of managed services, which focuses on insurance, finance, and travel industries. It has established a detailed understanding of the underlying processes in these industries. It has developed various accelerators, including the Helios Platform – an intelligent programmable platform leveraging AI and machine learning tools and technologies.

Computacenter

Computacenter has an integrated public cloud strategy, focussing on managed services, software sourcing, FinOps and cloud engineering, cloud platform strategy, cloud security, and advisory services. It has established a new centre for application modernisation and development in Romania.

Ensono

Ensono, which was recently acquired by KKR (a major investment company), continues its strategy to find and integrate new strategic acquisitions. The Ensono Envision® Platform, backed by ServiceNow, provides management across hybrid environments, including private cloud, mainframe and other infrastructure.

Hexaware continues to expand and promote its AI capabilities and structured approach to deliver managed public cloud services such as FinOps. Tensai™ is a cloud management platform that optimises multicloud services' performance and improves the security.

Rackspace Technology

Rackspace Technology has achieved several accreditations with key hyperscalers. In addition, the company has built its own IP for managed services. Rackspace Fabric™ takes a unified approach to administrative tasks across multicloud environments.

Tech Mahindra provides the client with a unified view across multicloud environments as well as with enhanced AIOps capabilities. It takes a structured approach to service delivery by measuring key metrics with streamlined processes.

Unisys

Unisys' CloudForte® solution is pre-built with modular templates that help clients accelerate their digital transformation. Its proprietary solution, Stealth®, secures and governs data in different cloud environments and helps clients seamlessly migrate to a secure, multicloud environment.

Unisys

Leader

"Unisys' modular solution helps clients migrate securely to the multicloud environment."

Rohan Thomas

Overview

Based in Delaware, U.S., Unisys is a global provider of IT solutions. It offers cloud transformation, application development and cybersecurity services via its Cloud, Applications, and Infrastructure Solutions segment. In 2021, this segment represented 11.4 percent of the company's total revenue of $1.74 billion. Outside the U.S., the U.K. is a key region for the company, representing 13.9 percent of the company's global revenue.

Strengths

Containers and microservices: Unisys' CloudForte® solution is pre-built with modular templates that help clients automate and modernise the entire container infrastructure end to end, thereby accelerating their digital transformation. The solution also automates provisioning and security, with enhanced FinOps capabilities.

Outcome-based revenue: End users prefer service providers that can collaborate with them as partners. Unisys stands out in this regard, as a significant part of its revenue is outcome based. The company actively collaborates with its clients to build solutions that specific to their requirements.

Robust security: Unisys is known for its robust cybersecurity capabilities. Its proprietary solution, Stealth®, secures and governs data in different cloud environments and helps clients seamlessly migrate to a secure, multicloud environment.

Caution

Unisys should focus on acquiring more FTEs who are skilled in niche technology areas and are also cloud certified. The acquired FTEs should preferably be based in the region they are residing in, as this would help the company gain further traction in the public sector.

Appendix

The ISG Provider Lens™ 2023 – Public Cloud - Solutions and Services analyzes the relevant 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

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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 September 2022, 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 study was divided into the following steps:

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

Author

Rohan Thomas
Senior Lead Analyst

Rohan Thomas has nearly a decade's worth of knowledge expertise in the realms of ICT, which include telecommunications, data centers, and networks and application performance management. At ISG, Rohan is the lead analyst for ISG Provider Lens™, leading research activities and benchmarking exercises pertaining to the regional adoption of digital infrastructure such as private/hybrid cloud. He has a Bachelor's degree in Mechanical Engineering from Visveswaraya Technological University and a Master's degree in Computer Aided Design and Manufacturing from Vellore Institute of Technology.

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Chandra Shekhar Sharma
Research Specialist

Chandra Shekhar Sharma is a Research Specialist at ISG and is responsible for supporting ISG Provider Lens™ studies on Private Hybrid Cloud and Public Cloud Data Center Solution and Services. He supports the lead analysts of multiple regions in the research process and authors the global summary report. Shekhar is responsible for delivering enterprise' perspective for IPL and collaborates with analyst, advisors, and enterprise clients on various ad-hoc research requests. He comes with over eight years of research and consulting experience into IT industry. Prior to this role, he has been associated with several custom market and procurement research firms, in which he has delivered actionable insights and recommendations around market sizing and forecasting, industry level trends and drivers, procurement best practices, sourcing models and strategy, competitive benchmarking, market share analysis and vendor landscape for industry verticals such as IT hardware, IT services, transportation and warehousing.

Enterprise Context and Overview Analyst

Manoj M
Research Specialist

Manoj is a research analyst at ISG and supports ISG Provider Lens™ studies on Cloud Native Services & Solutions and Public Cloud Data Center Solution and Services. He also supports the lead analysts of multiple regions in the research process. Prior to this role, he supported the ROI process in sales intelligence platform and was an individual contributor in handling research requirements for advanced technologies in different sectors. He has considerable expertise in predicting the automation impact by considering certain parameters such as productivity, efficiency and time reduction. During his tenure, he has supported research authors and authored Enterprise Context and Global Summary reports with market trends and insights.

IPL Product Owner

Jan Erik Aase
Partner and Global Head – ISG Provider Lens™

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 partner 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.

About Our Company & Research

ISG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally. For more information about ISG Provider Lens™ research, please visit this webpage.

ISG Research™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research delivers guidance that helps businesses accelerate growth and create more value.

ISG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: Public Sector.

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ISG

ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 800 clients, including more than 75 of the 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.

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