

***ISG** Provider Lens™

Public Cloud - Solutions & Services

Consulting and Transformational Services
for Midmarket

USA 2020

Quadrant
Report



A research report
comparing provider
strengths, challenges
and competitive
differentiators

Customized report courtesy of:

Tech
Mahindra

November 2020

About this Report

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

The lead author for this report is Shashank Rajmane. The editor is Grant Gross. The research analyst is Prakash N and the data analyst is Vijaykumar Goud. The enterprise context and global overview analyst is Prakash N. The quality and consistency advisors are Richard Chang and Rajib Datta.



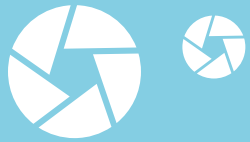
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- 1** Executive Summary
- 5** Introduction
- 16** Consulting and Transformational Services for Midmarket
- 20** Methodology

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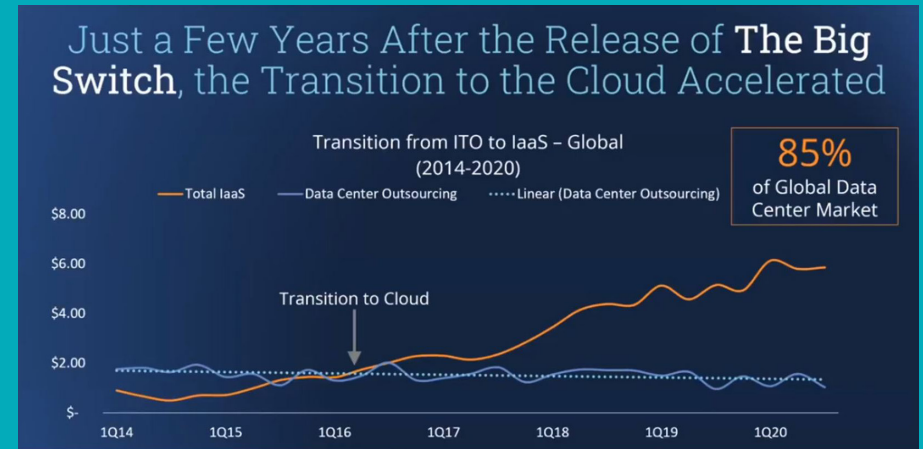


EXECUTIVE SUMMARY

In the last four quarters, public cloud adoption among the enterprise community in the U.S. has grown drastically. Enterprise demand has now shifted toward more of an as-a-service model, where the preference is for applications based on software as a service, pushing traditional providers and software vendors such as ERP companies to move their packaged applications to run in the cloud. One of the major reason enterprises accelerated their cloud adoption is the COVID-19 pandemic. The COVID-19 crisis has had a major impact in how everyone works. Many organizations wanted to rapidly move their employees to a work-from-home model, which required significant changes in their application and infrastructure landscapes. Traditional retail, travel and aviation are just a few of the industries that were severely impacted.

Many U.S. workers have been following social distancing norms and working from home for an extended period that started in March and continued throughout September. This has led to a massive rise in online shopping for almost everything, which has changed the business requirements to support work from home, increasing the overall cloud services demand. In addition, most large events — including trade shows, sporting events and festivals — have gone virtual this year. Cloud infrastructure is an ideal ecosystem for this because it provides the agility and scalability required to provide a better customer experience. Virtual business meetings are the new norm, which has often led to deals getting closed much faster. Almost all service providers reported non-stop service delivery, and some have exceeded their planned revenues advance with record-breaking growth, especially IaaS and PaaS providers.

In the recent ISG Index™ call (3Q20), we saw that the global 'as-a-service' market grew by 10.5% when compared to the same time last year, within which the IaaS market grew by 14% and SaaS by 2%. The major contributor to this increase was the growth of the hyperscalers, due to accelerated cloud adoption during the pandemic. ISG believes the IT spending will continue to grow and will be mainly driven by IaaS and cloud management providers. Although the traditional managed services business has remained flat across the globe in recent years, the as-a-service market has grown at 20% CAGR, and is more than 50% of the overall outsourcing market. With public cloud infrastructure getting commoditized, enterprises have been adopting cloud technology in their digital journeys, which corroborates the steady growth of IaaS since the last five years.



Source: 2020 SOURCING INDUSTRY CONFERENCE

Cloud-native focused transformation: Previously, there was high demand for lift-and-shift transitions as enterprises just wanted to move their applications to the public cloud. This approach later led to either refactoring or re-architecting the workload so that it performed better, which in turn raised costs. The irony was that enterprise moved to the cloud to save costs, but in the end, had to shell out more money to right-fit the application on the public cloud. Public cloud transformation engagements have now become more meaningful, as the trend has changed to moving the application to the public cloud in a cloud native way, which is mainly driven by the service provider community. Going cloud-native is now a big part of migrating workloads through recoding or re-architecting the application. Container technology and microservices have enabled enterprises to take full advantage of the flexibility and agility the public cloud architecture provides. Several other factors such as leveraging AI/ML and cognitive capabilities for data analysis are also driving enterprises to transform their applications and migrate to a public cloud environment. ISG also sees a strong demand in transforming legacy applications, which involves completely re-architecting or recoding workloads and moving from COBOL to Java-based applications, which work seamlessly on public cloud infrastructure.

Vertical-specific offerings bolstered by competencies: Service provider partnerships with hyperscalers have become even more important. Along with having a top-tier partnership level, service providers are also rapidly acquiring competency certifications from hyperscalers, which are like prized possessions or trophies. It's a seal of approval from the public cloud provider that the service provider has achieved expert knowledge in transformation in a particular domain or technology. This helps service providers instill

confidence in their prospective clients when they are selling their cloud transformation services. Service providers are also developing industry-specific specialized transformation capabilities to cater to particular verticals, including adhering to their industry compliance and guidelines.

Multi-cloud is the new norm: Applications work differently on different public cloud platforms, and each one of them has certain exclusive capabilities and expertise. For example, AWS offers a broad compute portfolio from basic to high compute requirements for any application development or management. Microsoft Windows and its ancillary product suite are easiest to migrate on Microsoft Azure platform. And Google Cloud Platform (GCP) offers the ideal infrastructure for big data analytics leveraging AI/ML technologies and high graphical and compute-intensive workloads. We have observed that hyperscalers are now being treated as a partner rather than just another infrastructure provider. Enterprises and service provider communities now understand the pros and cons of each hyperscaler and are moving their workloads accordingly. In addition, they do not want to get stuck with one provider because it hinders innovation and sometimes results in high costs. Many enterprise customers have already started to use two or more hyperscalers for different applications, and ISG believes that this trend is going to scale up considerably. But there is a downside to this setup. Several enterprises have mentioned that they find infrastructure orchestration has become difficult because of the several moving parts and the complexity of managing a hybrid multi-cloud environment. To help counter this problem, several service providers and vendors have developed robust cloud management platforms (CMPs), and enterprises are now adopting and using these tools

to make their lives easier. Other challenges that enterprises should be aware of with a multi-cloud environment include vendor lock-in by the public cloud provider and the need for interoperability between two or more public cloud providers.

Enhanced managed services: The managed public cloud ecosystem has been growing at a faster rate as overall cloud adoption rises. Enterprises need a helping hand because they are finding it difficult to manage the hybrid and multi-cloud infrastructure. The focus is mainly on cost optimization and moving enterprise resources to core activities rather than on cloud infrastructure management. Also, as the world adapts to working from home, it has become imperative for enterprises to outsource their cloud management and focus on building and innovating new solutions for their clients. Service providers are using DevOps and infrastructure-as-code (IaC) practices as well as artificial intelligence-led automation with out-of-the box API integration capabilities to manage cloud infrastructures efficiently. Automation is still a big part of cloud operations management and is being leveraged along with intelligent DevOps practice for remediation and self-healing capabilities that offer better user experience. Partnerships with hyperscale providers have moved to a strategic level where the vendor and provider work together to develop new solutions and have a joint go-to-market strategy.

Growing demand for cloud GRC services: Enterprises want to move to cloud environments quickly, and as cloud infrastructure landscape is getting complex and intertwined day by day, which may cause several security flaws leading to client data exposed in wrong hands. Some prominent challenges enterprises face while engaging into a cloud transformation are lack of integration among various systems in the organization,

vendor/provider management, of integrated risk reporting and financial impact. All these are addressed by governance, risk management and compliance (GRC) service providers. ISG is seeing an increase in demand for integrated solutions of GRC services to help manage cloud transformation engagements in a secure manner. GRC providers have developed robust frameworks that take regulatory, legal, business, and risk environments into account for risk management and follow a “secure by design” methodology.

Rising demand of IaaS and PaaS: Almost all public cloud providers have seen an increase in their business due to the sudden spike in demand for using cloud services and also due to enterprises preferring a multi-cloud setup rather than sticking to a single cloud provider. AWS has a first-mover advantage and has been entrenched in the public cloud infrastructure domain for over a decade. Microsoft Azure offerings are now getting more traction, especially with large enterprises that have legacy Microsoft dependencies such as Office 365 and Windows integration, which makes Azure a popular choice. Azure is catching up fast and is closer to AWS than ever before. Google, too, is catching up and has increased its market reach as several customers prefer GCP for specific use cases such as analytics, big data, and large compute and graphics-intensive workloads.

HANA is the new SAP way: In the last few years, enterprises had plans to move their SAP workloads to a cloud environment, but it was not a high priority. Due to the pandemic, enterprises have accelerated their plans. The overall impression of moving to SAP HANA is positive because it brings several benefits like improved performance and efficiency over legacy systems, better setup for faster innovation, optimizing of existing business

processes, faster access to analytics, easier to deliver data, elimination of customization and removal of unnecessary codes. But there have been some pain points experienced during implementation of SAP HANA. These include it being more complex than expected, a difficulty in integration with third-party systems and products, a lack of skilled staff to complete the project, software defects, integration with other SAP solutions, the need to clean up custom code and unanticipated costs.

Enterprises need to choose a public cloud infrastructure provider to host their HANA workloads very wisely, considering factors like its data center proximity, long-term pricing and discounts, and the flexibility to move to another vendor. Hosting SAP HANA on public cloud infrastructure requires knowledge of complexities involved in the migration process and then in operations. Providers must have a clear strategy and structured approach to handling SAP S/4HANA workloads and large-scale HANA databases. Leading cloud infrastructure providers of HANA services are coping up with fast-paced market developments, which include many ancillary cloud services. Such services include supporting infrastructure for other SAP offerings, cost analysis and related operational analysis, provisioning and setup of the technical infrastructure, and go-live and operations support. Deployment normally requires close cooperation with SAP for compliance with related standards.



Introduction

Simplified illustration

Public Cloud – Solutions and Services 2020	
Consulting and Transformation Services for Large Accounts	Consulting and Transformation Services for Midmarket
Governance, Risk and Compliance Services	Managed Public Cloud Services for large Accounts
Managed Public Cloud Services for Midmarket	SAP HANA Infrastructure Services
Hyperscale Infrastructure and Platform Services	

Source: ISG 2020

Definition

The growth in public cloud adoption among enterprises and the maturity of the cloud industry are creating a major impact on both enterprises and IT service providers as well as on business models, requiring increased acceptance of digital initiatives and creating risks of obsolescence. Considering the widespread adoption of the as-a-service model, enterprises need to continuously evaluate cloud services and IT providers globally.

ISG reports that the strong demand for digital transformation is driving global contracts for cloud products and services, including infrastructure as a service (IaaS) and platform as a service (PaaS). According to the 1Q 2020 ISG Index™, the global market has grown 7 percent in combined market annual contract value (ACV) since Q4 2019 to reach its current value of \$14.8 billion. In the same period, as-a-service ACV has increased by 11 percent to reach \$7.9 billion. Also, the IaaS market grew 18 percent to \$5.9 billion and the SaaS market dropped by 4 percent to \$2 billion. The growth in numbers in the as-a-service area indicates the shift to and preference for digital technologies to reduce costs, increase productivity, improve responsiveness to business requirements, improve service to end users and ultimately drive innovation.

Definition (cont.)

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

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

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

Scope of the Report

The Public Cloud – Solutions & Service Partners 2020 U.S. 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 global, the U.S., the U.K., Germany, Switzerland, the Nordics, France and Brazil.

Definition (cont.)

The full set of quadrants covered in this study are:

- **Consulting and Transformation Services:** This quadrant assesses providers of advisory and migration services for public cloud infrastructure, primarily AWS, Google Cloud Platform (GCP) and Microsoft Azure.
- **Governance, Risk and Compliance Services:** Here we assess providers such as consulting firms that offer various frameworks, policies, processes and functions to ensure enterprise cloud workloads are run in a secure and compliant environment, regardless of location.
- **Managed Public Cloud Services:** This quadrant covers companies that provide ongoing management and support services on top of public cloud infrastructure, primarily AWS, GCP and Microsoft Azure.
- **Hyperscale Infrastructure and Platform Services:** In this quadrant, we evaluate service providers that provide virtual compute resources, middleware and software on a public cloud. These vendors also include those in the hyperscaler PaaS segment, which offer multiple microservices and runtime engines for predefined, cloud-based application development processes that typically address full lifecycle needs for a developer.
- **SAP HANA Infrastructure Services:** This quadrant assesses cloud infrastructures best suited to host the SAP software portfolio, with emphasis on SAP S/4HANA workloads and large-scale HANA databases.

Provider Classifications

The ISG Provider Lens™ quadrants were created using an evaluation matrix containing four segments, where the providers are positioned accordingly.

Leader

The Leaders among the vendors/providers have a highly attractive product and service offering and a very strong market and competitive position; they fulfill all requirements for successful market cultivation. They can be regarded as opinion leaders, providing strategic impulses to the market. They also ensure innovative strength and stability.

Product Challenger

The Product Challengers offer a product and service portfolio that provides an above-average coverage of corporate requirements, but are not able to provide the same resources and strengths as the Leaders regarding the individual market cultivation categories. Often, this is due to the respective vendor's size or their weak footprint within the respective target segment.

Market Challenger

Market Challengers are also very competitive, but there is still significant portfolio potential and they clearly lag behind the Leaders. Often, the Market Challengers are established vendors that are somewhat slow to address new trends, due to their size and company structure, and therefore have some potential to optimize their portfolio and increase their attractiveness.

Contender

Contenders are still lacking mature products and services or sufficient depth and breadth of their offering, while also showing some strengths and improvement potentials in their market cultivation efforts. These vendors are often generalists or niche players.

Provider Classifications (cont.)

Each ISG Provider Lens™ quadrant may include a service provider(s) who ISG believes has a strong potential to move into the leader's quadrant.

Rising Star

Rising Stars are usually Product Challengers with high future potential. Companies that receive the Rising Star award have a promising portfolio, including the required roadmap and an adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market. This award is only given to vendors or service providers that have made extreme progress towards their goals within the last 12 months and are on a good way to reach the leader quadrant within the next 12 to 24 months, due to their above-average impact and innovative strength.

Not In

This service provider or vendor was not included in this quadrant as ISG could not obtain enough information to position them. This omission does not imply that the service provider or vendor does not provide this service. In dependence of the market ISG positions providers according to their business sweet spot, which can be the related midmarket or large accounts quadrant.

Public Cloud - Solutions & Services - Quadrant Provider Listing 1 of 6

	Consulting and Transformational Services for Large Accounts	Consulting and Transformational Services for Midmarket	Governance, Risk and Compliance Services	Managed Public Cloud Services for Large Accounts	Managed Public Cloud Services for Midmarket	SAP HANA Infrastructure Services	Hyperscale Infrastructure and Platform Services
2nd Watch	● Contender	● Not in	● Not in	● Contender	● Not in	● Not in	● Not in
Accenture	● Leader	● Not in	● Rising Star	● Leader	● Not in	● Not in	● Not in
Alibaba	● Not in	● Not in	● Not in	● Not in	● Not in	● Not in	● Contender
AllCloud	● Not in	● Contender	● Not in	● Not in	● Contender	● Not in	● Not in
Atos	● Product Challenger	● Not in	● Product Challenger	● Contender	● Not in	● Not in	● Not in
AWS	● Not in	● Not in	● Not in	● Not in	● Not in	● Leader	● Leader
Birlasoft	● Not in	● Contender	● Not in	● Not in	● Contender	● Not in	● Not in
Capgemini	● Leader	● Not in	● Product Challenger	● Leader	● Not in	● Not in	● Not in
CenturyLink	● Not in	● Contender	● Not in	● Not in	● Contender	● Not in	● Not in
CGI	● Not in	● Product Challenger	● Not in	● Not in	● Product Challenger	● Not in	● Not in
Coforge	● Not in	● Product Challenger	● Not in	● Not in	● Product Challenger	● Not in	● Not in
Cognizant	● Leader	● Not in	● Product Challenger	● Leader	● Not in	● Not in	● Not in
Deloitte	● Market Challenger	● Not in	● Leader	● Market Challenger	● Not in	● Not in	● Not in

Public Cloud - Solutions & Services - Quadrant Provider Listing 2 of 6

	Consulting and Transformational Services for Large Accounts	Consulting and Transformational Services for Midmarket	Governance, Risk and Compliance Services	Managed Public Cloud Services for Large Accounts	Managed Public Cloud Services for Midmarket	SAP HANA Infrastructure Services	Hyperscale Infrastructure and Platform Services
Digital Ocean	● Not in	● Not in	● Not in	● Not in	● Not in	● Not in	● Contender
DXC	● Product Challenger	● Not in	● Not in	● Product Challenger	● Not in	● Not in	● Not in
Ensono	● Not in	● Contender	● Not in	● Not in	● Product Challenger	● Not in	● Not in
EY	● Not in	● Not in	● Leader	● Not in	● Not in	● Not in	● Not in
Fujitsu	● Not in	● Product Challenger	● Not in	● Not in	● Product Challenger	● Not in	● Not in
Google	● Not in	● Not in	● Not in	● Not in	● Not in	● Rising Star	● Leader
HCL	● Leader	● Not in	● Product Challenger	● Leader	● Not in	● Not in	● Not in
Hexaware	● Not in	● Leader	● Not in	● Product Challenger	● Leader	● Not in	● Not in
IBM	● Leader	● Not in	● Product Challenger	● Leader	● Not in	● Product Challenger	● Product Challenger
Infinite	● Not in	● Contender	● Not in	● Not in	● Contender	● Not in	● Not in
Infosys	● Rising Star	● Not in	● Product Challenger	● Leader	● Not in	● Not in	● Not in
KPMG	● Contender	● Not in	● Leader	● Not in	● Not in	● Not in	● Not in
LTI	● Not in	● Leader	● Contender	● Not in	● Rising Star	● Not in	● Not in

Public Cloud - Solutions & Services - Quadrant Provider Listing 3 of 6

	Consulting and Transformational Services for Large Accounts	Consulting and Transformational Services for Midmarket	Governance, Risk and Compliance Services	Managed Public Cloud Services for Large Accounts	Managed Public Cloud Services for Midmarket	SAP HANA Infrastructure Services	Hyperscale Infrastructure and Platform Services
Metricstream	● Not in	● Not in	● Contender	● Not in	● Not in	● Not in	● Not in
Microland	● Not in	● Contender	● Not in	● Not in	● Product Challenger	● Not in	● Not in
Microsoft	● Not in	● Not in	● Not in	● Not in	● Not in	● Leader	● Leader
Mindtree	● Not in	● Leader	● Contender	● Product Challenger	● Leader	● Not in	● Not in
Mphasis	● Not in	● Product Challenger	● Not in	● Not in	● Product Challenger	● Not in	● Not in
NTT	● Market Challenger	● Not in	● Not in	● Market Challenger	● Not in	● Not in	● Not in
NTT DATA	● Product Challenger	● Not in	● Not in	● Rising Star	● Not in	● Not in	● Not in
Oracle	● Not in	● Not in	● Not in	● Not in	● Not in	● Not in	● Product Challenger
OVHcloud	● Not in	● Not in	● Not in	● Not in	● Not in	● Contender	● Contender
PwC	● Market Challenger	● Not in	● Leader	● Not in	● Not in	● Not in	● Not in
Rackspace Technology	● Not in	● Leader	● Not in	● Product Challenger	● Leader	● Not in	● Not in
SAP	● Not in	● Not in	● Not in	● Not in	● Not in	● Product Challenger	● Not in
TCS	● Leader	● Not in	● Product Challenger	● Leader	● Not in	● Not in	● Not in

Public Cloud - Solutions & Services - Quadrant Provider Listing 4 of 6

	Consulting and Transformational Services for Large Accounts	Consulting and Transformational Services for Midmarket	Governance, Risk and Compliance Services	Managed Public Cloud Services for Large Accounts	Managed Public Cloud Services for Midmarket	SAP HANA Infrastructure Services	Hyperscale Infrastructure and Platform Services
Tech Mahindra	● Contender	● Leader	● Not in	● Product Challenger	● Leader	● Not in	● Not in
TO THE NEW	● Not in	● Contender	● Not in	● Not in	● Contender	● Not in	● Not in
Trianz	● Not in	● Product Challenger	● Not in	● Not in	● Product Challenger	● Not in	● Not in
T-Systems	● Not in	● Not in	● Not in	● Not in	● Not in	● Contender	● Not in
Unisys	● Product Challenger	● Leader	● Not in	● Product Challenger	● Leader	● Not in	● Not in
UST Global	● Not in	● Product Challenger	● Not in	● Product Challenger	● Leader	● Not in	● Not in
Virtusa	● Not in	● Contender	● Not in	● Not in	● Product Challenger	● Not in	● Not in
Virtustream	● Not in	● Not in	● Not in	● Not in	● Not in	● Product Challenger	● Not in
Wipro	● Leader	● Not in	● Product Challenger	● Leader	● Not in	● Not in	● Not in
Zensar	● Not in	● Contender	● Not in	● Not in	● Product Challenger	● Not in	● Not in

A collection of camera aperture icons in various sizes and shades of blue, arranged in a scattered pattern on the left side of the slide. The icons are stylized, showing the blades of a camera lens.

Public Cloud - Solutions & Services Quadrants

ENTERPRISE CONTEXT

Consulting and Transformational Services for Midmarket

This quadrant is relevant to midsized enterprises in the U.S. 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.S. and how they can address key challenges in midsized enterprises' migration journey to the public cloud environment.

Enterprises have been reluctant to migrate to the public cloud owing to difficulties such as properly assessing the workloads, change management, a shortage of talented specialists or skill gaps, and uncertainties about integration of existing infrastructure. In 2020, however, the urge to move workloads to public cloud has become more pressing than ever, and many enterprises are accelerating their digital transformation. This report can help with choosing the right provider to overcome the challenges and address the difficulties as 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 and integration of automation capabilities.

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 midsize 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.

ISG sees that enterprises are increasingly shifting their focus from lift and shift to long-term application modernization, hence re-architecture, code reviews and cloud-native environments are on the rise in the U.S.

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.S.

CONSULTING AND TRANSFORMATIONAL SERVICES FOR MIDMARKET

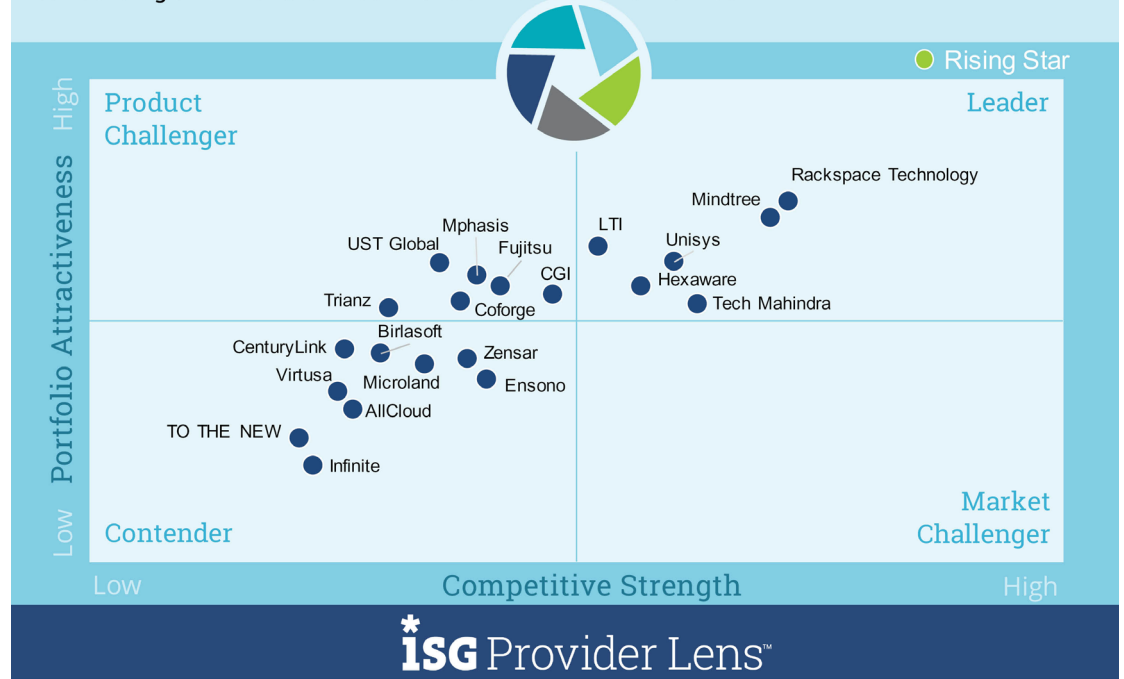
Definition

Public cloud enables enterprises to achieve agility and scalability without investing in their own infrastructure, thus making it an integral aspect of digital transformation. Consulting and transformation service providers partner with public cloud providers to manage customer-specific complexities of adopting and deploying public cloud solutions. Their services typically include the following:

- Consulting services:** Designing a business case for cloud; assessing the workload for migration; building a transformation roadmap, which includes addressing risk and compliance issues; and advising on migrating applications from the existing environment to that of a public cloud provider.
- Transformation services:** Designing and building the cloud architecture/environments, migrating and integrating applications and optimizing the architecture to harness the cloud-computing features and benefits.

Public Cloud – Solutions and Services Consulting and Transformational Services for Midmarket

2020
U.S.



Source: ISG Research 2020

CONSULTING AND TRANSFORMATIONAL SERVICES FOR MIDMARKET

Definition (cont.)

For this quadrant, we exclude the creation of private clouds because they are covered in a separate study on Next-Gen Private/Hybrid Cloud Data Center Service and Solution Providers. Accordingly, the Public Cloud Consulting and Transformation Services quadrant encompasses the adoption of public cloud services and their integration with on-premises environments, which can include private clouds.

Eligibility Criteria

- Public cloud transformation thought leadership.
- Methods and frameworks to analyze the client IT landscape.
- Experience in the planning and implementation of multi-cloud services.
- Application migration experience including templates, automation engines and partnerships with independent software vendors (ISVs).
- Hyperscale provider-related partner program certifications from the solutions standpoint.
- Competencies that are specific to a vertical (industry) or technology.
- Client references and projects or use cases.
- Hybrid cloud integration and support services.

CONSULTING AND TRANSFORMATIONAL SERVICES FOR MIDMARKET

Observations

In the midmarket segment, service providers in the U.S. have a strong focus on automated migration of workloads to the cloud. Enterprise clients are willing to engage in a multi-sourcing model and work with these midsized providers because of their flexibility and responsiveness. With cloud adoption accelerating, the focus is now on gradually increasing on transforming applications by leveraging cloud-native tools. Although SLAs are still tactical, enterprises are experimenting with strategic outcome-focused deals.

Service providers' partnerships with hyperscalers have become even more important. Along with having a top-tier partnership level, service providers are also rapidly acquiring competency certifications from hyperscalers, which are like prized possessions or trophies. It's like a seal of approval from the public cloud provider that the service provider has achieved expert knowledge in transformation in a particular domain or technology. This helps service providers instill confidence in their prospective clients when they are selling their cloud transformation services.

In this quadrant, there were 21 providers evaluated and featured, out of which we identified six Leaders.

- **Hexaware** has strengthened its public cloud consulting practice with the acquisition of Mobiquity last year. The acquisition has bolstered its Cloudify Everything offering and gives it AWS Premier Consulting Partner status.
- **LTI** offers tool-based automation assessment that leverages several of its intellectual properties (IPs) such as RapidAdopt and PaaSify, along with its MOSAIC platform to offer cloud transformation services.
- **Mindtree** delivers end-to-end cloud transformations services at scale and has a strong presence in the U.S. The firm has Microsoft Azure expertise and leverages its DevOps and continuous testing capabilities along with automated migration process to accelerate the transformation journey.
- **Rackspace Technology's** acquisition of Onica (an AWS Premier Consulting Partner) in 2019 has boosted its migration capabilities. The acquisition significantly increased its total count of AWS competencies to 14 and also its total number of hyperscale-certified FTEs.
- **Tech Mahindra** leverages its migration expertise with its in-house tools and frameworks to assess and migrate data and applications to the cloud. Tech Mahindra's MAC toolkit enables rapid migration of workloads to the public cloud.
- **Unisys** has preconfigured templates developed by its cloud experts for rapid cloud transformations. Unisys leverages its CloudForte solution's advisory module for public-cloud consulting engagements.

TECH MAHINDRA

Overview

Tech Mahindra is an IT services company headquartered in Pune, India. The company offers public cloud strategy advisory services as a part of its overall cloud services portfolio. Tech Mahindra is an AWS Advanced Consulting Partner, a Microsoft Azure Gold Partner and a bronze-level partner with GCP. In the U.S., it on the telecommunications, manufacturing, banking, financial services and insurance, healthcare and energy sectors.

Strengths

Robust advisory service: Tech Mahindra uses proven tools and frameworks to assess and migrate data and applications to the cloud. It leverages its PassportNXT to identify the application maturity, learn the limitations of the existing infrastructure, evaluate security and risk management, and provide a detailed migration plan. Application and data dependencies are also considered to plan the migration.

Legacy application modernization: As part of its cloud-native application modernization services, Tech Mahindra helps enterprises move their legacy workloads to the public cloud. The company has several offerings and accelerators for this, including Legacy Code as a Service, that helps re-engineer legacy COBOL applications to Java and cloud-friendly, multi-tier architecture.

Strong migration methodology: Tech Mahindra leverages its MAC Toolkit to enable rapid migration of workloads to the public cloud and set up a factory-like model for repeatable and predictable transitions. It follows the detailed assessment carried out by PassportNXT and classifies applications according to whether to rehost, re-platform, retire, re-architect or refactor them. It uses migration accelerators and cookbooks for automation to speed up the migration process. Tech Mahindra prioritizes security as it moves workloads to the cloud and the pace of migration is dictated by the client's requirements.

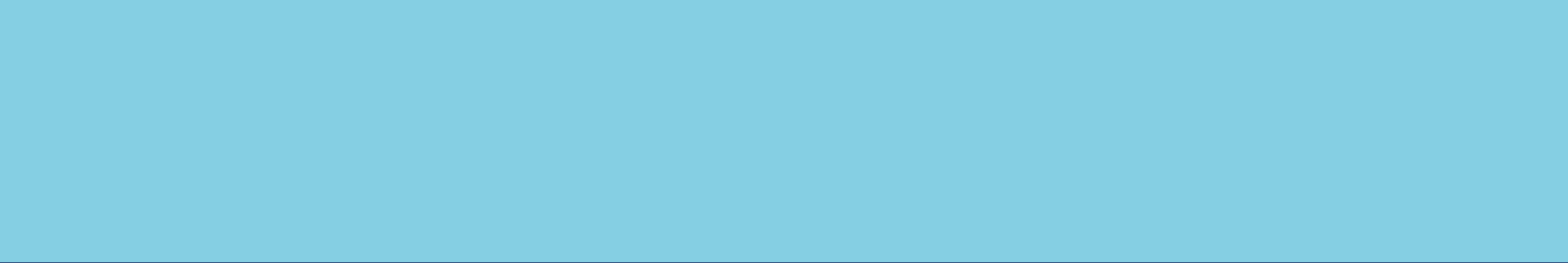
Caution

Compared to its competitors in midmarket, Tech Mahindra has a very low employee certification count for hyperscaler technologies. The company needs to ramp up its certified talent pool so that it can cater to all kinds of enterprises and carry out large migration engagements with ease.



2020 ISG Provider Lens™ Leader

Tech Mahindra has a proven public cloud consulting and transformation practice to help U.S.- based midmarket enterprises on their journey to the cloud. The company has developed several accelerators and frameworks for rapid workload migration.



Methodology



METHODOLOGY

The research study “ISG Provider Lens™ 2020 – Public Cloud - Solutions & Services” analyzes the relevant software vendors/service providers in the U.S. 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 Public Cloud - Solutions & Services market
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities and use cases
4. Leverage ISG's internal databases and advisor knowledge and experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts and figures received from providers and 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



Authors and Editors



Shashank Rajmane, Lead Author

Lead Analyst

Shashank Rajmane has more than a decade of extensive research experience and has led the ISG Provider Lens™ studies — Public Cloud Consulting & Transformation and Private/Hybrid Cloud & Data Center Outsourcing Services. He leads the efforts for the U.S. geography along with global geography reports. Apart from this, Shashank has been part of many consulting engagements and helps ISG's enterprise clients select the right service providers and vendors based on their IT buying requirements. He is also responsible for authoring thought leadership papers, briefing notes, blogs and service provider intelligence reports, especially in the next-generation cloud and infrastructure services domain. He has also authored several research papers on best practices for choosing cloud vendors and cloud management platforms, along with writing a few whitepapers on the cloud industry.



Jan Erik Aase, Editor

Director, Principal Analyst and Global Head – ISG Provider Lens/ISG Research

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.

Authors and Editors



Prakash N, Enterprise Context and Global Summary Analyst Senior Analyst

Prakash N is a senior analyst at ISG and is responsible for supporting ISG Provider Lens™ studies on Private/Hybrid Cloud, Public Cloud, and Cloud Native - Container Services. His areas of expertise are cloud, data center, public cloud platforms, and cloud native services. During his tenure, he has developed research content for ISG Provider Lens™ in the areas of Private Cloud, Cloud Native Services, and Public Cloud. He is responsible for supporting research, authoring blogs, enterprise content, and the global summary report with market trends and insights.

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