

# Multi Public Cloud Services

A research report comparing provider strengths,  
challenges and competitive differentiators

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**AI-led innovation and cost optimization have become integral to cloud service engagements**

Until last year, we saw public cloud services grow mainly due to innovation, faster time to market and improved customer experience. But, in the last four quarters, we saw AI technologies driving the growth of cloud services in the U.S. As enterprises increasingly recognize the transformative potential of AI, they are turning to cloud platforms to access the necessary computing power, storage and tools to develop and deploy AI applications. The ability to scale resources on-demand, combined with the wide range of AI-specific services offered by cloud providers, has made cloud computing an attractive option for enterprises seeking to leverage AI. This increased demand for cloud services, fueled by AI adoption, drives significant growth in the U.S. cloud services market, benefiting both cloud infrastructure providers and service providers.

Additionally, hyperscalers are investing heavily in AI-specific infrastructure and services, further accelerating the adoption of AI in the U.S. This symbiotic relationship between AI and cloud computing is expected to continue driving significant growth in the future.

When it comes to generative AI (GenAI), it is still in its early stages. However, it is rapidly gaining traction as service providers and hardware manufacturers are investing significantly in this space. Companies such as NVIDIA, Google and Microsoft are leading the charge with billions allocated to AI research, infrastructure and hardware development. Enterprises, meanwhile, are cautiously exploring the potential of GenAI, primarily through proofs of concept (POCs), to better understand its practical applications and potential implications on business and society. Many enterprises are testing GenAI in areas such as content creation, customer service automation and personalized marketing. However, adoption remains tentative, with enterprises focused on validating use cases before committing fully to broader implementations. Enterprises are

AI is driving the growth of public cloud infrastructure services and is expected to grow further.



turning to service providers to help guide them through these early stages with pilot projects and demonstrate value. Although AI and GenAI technologies show potential across various sectors, ranging from finance and healthcare to media, it is clear that enterprises are still in an experimental phase. The combination of high initial costs, unproven long-term benefits, and ethical concerns around AI-generated content keeps many of them from fully embracing GenAI at this time. Nonetheless, as technology matures and success stories emerge from early adopters, GenAI is poised to transform how enterprises operate in the coming years. It will also boost the overall cloud infrastructure services market, which is poised to reach \$1 trillion in the next few years.

Based on ISG's recent estimates, we have observed that the overall cloud services market in the Americas has grown by approximately 15 percent in Q2 2024 compared to last year, reaching an ACV of \$74 billion. However, when we look at the global figures, cloud services growth was 11 percent during the same period. This indicates the Americas outpaced

the global average in cloud services growth for the quarter. In the ISG Index™ report for the Americas market, ISG reported that the combined market (managed services and XaaS) witnessed a 10 percent increase in Q2 2024, with the ACV reaching \$12.1 billion. We also observed that the demand for managed services is sluggish, with ACV rising only 3 percent to \$4.7 billion in the second quarter. The number of managed services contracts decreased by nearly 6 percent from the prior year, totaling 347 deals. Within Managed Services, the ITO market declined by 4 percent to \$3.4 billion, while the BPO market surged by 25 percent.

Recently, ISG rolled out the Star of Excellence™ program, which is based on the Voice of the Customer concept. Here, providers are rated on six parameters, namely Service Delivery, Governance and Compliance, Collaboration and Transparency, Innovation and Thought Leadership, People and Culture Fit, and Business Continuity. The scores and data come from the Star of Excellence™ study that measures CX with providers based on

direct client feedback. ISG found that the average provider CX score for the public cloud domain in North America was 67.37 in 2023. Persistent Systems, HCLTech, LTIMindtree, PwC and Cognizant were the top five providers with above-average CX scores. PwC won the overall cloud computing Star of Excellence™ award for 2023.

In today's highly competitive and rapidly evolving market landscape, cost optimization remains a top priority for enterprises. With the widespread adoption of cloud technologies, businesses are under increasing pressure to optimize their IT spending while ensuring scalability and performance. Enterprises are looking for immediate cost-saving strategies to balance the growing demands of digital transformation with tight budgets. This urgency is driven by several factors, including the need to maximize ROI, mitigate economic uncertainties and stay ahead of competitors.

While public cloud infrastructure offers immense flexibility and innovation potential, it often leads to complex billing structures and unexpected costs if not managed effectively.

As a result, enterprises actively seek ways to reduce these expenses by optimizing resources through FinOps principles of accurate allocation, rightsizing workloads and eliminating underutilized assets. Moreover, the rise of FinOps frameworks and principles for cloud financial management has highlighted the importance of cross-functional collaboration between engineering, finance and operations teams to drive continuous cost optimization. Organizations can achieve significant cost savings by implementing best practices such as automated cost monitoring, adopting reserved or spot instances, and optimizing storage and computing resources.

**GreenOps and sustainable FinOps:** We also see a growing trend toward GreenOps and sustainable FinOps in the future. Sustainable FinOps extends the typical cloud resource optimization approach toward integrating sustainability metrics into financial decisions, ensuring that cloud spending is cost effective and environmentally conscious. In a sustainable FinOps model, enterprises track not only the financial impact of their cloud infrastructure



but also its carbon footprint. This encourages U.S. enterprises to adopt practices that reduce energy consumption by following several methods such as choosing energy-efficient cloud regions and data centers, leveraging serverless computing and auto-scaling to minimize unused resources, and optimizing workloads to reduce computational waste. By aligning cloud spending with sustainability goals and GreenOps philosophies, enterprises can make informed decisions that reduce the impact and cost of IT and cloud operations and contribute to their environmental, social and governance (ESG) commitments.

**VMware exit strategies:** Enterprises were also reaching out to us to get guidance on tackling the higher licensing costs and support fees for VMware solutions after its acquisition by Broadcom. Additionally, Broadcom's focus on cost-cutting could lead to reduced innovation and slower development of VMware's products. Enterprises heavily reliant on VMware are also worried about vendor lock-in, especially as Broadcom's future direction remains unclear. Furthermore, there is anxiety about possible

reductions in customer support, which could affect business continuity for those deeply embedded in the VMware ecosystem. To address these concerns, service providers are helping enterprises develop exit strategies from VMware by guiding cloud migrations to public cloud platforms such as AWS, Microsoft Azure and Google Cloud. Hybrid cloud and multicloud strategies are being introduced to reduce reliance on VMware, while open-source virtualization alternatives such as KVM are being explored to avoid vendor lock-in. Service providers are also promoting containerization technologies as modern alternatives to traditional virtualization, ensuring greater flexibility. Additionally, comprehensive exit planning and managed services are offered to assist businesses in transitioning smoothly and efficiently from the VMware ecosystem.

**GenAI for cloud operations:** As GenAI becomes more popular and in demand, we see that providers leverage this to their advantage in managing public cloud operations by automating tasks, improving efficiency and enhancing decision-making capabilities. It can help in the following ways:

- It can automate infrastructure management by dynamically optimizing resource allocation and provisioning based on usage patterns and demand while offering cost-optimization strategies by analyzing consumption data and generating savings recommendations.
- In security, AI can detect threats in real time and generate proactive responses.
- It can also automate DevOps workflows by generating code, scripts and testing scenarios, accelerating development cycles.
- AI-driven monitoring enhances cloud performance by predicting maintenance needs and reducing downtime.
- AI can personalize cloud service recommendations, manage hybrid and multicloud environments, and improve disaster recovery planning by simulating failure scenarios and generating optimized recovery strategies.

GenAI enables enterprises to optimize costs, enhance security and scale operations efficiently, making it a powerful tool for modern cloud environments.

**Hindrances to GenAI-led operations:** There are also challenges to the benefits mentioned above. Some key issues are the unpredictability and potential for inaccurate outputs, leading to misconfigurations and inefficiencies in resource allocation or security settings. Additionally, the lack of human oversight and explainability in AI-driven decisions raises concerns about accountability, trust and compliance, especially with regulatory requirements such as GDPR or HIPAA. Security is one of the major concerns, as AI could unintentionally expose vulnerabilities or mismanage access controls. GenAI may also struggle to optimize cloud performance dynamically and risks over-provisioning or under-provisioning resources, leading to cost overruns. Furthermore, GenAI models can suffer from biases, data limitations and difficulties integrating with legacy systems while potentially placing users in vendor-specific solutions. Lastly, as cloud services rapidly evolve, AI models require constant updates, adding to the complexity of managing infrastructure effectively and, most importantly, the high costs to run these power-hungry advanced systems, which are taking a toll on the environment and people.




## Executive Summary

While GenAI helps in the above-stated benefits, we also need to be cautious about how this can backfire; therefore, it must be used with a thorough and thoughtful approach that looks at the long-term horizon.

As FinOps becomes integral to any managed public cloud services deal, service providers are helping enterprises deploy cost-saving solutions quickly. They offer comprehensive frameworks and proprietary or third-party tools to deliver immediate financial benefits while maintaining operational efficiency.




 Provider Positioning

	Consulting and Transformation Services — Large Accounts	Consulting and Transformation Services — Midmarket	Managed Services — Large Accounts	Managed Services — Midmarket	FinOps Services and Cloud Optimization	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
Accenture	Leader	Not In	Leader	Not In	Leader	Not In	Not In
Accenture (Navisite)	Not In	Leader	Not In	Leader	Not In	Not In	Not In
Alibaba Cloud	Not In	Not In	Not In	Not In	Not In	Contender	Contender
Apexon	Not In	Product Challenger	Not In	Not In	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	Contender	Contender	Not In	Not In
Brillio	Not In	Rising Star ★	Not In	Product Challenger	Not In	Not In	Not In
Capgemini	Leader	Not In	Leader	Not In	Leader	Not In	Not In
CGI	Contender	Not In	Contender	Not In	Not In	Not In	Not In
Coforge	Not In	Product Challenger	Not In	Contender	Not In	Not In	Not In






 Provider Positioning


	Consulting and Transformation Services — Large Accounts	Consulting and Transformation Services — Midmarket	Managed Services — Large Accounts	Managed Services — Midmarket	FinOps Services and Cloud Optimization	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
Cognizant	Leader	Not In	Leader	Not In	Rising Star ★	Not In	Not In
Deloitte	Leader	Not In	Market Challenger	Not In	Leader	Not In	Not In
DigitalOcean	Not In	Not In	Not In	Not In	Not In	Contender	Not In
DXC Technology	Product Challenger	Not In	Leader	Not In	Product Challenger	Not In	Not In
Ensono	Not In	Product Challenger	Not In	Product Challenger	Not In	Not In	Not In
Eviden (Atos Group)	Product Challenger	Not In	Product Challenger	Not In	Product Challenger	Not In	Not In
EY	Contender	Not In	Not In	Not In	Not In	Not In	Not In
Fujitsu	Contender	Not In	Contender	Not In	Not In	Not In	Not In
GlobalLogic	Not In	Product Challenger	Not In	Product Challenger	Not In	Not In	Not In
Google	Not In	Not In	Not In	Not In	Not In	Leader	Leader



 Provider Positioning


	Consulting and Transformation Services — Large Accounts	Consulting and Transformation Services — Midmarket	Managed Services — Large Accounts	Managed Services — Midmarket	FinOps Services and Cloud Optimization	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
HARMAN	Not In	Product Challenger	Not In	Product Challenger	Not In	Not In	Not In
HCLTech	Leader	Not In	Leader	Not In	Leader	Not In	Not In
Hexaware	Not In	Leader	Not In	Leader	Not In	Not In	Not In
Hitachi Digital Services	Not In	Leader	Not In	Leader	Not In	Not In	Not In
IBM	Leader	Not In	Not In	Not In	Not In	Product Challenger	Product Challenger
Infosys	Leader	Not In	Leader	Not In	Product Challenger	Not In	Not In
KPMG	Contender	Not In	Not In	Not In	Not In	Not In	Not In
Kyndryl	Product Challenger	Not In	Leader	Not In	Leader	Not In	Not In
Logicalis	Not In	Contender	Not In	Contender	Not In	Not In	Not In
LTIMindtree	Rising Star ★	Not In	Product Challenger	Not In	Product Challenger	Not In	Not In



 Provider Positioning


	Consulting and Transformation Services — Large Accounts	Consulting and Transformation Services — Midmarket	Managed Services — Large Accounts	Managed Services — Midmarket	FinOps Services and Cloud Optimization	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
Lumen Technologies	Not In	Contender	Not In	Contender	Not In	Not In	Not In
Marlabs	Not In	Contender	Not In	Contender	Contender	Not In	Not In
Microland	Not In	Product Challenger	Not In	Leader	Product Challenger	Not In	Not In
Microsoft	Not In	Not In	Not In	Not In	Not In	Leader	Leader
Mphasis	Product Challenger	Leader	Product Challenger	Leader	Product Challenger	Not In	Not In
MSRCosmos	Not In	Contender	Not In	Not In	Not In	Not In	Not In
NTT DATA	Product Challenger	Not In	Rising Star ★	Not In	Leader	Not In	Not In
Ollion (2nd Watch)	Contender	Not In	Contender	Not In	Not In	Not In	Not In
Oracle	Not In	Not In	Not In	Not In	Not In	Product Challenger	Not In
OVHcloud	Not In	Not In	Not In	Not In	Not In	Contender	Not In



 Provider Positioning

	Consulting and Transformation Services — Large Accounts	Consulting and Transformation Services — Midmarket	Managed Services — Large Accounts	Managed Services — Midmarket	FinOps Services and Cloud Optimization	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
Persistent Systems	Not In	Leader	Not In	Rising Star ★	Product Challenger	Not In	Not In
PwC	Product Challenger	Not In	Contender	Not In	Not In	Not In	Not In
Rackspace Technology	Not In	Leader	Product Challenger	Leader	Leader	Not In	Not In
Randstad Digital	Not In	Product Challenger	Not In	Not In	Not In	Not In	Not In
Red River	Not In	Contender	Not In	Contender	Not In	Not In	Not In
SAP	Not In	Not In	Not In	Not In	Not In	Not In	Product Challenger
Stefanini	Not In	Product Challenger	Not In	Product Challenger	Not In	Not In	Not In
TCS	Leader	Not In	Leader	Not In	Product Challenger	Not In	Not In
Tech Mahindra	Product Challenger	Leader	Product Challenger	Leader	Product Challenger	Not In	Not In
TO THE NEW	Not In	Contender	Not In	Product Challenger	Contender	Not In	Not In



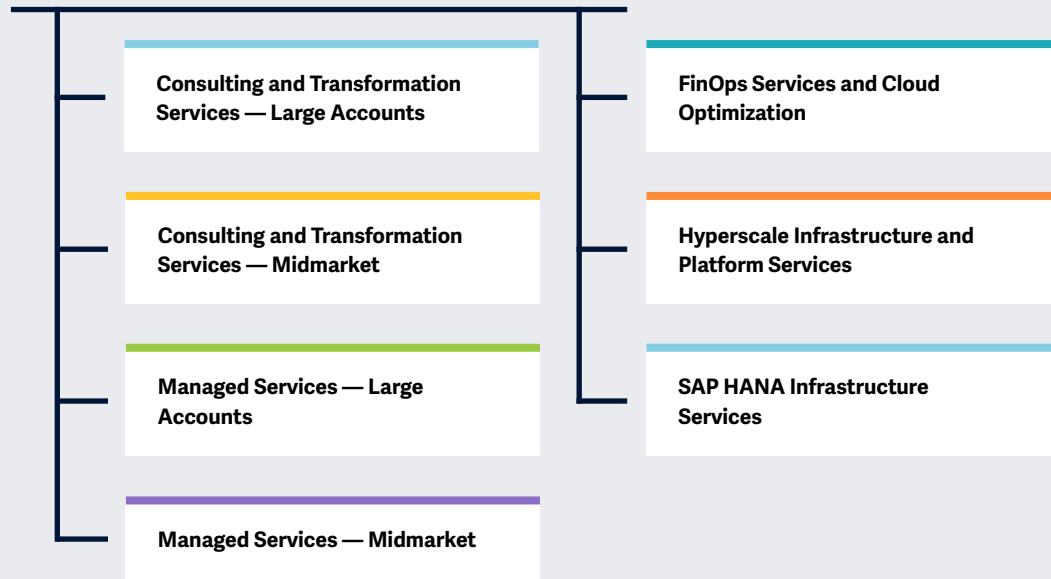
 Provider Positioning

	Consulting and Transformation Services — Large Accounts	Consulting and Transformation Services — Midmarket	Managed Services — Large Accounts	Managed Services — Midmarket	FinOps Services and Cloud Optimization	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
Trianz	Not In	Product Challenger	Not In	Contender	Not In	Not In	Not In
T-Systems	Product Challenger	Not In	Product Challenger	Not In	Not In	Not In	Contender
Unisys	Product Challenger	Leader	Product Challenger	Leader	Product Challenger	Not In	Not In
UST	Not In	Leader	Not In	Product Challenger	Contender	Not In	Not In
Virtusa	Not In	Product Challenger	Not In	Product Challenger	Not In	Not In	Not In
WVDN Technologies	Not In	Not In	Not In	Contender	Not In	Not In	Not In
Wipro	Leader	Not In	Leader	Not In	Product Challenger	Not In	Not In
Zensar Technologies	Not In	Product Challenger	Not In	Product Challenger	Product Challenger	Not In	Not In
Zones	Not In	Contender	Not In	Product Challenger	Not In	Not In	Not In



This study focuses on what ISG perceives as most critical in 2024 for **multi public cloud services**.

Simplified Illustration Source: ISG 2024



**Definition**

This study assesses providers offering public cloud services, including consulting and transformation, managed services, public cloud infrastructure and platforms, FinOps and related AI services. Providers in scope use intelligent automation and AI-powered tools to effectively manage, secure and optimize the public cloud infrastructure.

The public cloud infrastructure offers several benefits that outshine their traditional on-premises counterparts, making it the preferred choice for many organizations for infrastructure transformation projects and application development endeavors. The widespread adoption of intelligent automation tools further streamlines data management processes and allows businesses to focus on innovation rather than mundane tasks. Leveraging public cloud infrastructure also aligns with sustainability goals by reducing the environmental carbon footprint associated with on-premises data centers.



Enterprises recognize the necessity of adapting to modern cloud environments to optimize performance and scalability, prompting a heightened demand for re-architecting strategies and expertise in cloud-native solutions. Demand for sovereign cloud infrastructure is rising, especially in Europe. Organizations are prioritizing data sovereignty, security and flexibility and considering the ability to select data storage locations and maintain control over access and encryption keys, ensuring compliance with local regulations and safeguarding sensitive data.

Enterprises are keen on leveraging generative AI (GenAI) to enhance productivity, streamline operations and unlock new opportunities for innovation. They focus on not only complementing but also enhancing the functionality of current IT infrastructure. As enterprises are directing their attention toward integrating GenAI seamlessly into their existing IT environments, they expect providers to be on top of this trend.



### Scope of the Report

This ISG Provider Lens™ quadrant report covers the following seven quadrants for services/solutions: Consulting and Transformation Services — Large Accounts, Consulting and Transformation Services — Midmarket, Managed Services — Large Accounts, Managed Services — Midmarket, FinOps Services and Cloud Optimization, 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 (quadrants)
- Focus on the regional market

Our study serves as the basis for important decision-making by covering providers' 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 providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the service requirements from enterprise customers differ and the spectrum of providers operating in the local market is sufficiently wide, a further differentiation of the 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 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 \$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 revenue above \$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.

**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.

**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.

**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.





# Consulting and Transformation Services – Large Accounts

## Consulting and Transformation Services – Large Accounts

### Who Should Read This Section

This quadrant is relevant to large enterprises in the U.S. evaluating service providers that offer public cloud consulting and transformation services. In this quadrant, ISG highlights the current market positioning of these providers and shows how they address the key challenges in migrating to the multi public cloud environments.

Large U.S.-based enterprises are increasingly prioritizing the modernization of their digital infrastructure, focusing on long-term strategic cloud investments. These enterprises seek service providers that can offer more than technical support and look for partners that can drive large-scale digital transformation initiatives. The demand has shifted from basic cloud migration to comprehensive solutions integrating AI-powered automation, advanced data analytics and industry-specific expertise. Enterprises also show a heightened interest in governance, risk and compliance (GRC) frameworks that help them navigate the ever-evolving regulatory landscape.

In 2024, enterprises are preferring service providers with local expertise and presence that can offer tailored solutions and understand their unique regulatory environments and industry-specific needs. Providers demonstrating a strong local presence with specialized teams are increasingly preferred as strategic partners. This shift in priorities is prompting enterprises to engage more with providers offering holistic cloud transformation strategies that combine technological innovation with business value realization.



**IT leaders** should read this report to understand the relative strengths and weaknesses of consulting and transformation service providers, helping them drive enterprise digital transformation.



**Software development and technology leaders** should read this report to understand consulting service providers' positioning and the impact of their offerings on ongoing enterprise transformations.

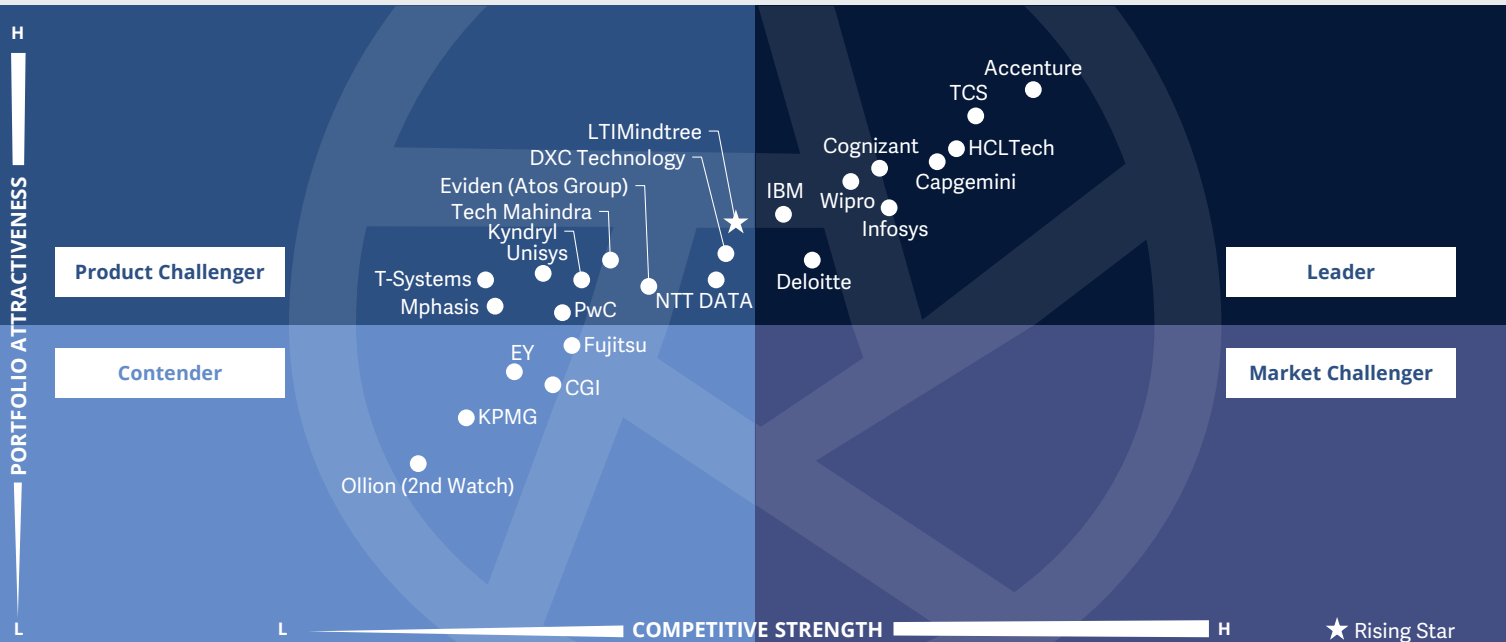


**Sourcing, procurement and vendor management professionals** should read this report to better understand the current landscape of consulting and transformation service providers in the U.S. market.



**Multi Public Cloud Services  
Consulting and Transformation Services – Large Accounts**

U.S. 2024



This quadrant evaluates service providers that offer **consulting services** for **migrating applications** on **public cloud** infrastructure and **modernizing infrastructure** to public cloud environments, enabling large enterprises with their digital strategy.

*Shashank Rajmane*



## Consulting and Transformation Services – Large Accounts

### Definition

This quadrant assesses service providers that offer public cloud consulting and transformation services that help enterprises modernize, optimize and transform their IT operations to enhance efficiency, agility and security. These service providers partner with multiple public cloud infrastructure providers to offer multicloud strategy and industry cloud solutions and manage customer-specific complexities in adopting and deploying public cloud solutions. They have highly skilled developers and software architects who use design thinking and short work cycles to meet customer demands. Provider services typically comprise:

- **Consulting services**, which include business case design for multicloud environments and workload migration assessments. Service providers offer transformation road maps addressing security tools, networking and connectivity, data services, analytics, computing performance and guidance on application modernization for migration to public clouds.
- **Transformation services**, which include cloud architects and engineers designing, building and configuring multicloud environments. They also support migrating and integrating workloads to harness cloud architecture. They help integrate AIOps, GenAI and FinOps to facilitate cloud-native application development and operations.
- **Compliance services**, which include those addressing environmental, social and governance (ESG) and security requirements, as they are integral to any transformation engagement. Providers use best practices and frameworks to design cloud policies, processes and functions, ensuring healthy, sustainable, secure and compliant environments regardless of location. They also embed guardrails while implementing GenAI solutions in existing ecosystems.

### Eligibility Criteria

1. Capability in **assessing and designing application modernization** strategies to adopt cloud-native services and API libraries for service integration, including **DevOps automation, AIOps, GenAI** and infrastructure as code (IaC) deployments, and cross-cloud integration
2. **Methods and frameworks** to analyze clients' IT landscape, optimize IT spending and prevent additional technical debts
3. Experience in **planning and implementing multicloud services** for major industry verticals
4. Experience in **application migration** (templates, automation engines and other techniques) and cloud-native application development
5. **Certified competence** in at least two hyperscalers such as AWS, Microsoft Azure, Google Cloud and OCI



## Consulting and Transformation Services – Large Accounts

### Observations

In the last four quarters, the consulting and transformation services market in the U.S. experienced steady growth as enterprises focused on modernizing and optimizing their IT environments. As they increasingly shift from monolithic systems to more flexible, scalable solutions, service providers have refined their multicloud and cloud-native strategies to enable enterprises to make the best use of cloud architecture. The integration of AI and automation technologies has also increased, enabling clients to make decisions faster, reduce costs and drive efficiency.

Enterprises are now seeking industry-specific solutions that align with their verticals. They are looking for not just generic cloud transformation but expect tailored solutions that integrate AI, automation and compliance frameworks and align with regulatory standards. Security remains a top priority, and enterprises are cautious about lift-and-shift migrations, preferring cloud-native applications for long-term value. Their focus has shifted to optimizing existing workloads rather than accelerating migration without clear business cases.

In response to these trends, service providers have invested significantly in AI-powered platforms, automation-driven frameworks and industry-specific cloud offerings. Many providers have emphasized their ability to integrate GenAI into cloud transformation projects and help enterprises streamline operations and enhance decision-making processes. Additionally, many providers are partnering with hyperscalers to implement multicloud strategies and reduce vendor lock-in for enterprises.

From the 59 companies assessed for this study, 24 qualified for this quadrant, with nine being Leaders and one a Rising Star.

### accenture

**Accenture** empowers U.S. enterprises with holistic multicloud strategies that reduce vendor dependency and enhance flexibility, integrating GenAI and advanced automation into cloud-native applications to drive business value and data-driven decision-making.

### Capgemini

**Capgemini** combines AI-driven cloud transformation with deep engineering expertise to deliver tailored, industry-specific solutions. Its robust governance, risk and compliance (GRC) services enable U.S. enterprises across various sectors to navigate regulatory complexities.

### cognizant

**Cognizant** distinguishes itself by integrating GenAI into its cloud transformation services. It has invested \$1 billion and launched an Advanced AI Lab in the U.S. to accelerate cloud-native modernization and offer significant operational efficiencies.

### **Deloitte.**

**Deloitte** enhances its leadership in cloud consulting by integrating AI-led data analytics. It has also launched an AI and Data Accelerator Program with AWS, empowering large enterprises to leverage GenAI capabilities for industry-specific cloud transformations.

### **HCLTech**

In 2024, **HCLTech** will focus on its engineering-first approach and substantial investments in GenAI and robust CloudSMART strategy. Its industry-specific cloud solutions, such as Microsoft Cloud for Healthcare and IBM Financial Services Cloud, strengthen its ability to meet vertical-specific needs.

### IBM

**IBM** enhances its leadership by deploying its AI-infused Consulting Advantage platform at scale, enabling its 88,000 consultants to deliver consistent and innovative transformation outcomes.

### Infosys

**Infosys** adopts an AI-first approach to cloud transformation, integrating its Cobalt and Topaz offerings to accelerate business value with GenAI capabilities. Its investments in expanding U.S.-based talent and partnerships with leading universities such as Stanford have enhanced its local presence and market credibility.



## Consulting and Transformation Services – Large Accounts



**TCS**’ ability to integrate advanced AI and ML capabilities into complex cloud transformation engagements stands out this year with AI-based decision engines and predefined migration templates, which cover over 75 percent of migration scenarios.



**Wipro** has embedded GenAI capabilities within its Cloud Studio platform, enabling enterprises to rethink cloud transformations with AI-first approaches. This integration of AI across consulting engagements has allowed Wipro to offer intelligent transformation road maps and enabled clients to modernize their operations rapidly and improve business outcomes.



**LTIMindtree** (Rising Star) integrates advanced AI and GenAI platforms such as Canvas.ai, CloudXperienz and Infinity into its cloud transformation services offerings, accelerating multicloud transformations and driving significant improvements in migration speed, cost optimization and risk mitigation.





# Consulting and Transformation Services – Midmarket



### Who Should Read This Section

This quadrant is relevant to midsize enterprises in the U.S. evaluating service providers that offer public cloud consulting and transformation services. In this quadrant, ISG highlights the current market positioning of these providers and shows how they address the key challenges in migrating to the multi public cloud environment.

U.S.-based midmarket enterprises focus on accelerating their digital transformation journeys by engaging with cloud service providers that can offer practical, cost-effective and tailored solutions. These businesses seek providers to help them modernize their operations without the complexities and high costs often associated with large-scale cloud migrations. A significant priority for midmarket businesses in 2024 is optimizing their cloud infrastructure to improve operational efficiency while reducing costs. These enterprises seek service providers specializing in managing

cloud costs and offering advisory services for migrating critical workloads. The focus is on providers delivering a simplified and well-governed migration strategy that allows for minimal disruption to ongoing operations while ensuring long-term scalability and flexibility.

In 2024, midmarket businesses are actively focusing on security and governance as they move more of their operations to the cloud. They are seeking service providers that can help them enhance their cloud governance frameworks and ensure robust security practices to protect sensitive data. These enterprises are also more likely to partner with providers that have strong relationships with hyperscalers. As these businesses continue to grow, they look for long-term strategic partnerships that can evolve with their needs and help them stay competitive.



**IT leaders** should read this report to understand the relative strengths and weaknesses of consulting and transformation service providers, helping them drive enterprise digital transformation.



**Software development and technology leaders** should read this report to understand the positioning and offerings of consulting and transformation service providers and the benefits of moving to the cloud.

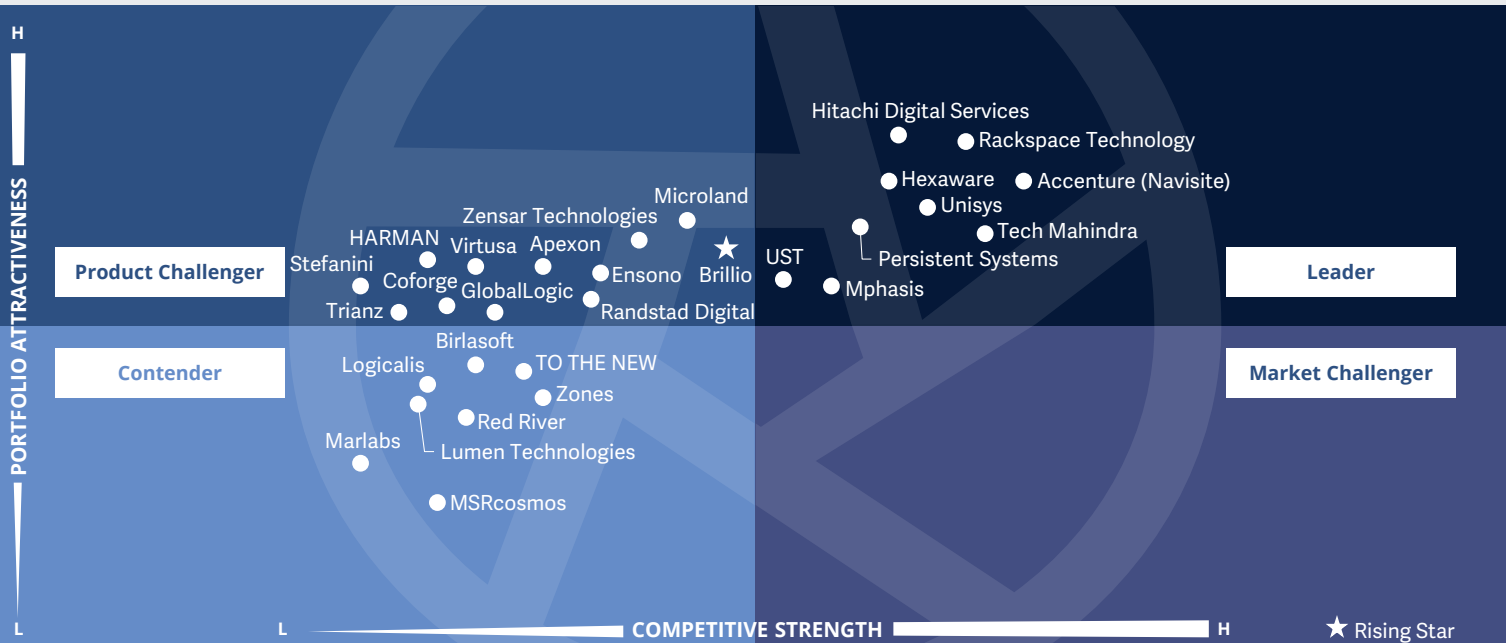


**Sourcing, procurement and vendor management professionals** should read this report to better understand the current landscape of consulting and transformation service providers in the U.S. market.



**Multi Public Cloud Services  
Consulting and Transformation Services – Midmarket**

U.S. 2024



This quadrant evaluates service providers that offer **consulting services** for **migrating applications** on **public cloud** infrastructure and **modernizing infrastructure** to public cloud environments, enabling SMEs with their digital strategy.

*Shashank Rajmane*



## Consulting and Transformation Services – Midmarket

### Definition

This quadrant assesses service providers that offer public cloud consulting and transformation services that help enterprises modernize, optimize and transform their IT operations to enhance efficiency, agility and security. These service providers partner with multiple public cloud infrastructure providers to offer multicloud strategy and industry cloud solutions and manage customer-specific complexities in adopting and deploying public cloud solutions. They have highly skilled developers and software architects who use design thinking and short work cycles to meet customer demands. Provider services typically comprise:

- **Consulting services**, which include business case design for multicloud environments and workload migration assessments. Service providers offer transformation road maps addressing security tools, networking and connectivity, data services, analytics, computing performance and guidance on application modernization for migration to public clouds.
- **Transformation services**, which include cloud architects and engineers designing, building and configuring multicloud environments. They also support migrating and integrating workloads to harness cloud architecture. They help integrate AIOps, GenAI and FinOps to facilitate cloud-native application development and operations.
- **Compliance services**, which include those addressing environmental, social and governance (ESG) and security requirements, as they are integral to any transformation engagement. Providers use best practices and frameworks to design cloud policies, processes and functions, ensuring healthy, sustainable, secure and compliant environments regardless of location. They also embed guardrails while implementing GenAI solutions in existing ecosystems.

### Eligibility Criteria

1. Capability in **assessing and designing application modernization** strategies to adopt cloud-native services and API libraries for service integration, including **DevOps automation, AIOps, GenAI** and **infrastructure as code (IaC)** deployments, and cross-cloud integration
2. **Methods and frameworks** to analyze clients' IT landscape, optimize IT spending and prevent additional technical debts
3. Experience in **planning and implementing multicloud** services for major industry verticals
4. Experience in **application migration** (templates, automation engines and other techniques) and cloud-native application development
5. **Certified competence** in at least two hyperscalers such as AWS, Microsoft Azure, Google Cloud and OCI



## Consulting and Transformation Services – Midmarket

### Observations

In 2024, ISG observed that midmarket enterprises are continuing their journey toward a public cloud driven by the need for cost efficiency, flexibility and scalability. Enterprises are seeking service providers that can deliver tailored, outcome-focused cloud transformation. Therefore, many service providers have distinguished themselves by offering cost-effective and automation-driven solutions. Many providers have also stood out by being highly flexible, accelerating the time to value and focusing on simplifying cloud migration processes through automation platforms. Midmarket clients prioritize affordability and rapid deployment, and service providers have responded by developing fast, optimized and secure solutions.

An increased use of lift-and-shift methodologies in migration projects was observed among midmarket enterprises, as many SMEs are still in the early stages of cloud adoption. Service providers are using simplified migration strategies, helping them move to the cloud swiftly and efficiently without requiring extensive rearchitecting. Security is also

a major concern for these enterprises, and service providers have been addressing this by integrating secure-by-design frameworks, offering comprehensive cloud governance and compliance solutions tailored for industries.

Providers in this segment were also seen enhancing their automation and AI capabilities, delivering successful use cases automation and improving decision-making. They are increasingly taking a platform-led approach to offer modular, scalable solutions that can be easily adapted to meet the evolving needs of SMEs.

From the 59 companies assessed for this study, 29 qualified for this quadrant, with nine being Leaders and one Rising Star.

### accenture

**Navisite**, part of **Accenture** in 2024, has cemented its leadership by expanding its midmarket presence with cost optimization and migration automation solutions. Accenture's unique value proposition includes its deep consulting expertise and Navisite's midmarket focus.

### HEXAWARE

**Hexaware's** investment in GenAI and its accelerated transformation strategy are the key differentiators in 2024. The provider's Amaze® platform enables rapid migrations, while its focus on innovative AI-driven solutions highlights a forward-looking approach.

### Hitachi Digital Services

**Hitachi Digital Services'** cloud-native transformation expertise and application modernization through a comprehensive delivery framework make it a robust player in the consulting space. Its expertise in offering speed and operational excellence through its DevOps-driven approach is a differentiator.

### Mphasis

**Mphasis** is investing in and enhancing its AWS-driven GenAI solution tailored to the financial services sector. It has expanded its partnerships with hyperscalers to build industry-specific AI solutions, and its Krypton™ solution for large-scale cloud migrations stands out in the cloud transformation space.

### Persistent

**Persistent Systems** is investing in GenAI and its robust cloud-native platforms, such as PiCloud and iAura, to enhance cloud-native agility for its clients. Its investment in cloud-native architectures and partnerships with major hyperscalers position it as a transformation leader for mission-critical workloads.

### rackspace technology.

**Rackspace Technology** has launched its FAIR™ AI-driven offering and Workload Aware Cloud Migration (WAM) solution, which provides tailored cloud migration strategies. This year, Rackspace will focus on delivering value through cloud-native transformation and AI-driven consulting capabilities.



## Consulting and Transformation Services – Midmarket

### TECH mahindra

**Tech Mahindra's** ability to combine a platform-led multicloud strategy with agile consulting methodologies positions it as a leader in driving large-scale cloud transformations. Its use of Cloud BlazeTech as a foundational platform for integrating advanced tools such as AIOps and FinOps, along with a flexible, automation-first consulting approach, accelerates cloud-native transformations with minimal disruption.

### U unisys

**Unisys** combines AI-enabled advisory services and hyperautomation with deep industry expertise to enable midmarket clients to efficiently navigate complex multicloud environments while meeting stringent regulatory requirements.

### U • S T

**UST** focuses on cloud-native architecture and has invested heavily in AI-powered automation solutions such as SmartOps and SmartSense. Its academic collaborations to develop AI-infused solutions and expertise in DevSecOps practices have enhanced its cloud consulting capabilities.

### Brillio

This year, **Brillio** (Rising Star) has excelled in leveraging its Cloud and AI Studio and CoEs to address the growing demand for industry-specific cloud solutions in regulated industries.



# Unisys



“Unisys’ strategic focus on blending industry expertise with client-centric solutions enables them to navigate complex multicloud ecosystems while meeting regulatory demands and offering a secure platform to transform workloads on public cloud environments.”

*Shashank Rajmane*

## Overview

Unisys is headquartered in Pennsylvania, U.S. It has more than 16,500 employees across 48 offices in 22 countries. In FY23 the company generated \$2.0 billion in revenue, with Enterprise Computing Solutions as its largest segment. It provides advisory services for AI-driven digital transformation and offers tailored cloud-native migrations through an integrated Software Development Life Cycle (SDLC) framework. It supports clients in rearchitecting operations to maximize efficiency, scalability and security in multicloud environments, working with major public cloud platforms. In the U.S., the company has seen significant growth in sectors such as government, healthcare and financial services.

## Strengths

**AI-focused advisory:** Unisys takes a unique AI-enabled workshop approach to advise its U.S.-based clients on an objective-based process framework for a consultative cloud assessment. This approach uses AI to understand client scenarios and prioritizes transformation initiatives effectively. The AI-driven insights enable clients to make informed decisions, optimize resources and achieve sustainable business benefits.

### **Comprehensive hyperautomation solution:**

Unisys employs a hyperautomation strategy embedded across their services, using proprietary solutions such as Unisys Core AI and AI-capabilities. This strategy uses adaptable automated tools and templates to address design, timelines, security and automation challenges, facilitating

AI-optimized continuous delivery across business units. It translates to reduced time to value and accelerated transformation for clients.

### **Advanced serverless architecture design:**

Unisys has strong capabilities in designing and deploying serverless architectures by leveraging its CloudForte® asset suite and open-source tools. Its expertise includes full-stack designs, pre-configured automated templates and implementations across major cloud providers, which help clients deploy and scale applications to meet changing demands without significant upfront infrastructure investments.

## Caution

Compared to its competition, Unisys has relatively fewer full-time employees certified in hyperscaler platforms. However, it can deliver quality public cloud transformation services even with the limited talent pool of certified cloud consultants, as some are trained in multiple public cloud platforms.





# Managed Services — Large Accounts

## Managed Services – Large Accounts

### Who Should Read This Section

This quadrant is relevant to large enterprises in the U.S. evaluating public cloud MSPs. In this quadrant, ISG highlights the current market positioning of these providers and shows how they address the key challenges in infrastructure management in the public cloud environment.

In 2024, large U.S. enterprises are increasingly focused on complex multicloud ecosystems and AI-driven automation to drive operational efficiencies and support business innovation at scale. With their vast and distributed cloud environments, these organizations prioritize partnerships with service providers that can deliver tailored, scalable solutions designed to manage their hybrid and multicloud environments. Enterprises are seeking end-to-end managed services that can integrate FinOps, DevSecOps and site reliability engineering (SRE) practices to ensure real-time visibility into cloud spending, proactive governance and rapid incident resolution. Providers offering advanced cloud-native

platforms such as infrastructure-as-code (IaC) and automated compliance frameworks are highly favored.

This year, there has been a strong demand for platform-centric managed services that deliver centralized control over cloud environments, offering seamless automation and AI-enabled cloud optimization. Providers have been actively developing new AI-powered tools and cloud governance solutions to support these evolving demands, help large enterprises manage their workload complexity and ensure compliance across multiregional environments. These tools are crucial for organizations operating across multiple geographies, each with its regulatory requirements.



**IT leaders** should read this report to understand MSPs' relative strengths and weaknesses and how their market approaches impact enterprise public cloud strategies, improve business agility and reduce TCO.



**Sourcing, procurement and vendor management professionals** should read this report to better understand the current landscape of MSPs in the U.S. market.



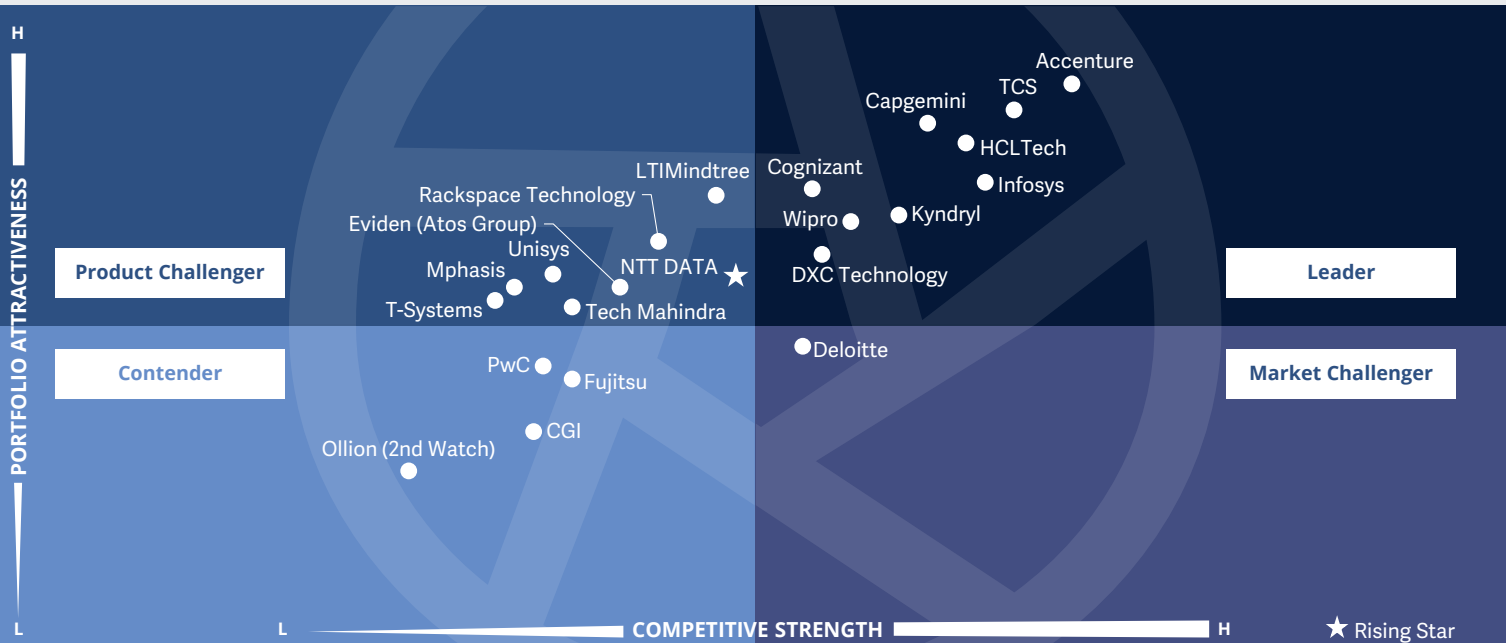
**Software development and technology leaders** should read this report to understand the positioning of MSPs and determine how their offerings can impact the ongoing development of an enterprise's software.





**Multi Public Cloud Services  
Managed Services – Large Accounts**

U.S. 2024



This quadrant evaluates MSPs' ability to **support** the **complexities, security and compliance** requirements of managing and orchestrating **multiple public cloud** environments to deliver seamless day-to-day **operations** for large enterprises.

*Shashank Rajmane*



## Managed Services – Large Accounts

### Definition

This quadrant assesses managed service providers specializing in managing day-to-day operations of hyperscale environments (such as AWS, Microsoft Azure and Google Cloud). These providers adopt a DevOps-centric approach to support robust CI/CD pipelines with strong container management capabilities. They also offer expertise in site reliability engineering (SRE) and business resiliency.

Typical managed services offered by these providers include management of the entire cloud infrastructure lifecycle and real-time multicloud monitoring with predictive analytics to maximize performance, reduce costs and ensure compliance and security. Service providers use AIOps and GenAI tools to automate processes, auto-scale and optimize resources, offer predictive analytics and more. They also use FinOps tools to provide transparency on cloud resources, capacity utilization and costs. Service platforms include service catalogs, approval workflows, self-service and self-heal capabilities.

Apart from typical managed services offered, service providers differentiate themselves by providing advanced services such as:

- Automated compliance monitoring to ensure robust governance and compliance management across cloud environments
- IoT and edge services integration with cloud services to bring data processing closer to the source, improving latency and bandwidth usage
- Energy-efficient cloud infrastructure services and sustainable practices to reduce carbon footprint and achieve sustainability goals
- Data governance services to ensure data quality, privacy and security across multicloud environments
- Use AI and ML for cybersecurity through automated responses, threat detection and compliance management, along with zero trust security models
- Self-service catalogs that automate provisioning, container management, service on/off scheduling, IaC and DevOps automation

### Eligibility Criteria

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



## Managed Services – Large Accounts

### Observations

In the past four quarters, the managed services segment for large accounts has seen notable advancements driven by the integration of AI-powered automation and enhanced cloud optimization tools. Providers have increasingly focused on delivering comprehensive automation platforms incorporating AIOps and FinOps capabilities. Sustainability has also become a key focus, with providers embedding energy-efficient practices into their services for the growing demand for green cloud solutions.

From an enterprise perspective, large organizations prioritize solutions that address the increasing complexity of managing multicloud environments. There has been a heightened focus on cost optimization, driven by the need to control cloud expenditures amid growing cloud usage due to deploying AI-related workloads. Enterprises also seek improved governance and compliance capabilities, particularly as regulatory requirements evolve in industry-specific sectors. Sustainability goals are becoming more prominent, with enterprises expecting managed service providers to deliver solutions that reduce their environmental footprint.

In response to these enterprise demands, service providers have invested significantly in AI-powered automation. They are helping enterprises achieve real-time cloud monitoring and enhanced cost management through integrated FinOps tools. As providers continue to refine their AI capabilities and deliver more autonomous cloud management solutions, enterprises are expected to further adopt these technologies, reducing operational complexity while achieving greater efficiency and sustainability.

From the 59 companies assessed for this study, 22 qualified for this quadrant, with nine being Leaders and one Rising Star.

### accenture

**Accenture** continues to invest in robust partnerships with leading hyperscalers and has expanded the capabilities of its proprietary platforms like myNav® and myWizard®, integrating AI, AIOps and FinOps principles to deliver a comprehensive cloud management experience.

### Capgemini

**Capgemini** stands out for its ability to scale operational efficiency while ensuring energy efficiency through GreenOps practices. It strongly emphasizes embedding automation into day-to-day cloud operations and combining them with comprehensive FinOps capabilities.

### cognizant

**Cognizant's** commitment to AI-powered innovation extends beyond automation, with significant investments in GenAI and FinOps capabilities. Its ability to coinnovate with hyperscalers and integrate advanced AI features into its managed services has elevated it to a leadership position.

### DXC TECHNOLOGY

**DXC Technology's** use of its Platform X™ for intelligent automation and its large-scale legacy modernization capabilities set it apart by enabling U.S. enterprises to efficiently manage cloud operations. DXC's expansion into GreenOps makes it a forward-thinking provider in terms of operational efficiency and sustainability.

### HCLTech

**HCLTech** delivers AI-led automation, predictive operations and sustainability capabilities through its DRYICE™ platform. Its Net-Zero Intelligent Operations (NIO) platform integrates real-time energy tracking and GHG emission reduction capabilities to align cloud operations with sustainability goals for large enterprise clients.

### Infosys

**Infosys** integrates FinOps with business value to optimize costs while tracking business outcomes for its clients. Its focus on balancing financial efficiency and outcomes, along with enhanced AI-led infrastructure management through Cobalt and Topaz, makes it a Leader this year.



## Managed Services – Large Accounts

### kyndryl

**Kyndryl's** focus on improving autonomous cloud operations and platform engineering and commitment to transforming cloud management through innovation is evident from its introduction of AI-powered developer platforms and expansion into GenAI capabilities.



**TCS** is enhancing its DevOps-centric capabilities and AI-powered multicloud management. It has been working on optimizing its cloud operations using AI-driven automation, ensuring improved security and operational resilience across complex multicloud environments.



**Wipro** has strengthened its managed services capabilities by advancing its automation-led FullStride platform and integrating GenAI tools into cloud operations to help optimize infrastructure management and reduce complexity for large enterprises.



**NTT DATA** (Rising Star) continually focuses on enterprise-scale cloud optimization and integrating sustainability into cloud FinOps. This year, it has distinguished itself through its FinOps Carbon solution, which combines cost efficiency with real-time sustainability tracking.





# Managed Services — Midmarket

### Who Should Read This Section

This quadrant is relevant to midsize enterprises in the U.S. evaluating public cloud MSPs. In this quadrant, ISG highlights the current market positioning of these providers and shows how they address the key challenges in infrastructure management for midsize enterprises in the public cloud.

Midmarket enterprises in the U.S. are increasingly focusing on cost-effective cloud solutions that enable scalability and operational efficiency without sacrificing flexibility. These businesses, which are often newer to cloud adoption, seek service providers offering tailored managed services that align with their budget constraints. Cost optimization, automation and enhanced security are top priorities as midmarket enterprises look to balance growth with financial cautiousness. A key trend in the midmarket is the shift toward simplified cloud management platforms providing integrated FinOps tools to effectively manage cloud spending. With limited in-house

resources, midmarket enterprises are turning to providers offering out-of-the-box solutions and unified cloud management platforms.

Thus, service providers are enhancing their automation-driven platforms, integrating GenAI capabilities and AIOps, and offering predictive cloud management to reduce downtime. These tools allow midmarket enterprises to gain real-time insights into their cloud environments and make data-driven decisions. Additionally, midmarket enterprises prefer flexible pricing models, such as consumption-based or outcome-based pricing, to align cloud investments with their growth stages. This shift reflects a broader trend toward value-based engagements, where service providers are expected to deliver measurable outcomes rather than just managing infrastructure.



**IT leaders** should read this report to understand MSPs' relative strengths and weaknesses and how their market approaches impact enterprise public cloud strategies, improve business agility and reduce TCO.



**Sourcing, procurement and vendor management professionals** should read this report to better understand the current landscape of MSPs in the U.S. market.

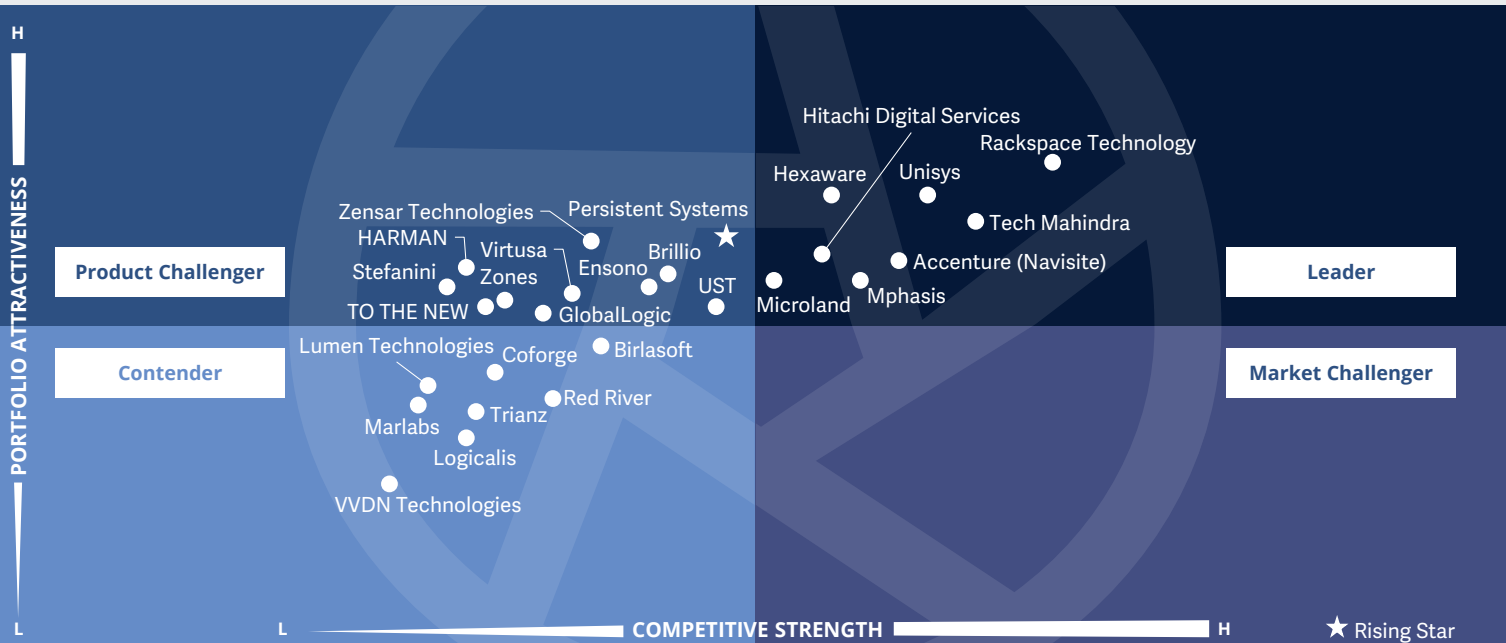


**Software development and technology leaders** should read this report to understand the positioning of MSPs and learn how their offerings can impact the ongoing development of an enterprise's software.



**Multi Public Cloud Services  
Managed Services – Midmarket**

U.S. 2024



This quadrant evaluates managed services providers' (MSPs) ability to **support** the **complexities, security and compliance** requirements of managing and orchestrating **multiple public cloud** environments to deliver seamless day-to-day **operations** for SMEs.

*Shashank Rajmane*



## Managed Services – Midmarket

### Definition

This quadrant assesses managed service providers specializing in managing day-to-day operations of hyperscale environments (such as AWS, Microsoft Azure and Google Cloud). These providers adopt a DevOps-centric approach to support robust CI/CD pipelines with strong container management capabilities. They also offer expertise in site reliability engineering (SRE) and business resiliency.

Typical managed services offered by these providers include management of the entire cloud infrastructure lifecycle and real-time multicloud monitoring with predictive analytics to maximize performance, reduce costs and ensure compliance and security. Service providers use AIOps and GenAI tools to automate processes, auto-scale and optimize resources, offer predictive analytics and more. They also use FinOps tools to provide transparency on cloud resources, capacity utilization and costs. Service platforms include service catalogs, approval workflows, self-service and self-heal capabilities.

Apart from typical managed services offered, service providers differentiate themselves by providing advanced services such as:

- Automated compliance monitoring to ensure robust governance and compliance management across cloud environments
- IoT and edge services integration with cloud services to bring data processing closer to the source, improving latency and bandwidth usage
- Energy-efficient cloud infrastructure services and sustainable practices to reduce carbon footprint and achieve sustainability goals
- Data governance services to ensure data quality, privacy and security across multicloud environments
- Use AI and ML for cybersecurity through automated responses, threat detection and compliance management, along with zero trust security models
- Self-service catalogs that automate provisioning, container management, service on/off scheduling, IaC and DevOps automation

### Eligibility Criteria

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





## Managed Services – Midmarket

### Observations

Unlike their large counterparts, midmarket enterprises are primarily looking for cost-effective solutions that support their cloud operations with minimal disruption and scalable capacity. The demand for AI-led automation, combined with FinOps practices, has become a major trend as these businesses seek to optimize cloud spending without sacrificing operational efficiency. Therefore, providers have made advancements in cloud cost optimization, leveraging AI technologies to deliver automated cloud operations at a lower cost.

Midmarket enterprises are strongly emphasizing cost control and simplified operations. They are particularly interested in platform-centric solutions that provide end-to-end visibility across their cloud environments. The midmarket segment has also shown an increased focus on scalability, as many of these businesses are in growth phases and need solutions that can expand in line with their needs. Security and compliance remain important, but the key priority is finding providers to help them efficiently manage their cloud infrastructure at a manageable cost.

Service providers are responding to these specific needs of midmarket enterprises by emphasizing automation-first approaches and cost optimization. They are also investing in FinOps-driven platforms to ensure transparent cloud spending and optimal resource usage. With AI and automation becoming integral to managed services, midmarket enterprises are expected to increase their reliance on managed service providers for day-to-day cloud operations.

From the 59 companies assessed for this study, 27 qualified for this quadrant, with eight being Leaders and one Rising Star.

### accenture

**Accenture's** expanded focus on serving midmarket clients is reinforced by the acquisition of Navisite. By integrating Navisite's expertise in public cloud services across healthcare, life sciences and manufacturing, Accenture caters to a broad range of clients across segments.

### HEXAWARE

**Hexaware** leverages GenAI capabilities through its Tensai™ platform and has introduced AI-driven monitoring and predictive analytics, enabling it to offer an intelligent approach to managing cloud infrastructure. Its increased focus on automation and AI for predictive analytics and cost optimization has elevated Hexaware's position as a Leader.

### Hitachi Digital Services

**Hitachi Digital Services** is enhancing its HARC platform by leveraging AI and SRE principles for automated cloud workload management. It optimizes resources through FinOps practices and helps U.S. enterprises achieve greater efficiency in their cloud infrastructure.

### MICROLAND®

**Microland** invests in cloud cost optimization and FinOps through its proprietary Cloud Cost Management Framework (CCMF™). It delivers significant savings on cloud costs for U.S. midmarket enterprises while maintaining high efficiency, making Microland a unique leader.

### Mphasis

**Mphasis** strongly focuses on AI-led cloud management and advanced security measures, positioning it as a robust Leader. Its SRE and FinOps principles have ensured that IT services remain highly predictable and resilient for clients.

### rackspace technology.

**Rackspace Technology's** emphasis on integrating Elastic Engineering with its extended security services is a significant evolution from previous years. Its tailored, pod-based managed service model has provided U.S. enterprises with a highly flexible and responsive service.



## Managed Services – Midmarket



**Tech Mahindra's** continued refinement of its Cloud BlazeTech platform has positioned it as a leader in delivering highly automated, centralized multicloud management for midmarket clients. The platform's automation-first capabilities and policy-based compliance enable enterprises to streamline multicloud management.



**Unisys** solidifies its leadership through its ZeroOps delivery model, powered by hyperautomation and AI-driven capabilities. A key differentiator this year is Unisys' ability to seamlessly integrate self-healing systems and AI-enabled governance to deliver a truly autonomous cloud operations experience.



**Persistent Systems** stands out for CloudOps 3.0 evolution. It integrates AIOps, FinOps and GenAI capabilities through platforms such as PiCloud, making it a Rising Star this year.



# Unisys



“Unisys offers robust managed cloud services by integrating its AI-driven platforms to automate and create ZeroOps environments, enabling cost-effective, secure and resilient multicloud management.”

*Shashank Rajmane*

## Overview

Unisys is headquartered in Pennsylvania, U.S. It has more than 16,500 employees across 48 offices in 22 countries. In FY23 the company generated \$2.0 billion in revenue, with Enterprise Computing Solutions as its largest segment. Unisys focuses on AI-powered automation, intelligent cloud management and financial governance through its CloudForte platform. Services include AI-driven operations, predictive analytics and FinOps-enabled cost optimization, supporting clients in managing complex multicloud and hybrid cloud environments. It primarily services clients from the U.S. in the public sector, financial services and healthcare verticals.

## Strengths

**ZeroOps delivery model:** Unisys’ ZeroOps approach, built on the CloudForte® asset suite, allows U.S.-based clients to automate key operational tasks such as zero-touch patching, self-healing systems and incident remediation with minimal human intervention. The integrated AIOps framework analyzes real-time data to predict, prevent and resolve incidents automatically. This approach eliminates manual intervention, resulting in lower operating costs, reduced human error and faster incident resolution.

**AI-led intelligent operations:** Unisys integrates AI and ML technologies into its intelligent operations platform to drive proactive multicloud environment management. Unisys’ CloudForte® asset suite uses predictive analytics and

anomaly detection to ensure that the system performance is optimized and potential issues are addressed before they impact operations. This enhances the reliability of cloud environments, reduces unplanned outages and ensures continuous optimization.

**Strong cost optimization capabilities:** Unisys offers a comprehensive FinOps solution integrated into its CloudForte® asset suite. It offers real-time cost monitoring, resource optimization and predictive cost management using third-party tools such as CloudHealth and Apptio Cloudability. This solution has resulted in substantial cost reductions, up to 40 percent in compute costs.

## Caution

Despite Unisys’ strong managed services capabilities, it faces limitations in its Google Cloud expertise when compared to AWS and Microsoft Azure. Its Google Cloud presence remains limited, which could present challenges for clients looking to leverage Google Cloud’s advanced AI, ML and analytics services.





# FinOps Services and Cloud Optimization

## FinOps Services and Cloud Optimization

### Who Should Read This Section

This quadrant is relevant to enterprises of all sizes evaluating cloud FinOps service providers. In this quadrant, ISG highlights the current market positioning of FinOps service providers and shows how they address the key challenges enterprises face.

U.S. enterprises are increasingly integrating FinOps practices into their broader IT and business strategies to enhance financial accountability and operational efficiency. They are seeking service providers that offer industry-specific FinOps solutions tailored to the unique challenges and regulatory requirements of their sectors. Enterprises are emphasizing the need for comprehensive FinOps services that extend beyond cost optimization to include governance, compliance and security aspects. They look for providers that can assist in establishing internal FinOps CoEs to foster a culture of financial responsibility across IT, finance and business teams. Additionally, enterprises focus on organizational change management and training to embed FinOps practices deeply within their operations.

ISG observed that in the U.S. market, there is an increased demand for unified visibility and control across multicloud and hybrid cloud environments. Enterprises require FinOps solutions that offer real-time, granular reporting and persona-based dashboards, empowering stakeholders at all levels to make informed decisions. They are collaborating closely with service providers to develop customized FinOps frameworks that optimize costs and address regulatory compliance and data sovereignty concerns.



**IT leaders** should read this report to understand the relative strengths and weaknesses of FinOps service providers and how their market approaches influence enterprises' adoption of cloud-native technologies.



**Software development and technology leaders** should read this report to understand the positioning of cloud FinOps service providers and how their offerings influence the creation of cloud usage dashboards.

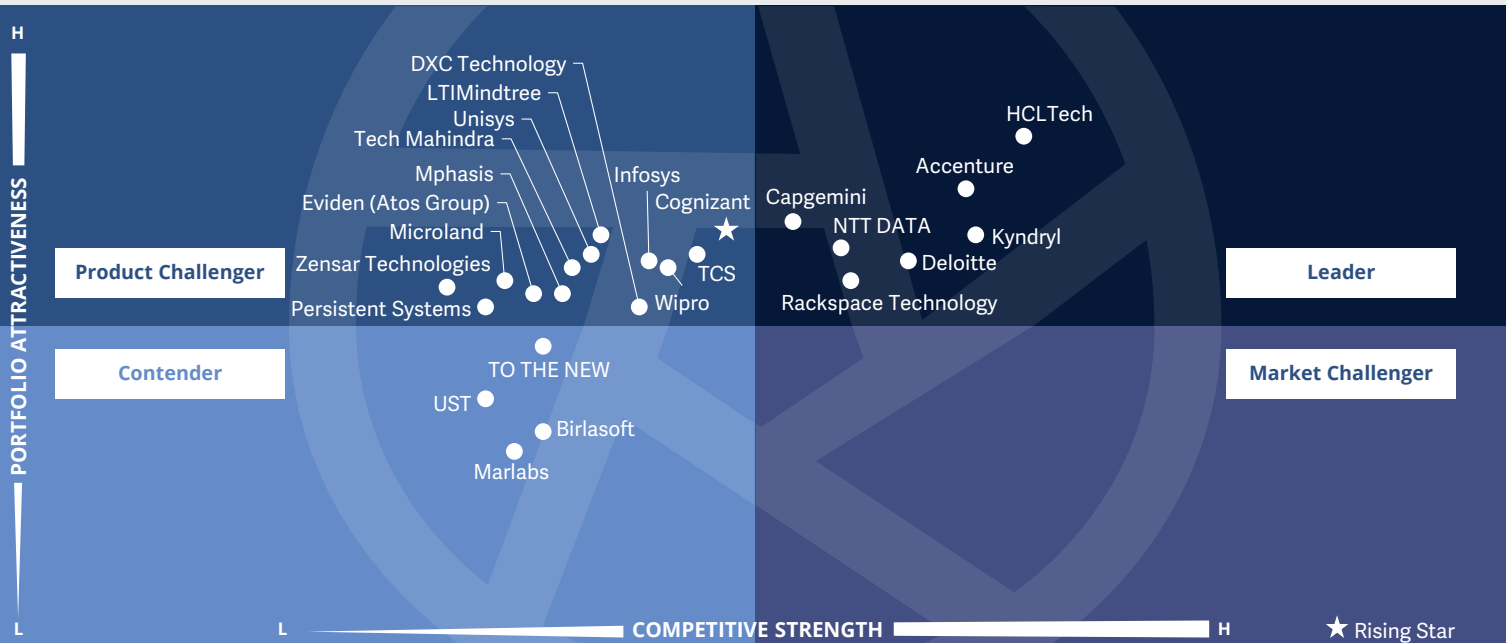


**Sourcing, procurement and vendor management professionals** should read this report to develop a better understanding of the current landscape of FinOps service providers.



**Multi Public Cloud Services  
FinOps Services and Cloud Optimization**

U.S. 2024



This quadrant evaluates providers' ability to offer **consulting** and **managed services** around **FinOps** services, enabling enterprises to **optimize** their **cloud costs** on multiple public cloud environments, maximize cloud **resource utilization** and **reduce waste**.

*Shashank Rajmane*



## FinOps Services and Cloud Optimization

### Definition

This quadrant assesses service providers that offer consulting and managed services around multicloud architecture with a best-of-breed approach for cloud infrastructure cost optimization for AWS, Microsoft Azure, Google Cloud and other public cloud platforms. These providers undertake projects that include workload assessments to analyze and reduce cloud expenses and maximize cost efficiency.

These providers offer cloud governance advisory services for various activities such as user rights, service approval workflows, audit tracking (setting of logs/agents/reports) and defining compliance check methods, configuration policies, data access policies and service reporting configurations that include tagging, charge-back and show back functionalities.

Leaders in this quadrant demonstrate the ability to predict clients' consumption patterns and cloud price changes using AI- and ML-based analytics. They use FinOps frameworks, comprising proprietary and third-party tools, to analyze and forecast usage, pricing and

financial impacts. Providers also use data analytics to identify underutilized resources and optimization opportunities.

Clients expect providers to actively manage FinOps tools to maximize cloud resource utilization and improve automation and auto-scaling capabilities. Contractual terms enable providers to operate on behalf of clients to facilitate activities such as buying and selling reserved instances, upscaling and downscaling resources, and enabling dynamic cost allocation changes. Alternatively, streamlined approval workflows enable fast decision-making to optimize infrastructure costs and maintain budget adherence.

### Eligibility Criteria

1. **FinOps-certified full-time employees (FTEs) in at least three hyperscalers** among the popular ones like AWS, Microsoft Azure, Google Cloud or OCI (FinOps-certified staff improves ratings, but it is not a prerequisite)
2. **Ability to offer FinOps framework strategy and implementation** road map within the client's organization, including the three major FinOps framework elements – inform, optimize and operate
3. **FinOps services regulated by cost-saving targets** centered on **budget control SLAs**
4. **Ability to enable clients** to develop their internal FinOps teams from various organizations within the enterprise
5. **Ability to empower clients** with organizational change management (OCM) for **sustainable FinOps** practices
6. **Ability to demonstrate optimization expertise** with client examples; FinOps reporting is not enough for qualification



## FinOps Services and Cloud Optimization

### Observations

In the last four quarters, service providers have been seen integrating advanced technologies like AI and ML into their offerings. These enhancements have led to more predictive analytics and proactive cost control capabilities, enabling enterprises to manage and optimize cloud expenditures more effectively. Additionally, there is a notable emphasis on sustainability, with providers introducing solutions that align cost optimization with environmental objectives. Also, the introduction of FinOps Cost and Usage Specification (FOCUS™) has enabled service providers to have consistent data around cloud resource usage. This has allowed enterprises to feed data into multiple AI and ML platforms to gain close to accurate predictions, which is helpful for budgeting and overall financial operations.

Enterprises are increasingly seeking sophisticated FinOps solutions that not only reduce cloud costs but also support broader organizational goals such as sustainability and innovation. There is a growing demand for integrating sustainability metrics into financial

operations, allowing enterprises to minimize their carbon footprint alongside overall cloud bills.

Service providers are addressing these needs by enhancing their FinOps services with AI and ML capabilities to offer predictive cost optimization and real-time financial insights. They are introducing sustainability-focused offerings, such as carbon-aware FinOps solutions, to help clients track and reduce the environmental impact of their cloud usage. Providers are also expanding support for GenAI workloads, edge-to-cloud architectures, and hybrid environments, ensuring comprehensive financial governance across all platforms.

From the 59 companies assessed for this study, 24 qualified for this quadrant, with seven being Leaders and one Rising Star.

### accenture

**Accenture** has made significant strides in evolving its FinOps services by introducing AI-enhanced cost optimization and sustainability-driven FinOps. It has improved its intelligent automation and predictive analytics capabilities to help clients with proactive cost control.

### Capgemini

**Capgemini** combines FinOps and GreenOps in its sustainable FinOps offering. Its Tech Value On-Demand service, which expands beyond traditional cloud cost management to include GenAI, SaaS and ERP management, broadens the value proposition for large enterprises.

### **Deloitte.**

**Deloitte** integrates AI, ML and GenAI technologies to predict cloud usage. It also has hybrid cloud expertise to offer transparency and financial accountability across cloud and on-premise environments.

### **HCLTech**

**HCLTech's** defining leadership quality in 2024 is the convergence of FinOps and sustainability, particularly through its Carbon-Aware FinOps. This enables clients to manage cloud resources more efficiently, optimizing for cost and carbon emissions.

### **kyndryl**

**Kyndryl** has expanded into an AI- and ML-powered financial optimization that offers comprehensive support for GenAI workloads and enhanced sustainability tracking. It delivers precise, real-time financial insights and extends financial governance across hybrid IT and GenAI environments.

### NTT DATA

**NTT DATA** is pioneering the integration of sustainability with financial governance through the FinOps Carbon solution, setting a new benchmark in the industry. This year, its ability to balance financial optimization with environmental impact reduction has positioned it as a FinOps and cloud optimization leader.





## FinOps Services and Cloud Optimization



**Rackspace Technology** has expanded its FinOps services portfolio with two new offerings, bringing a broader range of cloud financial management tools that cater to clients across different verticals. Its continuous investment in automation and scaling of its FinOps services solidifies Rackspace as a leader in cloud cost optimization.



**Cognizant's** (Rising Star) expansion of AI-driven financial management, combined with integrating new sustainability features in its FinOps services, highlights its ability to lead complex cloud cost optimization efforts for enterprises of all sizes.





# Hyperscale Infrastructure and Platform Services

## Hyperscale Infrastructure and Platform Services

### Who Should Read This Section

This quadrant is relevant to enterprises across industries in the U.S. evaluating hyperscale infrastructure and platform services providers. In this quadrant, ISG highlights the current market positioning of U.S. providers and their capabilities in addressing the key challenges enterprise clients face.

U.S.-based enterprises are increasingly prioritizing optimizing their cloud investments to balance scalability and cost efficiency. They are focusing on enhancing their cloud governance models to effectively manage resource utilization and reduce overspending. They are emphasizing the need for seamless integration between their on-premises systems and public cloud environments, particularly as they modernize legacy applications and embrace digital transformation. Enterprises also seek hyperscale service providers to support AI-driven initiatives while focusing on GenAI integration.

From a regional perspective, U.S. enterprises are seeking more localized support for their cloud operations. Hyperscalers are responding to this demand by enhancing their cloud compliance and security offerings, particularly in highly regulated industries. The shift toward sustainable cloud operations has also gained traction, with enterprises pushing for energy-efficient solutions as part of their broader environmental, social and governance (ESG) goals. Enterprises expect proactive support, including real-time monitoring and predictive analytics, to prevent disruptions and ensure continuous operations. Hyperscale providers are aligning their services to meet these expectations by expanding their AI capabilities, offering more robust automation tools and focusing on sustainable, scalable cloud infrastructure.



**IT leaders** should read this report to understand the relative strengths and weaknesses of hyperscale infrastructure and platform service providers and how their market approaches impact enterprise public cloud strategies, reduce TCO and improve business agility, scalability and flexibility.



**Software development and technology leaders** should read this report to understand the relative positioning and capabilities of hyperscalers, helping them procure infrastructure and platform services to migrate their workloads to public cloud platforms.

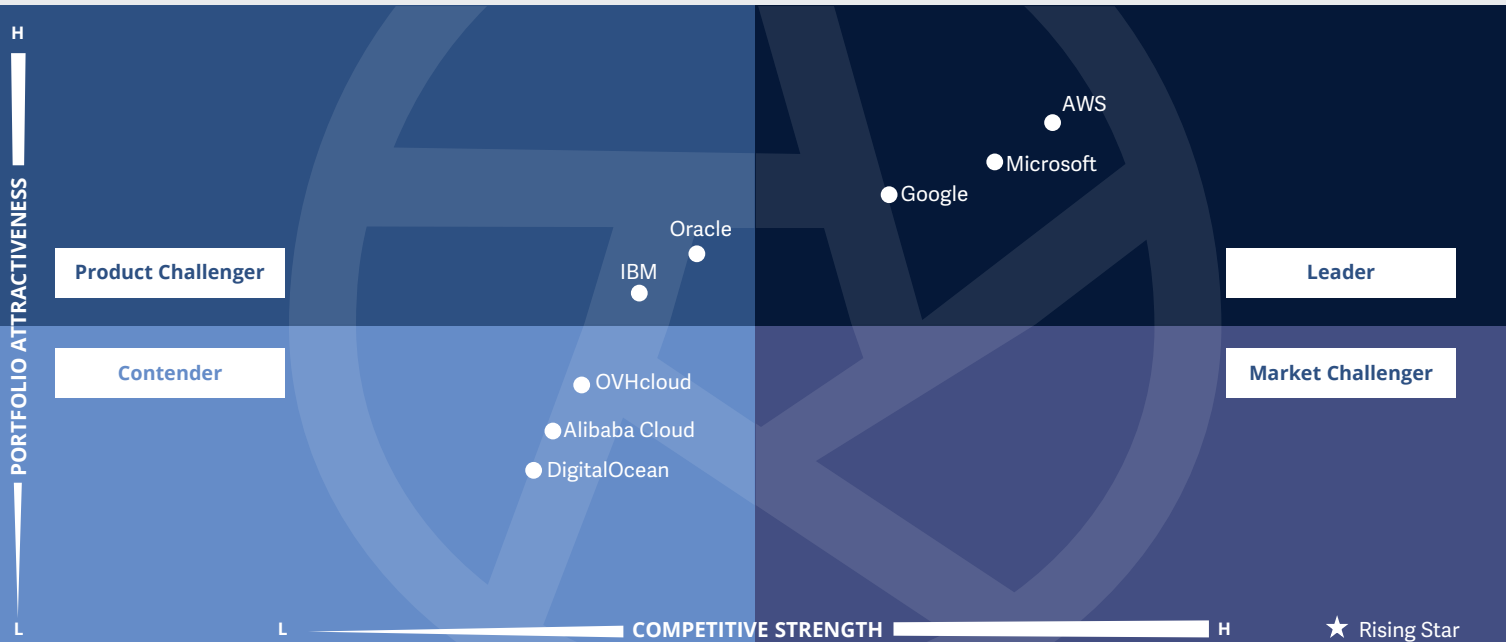


**Sourcing, procurement and vendor management professionals** should read this report to better understand the current landscape of hyperscale infrastructure and platform service providers in the U.S. market.



**Multi Public Cloud Services  
Hyperscale Infrastructure and Platform Services**

U.S. 2024



This quadrant evaluates **hyperscale public cloud** infrastructure and **platform** providers that offer a **pay-as-you-go** model and support numerous clients on **shared infrastructure** with **on-demand** and web-centric services.

*Shashank Rajmane*



## Hyperscale Infrastructure and Platform Services

### Definition

This quadrant assesses suppliers that provide virtual computing resources, middleware and software in a highly scalable public cloud environment. Clients consume infrastructure and platform functionality as on-demand and web-centric services. Typical services in the IaaS segment are compute services, storage, and network resources, all provided as virtual or containerized software-defined offerings and complemented by serverless architectures. GenAI capabilities are offered to automate resource provisioning, cost and performance optimization, dynamic scaling and more.

The hyperscaler PaaS segment offers multiple microservices and runtime engines for predefined cloud-based application development that typically addresses the developers' complete lifecycle needs to build or modernize applications. Offerings include middleware, business process management, collaboration networks, databases, analytics

and ML capabilities. Internal and external (third-party) services are accessible through marketplaces. GenAI capabilities are offered to optimize application deployment and DevOps integration, monitor application performance, suggest ways to optimize and more.

In addition, IaaS or PaaS providers support and manage ISVs in their go-to-market activities.

### Eligibility Criteria

1. Infrastructure portfolio with **computing power**, memory, storage, network, backup and container management functions; the self-service catalog includes high-performance computing (**HPC**) and **ML instances**
2. Tools (such as specialized hardware or foundational models, large language models [LLMs]) to develop **AI- and ML-based projects**, including **GenAI services**
3. **Price transparency** with consumption-based and reserved billing models
4. Compliance with recognized **quality standards** and **service certifications**, including data center and facilities certification
5. Support for **data location** according to local regulations for sovereignty, data access control, encryption and privacy; strong focus on **data protection** and sophisticated **cybersecurity solutions**
6. Support for IaC and **serverless computing** in combination with **automated provisioning**, event triggering and failover
7. APIs to **connect multiple clouds**, SaaS and web services
8. **Partner program** with a vast partner ecosystem



## Hyperscale Infrastructure and Platform Services

### Observations

The hyperscale infrastructure and platform services market in the U.S. has experienced significant advancements over the past four quarters. Major providers such as AWS, Microsoft Azure and Google Cloud have intensified their focus on integrating advanced AI and ML capabilities into their offerings. Innovations in custom hardware designed for specialized workloads, particularly in AI and ML training and inference, have become prominent.

Enterprises seek robust, AI-ready infrastructure to support complex workloads and derive actionable insights from large datasets. There is a growing demand for platforms that offer seamless multicloud flexibility, allowing organizations to manage and deploy applications across diverse environments without significant overhead. Additionally, enterprises prioritize solutions that can integrate AI and ML capabilities into existing workflows to enhance productivity

and maintain a competitive edge in their respective industries.

In response to these needs, the hyperscalers are enhancing their offerings accordingly. AWS has expanded its custom silicon lineup with processors optimized for AI and ML workloads, providing substantial cost savings and performance improvements. Google Cloud has focused on AI-led infrastructure services by integrating its multicloud data platform BigQuery with Gemini AI, enabling real-time analytics across multicloud environments. Microsoft Azure has evolved its multicloud management capabilities with Azure Arc and invested in comprehensive AI-driven services such as Azure OpenAI and Azure Machine Learning to accelerate AI innovation for enterprises.

From the 59 companies assessed for this study, eight qualified for this quadrant, with three being Leaders.



**AWS** continues to maintain its leadership position by innovating in the areas of custom silicon and AI and ML integration. It has expanded its custom silicon lineup, specifically Graviton4, Inferentia2 and Trainium processors, which optimally handle specialized workloads.

### Google

**Google** Cloud's focus on AI-led infrastructure services stands out this year with its AI-ready multicloud data platform, BigQuery, which is now integrated with Gemini AI, enabling enterprises to derive real-time insights from large datasets.

### Microsoft

**Microsoft** Azure has evolved its multicloud management capabilities significantly in 2024 with Azure Arc, allowing enterprises to manage diverse environments seamlessly. Its focus on comprehensive AI-driven services with tools is accelerating the pace of AI innovation.





# SAP HANA Infrastructure Services

### Who Should Read This Section

This report is relevant to enterprises across industries in the U.S. evaluating providers of SAP HANA infrastructure services for SAP S/4HANA workloads and large-scale HANA databases. In this quadrant, ISG highlights the current market positioning of these U.S. providers based on the depth of their service offerings and market presence.

Enterprises in the U.S. are increasingly focused on optimizing costs, improving performance and enhancing operational efficiency for their SAP HANA workloads. The complexity of managing large-scale SAP environments has highlighted challenges in accurately predicting and controlling cloud infrastructure expenses. As a result, organizations are seeking greater transparency in pricing models and more sophisticated cost management tools from service providers. There is a growing demand for flexible infrastructure solutions that not only scale efficiently but also provide detailed insights into resource utilization and associated costs. ISG also observed that in 2024, there

is a heightened concern over vendor lock-in in the U.S. market. Enterprises are becoming cautious about dependency on a single cloud provider, especially when incentivized by heavy discounts tied to bundled services.

To meet these priorities, enterprises are seeking hyperscalers that offer advanced cost management tools, greater control over infrastructure customization, and strong support for migrating their SAP workloads to their platform. They are interested in hyperscalers that can assist with multicloud deployments and offer expertise in migration planning, architecture design and performance optimization.



**IT leaders** should read this report to better understand SAP HANA infrastructure service providers' relative strengths and weaknesses and learn how their market approaches impact enterprise public cloud strategies.



**Software development and technology leaders** should read this report to understand the relative positioning and capabilities of SAP HANA infrastructure providers, helping them procure infrastructure and services to migrate their workloads to public cloud platforms.



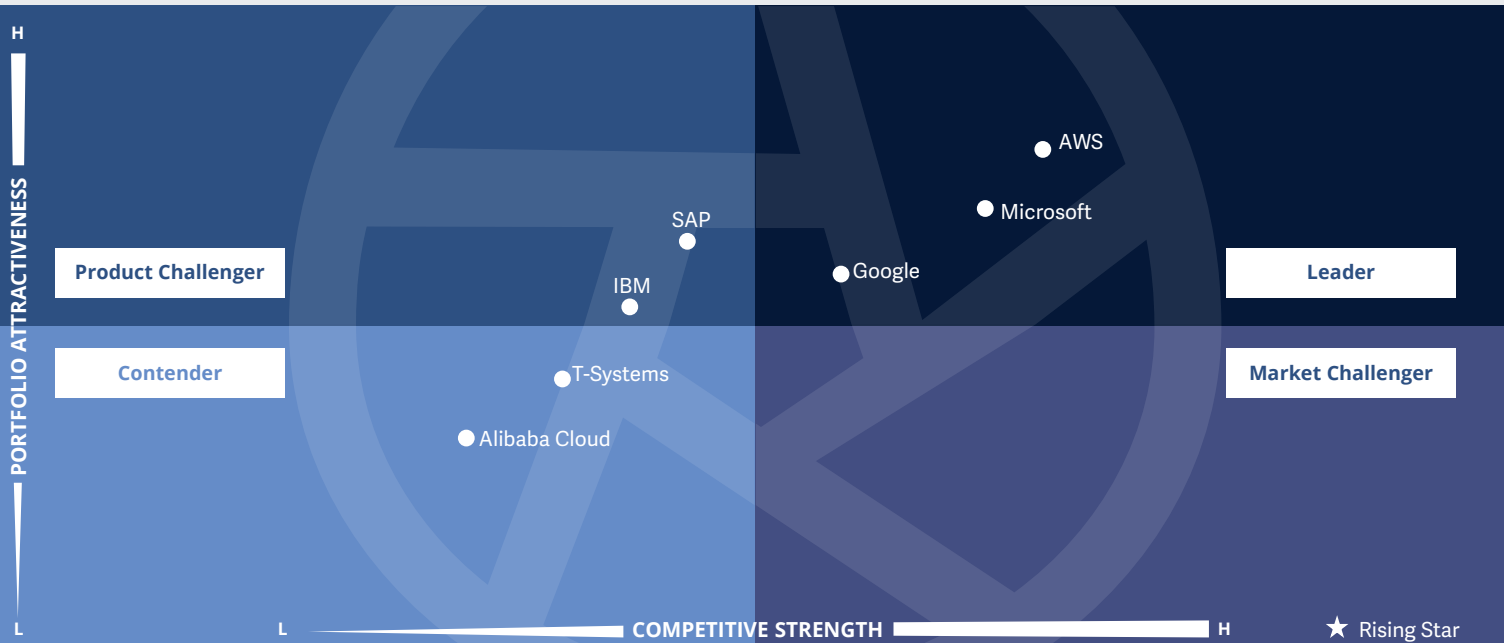
**Sourcing, procurement and vendor management professionals** should read this report to better understand the current landscape of SAP HANA infrastructure service providers in the U.S. market.





**Multi Public Cloud Services**  
**SAP HANA Infrastructure Services**

U.S. 2024



The quadrant evaluates service providers offering **SAP product hosting**, particularly **SAP S/4HANA**, within **public cloud-shared environments** using **SAP-certified infrastructure** and standard services.

*Shashank Rajmane*



### Definition

This quadrant assesses providers that offer cloud infrastructures best suited to host SAP's software portfolio, emphasizing SAP S/4HANA workloads and large-scale HANA databases. Positioned providers offer IaaS, including infrastructure operations, facilities, provisioning and scaling capacity for SAP workloads.

Key criteria for assessment include the IaaS providers' offering of data migration tools, technical support, system imaging, backup and restore capabilities, disaster recovery solutions, resource usage monitoring and dashboard management solutions. These required tools can be a part of the standard IaaS offerings or provided by partners in a marketplace.

Infrastructure providers participating in the RISE with SAP program receive a higher rating. However, RISE participation is not mandatory for inclusion in this quadrant. Ideally, the infrastructure provider should have a broad ecosystem, including SAP partners, enabling them to support clients in automating and operating their SAP instances in the cloud.

The cloud infrastructure provider should also offer presales support to help clients with migration planning, cloud architecture design, sizing and performance optimization, licensing considerations, system and database configuration, virtual private network configuration and third-party vendor solutions (toolsets). The support analysis focuses on the provider's service partner ecosystem and their expertise in conducting related migrations and operations.

The hyperscaler should offer GenAI capabilities to automate resource allocation, dynamic scaling, performance and cost optimization, backup schedules and more. However, this is not a mandatory requirement for inclusion in this quadrant.

### Eligibility Criteria

1. Offer **SAP-certified servers** with storage and connectivity for SAP products and ensure availability of SAP HANA instances in multiple memory sizes, enabling **on-demand upscaling** to accommodate instance growth and upgrades with minimum service interruptions
2. Offer **virtual machines** with memory capacity exceeding **6 TB**
3. Provide easy access; **transparent prices**; consumption-based, reserved instance; and dedicated instance billing models
4. Comply with recognized **quality standards and service certifications**, focusing on **data protection and cybersecurity**
5. Possess **low-cost storage** for backups and archiving
6. Have **multiregion** disaster recovery capabilities
7. Demonstrate automated **backup and restore functionality** (platform-based, proprietary or partner solutions)
8. Offer frameworks and **tools for application and data migration**
9. Have a **certified partner ecosystem** with SAP specialization



## SAP HANA Infrastructure Services

### Observations

Over the past four quarters, the SAP HANA infrastructure services market in the U.S. has seen significant advancements, particularly in GenAI integration capabilities and automation tools. Key public cloud service providers have enhanced their offerings to include AI-driven solutions that automate resource management and optimize SAP HANA workloads.

Enterprises increasingly seek scalable and flexible infrastructure solutions to support their large-scale SAP HANA databases. There is a growing demand for integrating GenAI technologies to enhance productivity, streamline operations and gain deeper insights from data. Enterprises are also concerned about the downtime while migrating. Therefore, they are looking to reduce downtimes, automate routine tasks and achieve real-time analytics capabilities to make faster and more informed decisions. Proactive problem detection and comprehensive data integration have become critical requirements as well.

In response, service providers are introducing advanced infrastructure capabilities and sophisticated automation tools. Providers such as AWS are leveraging GenAI to automate resource management tasks, resulting in significant cost savings and performance improvements. Google is automating routine checks and emphasizing proactive problem detection through solutions such as Workload Manager, enhancing overall operational efficiency. Microsoft has expanded its infrastructure offerings with highly scalable instances and automated deployment processes using customizable templates and open-source tools.

From the 59 companies assessed for this study, seven qualified for this quadrant, with three being Leaders.



**AWS** continues solidifying its position as a leader in SAP HANA Infrastructure services by enhancing GenAI capabilities on its Nitro Systems, which now enables the automation of tasks like resource management and optimization of SAP HANA workloads. This is setting a new standard for automating SAP workload management.


### Google

In 2024, **Google** is focusing on proactive problem detection and strong data integration capabilities through its Workload Manager solution, which significantly improves operational efficiency by automating routine checks for SAP HANA workloads.

### Microsoft

**Microsoft** has introduced its M-series VMs and TD1v4/5 instances that scale up to 120TB, pushing Azure's infrastructure capabilities for SAP workloads to new heights. Microsoft's automated deployment processes using customizable templates and open-source tools further streamline SAP migrations for clients in the U.S.





# Star of Excellence

A program, designed by ISG, to collect client feedback about providers' success in demonstrating the highest standards of client service excellence and customer centricity.





# Appendix

## Methodology & Team

The ISG Provider Lens 2024 – Multi Public Cloud Services study 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.

### Study Sponsor:

Heiko Henkes

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### Editor:

Upasana Hembram

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Manikanta Shankaran

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The research and analysis presented in this study will include data from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. ISG recognizes the time lapse and possible market developments between research and publishing, in terms of mergers and acquisitions, and acknowledges that those changes will not reflect in the reports for this study.

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

The study was divided into the following steps:

1. Definition of Multi Public Cloud 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 & use cases
4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)
5. Use of Star of Excellence CX-Data
6. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
7. Use of the following key evaluation criteria:
  - \* Strategy & vision
  - \* Tech Innovation
  - \* Brand awareness and presence in the market
  - \* Sales and partner landscape
  - \* Breadth and depth of portfolio of services offered
  - \* CX and Recommendation



## Author & Editor Biographies

*Author*

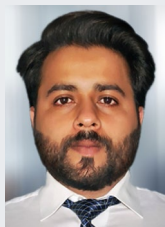


**Shashank Rajmane**  
**Manager and Principal Analyst**

Shashank Rajmane has more than a decade of extensive experience in research and works as a Principal Analyst at ISG. He leads the efforts for ISG Provider Lens™ studies — Public Cloud Services & Solutions and Private/Hybrid Cloud & Data Center Outsourcing Services. He also authors the U.S. and Global reports. Apart from these, Shashank has been part of many consulting engagements and helping ISG's enterprise clients with their cloud strategy, along with selecting the right service providers/vendors based on their IT-related buying requirements.

He has authored several white papers, thought leadership articles, briefing notes, blogs and service provider intelligence reports, especially in the next-generation hybrid cloud and infrastructure services domain. Shashank has also delivered several workshops, webinars and podcasts and has been quoted in IT journals.

*Research Analyst and Co-Author*



**Yatharth Bharti**  
**Senior Research Analyst**

Yatharth is a Senior Research Analyst at ISG. He is responsible for supporting and co-authoring Provider Lens™ studies on Public Cloud and Private Hybrid Cloud Data Centre Solutions and Services. Yatharth supports the Lead Analysts in the research process on multiple regions and authors the global summary report, and focal points. He also collaborates with the Lead Analysts in the process of rating the providers and building insights around the market trends and drivers.

Yatharth has over 5 years of experience with a strong background in research, data analysis, and business analysis. In his previous role, Yatharth oversaw custom research and analysis projects to support businesses in better decision-making. Specializing across various industries with Everest Group, Yatharth provided valuable insights and recommendations and led in-depth analyses of enterprises and their operations to provide tailored insights to the clients.





## Author & Editor Biographies



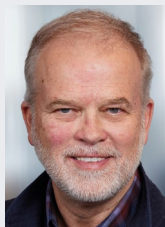
*Study Sponsor*

**Heiko Henkes**  
**Director and Principal Analyst**

Heiko Henkes serves as Director and Principal Analyst at ISG, overseeing the Global ISG Provider Lens™ (IPL) Program for all IT Outsourcing (ITO) studies alongside his pivotal role in the global IPL division as a strategic program manager and thought leader for IPL lead analysts.

Henkes heads Star of Excellence, ISG's global customer experience initiative, steering program design and its integration with IPL and ISG's sourcing practice. His expertise lies in guiding companies through IT-based business model transformations, leveraging his deep understanding

of continuous transformation, IT competencies, sustainable business strategies and change management in a cloud-AI-driven business landscape. Henkes is known for his contributions as a keynote speaker on digital innovation, sharing insights on using technology for business growth and transformation.



*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 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™

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.

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Founded in 2006, and based in Stamford, Conn., ISG employs 1,600 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.

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**DECEMBER, 2024**

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**REPORT: MULTI PUBLIC CLOUD SERVICES**