

# Multi Public Cloud Services

A research report comparing provider strengths,  
challenges and competitive differentiators

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**Tools and processes that improve cloud spending optimisation are becoming a significant trend**

The following are key trends associated with the multi public cloud market in the UK:

**Rise of hybrid multicloud solutions:** UK businesses are increasingly turning to hybrid multicloud strategies — a trend significantly more prominent compared to the global landscape. This shift is fuelled by the desire to enhance performance, manage costs effectively and strengthen security measures against malware and data breaches.

**Selective investment in premium cloud services:** With rising cloud costs, primarily due to increasing energy prices and demand for advanced services, businesses are becoming selective in their cloud investments. This trend, called premiumization, focusses on high-value services like generative AI (GenAI) while moving less critical workloads to cost-effective alternatives.

**Emphasis on sustainable cloud practices:**

In response to regulatory and environmental pressures, organisations prioritise sustainable cloud solutions. Several organisations are adopting sovereign cloud capabilities to ensure compliance with data sovereignty regulations, especially within heavily regulated sectors.

**Focus on data sovereignty and legal**

**compliance:** As AI and data-heavy applications proliferate, UK companies are placing increased importance on data residency and sovereignty to meet legal obligations. This focus is especially critical for businesses in highly regulated industries.

**Multicloud strategies for cost optimisation:**

Many enterprises are adopting multicloud strategies to avoid vendor lock-in and improve cost efficiency. This allows them to take advantage of competitive pricing and the unique strengths of various cloud providers.

In the Q2 2024 ISG Index™ call for the EMEA market, it was reported that Europe’s IT and business services sector experienced slight growth in the second quarter, as a decline in demand for managed services was largely offset by increased spending on cloud-based services.

Customers are emphasising **cost-effective** and **sustainable solutions** for cloud migration.



The EMEA ISG Index™, which tracks commercial outsourcing contracts with an ACV of or higher than \$5 million, showed a percent rise in the combined market ACV (managed services and cloud as a service) to \$7.7 billion. Following a low in Q3 2023, the market has grown sequentially for three quarters, reaching its second-highest ACV on record.

Managed services ACV fell by 8 percent to \$4.0 billion, though it saw a 3 percent sequential increase from the first quarter. A total of 295 managed services contracts were signed, up 20 percent year on year, including four mega deals (ACV of or higher than \$100 million) compared to five in Q2 2023. Smaller deals under \$10 million rose 38 percent year on year. The UK, the largest managed services market, reported its sixth consecutive \$1 billion quarter, with ACV reaching \$1.3 billion, though this represents a 13 percent decline year on year.

In the first half of 2024, combined market ACV grew 3 percent to \$15.2 billion. Managed services, at \$7.9 billion, fell by 3 percent, while cloud-based services such as XaaS rose 11 percent to \$7.3 billion. A record 571 managed

services contracts were signed, a 5 percent increase over the prior year, with six mega deals signed. On the cloud side, IaaS grew 15 percent to \$5.2 billion, while SaaS increased by a percent to \$2.1 billion.

For the full year, ISG forecasts 2 percent revenue growth for managed services (down by 100 basis points from its April forecast) and 14 percent growth for XaaS (slightly below the previous 15 percent projection).

The IaaS market saw strong growth through 2022 but faced a downturn as enterprises adjusted to macroeconomic uncertainties by optimising their existing cloud investments. This led to five consecutive quarters of declining bookings. However, in 2024, this trend reversed, with the big three hyperscalers — AWS, Google Cloud and Microsoft Azure — experiencing double-digit growth in bookings year to date.

Specifically, bookings for these cloud providers have risen by 14 percent in 2024. Moreover, 40 percent of enterprises plan to increase cloud consumption over the next 12 months.

A significant factor driving this growth is the rising demand for AI services, which is expected to continue pushing the consumption of IaaS into 2025.

Looking ahead, AWS, Google and Microsoft are broadening their portfolios to support data and AI services, aiming to retain AI workloads within their ecosystems. However, a notable trend is the increasing interoperability of data and AI services across different cloud environments. For instance, Oracle Cloud Infrastructure now supports interoperability across AWS, Azure and Google Cloud, making it easier for enterprises to integrate AI and data services across platforms.

While deploying AI and data services within these large clouds is becoming more straightforward, managing the complexity of enterprise cloud environments remains a challenge. The shift towards an intercloud architecture for data and AI could further complicate cloud management. Nearly half of enterprises plan to reduce the number of MSPs they use to manage their cloud estates over the next 12 months. However, given the growing

demand for AI and data services and the additional complexity this introduces, achieving such consolidation may prove difficult for sourcing and technology leaders in 2025.

The following are the regulatory shifts in the UK cloud services market:

**Data Act and customer switching rights:** The Data Act, agreed upon in June 2023, seeks to improve customer rights in the cloud services market by making it easier and cheaper to switch providers. It focusses on reducing switching costs like data egress charges and enhancing interoperability. While most changes take effect in 2025, discussions about its impact on vendor lock-in have already begun.

**Ofcom's market study and CMA investigation:** Ofcom completed a study on public cloud infrastructure services and raised concerns about competition. The Competition and Markets Authority (CMA) is now investigating challenges to switching providers and using multiple suppliers, potentially leading to new UK regulations.



### **Digital markets competition and consumer bill:**

This bill may impose new obligations on cloud providers with Strategic Market Status in the UK, possibly diverging from EU Digital Markets Act regulations.

### **Regulatory framework for financial services:**


HM Treasury proposed a new regulatory regime to address risks of cloud concentration in financial services. The Financial Conduct Authority (FCA) is expected to enforce resilience standards for critical cloud providers.

**G-Cloud Framework Updates:** Updates to the G-Cloud initiative include revised classifications for Microsoft services under Government Cloud v.6, which aims to ensure security compliance for public sector procurement of cloud services.

These developments indicate increased regulation, competition and consumer protection in the UK's public cloud services market.


Service providers consistently invest in technologies that enable the implementation of Agile architectures while maintaining sustainable operations across multicloud environments. They can also acquire new capabilities through inorganic growth to meet customer needs.



 Provider Positioning

	Consulting and Transformation Services — Large Accounts	Consulting and Transformation Services — Midmarket	Managed Services — Large Accounts	Managed Services — Midmarket	FinOps Services and Cloud Optimisation	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
Accenture	Leader	Not In	Leader	Not In	Leader	Not In	Not In
Alibaba Cloud	Not In	Not In	Not In	Not In	Not In	Contender	Not In
ANS Group	Not In	Not In	Not In	Contender	Not In	Not In	Not In
AWS	Not In	Not In	Not In	Not In	Not In	Leader	Leader
Birlasoft	Not In	Contender	Not In	Contender	Not In	Not In	Not In
Brillio	Not In	Product Challenger	Not In	Product Challenger	Not In	Not In	Not In
Capgemini	Leader	Not In	Leader	Not In	Leader	Not In	Not In
CGI	Product Challenger	Not In	Product Challenger	Not In	Not In	Not In	Not In
Claranet	Leader	Leader	Leader	Leader	Not In	Not In	Not In
Coforge	Not In	Market Challenger	Product Challenger	Leader	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 Optimisation	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
Cognizant	Leader	Not In	Rising Star ★	Not In	Product Challenger	Not In	Not In
Computacenter	Market Challenger	Leader	Product Challenger	Leader	Contender	Not In	Not In
Deloitte	Product Challenger	Not In	Not In	Not In	Not In	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	Leader	Not In	Not In
Ensono	Contender	Leader	Leader	Leader	Not In	Not In	Not In
Eviden (Atos Group)	Product Challenger	Not In	Market Challenger	Not In	Contender	Not In	Not In
Fujitsu	Product Challenger	Not In	Product Challenger	Not In	Not In	Not In	Not In
Google	Not In	Not In	Not In	Not In	Not In	Leader	Leader
HCLTech	Leader	Not In	Leader	Not In	Leader	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 Optimisation	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
Hexaware	Rising Star ★	Leader	Product Challenger	Leader	Product Challenger	Not In	Not In
IBM	Leader	Not In	Not In	Not In	Not In	Product Challenger	Product Challenger
IBM (Nordcloud)	Not In	Not In	Not In	Not In	Leader	Not In	Not In
Infosys	Leader	Not In	Leader	Not In	Rising Star ★	Not In	Not In
IONOS	Not In	Not In	Not In	Not In	Not In	Contender	Not In
Kainos	Not In	Contender	Not In	Contender	Not In	Not In	Not In
Kyndryl	Product Challenger	Not In	Leader	Not In	Leader	Not In	Not In
Lemongrass Consulting	Not In	Market Challenger	Not In	Not In	Not In	Not In	Not In
Littlefish	Not In	Contender	Not In	Contender	Not In	Not In	Not In
Logicalis	Product Challenger	Contender	Not In	Market Challenger	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 Optimisation	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
LTIMindtree	Leader	Leader	Product Challenger	Leader	Product Challenger	Not In	Not In
Microland	Contender	Product Challenger	Contender	Product Challenger	Not In	Not In	Not In
Microsoft	Not In	Not In	Not In	Not In	Not In	Leader	Leader
Mphasis	Market Challenger	Product Challenger	Contender	Rising Star ★	Product Challenger	Not In	Not In
N-iX	Not In	Rising Star ★	Not In	Not In	Not In	Not In	Not In
NTT DATA	Product Challenger	Not In	Not In	Not In	Not In	Not In	Not In
OneAdvanced	Not In	Not In	Not In	Contender	Not In	Not In	Not In
Oracle	Not In	Not In	Not In	Not In	Not In	Product Challenger	Not In
OUTSCALE	Not In	Not In	Not In	Not In	Not In	Contender	Not In
OVHcloud	Not In	Not In	Not In	Not In	Not In	Contender	Contender



 Provider Positioning

	Consulting and Transformation Services — Large Accounts	Consulting and Transformation Services — Midmarket	Managed Services — Large Accounts	Managed Services — Midmarket	FinOps Services and Cloud Optimisation	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
Persistent Systems	Not In	Contender	Not In	Product Challenger	Not In	Not In	Not In
Pythian	Not In	Contender	Not In	Not In	Not In	Not In	Not In
Rackspace Technology	Product Challenger	Leader	Leader	Leader	Leader	Not In	Not In
SAP	Not In	Not In	Not In	Not In	Not In	Not In	Product Challenger
SCC	Not In	Not In	Not In	Market Challenger	Not In	Not In	Not In
Slalom	Not In	Contender	Not In	Contender	Not In	Not In	Not In
Softcat PLC	Not In	Not In	Not In	Contender	Not In	Not In	Not In
Sopra Steria	Product Challenger	Not In	Product Challenger	Not In	Not In	Not In	Not In
SysGroup	Not In	Not In	Contender	Not In	Not In	Not In	Not In
TCS	Leader	Not In	Leader	Not In	Product Challenger	Not In	Not In



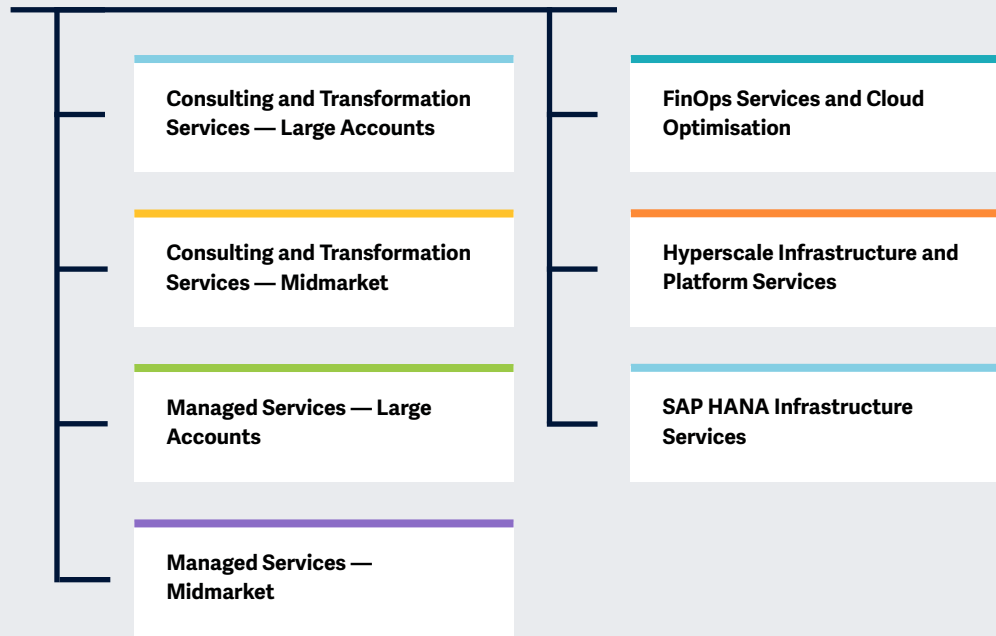
 Provider Positioning

	Consulting and Transformation Services — Large Accounts	Consulting and Transformation Services — Midmarket	Managed Services — Large Accounts	Managed Services — Midmarket	FinOps Services and Cloud Optimisation	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
Tech Mahindra	Contender	Leader	Product Challenger	Leader	Product Challenger	Not In	Not In
Telefonica Tech	Not In	Leader	Product Challenger	Product Challenger	Not In	Not In	Not In
T-Systems	Contender	Not In	Contender	Contender	Contender	Not In	Contender
Unisys	Product Challenger	Leader	Product Challenger	Leader	Product Challenger	Not In	Not In
Version 1	Not In	Not In	Contender	Not In	Not In	Not In	Not In
Virtusa	Not In	Contender	Not In	Contender	Not In	Not In	Not In
Wipro	Leader	Not In	Leader	Not In	Leader	Not In	Not In
Zensar Technologies	Not In	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Not In	Not In



This study focusses 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 optimise 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 organisations 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 datacentres.



Enterprises recognise the necessity of adapting to modern cloud environments to optimise performance and scalability, prompting a heightened demand for rearchitecting strategies and expertise in cloud-native solutions. Demand for sovereign cloud infrastructure is rising, especially in Europe. Organisations are prioritising 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 towards 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 Optimisation, 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

### Who Should Read This Section

This report is relevant to large enterprises in the UK for evaluating consulting and transformation service providers in the multi public cloud environment. In this quadrant, ISG defines the current market positioning of service providers in the UK and demonstrates how they address key challenges large enterprises face with their public cloud models.

Enterprises are increasingly adopting public cloud solutions, collaborating with consulting and transformation service providers to address challenges such as workload assessment, change management and skill shortages. They prioritise migrating workloads to optimise cloud governance and develop cloud-native services. Service providers emphasise a business-centric approach, integrating technology with organisational goals to ensure cloud solutions deliver tangible outcomes. They also help in creating cloud strategy road maps that prioritise applications for migration based on factors such as security, cost efficiency and business relevance.

Enterprises are also seeking multicloud solutions while focusing on sustainable cloud practices. Consulting and transformation service providers play a crucial role by offering frameworks for workload migration aligned with the UK's operational landscape and data protection regulations.

ISG notes a shift in the UK towards application modernisation, moving beyond simple rehosting.



**IT leaders** should read this report to understand the relative strengths and weaknesses of consulting and transformation service providers leading the drive towards digital transformation in enterprises.



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

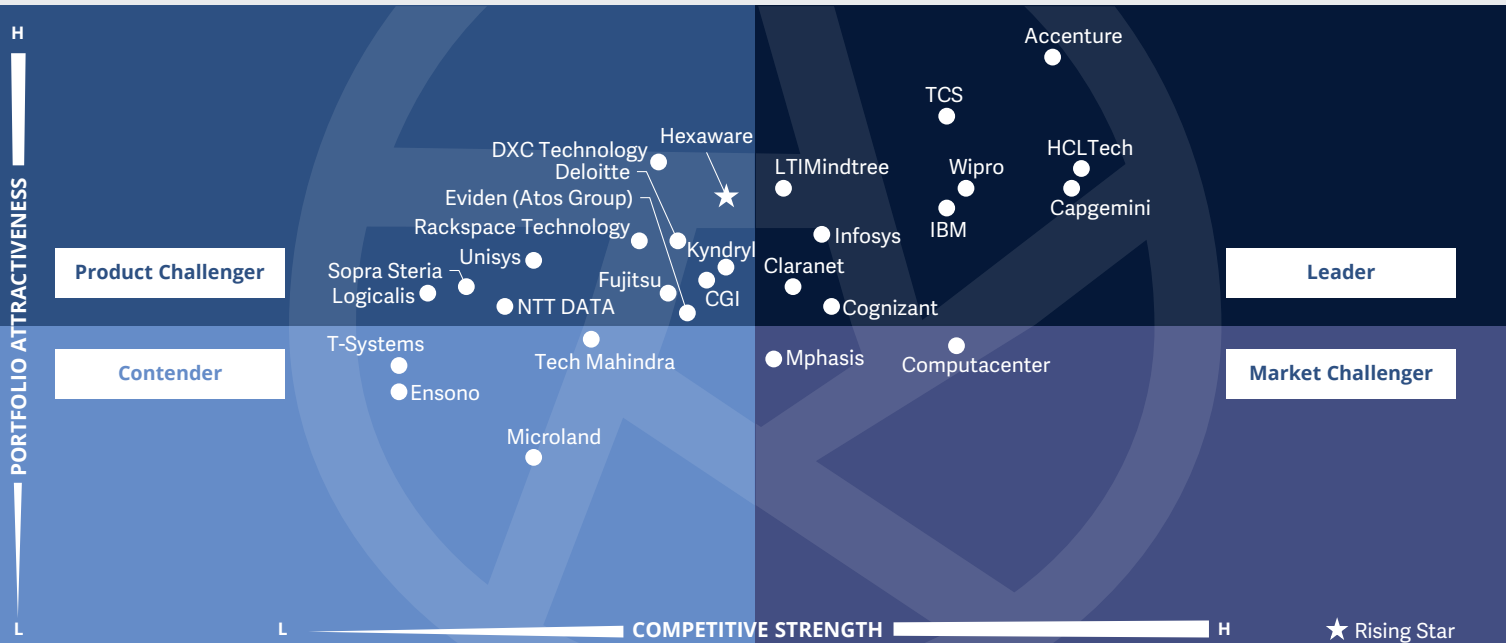


**Sourcing, procurement and vendor management** professionals should read this report to understand the current landscape of consulting and transformation service providers in the UK.



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

U.K. 2024



This quadrant assesses consulting service providers specialising in **migrating applications** to multicloud environments and **transforming the legacy infrastructure** of large accounts to modern digital platforms.

Meenakshi Srivastava



## Consulting and Transformation Services – Large Accounts

### Definition

This quadrant assesses service providers that offer public cloud consulting and transformation services that help enterprises modernise, optimise 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 modernisation 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 modernisation** 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 analyse clients' IT landscape, optimise 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



### Observations

Accenture remains a Leader in the market due to the portfolio's attractiveness, having bolstered technological capabilities through acquisitions to maintain its position. However, the company's premium pricing and limited customisation options have led to dissatisfaction among end users. Capgemini stands out for its competitive strength, further enhanced by its 2022 acquisitions. HCLTech's competitive strength is comparable to Accenture's, while Wipro and IBM excel in automation and have made significant investments in GenAI. These investments have helped both companies maintain a strong presence among large enterprises. TCS continues to perform well in terms of portfolio attractiveness, though its competitive strength trails behind Wipro and IBM. LTIMindtree has become a Leader, and Hexaware has become a Rising Star as they have been actively expanding public cloud consulting services in the region. NTT Data has been included as a Product Challenger.

From the 58 companies assessed for this study, 28 qualified for this quadrant, with 10 being Leaders and a Rising Star.

### accenture

**Accenture** leads the market with numerous certifications and competencies from key hyperscalers. Its proprietary platforms such as SynOps, myConcerto and myWizard enable enhanced cloud orchestration and application transformation for end users.

### Capgemini

**Capgemini** demonstrates deep expertise across sectors such as banking, insurance, consumer goods, manufacturing and technology. Its knowledge of Agile and DevOps ensures smooth cloud migration.

### claranet

**Claranet**, with specialisations from leading hyperscalers, offers GreenOps to track sustainability data. Recent acquisitions have bolstered its cybersecurity capabilities.

### cognizant

**Cognizant** uses AI-driven tools to optimise IT operations, while its Skygrade platform accelerates cloud-native architecture adoption, reducing costs.

### HCLTech

**HCLTech's** CloudSMART strategy offers a wide range of services for cloud migration and transformation, specialising in areas such as DevOps, SAP and mainframe modernisation.

### IBM

**IBM's** primary offering centres around the IBM Cloud, backed by strategic alliances with other hyperscale cloud providers. IBM's Platinum membership in CNCF and Red Hat's recognition for its robust containerisation and cloud orchestration capabilities are noteworthy.

### Infosys

**Infosys** has significantly invested in training and certifying its workforce in various cloud environments. Solutions such as Catalyst and Innov8 have facilitated smooth transitions for enterprise customers to the SAP S/4HANA environment.



## Consulting and Transformation Services – Large Accounts



**LTIMindtree** has expanded its competitive edge and invested in new capabilities. Its workforce of over 80,000 professionals across 29 countries ensures seamless client service.



**TCS** has made significant investments in certifying its employees in cloud technologies. Around 16 percent of its workforce is based in the UK. Through the COIN ecosystem, which includes startups and specialists, customers can leverage emerging technologies to enhance their cloud environment.



**Wipro** accelerates cloud adoption with its digital repository, offering cloud-native DevOps, AIOps, IaC and blockchain capabilities within a GDPR-compliant framework.

### **HEXAWARE**

**Hexaware** (Rising Star) optimises and manages hybrid multicloud environments through its vendor-neutral platform, Tensai®. Its Amaze® solution and services have achieved a reduction in TCO by around 40 percent.





# Consulting and Transformation Services – Midmarket

### Who Should Read This Section

This report is relevant to midsize enterprises in the UK for evaluating consulting and transformation service providers in the multi public cloud environment. In this quadrant, ISG defines the current market positioning of service providers in the UK and demonstrates how they address vital challenges midsize enterprises face with their public cloud models.

Midsize enterprises in the UK prefer service providers that offer specialised public cloud consulting and transformation services that cater to the unique needs of businesses seeking to leverage cloud technologies effectively. These firms favour providers with regional expertise and adherence to local frameworks. Enterprises collaborate with these providers to address challenges such as workload assessment, change management and skill shortages. Cost reduction is a priority for midsize businesses, and these providers help clients reduce expenses through efficient resource management and the adoption of scalable cloud solutions. They also focus on

enhancing security and compliance, ensuring businesses meet regulatory standards while safeguarding sensitive data.

This momentum for cloud migration is driving rapid digital transformation and enhancing CX. Consulting and transformation service providers assist by assessing workloads, crafting transformation road maps, guiding migration, reimagining legacy applications and refining cloud governance.

ISG highlights an increasing emphasis on middleware, the first step toward cloud modernisation among midmarket enterprises.



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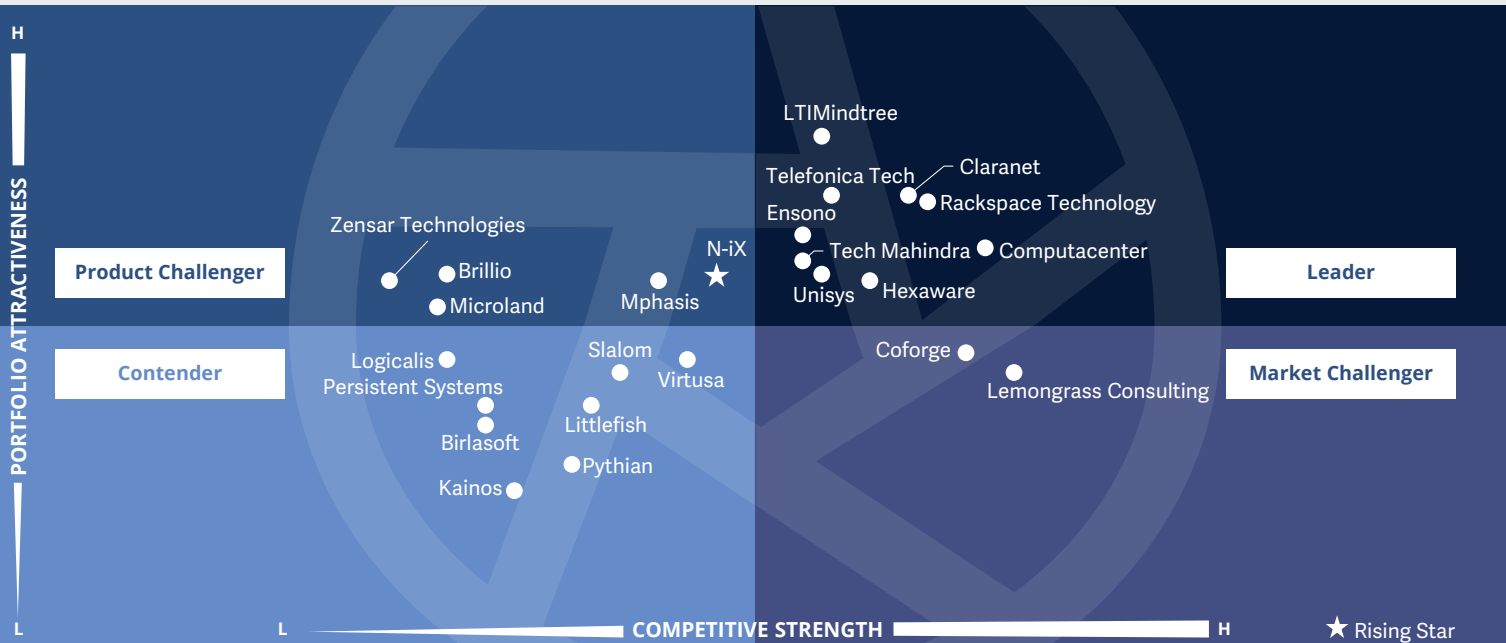
**Sourcing, procurement and vendor management professionals** should read this report to understand the current landscape of consulting and transformation service providers in the UK.





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

U.K. 2024



This quadrant assesses consulting service providers specialising in **migrating applications** to multicloud environments and **transforming** the **legacy infrastructure** of SMEs to modern digital platforms.

Meenakshi Srivastava



### Definition

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- **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 whilst implementing GenAI solutions in existing ecosystems.

### Eligibility Criteria

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2. **Methods and frameworks** to analyse clients' IT landscape, optimise 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

Although Telefonica Tech's product portfolio is not as strong as LTIMindtree's, it continues to make targeted acquisitions. Such acquisitions enhance the company's portfolio attractiveness and have significantly gained traction among its customers. Claranet's portfolio attractiveness is not as high as its competitive strength, mainly due to its strong localisation and expertise in the UK.

N-iX continues to expand its footprint in the region, particularly in the midmarket, positioning itself to become a Rising Star.

Due to their significant presence in the UK market, there are new entrants in this quadrant: Brillion (Product Challenger), Kainos (Contender) and Littlefish (Contender).

Tech Mahindra provides transformation services to large and midmarket clients. The company is placed as a Leader in this quadrant and a Contender in the large accounts quadrant.

Positioned as a Market Challenger, Lemongrass Consulting's competitive strength closely follows Claranet's. The company has established a long-standing partnership with Microsoft and is known for assisting midmarket companies in optimising their SAP on Azure environments.

From the 58 companies assessed for this study, 24 qualified for this quadrant, with 9 being Leaders and a Rising Star.

### claranet

**Claranet's** customers deploy applications in cloud environments using its partnerships with Ansible and Terraform. Its managed container services enable customers to build and manage Kubernetes across various cloud platforms.

### Computacenter

**Computacenter's** collaborations with ISVs such as IBM, Dell, Cisco, HPE and Nutanix have enabled the company to develop turnkey solutions for its customers. Its cybersecurity offerings address multiple stages of the cybersecurity lifecycle.

### ensonō

**Ensono's** Envision Advisor platform offers customers enhanced visibility into resource utilisation across multicloud environments. The company's acquisitions of ExperSolve and AndPlus have strengthened its mainframe and cloud-native capabilities.

### HEXAWARE

**Hexaware's** Tensai® for cloud solution provides unified, single-pane observability across AppOps, DataOps and InfraOps in multicloud environments. Its Outcome Linked Flexible Engagement Model is specifically designed to align with customers' cloud consumption patterns.

### LTIMindtree

**LTIMindtree** provides comprehensive cloud transformation solutions designed for midmarket enterprises. Its Infinity Cloud Platform includes a suite of over 100 tools supporting assessment, mass migration, modernisation, DevSecOps, FinOps, observability and sustainability.

### **rackspace** technology

**Rackspace Technology's** transformation services focus on modernising legacy applications and establishing landing zones for application development. Its strong cybersecurity capabilities safeguard applications against advanced persistent threats.



## Consulting and Transformation Services – Midmarket

### TECH mahindra

**Tech Mahindra** supports its clients through extensive onshore and nearshore operations, providing advisory services in containerisation, orchestration, microservices and site reliability engineering (SRE) to aid in modernising legacy infrastructures.

### Telefónica Tech

**Telefónica Tech's** public cloud services are complemented by its cybersecurity offerings, particularly through the launch of its NextDefense service.

### UNISYS

**Unisys** continues to expand its offerings in cloud management services, emphasising a cloud-agnostic approach that facilitates seamless integration across various platforms such as AWS and Microsoft Azure.

### N-iX

**N-iX** (Rising Star) has emphasised its expertise in cloud-native services, helping clients develop and migrate applications to cloud platforms effectively.





“Unisys exemplifies a client-focussed transformation approach that simplifies complexity. With a strong reputation in mission-critical security, it offers flexible solutions that scale to meet evolving client needs.”

*Meenakshi Srivastava*

# Unisys

## Overview

Unisys is headquartered in Pennsylvania, US. 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 offers secure solutions for multicloud environments, particularly for the public sector and highly regulated commercial clients or workloads. The UK contributed 14.4 percent, or \$289.3 million, to its revenue in FY23. It has one office in the UK, located in Milton Keynes.

## Strengths

### **Innovative workshop advisory approach:**

Unisys utilises a workshop advisory approach with an objective-based process framework for cloud assessments and AI-driven digital transformation. By employing an automated process, Unisys understands client scenarios and prioritises key transformations in strategy, change management, DevSecOps, security governance, compliance and lifecycle management, enhanced by AIOps and FinOps analytics.

### **Hyperautomation and compliance:**

Unisys’ ZeroOps approach stands out in hyperautomation by integrating security and compliance through the CloudForte® Cloud Management Asset Suite. This strategy emphasises continuous transformation and governance, enabling secure and

compliant operations, runtime FinOps and advanced analytics to maintain a robust cloud infrastructure.

### **Tailored cloud solutions and accelerated modernisation:**

Unisys combines expertise in governance and cloud-native migrations to deliver tailored solutions efficiently. The company’s SDLC Framework and over 35 platforms accelerate cloud modernisation, while its focus on strategy, security and lifecycle planning enhances flexibility in advisory, automation and application modernisation services.

## Caution

Unisys should enhance efficiency and financial management by expanding hybrid cloud optimisation and FinOps solutions across its portfolio. It should also ensure alignment among assessment, migration and modernisation frameworks, as well as hyperscaler migration programmes.





# Managed Services — Large Accounts

### Who Should Read This Section

This report is relevant to large enterprises in the UK that are evaluating public cloud MSPs. In this quadrant, ISG defines the current market positioning of service providers in the UK and demonstrates how they address key challenges large enterprises face with their public cloud models.

Public cloud managed services in the UK are experiencing significant growth, with providers offering services designed to optimise cloud environments for enterprises. Large enterprises in the UK seek providers with extensive experience in end-to-end cloud management, which includes strategy development, migration and ongoing support. These services ensure operational efficiency, security and compliance while enabling businesses to scale rapidly.

Service providers manage client workloads on public cloud and hyperscale environments, allowing enterprises to focus on other tasks. As businesses increasingly adopt cloud-native, DevOps and IoT technologies, they seek providers skilled in rearchitecting applications

for cloud-native environments. Public cloud managed services help implement these solutions, utilising containers and serverless functions for cost efficiency.

UK enterprises are pursuing cloud-agnostic solutions to enhance multicloud management. The cloud managed services landscape is evolving with a focus on FinOps capabilities, automation and sustainability. Real-time monitoring by managed service providers enables a reduction in cost and operational expenses while promoting carbon-neutral solutions.



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



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

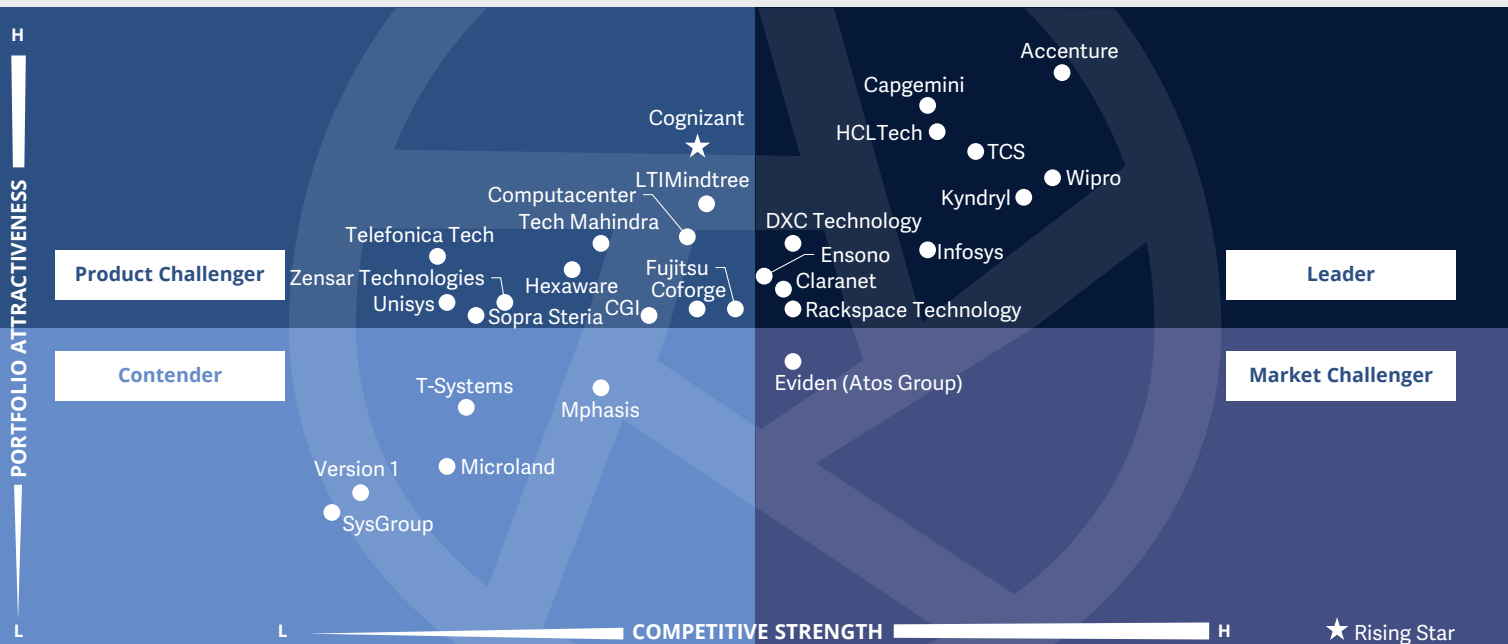


**Sourcing, procurement and vendor management professionals** should read this report to understand the current landscape of MSPs in the UK.



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

U.K. 2024



This quadrant assesses **MSPs** that are capable of supporting **large enterprises** with **operations, security** and **sustainability** of their **multicloud environments**, ensuring optimal performance and compliance with industry standards.

Meenakshi Srivastava





## Managed Services – Large Accounts

### Definition

This quadrant assesses managed service providers specialising 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 maximise performance, reduce costs and ensure compliance and security. Service providers use AIOps and GenAI tools to automate processes, auto-scale and optimise resources, offer predictive analytics and more. They also use FinOps tools to provide transparency on cloud resources, capacity utilisation 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

Accenture continues to lead the Managed Services — Large Accounts quadrant, excelling in both portfolio attractiveness and competitive strength. The company has recently expanded its technological capabilities through acquisitions, helping it maintain a strong market position. However, its premium pricing may pose challenges moving forward.

Wipro's competitive strength matches that of Accenture, driven by its expertise in automation and significant investments in GenAI. While HCLTech trails Wipro in competitive strength, it boasts a highly attractive portfolio, supported by its capabilities in container technology and AI. Known for its cost-effectiveness, HCLTech is expected to gain further traction among customers. Infosys, Kyndryl and TCS are also recognised as Leaders in this quadrant, with strong competitive strengths, although they fall short of Capgemini in portfolio attractiveness.

Ensono, recognised for its strong managed services for public cloud transformation, is positioned as a Leader in this quadrant.

Cognizant's higher revenue growth in the region compared to other providers makes it a Rising Star in this quadrant. Eviden has moved from a Product Challenger to a Market Challenger this year, while Fujitsu has dropped from a Leader to a Contender due to the recent negative news around its post office scam and client losses.

Due to the enhancement of its portfolio in the region, Zensar Technologies has moved from a Contender to a Product Challenger.

From the 58 companies assessed for this study, 29 qualified for this quadrant, with 11 being Leaders and a Rising Star.



**Accenture's** strong hyperscaler partnerships, cloud-native investments, orchestration capabilities via assets such as SynOps, myConcerto and myWizard and SAP HANA services have been bolstered by the acquisition of Einr AS.



**Capgemini** helps businesses modernise their operations and optimise cloud infrastructure with a comprehensive suite of cloud services. They focus on making cloud solutions cost-effective, secure and automated through practices such as GreenOps, FinOps and SRE.



**Claranet** has a strong UK presence with over 1,500 experts and has established a CCoE for efficient cloud migration. Its managed services platform also features advanced DevSecOps and AIOps capabilities.



**DXC Technology** leverages an extensive repository of AI-driven accelerators, blueprints and deployment scripts to uncover optimisation opportunities throughout the workflow. The company also employs third-party observability tools to detect anomalies.



**Ensono** provides a wide range of cloud services, including serverless computing environments such as AWS Lambda and Azure Functions. The company also offers a complete application performance management solution and utilises third-party performance monitoring tools.



**HCLTech's** CloudSMART strategy includes diverse IT services designed to speed up customer cloud migration and transformation. Its broad portfolio of capabilities covers migration, DevOps, SAP, storage and mainframe modernisation.



**Infosys** heavily invests in training and certifying its workforce in various cloud environments. Its proprietary solutions, Catalyst and Innov8, help enterprise customers smoothly transition into the SAP S/4HANA environment.



## Managed Services – Large Accounts

### kyndryl

**Kyndryl's** primary practice areas encompass cloud, Core Enterprise and zCloud, digital workplace, application, data and AI, network and edge, and security and resiliency. It leverages microservices, Kubernetes, DevOps and IaC within its managed public cloud services.

### rackspace technology

**Rackspace Technology** can connect and manage its customers' workloads across the three major public cloud providers — AWS, Microsoft Azure and Google Cloud. The company claims more than 10,000 technical certifications, supported by over 2,000 certified experts.



**TCS** invests in a cloud-ready workforce with a local presence in the UK for improved market insight. Its automation tools, like ignio, have effectively helped regional customers reduce mean time to recovery (MTTR).



**Wipro** speeds up cloud adoption and decreases time to market with its digital repository. Its varied portfolio, which adheres to GDPR and encompasses cloud-native DevOps, AIOps, IaC and blockchain capabilities, meets a wide range of client requirements.



**Cognizant** (Rising Star) utilises AI-driven tools to optimise operations and enhance visibility into IT processes. Cognizant Skygrade assists clients in rapidly adopting cloud-native architectures, leading to cost savings.





# Managed Services — Midmarket

### Who Should Read This Section

This report is relevant to midsize enterprises in the UK that are evaluating public cloud MSPs. In this quadrant, ISG defines the current market positioning of service providers in the UK and demonstrates how they address key challenges midsize enterprises face with their public cloud models.

Midsize enterprises in the UK prefer service providers offering flexible and cost-effective services that cater specifically to their needs. These services facilitate seamless transitions to the cloud, addressing challenges such as cost management and compliance with regulations such as GDPR.

Service providers handle client workloads on public cloud and hyperscale platforms, allowing enterprises to focus on core activities. As companies increasingly adopt cloud-native, DevOps and IoT technologies, they seek providers skilled in rearchitecting applications for cloud environments. Public cloud managed services support implementing these solutions, leveraging containers and serverless functions for improved cost

efficiency. In the UK, businesses are interested in cloud-agnostic solutions for their multicloud setups, often prioritising specialised providers with competitive pricing. Enterprises utilise MSPs' automation and AI for monitoring and predictive maintenance, leading to cost savings and reduced overhead. Several UK firms are also investing in self-service and auto-heal capabilities for managing ticket requests.



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



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

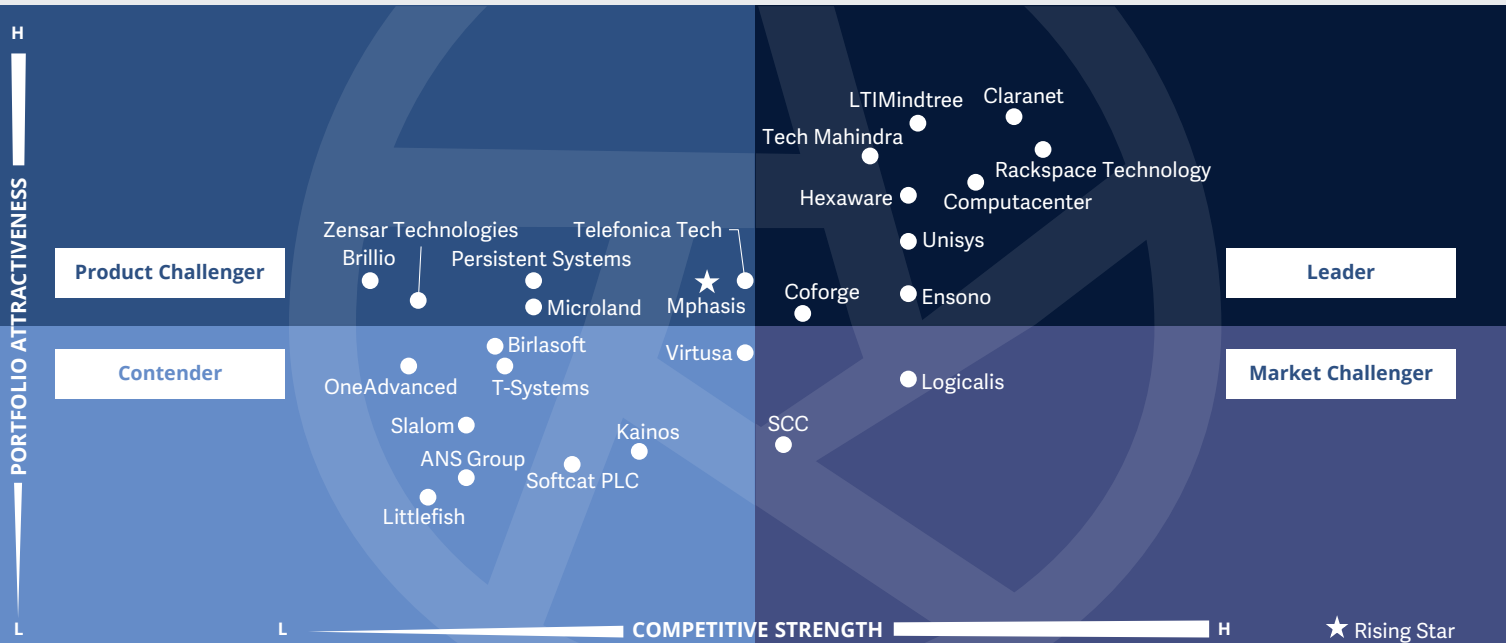


**Sourcing, procurement and vendor management professionals** should read this report to understand the current landscape of MSPs in the UK.



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

U.K. 2024



This quadrant evaluates **MSPs** that support two or more public clouds and deliver **automation** and **value-added services** to midmarket enterprise clients, ensuring seamless integration and enhanced operational efficiency.

Meenakshi Srivastava



## Managed Services – Midmarket

### Definition

This quadrant assesses managed service providers specialising 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 maximise performance, reduce costs and ensure compliance and security. Service providers use AIOps and GenAI tools to automate processes, auto-scale and optimise resources, offer predictive analytics and more. They also use FinOps tools to provide transparency on cloud resources, capacity utilisation 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

LTIMindtree has emerged as a Leader in the midmarket, with a notably high portfolio attractiveness. Claranet leads in both portfolio attractiveness and competitive strength, benefiting from its strong local expertise in the UK. Rackspace Technology's competitive strength matches Claranet's, reinforced by its network of local experts.

Tech Mahindra excels in managed services, which is its core strength compared to consulting and transformation offerings, although the company's competitive strength is balanced across both areas. Hexaware, Unisys and Computacenter are well positioned among the Leaders. Sopra Steria and Telefonica Tech perform better in the Consulting and Transformation quadrant than in the Managed Services quadrant. Sopra Steria's portfolio attractiveness is slightly lower in this area, while Telefonica Tech is classified as a Product Challenger.

Coforge, ranked as a Leader, continues to focus on enhancing the attractiveness of its managed services portfolio.

There are new Contenders in the quadrant — ANS Group, Kainos, Littlefish and Softcat. Brillio is a new Product Challenger, and SCC is a Market Challenger. Persistent Systems saw a rise in portfolio attractiveness to become a Product Challenger from a Contender.

From the 58 companies assessed for this study, 26 qualified for this quadrant, with 9 being Leaders and a Rising Star.

### claranet

**Claranet** has gained multiple specialisations from top hyperscalers. Its GreenOps solutions compile data from various applications across departments to provide insights into sustainability. The company's acquisitions have strengthened its cybersecurity capabilities.

### Coforge

**Coforge's** proprietary platform, Quasar, comes pre-equipped with over 100 APIs, improving application deployment across multicloud environments. The company employs edge solutions such as AWS Outposts, Azure Stack, AWS Local Zones and Nutanix ROBO to provide timely services.

### Computacenter

**Computacenter** provides ongoing support tailored to client needs, including flexible Resource-on-Demand support and training services that ensure clients can effectively manage their new cloud environments post-implementation.

### ensono

**Ensono** provides a full range of cloud services, including serverless computing environments such as AWS Lambda and Azure Functions. The company also delivers a robust Application Performance Management (APM) solution and utilises third-party performance monitoring tools.

### HEXAWARE

**Hexaware** manages and optimises hybrid multicloud environments using its vendor-agnostic platform, Tensai®. Its Amaze® solution and service range has reduced the total cost of ownership (TCO) by approximately 40 percent.





## Managed Services – Midmarket



**LTIMindtree** has strengthened its partnership with AWS as a Tier 1 Managed Service Partner, achieving nine AWS Competencies in areas such as data & analytics and ML.



In March 2024, **Rackspace Technology** introduced Rackspace UK Sovereign Services, providing end-to-end digitally sovereign cloud solutions specifically designed for the UK public sector and other regulated industries.



**Tech Mahindra** continues to develop over 40 domain-specific cloud solutions, incorporating next-generation technologies such as GenAI, IoT and ML.



**Unisys** has expanded its offerings with the UK Public Sector Secure Cloud (UKPSC), an IaaS solution designed to provide a secure virtual hosting environment for public sector applications.



**Mphasis** (Rising Star) is set to double its presence in the UK by establishing an Innovation Hub in London, focussing on quantum computing, quantum cryptography and AI.





“Unisys stands out for its advanced platforms and solutions, harnessing deep expertise in AI, data analytics and industry-specific applications to meet its clients’ evolving needs.”

Meenakshi Srivastava

# Unisys

## Overview

Unisys is headquartered in Pennsylvania, US. 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 prioritises client scenarios and includes strategy, DevSecOps and lifecycle planning as a part of its managed services. It offers secure solutions for multicloud environments, particularly for the public sector and highly regulated commercial clients or workloads. The UK contributed 14.4 percent, or \$289.3 million, to its revenue in FY23. It has one office in the UK, located in Milton Keynes.

## Strengths

**Innovative ZeroOps delivery model:** Unisys excels with its unique ZeroOps approach, which emphasises hyperautomation to embed security and compliance seamlessly. Utilising the CloudForte® capability framework, this model provides clients with a smooth pathway to achieve their cloud goals. Configuration management database (CMDB) auto-discovery technology enables rapid deployment of AI-driven hybrid and cloud solutions, facilitating quick adaptations to evolving business needs.

**Comprehensive cybersecurity suite:** Unisys provides a robust cybersecurity suite that includes advisory services, compliance, monitoring and end-to-end service delivery. This suite is strengthened by its dedicated ecosystem and strategic partnerships,

such as collaboration with Dell to develop the Unisys Cyber Recovery Solution. The company regards Zero Trust Architecture as a widely embraced and continually evolving approach to cybersecurity.

### Adaptable industry solutions:

Unisys is capable of aligning modular solutions — such as licensing and permitting, travel and transportation logistics and public sector benefits programmes — with specific industry verticals to ensure compliant implementation. Its dedication to providing customised, application-centric solutions for each sector, marked by rapid implementation and efficient delivery cycles, sets it apart as a Leader in the industry.

## Caution

Unisys should prioritise enhancing regional capabilities and investing in self-sufficiency in the UK. It would also be beneficial to focus on meeting domestic sovereignty requirements to ensure more secure operations.





# FinOps Services and Cloud Optimisation

### Who Should Read This Section

This report is relevant to enterprises in the UK that are evaluating multi public cloud FinOps service providers. In this quadrant, ISG highlights the current market positioning of FinOps service providers in the UK and demonstrates how they address key challenges enterprises face.

FinOps and cloud optimisation services in the UK are gaining traction as organisations recognise the importance of managing cloud costs effectively. UK enterprises are increasingly looking for service providers to optimise cloud costs, enhance efficiency and maximise their return on cloud investments. They prioritise secure and cost-effective planning and execution of cloud migrations while maintaining robust environments. These enterprises seek providers that can assist with cloud budgeting and forecasting while

mitigating security risks and compliance issues. Evaluating providers involves assessing their experience and understanding of specific cloud environments, service offerings and pricing structures.

Recognising the demand for FinOps and cloud optimisation, UK service providers are investing in skilled personnel and tools to deliver tailored services that meet the diverse needs of various businesses and industries. By leveraging advanced analytics and automation, these service providers help organisations identify inefficiencies and reduce waste, often achieving significant savings.



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



**Software development and technology leaders** should read this report to understand cloud FinOps service providers' positioning and the impact of their offerings on cloud usage dashboard creation.

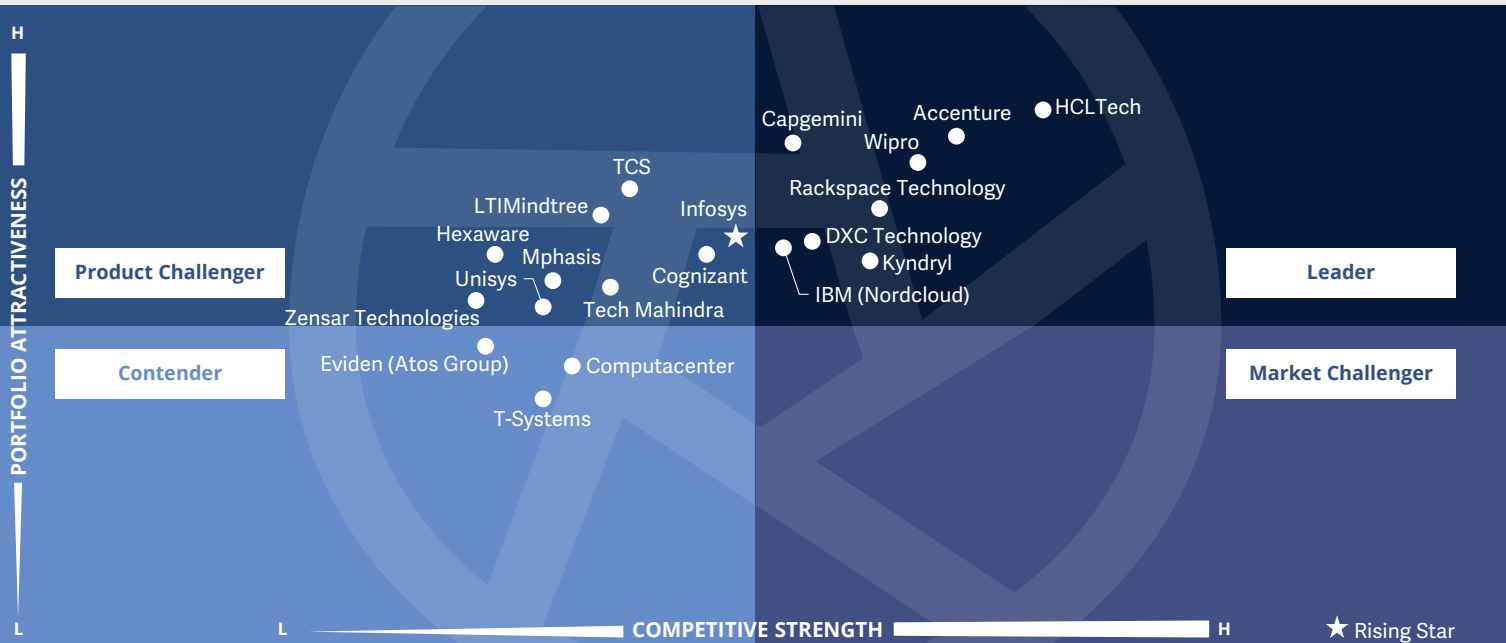


**Sourcing, procurement and vendor management professionals** should read this report to understand the current landscape of FinOps service providers in the UK.



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

U.K. 2024



This quadrant evaluates service providers that deliver FinOps services, helping enterprises showcase their **cloud expenditures**, adhere to **corporate governance** and generate insights for **optimising cloud usage**.

Meenakshi Srivastava



## FinOps Services and Cloud Optimisation

### 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 optimisation for AWS, Microsoft Azure, Google Cloud and other public cloud platforms. These providers undertake projects that include workload assessments to analyse and reduce cloud expenses and maximise 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 analyse and forecast usage, pricing and

financial impacts. Providers also use data analytics to identify underutilised resources and optimisation opportunities.

Clients expect providers to actively manage FinOps tools to maximise cloud resource utilisation 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 optimise infrastructure costs and maintain budget adherence.

### Eligibility Criteria

1. **FinOps-certified full-time employees (FTEs) in at least three hyperscalers** among the popular ones such as 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 organisation, including the three major FinOps framework elements – inform, optimise and operate
3. **FinOps services regulated by cost-saving targets** centred on **budget control** SLAs
4. **Ability to enable clients** to develop their internal FinOps teams from various organisations within the enterprise
5. Ability to empower clients with organisational change management (OCM) for **sustainable FinOps** practices
6. **Ability to demonstrate optimisation expertise** with client examples; FinOps reporting is not enough for qualification



## FinOps Services and Cloud Optimisation

### Observations

Several leading service providers in this quadrant are members of the FinOps Foundation, a nonprofit under the Linux Foundation that focusses on establishing best practices to optimise cloud operations spending. These companies offer a comprehensive suite of services, including advisory solutions and a mix of proprietary and white-labelled tools.

HCLTech stands out among its peers in this market. As an active member and contributor to the FinOps Foundation, it collaborates with organisations like the CNCF. The company has made significant investments in gaining accreditations from major hyperscalers and certifying its workforce in cloud technologies. Its collaboration with CNCF has enabled the development of innovative container technologies, which help users optimise cloud spending — demonstrated through several company use cases.

Accenture ranks just behind HCLTech in portfolio attractiveness and strength. Despite expanding its technological capabilities through acquisitions, Accenture's large size and premium pricing may present some challenges. Capgemini and Wipro follow closely behind Accenture. Accenture's investments in AI applications enable it to offer differentiated FinOps services to clients. Cognizant is positioned as the Rising Star. Unisys and Eviden have moved from Contender to Product Challenger.

From the 58 companies assessed for this study, 20 qualified for this quadrant, with 8 being Leaders and a Rising Star.

### accenture

**Accenture** provides various FinOps services that enhance the cloud lifecycle through evaluations and cost-saving initiatives. The company's certifications, specialisations with hyperscalers and strategic alliances strengthen its capacity to deliver effective cloud solutions.

### Capgemini

**Capgemini** employs advanced tools, visualisation techniques and cloud-native services to optimise cloud expenditures and boost efficiency. Collaborations with major hyperscalers enhance its ability to modernise and improve cloud processes, offering valuable FinOps solutions.

### DXC TECHNOLOGY

**DXC Technology** emphasises cloud unit economics, a metric that helps organisations assess ROI per unit of cloud expenditure. This approach allows clients to gain optimal insights into their cloud costs and make informed decisions regarding resource allocation.

### HCLTech

**HCLTech** demonstrates its dedication to FinOps through a substantial number of certifications from the FinOps Foundation. Its MyXalytics tool and CloudSMART framework enhance cloud visibility, governance and cost optimisation for clients.

### IBM

**IBM (Nordcloud)** is certified in FinOps and provides certified training, showcasing commitment to FinOps Foundation principles. With localised certified experts and acquisitions like Apptio, its FinOps capabilities have been strengthened to support midmarket clients.



## FinOps Services and Cloud Optimisation

### kyndryl

**Kyndryl** delivers comprehensive FinOps services based on the FinOps Foundation model, using both third-party and proprietary tools to improve cloud observability and automation. Its partnerships with hyperscalers further facilitate cloud optimisation.

### **rackspace** technology

**Rackspace Technology** allows organisations to manage their cloud spending using a utility-based pricing model.



**Wipro** integrates advanced AI and ML into its FinOps offerings, particularly through the HOLMES platform. Its strategic partnerships with key hyperscalers enable efficient multicloud management via its Cloud Studio tool, resulting in significant cost savings.

### Infosys®

**Infosys** (Rising Star) Cobalt platform plays a crucial role in their FinOps services, providing a repository of assets that help define cost allocation models for shared services.







# Hyperscale Infrastructure and Platform Services

### Who Should Read This Section

This report is relevant to enterprises across industries in the UK for evaluating hyperscale infrastructure and platform service providers in the multi public cloud environment. In this quadrant, ISG defines the current market positioning of these service providers in the UK and demonstrates how they address key challenges enterprise clients face.

Hyperscale infrastructure and platform services in the UK are rapidly evolving to meet the demands of organisations that require extensive computing power and storage capabilities. Enterprises face challenges in maintaining their IT infrastructure, leading to increased costs, which drives the adoption of public cloud services across industries. Many organisations are adopting a multicloud strategy as they accelerate workload migrations. Focused on digital transformation and enhancing CX, enterprises leverage investments in infrastructure and platform services, ensuring service providers manage regular software updates. These providers are

vital in streamlining processes and improving operational efficiency. They also focus on sustainability and energy efficiency, addressing the growing concern over the environmental impact of large data centres.

Enterprises are focusing on several objectives such as migrating workloads to the cloud, modernising IT systems, managing large-scale data, achieving ROI and utilising the resources provided by hyperscale public cloud providers in virtualised or containerised environments and serverless architectures.

The IaaS market in the UK is witnessing a resurgence in growth, driven by the rising demand for AI services, which is expected to continue driving IaaS consumption through 2025.



**IT leaders** should read this report to understand the strengths and weaknesses of hyperscale infrastructure and platform providers and their impact on public cloud strategies to improve agility.



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

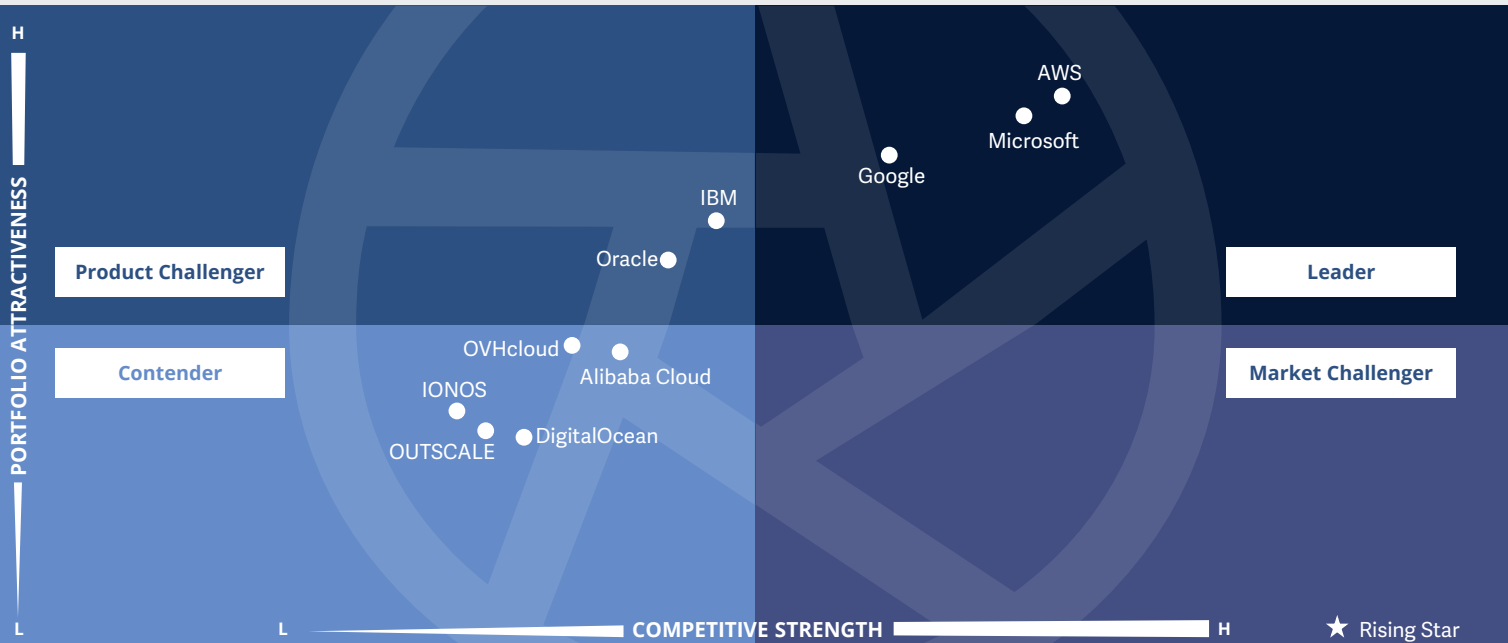


**Software development and technology leaders** should read this report to understand hyperscale infrastructure and platform service providers' capabilities in migrating workloads to the public cloud.



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

U.K. 2024



This quadrant evaluates public cloud infrastructure and platform providers in the UK that can support a significant number of clients by delivering **shared infrastructure** through a **pay-as-you-go model**.

Meenakshi Srivastava



## 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 containerised software-defined offerings and complemented by serverless architectures. GenAI capabilities are offered to automate resource provisioning, cost and performance optimisation, 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 modernise 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 optimise application deployment and DevOps integration, monitor application performance, suggest ways to optimise 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 specialised 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 recognised **quality standards** and **service certifications**, including data centre 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 programme** with a vast partner ecosystem



## Hyperscale Infrastructure and Platform Services

### Observations

The UK Hyperscale Infrastructure and Platform Services market has seen notable advancements recently, with major players such as AWS, Microsoft Azure and Google Cloud enhancing their offerings by integrating AI and ML capabilities. AWS has expanded its custom silicon for AI workloads, Google Cloud integrates its BigQuery with Gemini AI for real-time analytics and Microsoft Azure has enhanced multicloud management with Azure Arc while advancing AI services such as Azure OpenAI and Azure Machine Learning to boost enterprise innovation.

AI is driving a rebound in growth of the cloud infrastructure market. Cloud infrastructure providers are investing in advanced infrastructure to cater to the increasing demand from enterprises for AI-ready solutions. There is also a rising demand for multicloud platforms that enable seamless and efficient application management across various environments. Cloud providers are catering to this by providing tools and services that enable

workload portability, data synchronisation and unified management of resources across hybrid and multicloud architectures.

Sustainability is another major arena in which cloud infrastructure providers are innovating with the latest technologies. While Microsoft has recently announced pioneering a green, hydrogen-powered data centre in UK's neighborhood, Digital Reef is planning to build a zero-carbon hydrogen powered data centre right in London.

The UK Hyperscale Infrastructure and Platform Services market is poised for significant growth as market leaders, AWS and Google, have announced huge investments in building new data centres in the region to cater to their growing customer base.

From the 58 companies assessed for this study, 10 qualified for this quadrant, with three being Leaders.



**AWS** continues to hold its leadership position in the UK IaaS market with continued long-term public sector contracts, large-scale investments in regional data centres and major portfolio innovations such as Amazon Q and Amazon Bedrock.

### Google

In addition to its data analytics capabilities and transparent pricing model, **Google** Cloud focusses particularly on GenAI and edge computing. It helps clients make data-driven decisions by leveraging BigQuery, Vertex AI and Google Cloud Cortex Framework.

### Microsoft

**Microsoft** has introduced significant developments in its infrastructure over the past year, targeted at harnessing the potential of AI, in partnership with AMD and NVIDIA. Its Azure Arc platform is an effective tool for seamlessly managing multicloud environments.





# SAP HANA Infrastructure Services

### Who Should Read This Section

This report is relevant to enterprises across industries in the UK for evaluating SAP HANA infrastructure service providers for SAP S/4HANA workloads and large-scale HANA databases. In this quadrant, ISG defines the current market positioning of these service providers in the UK and demonstrates how they address key challenges based on the depth of service offerings and market presence.

SAP HANA infrastructure services in the UK are becoming increasingly vital as organisations seek to leverage real-time data processing and analytics for improved decision-making.

UK enterprises are facing challenges in managing critical SAP workloads, including financial pressures, data management complexities and a shortage of skilled personnel. To address these issues, many enterprises are integrating SAP HANA into their digital transformation efforts and seeking support from hyperscale providers. Service providers aim to reduce costs, improve agility, enhance security and resilience, leverage data

analytics and implement industry-specific solutions for SAP workload migration. There has been a notable rise in integrating third-party applications with SAP S/4 HANA.

Enterprises are utilising compute resources, storage and connectivity of hyperscale public cloud platforms to host SAP workloads, ensuring scalability, adaptability and smooth integration with third-party tools. With the ability to scale resources on demand, enterprises can efficiently adapt to changing operational needs while benefiting from enhanced performance metrics and reduced TCO.



**IT leaders** should read this report to understand SAP HANA infrastructure service providers' relative strengths and weaknesses and the impact of their market approaches on public cloud strategies.



**Software development and technology leaders** should read this report to understand SAP HANA infrastructure providers' capabilities in migrating workloads to the public cloud.



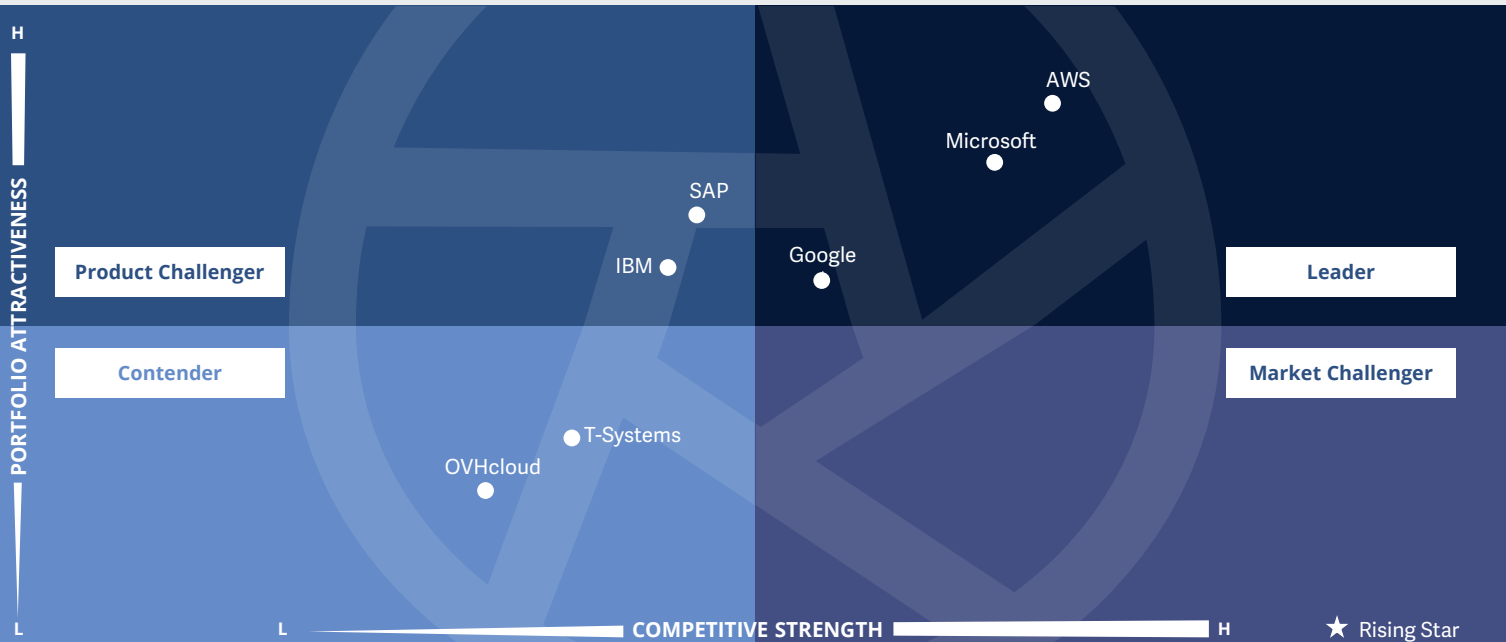
**Sourcing, procurement and vendor management professionals** should read this report to understand the current landscape of SAP HANA infrastructure service providers in the UK.





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

U.K. 2024



This quadrant assesses service providers that offer **SAP products hosting**, especially SAP HANA, in **public cloud** shared environments with standard services and **SAP-certified infrastructure**.

*Meenakshi Srivastava*





## SAP HANA Infrastructure Services

### Definition

This quadrant assesses providers that offer cloud infrastructures best suited to host SAP's software portfolio, emphasising 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 programme 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 optimisation, licensing considerations, system and database configuration, virtual private network configuration and third-party vendor solutions (toolsets). The support analysis focusses 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 optimisation, 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 recognised **quality standards** and **service certifications**, focussing 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 specialisation



### Observations

AWS remains a Leader in the SAP HANA Infrastructure Services quadrant due to its robust product portfolio and competitive edge. The company boasts a vast partner ecosystem and ensures its partners are certified for SAP transformation capabilities.

Microsoft closely follows AWS in terms of portfolio strength and competitive positioning. Through its strategic partnership with SAP, Microsoft accelerates the adoption of SAP S/4HANA services. AWS and Microsoft together command a significant share of the UK's IaaS market, bolstering both companies' competitive advantages.

Although Google is also a Leader in this quadrant, it may not have the same visibility as AWS and Microsoft. However, Google is recognised for its strong encryption standards and advanced AI capabilities, which enhance the security of the SAP HANA environment and enable seamless integration with other datasets.

From the 58 companies assessed for this study, seven qualified for this quadrant, with three being Leaders.



**AWS** offers a secure and dependable cloud infrastructure that optimises customers' SAP investments. Its vast network guarantees that partners have the necessary expertise for migrating, operating and transforming SAP workloads.


### Google

**Google** Cloud provides SAP HANA services that include containerisation capabilities, APIs and scalable data processing tailored to SAP workloads. It also features enhanced security measures to safeguard SAP workloads from unauthorised access.

### Microsoft

**Microsoft** Azure enables customers running SAP workloads to integrate seamlessly with a wide array of software tools, such as Microsoft 365, Teams, Power Apps and Power BI. It offers SAP-certified virtual machines with memory capacities ranging from 192 GB to 12 TB.





# 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

The ISG Provider Lens 2024 – Multi Public Cloud Services study analyzes the relevant software vendors/service providers in the UK market, based on a multiphased research and analysis process and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this 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



**Meenakshi Srivastava**  
**Lead Analyst**

Meenakshi Srivastava has nearly eight years of expertise and knowledge in IT infrastructure and analysis and insight generation. At ISG, Meenakshi is a lead analyst for ISG Provider Lens™, leading research activities and benchmarking exercises on the regional adoption of digital infrastructure such as private and hybrid cloud.

She holds a bachelor's degree from Mumbai University in electronics engineering and an MBA degree in marketing from the Indian Institute of Management, Jammu (IIM Jammu).

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

Arpita comes with an experience of over 5.5 years in research. She has led and supported ad-hoc research requests in investment banking, healthcare, energy

and information and communication technology. During this period, she has also spent significant time enabling technology sales in pre-sales research teams. Arpita is skilled in insights generation, market sizing and forecasting, storyboarding, design thinking, financial analysis, go-to-market strategies, competitive intelligence and benchmarking. Her areas of interest broadly are- technology, finance and business strategy.



## Author & Editor Biographies

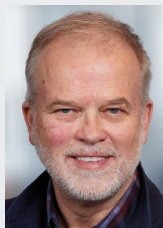


*Study Sponsor*

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

Heiko Henkes serves as Managing Director and Principal Analyst at ISG, where he oversees the Global ISG Provider Lens™ (IPL) Program for all IT Outsourcing (ITO) studies alongside his pivotal role in the global IPL division as strategic program manager and thought leader for IPL Lead Analysts. Additionally, Henkes heads the 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 renowned for his contributions as a keynote speaker on digital innovation, where he shares insights on leveraging 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.

For more information about ISG Provider Lens™ research, please visit this [webpage](#).

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For more information, visit [isg-one.com](http://isg-one.com).





**DECEMBER, 2024**

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**REPORT: MULTI PUBLIC CLOUD SERVICES**