

***ISG** Provider Lens™

Private/Hybrid Cloud - Data Center Services & Solutions

Managed Services

Global 2019

Quadrant
Report



A research report
comparing provider
strengths, challenges
and competitive
differentiators

Customized report courtesy of:



July 2019

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The research and analysis presented in this report includes research from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that was current as of May, 2019. ISG recognizes that many mergers and acquisitions have taken place since that time but those changes are not reflected in this report.

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1	Executive Summary
4	Introduction
15	Managed Services
19	Methodology

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EXECUTIVE SUMMARY

Digital transformations are unfolding in enterprise businesses on a massive scale, with private/hybrid cloud solutions and services becoming an integral central ecosystem of transformation services. In this digital race, enterprises are rapidly evolving their outsourcing engagements and transformations in IT managed services to bring a strategic balance among stakeholders. As businesses are becoming software and data-driven, they need an infrastructure base that can adapt to the changing market conditions, can be managed in an augmented model, and should be always accessible. Most data center outsourcing engagements now have elements of private/hybrid cloud and intuitive cloud management cognitive platforms enablement. With data becoming distributed, managed digital security services have become necessary for enterprises on a data and infrastructure front. Hence, they seek strategic cyber security managed service providers. The evolution of containers (microservices) has raised a need to manage the container's cluster and its optimization to ensure that the enterprise spends on actual consumption. Strategic decision-making on technologies is the driving force of the entire exercise, along with altering the workplace ecosystem and changing the way in which an enterprise operates. This, in turn, has led to the emergence of IT managed services, hybrid cloud management platforms, digital managed security services, private and hybrid clouds and managed container cluster services.

Some of the key trends in the private/hybrid cloud and data center services space are below:

Increase in investments on cloud infrastructure (trap value and incremental value): From a commodity and innovation standpoint, budgets for cloud computing have doubled down in the past few years. The fundamental nature of cloud and hybrid cloud computing eliminates or minimizes hardware infrastructure, resulting in huge savings. However, cloud technology and services are not always simple. Organizations are realizing that they need expertise in capitalizing their investments to gain the immense benefits of the technology. They must be patient to see the revenue realization from a trap-value aspect. It is important for enterprises to craft their strategies clearly and let the execution progress to see the ROI sooner. In principal, they should consciously craft their strategies from trap value and incremental value standpoints.

Hyper converged infrastructure (HCI) kicking into hyperactive mode: The convergence of software-defined anything (SDx/hardware and software), which includes computation, networking, and storage, in a single easy-to-use system has enabled a true digital transformation. Enterprises see HCI as cloud coming to them rather than the other way around. Agile implementation and the ability of its intelligent inbuilt software to act on events have indicated a high possibility of expanding in-house cloud. Software-defined infrastructure has shown tremendous results, due to which the implementation of HCIs

has grown more than 100 percent over the year. This also falls in line with the growing data center consolidation trend and the development of smart ROBO. Several enterprises want to consolidate and merge their infrastructure and keep only a few data centers across strategic global locations. Few service providers are showcasing their ability to consolidate and modernize data centers by getting design certifications from prominent HCI vendors, such as VMware, to gain a competitive edge.

AI Ops one-touch and zero-touch IT operation: Artificial intelligence for IT operations (AIOps) is primarily used to automate monotonous and commoditized IT infrastructure and software maintenance tasks, essentially to eliminate labor-intensive intervention on mundane tasks. However, we believe that it is more about building an augmented intelligence operation ecosystem that leverages an AI-based platform. We also see a shift in organizations adopting the AIOps model to enable them beyond automation. This would mainly take place in a model where data is fed into an AI platform that would analyze the pattern behavior and trigger a workflow for event resolution. The AI Ops platform performs three key roles, namely co-relation, machine learning (ML) and visualization. It also feeds the leadership dashboard with end-user experience, prediction and capacity management.

Managed services shifting to outcome-based services: Cutting-edge technology offers the benefit of quantifying results in a real-time scenario. Taking note of this, global enterprises are pursuing outcome-based services and are shifting away from the service-level agreements (SLAs). Service providers are required to meet their legal obligations of implementing AIOps, cognitive management platforms and advanced analytics. In 2018,

several providers had moved away from staff augmentation-led transition services and had opted for an outcome-based model, giving them a competitive edge over peers.

Container technology gaining significant traction: In the last couple of years, container technology has grown in popularity with Kubernetes being the most prominent container orchestration system. This open-source container management tool has a high acceptance rate and has been growing exponentially. Container technology has been impactful, especially in mission-critical applications in financial, media and communications, and educational institutions. Several multi-player online gaming companies are using containers to deploy their updates with ease to achieve a faster streaming speed that elevates user experience. Service providers have strategically partnered with Kubernetes to provide managed containers as a service (CaaS) and are re-skilling/up-skilling their employees in this technology,

Move toward SaaS-based cyber infrastructure security solutions: As data is becoming more distributed, enterprises are seeking robust global digital security solutions and services. To address the needs of clients, large service providers and some smart startups (cloud native) have shifted their focus towards building a software as a service (SaaS)-based lightweight platform for securing the entire infrastructure (both on-premises and cloud). This is a win-win situation for both clients and small and medium enterprises (SMEs) as they get to deploy the model wherever necessary. Service providers also find it as a cost-effective solution to develop and offer better modularity compared to a traditional bundled offering.

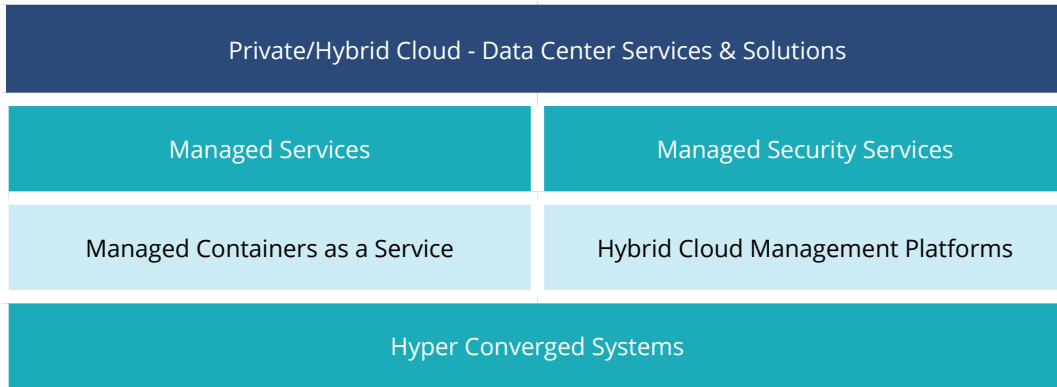
Hybrid cloud management platform: Over the last few years, the growth of public/hybrid cloud has increased considerably. There has also been a growing demand from enterprises for a cloud management platform (CMP) with a single-pane-of-glass view and cost-control features across hybrid or multi-cloud platforms. CMP manages multi-cloud workloads with intelligent AI and ML-based platforms. As enterprises have become global in nature, they demand a more customizable CMP ecosystem with strong application programming interface (API) capabilities to integrate with a large application monitoring and management platform. Financial management and infrastructure as code, with robust catalog services are considered an essential part of the platform to bring agility in business. Before shifting their focus to business units, vendors have excluded their cloud financial management capabilities to address enterprise cloud management problems such as cost monitoring, management and optimization, etc.

Hyper converged infrastructure: HCI is a high-potential growth area of the overall market for integrated infrastructure ecosystems and has seen double-digit growth over the last couple of years. The digitalization of enterprises is driving the convergence of the physical and digital worlds, thus eliminating the large abstraction layer between hardware and software ecosystems. HCI is found to be easy to implement and manage; it also comes in an integrated SDx format. It has an application-centric ecosystem and its infrastructure is application driven.



Introduction

Simplified illustration



Source: ISG 2019

Definition

Private clouds are an extension of the existing computing environments at enterprises and they leverage the investments in virtual infrastructure and applications. Enterprises or businesses that have strict security and governance requirements, exorbitant data volumes, and a need for tight integration with other enterprise applications and workflows are best suited for on-premises deployments and operations. Service providers help enterprises implement cloud technology to create private clouds (virtual compute, networking and storage resources) in their data centers. A hybrid cloud combines the best of on-premises infrastructure, private and public cloud services.

A hybrid cloud setup connects the existing on-premises infrastructure services with a private or public cloud or both. The aim is to combine services and data from a variety of cloud models to create a unified, automated and well-managed computing environment. Hybrid clouds allow businesses to leverage the capabilities of public cloud platform providers without offloading their entire data to a third-party data center. This provides greater flexibility while keeping the vital components within the company's firewall.

Definition (cont.)

Data center outsourcing is the practice of outsourcing the responsibility of provisioning, monitoring and managing computing and storage resources to a third-party provider. The data center may be owned by the enterprise, service provider or third-party colocation provider. Monitoring services are usually offered from the provider's location and are called remote infrastructure management services.

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

- Transparency on the strengths and weaknesses of relevant providers.
- Differentiated positioning of providers by segment.
- Focus on different markets, including global, the U.S., Germany, Switzerland, the U.K., Australia and New Zealand, Brazil, and Latin America.

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

Scope of the Report

At a broad level, data center outsourcing is the practice of outsourcing the responsibility of provisioning, monitoring, and managing computing storage and associated resources to a third-party provider. The data center may be owned by the client, service provider, or third-party colocation provider. Monitoring and management services usually take place at service provider locations and are called remote infrastructure management (RIM) services. Some staff may also be present at the data center facility for specific support services.

Typical outsourcing activities include level 1, 2, and 3 technical support, server monitoring, application performance monitoring, storage and database administration, hosting, colocation, disaster recovery testing and execution, defining or setting up the architecture, standards and policies, and transformation projects such as virtualization, consolidation and cloud-enablement services.

For standalone services such as colocation and managed hosting, the level of services and support varies from those in a fully managed data center outsourcing contract. For example, a colocation provider will provide the facilities and infrastructure to host equipment and some basic support services. However, all other aspects of infrastructure management are the responsibility of the client, which may independently handle it or outsource it to a managed service provider.

Definition (cont.)

ISG studies are intended to anticipate the investigation efforts and buying decisions of typical enterprise clients. While contemplating a significant strategy transformation, making purchase-versus-rent decisions for infrastructure, implementing agile practices, or incorporating automation into their environments, enterprise clients will benefit from a study that examines an entire ecosystem for a certain service line.

Therefore, ISG studies are comprised of multiple quadrants covering the spectrum of services that an enterprise client would require.

The quadrant descriptions are:

- **Managed Services and Transformation**, assessing a provider's ability to provide ongoing management services for data center infrastructure, such as servers, storage, databases and networking, along with transformation projects such as cloud enablement.
- **Managed Security Services**, covering a provider's ability to consult, train, integrate, maintain, support and manage security services; comprising the operations and management of an IT security infrastructure for one or several customers via a security operations center (SOC).
- **Managed Container as a Service (mCaaS)**, assessing the management of container orchestration solutions as a service for applications, data, security and infrastructures with the purpose of developing and operating applications, and the benefit of increased product/service availability, platform flexibility and cost savings.
- **Hybrid Cloud Management Platforms**, assessing those vendors with technology appliances that are used to build and operate infrastructures with a robust integrated management platform for on-premises, public, private and hybrid clouds within the customer's internal data center or the provider's remote repository.
- **Hyper Converged Systems**, analyzing vendors with HCI systems that are closely aligned or preconfigured hardware and software appliances, have blueprints designed to scale up or down, and can centrally manage a scalable cloud infrastructure.

Provider Classifications

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

Leader

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

Product Challenger

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

Market Challenger

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

Contender

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

Provider Classifications (cont.)

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

Rising Star

Rising stars are mostly product challengers with high future potential. When receiving the “rising stars” award, such companies have a promising portfolio, including the required roadmap and an adequate focus on key market trends and customer requirements. Also, the “rising stars” has an excellent management and understanding of the local market. This award is only given to vendors or service providers that have made extreme progress towards their goals within the last 12 months and are on a good way to reach the leader quadrant within the next 12-24 months, due to their above-average impact and innovative strength.

Not In

This service provider or vendor was not included in this quadrant as ISG could not obtain enough information to position them. This omission does not imply that the service provider or vendor does not provide this service.

Private/Hybrid Cloud - Data Center Services & Solutions - Quadrant Provider Listing 1 of 5

	Managed Services	Managed Containers as a Service	Managed Security Service	Hybrid Cloud Management Platforms	Hyper Converged Systems
Abiquo	● Not In	● Not In	● Not In	● Contender	● Not In
Accenture	● Leader	● Leader	● Leader	● Not In	● Not In
Atos	● Leader	● Product Challenger	● Leader	● Not In	● Not In
BMC	● Not In	● Not In	● Not In	● Leader	● Not In
BT	● Not In	● Not In	● Market Challenger	● Not In	● Not In
Capgemini	● Leader	● Market Challenger	● Product Challenger	● Not In	● Not In
CenturyLink	● Not In	● Not In	● Market Challenger	● Not In	● Not In
CIBER	● Contender	● Not In	● Not In	● Not In	● Not In
Cisco	● Not In	● Not In	● Not In	● Leader	● Leader
Citrix Systems	● Not In	● Not In	● Not In	● Product Challenger	● Not In
Cloudbolt	● Not In	● Not In	● Not In	● Contender	● Not In

Private/Hybrid Cloud - Data Center Services & Solutions - Quadrant Provider Listing 2 of 5

	Managed Services	Managed Containers as a Service	Managed Security Service	Hybrid Cloud Management Platforms	Hyper Converged Systems
Cognizant	● Leader	● Leader	● Product Challenger	● Not In	● Not In
Dell	● Not In	● Not In	● Not In	● Product Challenger	● Not In
Densify	● Not In	● Not In	● Not In	● Rising Star	● Not In
DXC	● Leader	● Leader	● Leader	● Not In	● Not In
Ensono	● Contender	● Not In	● Not In	● Not In	● Not In
Fujitsu	● Market Challenger	● Not In	● Product Challenger	● Not In	● Not In
GAVS	● Contender	● Not In	● Not In	● Not In	● Not In
HCL	● Leader	● Product Challenger	● Product Challenger	● Not In	● Not In
HPE	● Not In	● Not In	● Not In	● Market Challenger	● Leader
Huawei	● Not In	● Not In	● Not In	● Not In	● Product Challenger
HTBASE	● Not In	● Not In	● Not In	● Not In	● Contender

Private/Hybrid Cloud - Data Center Services & Solutions - Quadrant Provider Listing 3 of 5

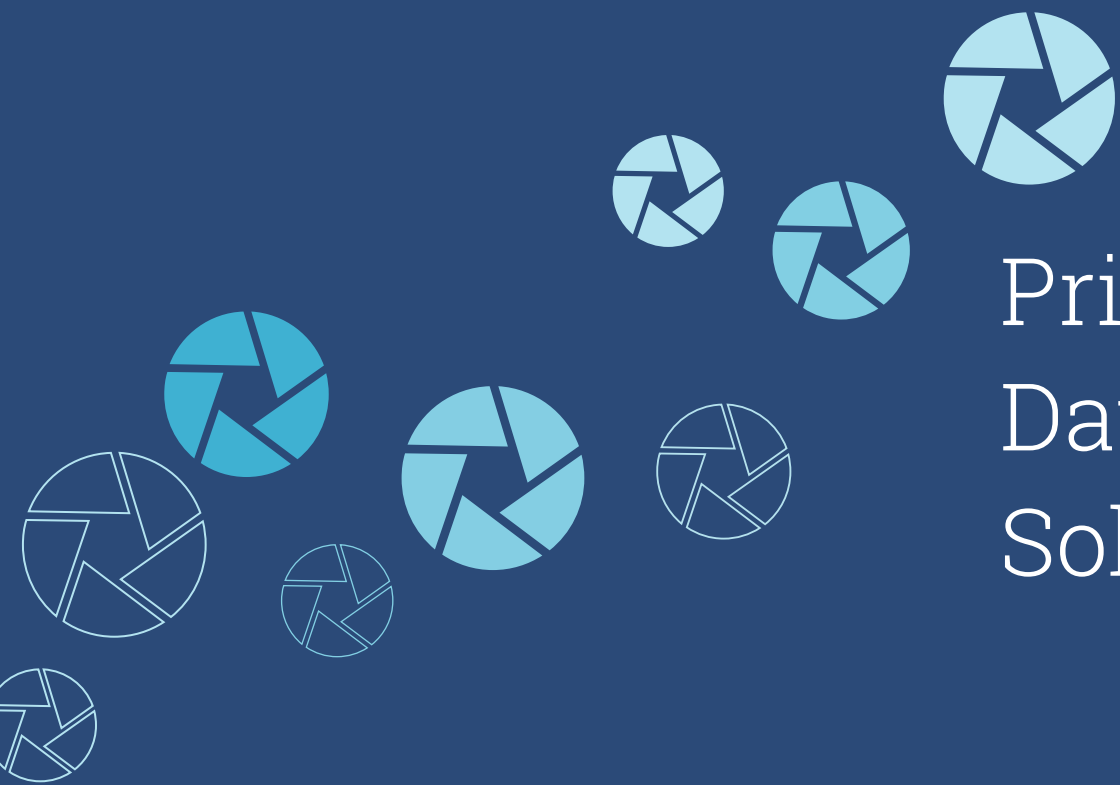
	Managed Services	Managed Containers as a Service	Managed Security Service	Hybrid Cloud Management Platforms	Hyper Converged Systems
Hypergrid	● Not In	● Not In	● Not In	● Contender	● Not In
IBM	● Leader	● Leader	● Leader	● Not In	● Not In
Infosys	● Product Challenger	● Not In	● Not In	● Not In	● Not In
Lenovo	● Not In	● Not In	● Not In	● Not In	● Product Challenger
LTI	● Product Challenger	● Not In	● Product Challenger	● Not In	● Not In
Maxta	● Not In	● Not In	● Not In	● Not In	● Market Challenger
Microland	● Contender	● Not In	● Contender	● Not In	● Not In
Mindtree	● Product Challenger	● Not In	● Not In	● Not In	● Not In
Morpheus Data	● Not In	● Not In	● Not In	● Market Challenger	● Not In
Mphasis	● Product Challenger	● Not In	● Contender	● Not In	● Not In
NetApp	● Not In	● Not In	● Not In	● Not In	● Contender

Private/Hybrid Cloud - Data Center Services & Solutions - Quadrant Provider Listing 4 of 5

	Managed Services	Managed Containers as a Service	Managed Security Service	Hybrid Cloud Management Platforms	Hyper Converged Systems
NIIT Technologies	● Contender	● Contender	● Contender	● Not In	● Not In
NTT	● Rising Star	● Market Challenger	● Leader	● Not In	● Not In
NTT DATA	● Product Challenger	● Not In	● Not In	● Not In	● Not In
Nutanix	● Not In	● Not In	● Not In	● Not In	● Leader
Orange Business Services	● Rising Star	● Not In	● Market Challenger	● Not In	● Not In
Pivot3	● Not In	● Not In	● Not In	● Not In	● Product Challenger
RightScale (Flexera)	● Not In	● Not In	● Not In	● Leader	● Not In
Scalr	● Not In	● Not In	● Not In	● Leader	● Not In
Secureworks	● Not In	● Not In	● Leader	● Not In	● Not In
ServiceNow	● Not In	● Not In	● Not In	● Rising Star	● Not In
Stratoscale	● Not In	● Not In	● Not In	● Not In	● Market Challenger

Private/Hybrid Cloud - Data Center Services & Solutions - Quadrant Provider Listing 5 of 5

	Managed Services	Managed Containers as a Service	Managed Security Service	Hybrid Cloud Management Platforms	Hyper Converged Systems
Sungard AS	● Contender	● Not In	● Not In	● Not In	● Not In
TCS	● Leader	● Rising Star	● Not In	● Not In	● Not In
Tech Mahindra	● Product Challenger	● Contender	● Not In	● Not In	● Not In
Trianz	● Contender	● Not In	● Not In	● Not In	● Not In
Trustwave	● Not In	● Not In	● Leader	● Not In	● Not In
T-Systems	● Market Challenger	● Not In	● Not In	● Not In	● Not In
Unisys	● Product Challenger	● Not In	● Not In	● Not In	● Not In
Verizon	● Not In	● Not In	● Market Challenger	● Not In	● Not In
VMware	● Not In	● Not In	● Not In	● Product Challenger	● Leader
Wipro	● Leader	● Product Challenger	● Product Challenger	● Not In	● Not In
Zensar	● Product Challenger	● Not In	● Not In	● Not In	● Not In



Private/Hybrid Cloud - Data Center Services & Solutions Quadrants

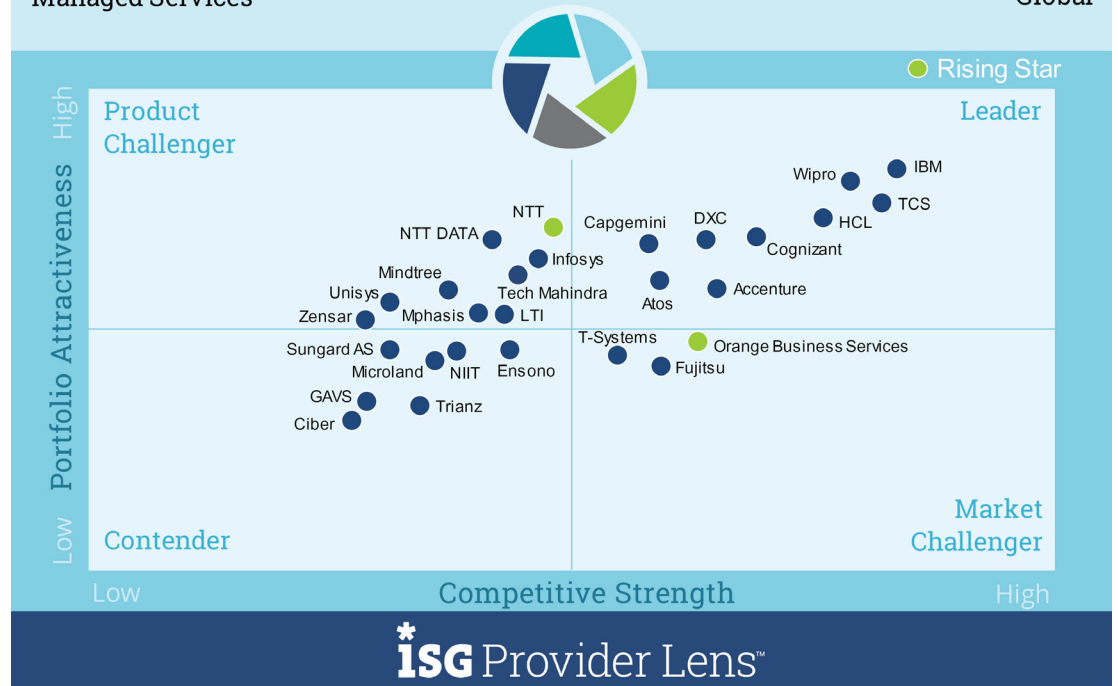
MANAGED SERVICES

Definition

This quadrant assesses a provider's ability to provide ongoing management services for data center infrastructure and platforms that consist of servers, middleware, storage, databases, and networking components. The infrastructure may be in the client's or service provider's data center or co-located in a third-party facility. Transition services are projects that include large-scale consolidation, virtualization, and cloud enablement and are increasingly based on software-defined infrastructure (for example, software-defined data centers [SDDCs]).

Private/Hybrid Cloud - Data Center Services & Solutions Managed Services

2019
Global



Source: ISG Research 2019

MANAGED SERVICES

Eligibility Criteria

- Ability to service data center infrastructure (servers, middleware, storage, databases and networks) by themselves and not through partners.
- Established or emerging basic/standard relationships with one of the major public cloud hyperscale providers such as AWS, Microsoft, Google and IBM.
- Ability to provide services within a client's premises or remotely and preferably through its own RIM or shared services center.
- Experience in large transition projects that include consolidation, virtualization of data centers, and cloud enablement.
- Ability to act as an extension of the client's IT organization and create blueprints, architecture frameworks and management processes at the client's location.

Observations

- **Accenture and HCL** are advocating a cloud-first strategy in their engagements. Accenture has partnered with VMware to develop a validated SDDC design for clients to integrate the on-premise data center environment with AWS.
- **Atos** is using the Canopy orchestration framework as a pillar of digital transformation to deliver all services on cloud and ensure the co-existence of legacy and cloud-born applications. It is also working on building EDGE-centric data centers.
- **Capgemini** is an established player and an expert in large geo-based data center consolidation and modernization.
- **DXC Technology and Cognizant** have a strong focus on automation with AI and cognitive capabilities to deliver enterprise-grade services to clients.
- **IBM** has been named a leader in the managed services and transformation market owing to its heritage, scale and broad portfolio of offerings.

MANAGED SERVICES

Observations (cont.)

- **TCS** has adopted the Machine First™ delivery model and has introduced a framework to provide complete visibility over a client's IT landscape. This would help the company align its digital transformation strategy to its business objectives.
- **Wipro's** expertise in SDx and in developing its own AI and ML tools has helped in accelerating its digital transformation capabilities.
- **Orange Business Services and NTT** are considered Rising Stars in this category; they are profiled in this report along with the nine quadrant leaders. NTT has a strong focus on outcome-based managed services that are coupled with private and hybrid cloud capabilities, making it a trusted partner among clients. Orange is focused on developing its cloud capabilities. It has also been modernizing its data center infrastructure and scale to offer better services and cost benefits.



RISING STAR: ORANGE BUSINESS SERVICES (ORANGE)

Overview

Orange Business Services (Orange) provides managed transformation services through more than 70 data centers worldwide, serving over 120,000 virtual machines. It provides services on data center operations through six major delivery centers in France, Norway, Egypt, India, Mauritius, and Brazil. These are handled by 2,200 professionals who serve clients in more than 20 countries.

Strengths

Modernizing its infrastructure: Orange has been steadily modernizing and consolidating some of its 70-plus data centers to the Tier 3 standard and beyond. Its strong global infrastructure presence enables a cost advantage over its competitors, especially in the European market. With a strong focus on cybersecurity, the company is also updating its ten security operation centers (SOCs) across the globe to help its clients move safely to cloud environments.

Emphasis on consulting multi-cloud strategy: Orange is investing heavily in both private and public cloud technologies. It has planned to increase its full-time employee count in cloud certifications in order to meet the growing client demands. The firm is particularly focused on advising its clients about multi-cloud and hybrid strategies.

Caution

In the infrastructure and cloud domain, Orange has strong focus on European market and addresses North America through local presence of those European companies as well as on a case by case basis. Orange can expand its operations in North America by either acquiring a local infrastructure company or establishing a nearshore delivery center.



2019 ISG Provider Lens™ Rising Star

Although Orange had started late in the cloud business, it has aggressive plans to gain market share by shifting its focus from managed infrastructure to business outcome-based realizations in the infrastructure and cloud space. The company has been maintaining a robust and large client base over the years.



Methodology

METHODOLOGY

The ISG Provider Lens™ 2019 – Private/Hybrid Cloud - Data Center Services & Solutions research study analyses the relevant software vendors and service providers in the Global market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

The study was divided into the following steps:

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



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Shashank Rajmane is the Lead Analyst for Public Cloud Transformation and Data Center Outsourcing studies and has a total experience of 8 years in the technology research industry. Shashank is responsible for authoring quadrant reports around public and private cloud services and data center outsourcing market.

He has authored articles around the best practices in the cloud services domain and infrastructure services. Along with this Shashank helps ISG's enterprise clients' with their cloud strategy, service provider selection, contracts negotiation, etc. He also works with advisors and clients' requests for ad-hoc research assignments in the cloud domain, across industries, predominantly in Automotive, BFSI, Retail CPG and Energy sectors.



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Jan Erik Aase is a director and principal analyst for ISG. He has more than 35 years of collective experience as an enterprise client, a services provider, an ISG advisor and analyst. Jan Erik has overall accountability for the ISG Provider Lens™ reports, including both the buyer-centric archetype reports and the worldwide quadrant reports focused on provider strengths and portfolio attractiveness. He sets the research agenda and ensures the quality and consistency of the Provider Lens™ team.

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