

IDC MarketScape: Worldwide Managed Public Cloud Services 2023 Vendor Assessment

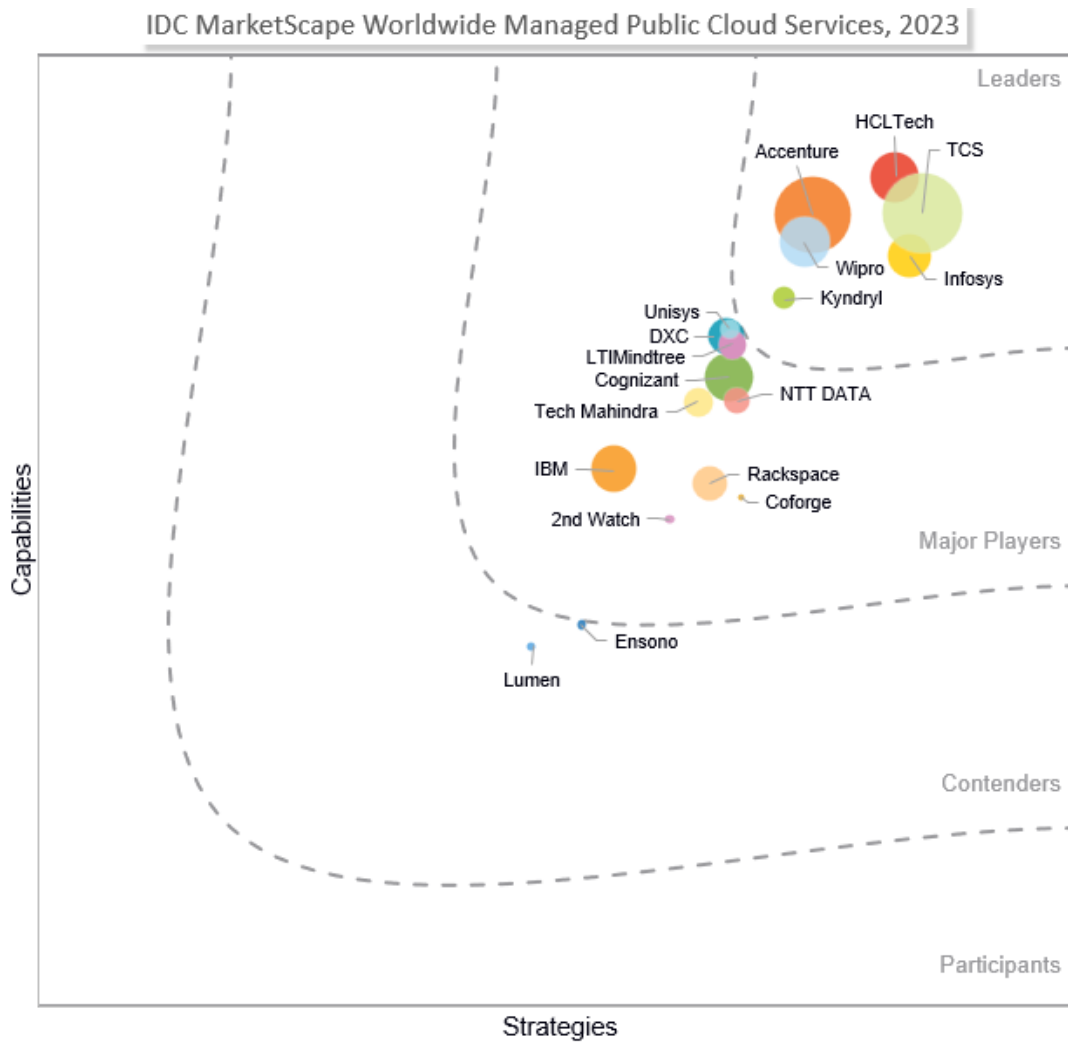
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IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Managed Public Cloud Services Vendor Assessment



Source: IDC, 2023

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

This report was originally published in November 2023. While the source data that generated the ratings did not change due to this March 2024 update, the adjustment reflects an IDC data mapping error that was used to achieve the final results. The impact of this remapping was a shift involving TCS and Tech Mahindra.

IDC OPINION

Using the IDC MarketScape model, IDC evaluated 18 managed service providers (SPs) that provide managed public cloud services utilizing public cloud infrastructure-as-a-service (IaaS) platforms (Note: For the purposes of this document, public cloud refers to public cloud /IaaS). IDC research highlights that when it comes to utilizing managed public cloud services, enterprises are seeking to use these services to become more agile, improve customer experience by leveraging artificial intelligence (AI) and analytics, more closely link IT with business performance, and increase revenue by building new revenue-generating products and services faster. From a technology perspective, firms are looking to simplify and standardize IT infrastructure and applications platforms, restructure IT financial footprint and shift from capex to opex, and pursuing a mandate for a new approach to managing IT. However, enterprises continue to have concerns when utilizing managed public cloud services that include not being able to meet the operational/performance requirements of critical applications and critical service-level agreements (SLAs) such as availability, speed of provisioning, and responsiveness along with potential loss of control over management of IT.

Complicating meeting these business and technology objectives while mitigating these concerns when utilizing managed public cloud services, firms are increasingly confronted with the need to manage an ever-expanding estate of technologies that are increasingly consumed as a set of services provisioned by public cloud providers (e.g., AWS, Azure, Google, IBM, Alibaba, OVH, Tencent). The complexity in using public cloud providers is in determining on which public cloud platform to host and/or procure workloads and application types (e.g., ERP, SCM, CRM), critical software brands (SAP, Oracle, Microsoft), and competencies (e.g., analytics, blockchain, cognitive/artificial intelligence, hybrid cloud, IoT), to name a few, while optimizing the quality of services, financial management, and ability to adapt technology requirements as demanded by business needs and the market. This is where managed SPs can help enterprises orchestrate and manage across a constantly expanding and shifting portfolio of public cloud resources to support client public cloud needs.

IDC used more than 250 criteria and 35 in-depth customer interviews spanning 8 countries and 12 industries to evaluate managed SPs that provide managed public cloud services, for which there are an array of players competing in this market. IDC's findings revealed that while each of these managed SPs exhibited many similarities in their capabilities supporting a broad portfolio of managed public cloud services, players do differentiate and are differentiated by key factors involving platforms and infrastructure, partner ecosystems, innovation, critical operational capabilities and service delivery models, software assets, financial management, and across four major public cloud IaaS providers: AWS, Azure, Google, and IBM.

IDC's findings also highlight client feedback that reflects client experience in utilizing managed SPs for managed public cloud services to execute these capabilities. If your organization is focused on using managed public cloud services, leverage this IDC MarketScape as a companion tool to evaluate providers your organization is considering or shortlisting to support your use of these services.

IDC MARKETSCOPE VENDOR INCLUSION CRITERIA

IDC collected and analyzed data on managed SPs within its 2023 IDC MarketScope for managed public cloud services assessment. The use of the term *public cloud* throughout this analysis refers to infrastructure-as-a-service public clouds. Vendor options for managed public cloud services are extensive and cover a broad set of different types of players. In determining the group of vendors for analysis in this IDC MarketScope, IDC utilized the following set of inclusion criteria:

- **Revenue.** Minimum of \$50 million worldwide revenue generated by managed public cloud services
- **Delivery locations.** Geographic presence (i.e., feet on the ground, delivery capability across major regions) in a minimum of two regions (e.g., Americas, EMEA, APAC)
- **Managed public cloud services coverage.** Focus on using public cloud IaaS platforms and providers
- **Technology coverage.** Applications (e.g., ERP, productivity, SCM, CRM), development and deployment software, and/or systems infrastructure software and innovative technologies; managed SPs not required to support all these areas; managed SPs could be supporting just a segment of these software technologies
- **Number of public cloud partners.** Minimum of utilizing one public cloud IaaS provider (e.g., AWS, Google, IBM, Azure, Alibaba)
- **Life cycle of services (end-to-end services).** From modernizing (e.g., architecting, developing/migrating) to ongoing management

ADVICE FOR TECHNOLOGY BUYERS

Succeeding in business today requires a firm to manage across a vast set of resources while facing a myriad of challenges spanning volatility in geopolitics, changing societal norms, elevated buyer expectations, and potential impacts from climate change and even pandemics. Critical business objectives that are also influencing success involve meeting growth expectations, developing more agile and resilient capabilities, and meeting new standards such as sustainability by which firms need to develop the right business, financial, and services metrics to determine the degree of success. Enterprises acknowledge that the key building blocks in achieving these objectives involving a triad of technology capabilities that involve the use of public cloud platforms (AWS, Google, Azure, Salesforce, Workday, ServiceNow, etc.), automation (cognitive/AI, machine learning [ML]), and hybrid cloud (combining private and public cloud) with public cloud IaaS is now the locus of how firms are building their IT capabilities and strategies.

However, as firms expand the use of cloud resources with public cloud, they are facing an increasingly daunting task of not just maintaining control over these resources but achieving an array of goals to ensure effective use of these resources that include aligning the use of public cloud IaaS providers (AWS, Azure, Google, IBM, Alibaba) by type of technology (e.g., IoT, analytics, compute, storage, blockchain), optimizing financial management of cloud (e.g., IaaS, platform as a service [PaaS], software as a service [SaaS]), and implementing multicloud/cloud management system as part of maintaining control over all IT and cloud resources. In addition, in modernizing IT to the cloud, enterprises are looking to move enterprise applications (CRM, ERP, SCM) to public cloud, leverage cloud for innovative technologies (e.g., IoT, edge computing, blockchain), utilize IoT to support

environmental and sustainability initiatives, and invest in data management and analysis capabilities using cloud capabilities.

Consequently, in utilizing public cloud as the locus of IT capabilities to meet these business and IT goals and objectives, enterprises are leveraging managed SPs to support their public cloud needs. While enterprises do expect managed SPs to have a broad set of capabilities in supporting their public cloud requirements, through detailed client interviews and extensive demand-side research, IDC has identified the following critical areas that buyer organizations indicate as critical in their process of selecting the optimal managed SP to meet their needs when utilizing managed public cloud services. As such, IDC suggests buyer organizations implement the following:

- **Lead with strategic road map and planning.** Aligning use of managed public cloud services with top enterprise cloud priorities of implementing the right processes to ensure control of all IT and cloud services that includes financial management and alignment of where to deploy assets and technologies across different public cloud providers requires enterprises to develop a strategic road map and plan. This road map and plan must clearly articulate what are the business and IT objectives that must be met, what are critical architectural decisions that must be defined and how they align with objectives, and how the values of the managed SP align with those of the enterprise. Key signals that will demonstrate the approach of managed SPs in their ability to support a strategic road map and plan include providing access to senior executives from the managed SP, the maturity of a vendor's road map showing their approach in the journey to the cloud, and the performance of the managed SP as reflected by its track record of results.
- **Define risk management and accountability.** The complexity in managing a multitude of technologies, processes, and talent when using public clouds that involve use of managed SPs, which also may require integration with noncloud (legacy) technologies as well as private clouds, significantly elevates the degree of risks and accountability. Part of these risks is understanding that not all public clouds are equal. Each public cloud platform has its benefits, challenges, and strengths. In addition, not all technologies and processes need to be deployed on public clouds. Many technologies and processes may require private clouds (dedicated to a single firm) or remain in their legacy, noncloud state. Consequently, to mitigate the risks in managing such complex portfolios of capabilities while using managed SPs to support enterprise use of public clouds requires enterprises to define clearly which parties are responsible for which services and service levels, which include SLAs for the managed SP; establish the optimal alignment of where technologies and processes should be deployed (e.g., private clouds, public clouds, noncloud/legacy); and ensure that contracts support the move to and use of DevOps and agile methodologies. In addition, enterprises need to develop risk mitigation approaches involving implementation of a multicloud framework that defines and prioritizes where there is a need to deploy the same processes (e.g., DevOps, continuous integration/continuous delivery [CI/CD], recovery), management approaches (e.g., containers, APIs), and/or protocols and procedures (e.g., security, compliance) across two or more public cloud IaaS providers (e.g., AWS, Google, Azure, IBM, Alibaba) to ensure resilience of operations.
- **Require an integrated organizational structure and agile culture.** Firms that are looking to use managed SPs to support their use of public clouds to help achieve critical business and IT objectives involving agility, resiliency, growth, and sustainability should expect that managed SPs have the right organizational structure and culture. Feedback from enterprises highlight that an effective organizational structure is designed to eliminate all barriers between the different stages of services from business development to designing, testing, deploying, and

managing technologies and processes using public cloud platforms. Incorporating processes such as site reliability engineering (SRE), continuous integration/continuous delivery, and DevOps as part of this organizational structure is critical to ensure achieving the level of agility needed to meet these objectives as is the use of cloud-native architectures. Finally, ensuring that firms achieve implementing these organizational outcomes requires implementing a multicloud management platform that can support all of these capabilities while acting as the control center to orchestrate, monitor, and manage every aspect in using public clouds when working with managed SPs.

- **Ensure availability of the right type of talent and quality of services.** As captured by the following statement made by a client that IDC interviewed and that utilizes managed SPs to support its public cloud requirements, "It's not the quantity of human resources, but the quality of the cloud knowledge that truly makes a difference." And while the quality of talent is critical, the type of talent required, as clients emphasized, must shift toward professionals that have more of a "systems" thinking approach in supporting public cloud capabilities and ability to "reverse engineer" from business and IT objectives to architecture and design. In addition, the pool of talent must be best in class, which requires that access to critical partners working with managed SPs for any type of technology, process, or resource is provided to enterprises. Finally, having the right pool of talent must be complemented increasingly with utilizing greater levels of automation spanning technologies such as infrastructure as code (IaC), cognitive/AI, and ML. Consequently, enterprises should expect managed SPs to effectively combine talent with automation that can help meet business and IT objectives that are becoming more stringent such as faster time to market, greater agility in adjusting resources as required, and resiliency to weather unforeseen events.
- **Establish collaborative environment with effective communications.** Enterprises expect that their relationship with the managed SP is based on one of open communication and collaboration. However, the process of collaboration must be centered on the concept of partnership in which both parties, the client and the managed SP, contribute equally to the entire process from brainstorming to defining criteria of delivery and measuring outcomes. This process must also allow for robust communications that include a regular cadence of meetings to prevent issues from delaying initiatives that are imperative and rigorous review processes. Factors that firms should confirm are integrated as part of a managed public cloud services engagement include access to senior executives, a blueprint of the processes for communications, a framework for remediation and benchmarking progress, and assignment of stakeholders for accountability.
- **Implement robust governance with financial operations (FinOps) capabilities.** Coordinating all of the aforementioned facets required to achieve business and IT objectives while utilizing managed SPs to support public cloud needs requires enterprises to create a robust governance structure. The goal of this structure is to provide a means of control that spans gaining visibility into all resources; meeting SLAs, security, regulatory, and compliance requirements; enabling access to any resource that includes public cloud providers as well as innovative technologies; helping standardize technologies (e.g., toolsets, cloud architectures) to drive operational efficiencies; and providing a means of assessing performance via analytics particularly as related to speed at which value is generated (e.g., revenue, launching products). Finally, firms need a means of optimizing financial management of public cloud resources that requires implementing FinOps, which should be considered a fundamental underpinning in utilizing public cloud resources with managed SPs. Capabilities that firms should seek in using FinOps should center on effective utilization of all types of financial instruments (e.g., reserved instances, spot instances); mapping costs to business units, cost centers, technologies, and projects; optimizing spend across cloud resources; establishing

policies and controls for usage and spending; and forecasting spending and budgeting. Utilizing FinOps with a robust governance structure should allow firms to gain the level of control required to ensure achieving their business and IT objectives when using cloud resources as part of managed public cloud services.

VENDOR SUMMARY PROFILES

IDC evaluated 18 managed SPs against more than 250 criteria and involving more than 4,500 data points and metrics as part of this 2023 IDC MarketScape for worldwide managed public cloud services analysis. IDC also interviewed 35 buyer organizations to learn more about how the organizations were able to navigate cultural change and generate business results from using managed public cloud services. Companies that IDC interviewed came from a wide range of industries including education, financial services, healthcare, insurance, computer services, manufacturing, personal and consumer services, government, real estate and legal services, retail, transportation, and wholesale. IDC interviewed managed cloud services buyers that are located in Australia, Denmark, India, Japan, Singapore, Switzerland, the United Kingdom, and the United States. This section explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

2nd Watch

2nd Watch's capabilities and forward-looking strategy positioned the managed SP in the Major Players category in this 2023 IDC MarketScape for worldwide managed public cloud services.

Part of a consortium with ST Telemedia Cloud group, 2nd Watch, along with four other businesses, provides a life cycle of services to support public clouds that span data and cloud consultancy services focused on application modernization and modern ways of working using cloud-native architectures; managed cloud solutions' advisory services centered on cloud migration and optimization; cybersecurity that is focused on data protection services and real-time threat detection and response; managed cloud solutions specializing in cloud strategy, architecture, migration, modernization and optimization; and data engineering, analytics, and application development that focus on delivering custom data solutions.

As part of its cloud-native migration and modernization capabilities, 2nd Watch incorporates a discovery and analysis approach that spans application discovery, use of a Cloud Adoption Framework (CAF), and security and resilience review and survey processes, along with best practices that collectively are used to produce a security stance and future architecture. 2nd Watch utilizes a planning process that incorporates proof of concepts (PoCs) to support rapid discovery and integration. When it comes to landing zone implementation, 2nd Watch uses a set of IaC templates and a questionnaire to speed up the onboarding process onto public clouds with best practices for governance and security that are designed to support automated, fast, and repeatable processes.

Key to designing and building the right cloud environments is 2nd Watch's use of PODs. 2nd Watch utilizes PODs that are designed around a single team of resources to help understand a client's vision and support the ability to ideate, design, and build these environments to meet critical client business and IT objectives. The key principles that underpin these PODs include collaboration involving contract negotiation, joint discovery/validation and planning, focus on how to deliver the greatest value, and providing an agile environment that allows for fast-fail processes.

Operationally, 2nd Watch has a portfolio of capabilities to support operational needs for public cloud requirements. These capabilities include managed DevOps that utilize key capabilities including IaC, CI/CD, configuration management, SRE, security policy as code, and cloud cost optimization through FinOps. These operational services also include modern cloud operations that involve setting up public cloud environments and the required networking and security that are coupled with managing and monitoring application environments.

2nd Watch also incorporates data insights processes and security. 2nd Watch's data insights capabilities involve using data analytics, data science, data management, and data applications. In providing data insights, 2nd Watch utilizes ML and machine learning operations (MLOPs) capabilities that include the use of Snowflake as a key partner while providing deep insights into key industries such as public sector, manufacturing, logistics, financial services, media and entertainment, and retail and marketing. As for security, 2nd Watch offers an end-to-end set of services spanning managed detection and response (MDR), vulnerability and pen testing and management, and data discovery and protection along with risk management and compliance that utilizes an extended detection and response (XDR) platform and security operations center (SOC) while addressing risks through a governance, risk, and compliance (GRC) framework.

Finally, 2nd Watch has strategic partnerships with AWS, Azure, and Google. 2nd Watch is a Premier Partner and audited MSP with AWS and has AWS competencies in DevOps, migration consulting, and financial services industry (FSI). With Azure, 2nd Watch is a Gold Cloud Platinum partner certified in application integration, DevOps, data analytics, and application development. Finally, with Google, 2nd Watch is a Premier Partner with specializations in data analytics and migration.

Strengths

With service delivery and operations, 2nd Watch exceeded industry averages in providing discrete managed public cloud services and supporting client use of SRE, CI/CD, cognitive/AI, ML, and data sovereignty. 2nd Watch was also above industry averages in assisting clients in utilizing platforms involving platform as a service and software as a service and in the share of staff that support managed public cloud services when utilizing AWS and Google.

When it comes to technologies, 2nd Watch surpassed market averages for incorporating serverless/function-as-a-service capabilities; software involving application development, endpoint management, and integration and orchestration middleware; innovative capabilities involving software-defined infrastructure (SDI); and SaaS platforms for CRM, collaborative applications, and content workflow and management applications as part of providing managed public cloud services. In addition, 2nd Watch was above industry averages in utilizing FinOps as part of providing managed public cloud services along with the use of spot instances, reserve instances, and service/financial credits. Finally, in utilizing public cloud platforms as part of providing managed public cloud services, 2nd Watch exceeded industry standards in assisting customers in using SaaS, development and deployment software capabilities, and in the number virtual machines (VMs) managed on AWS while also exceeding market averages in supporting PaaS on Azure and SaaS on Google.

Challenges

To enhance its market position with managed public cloud services, 2nd Watch should focus on a number of key areas where 2nd Watch trailed industry averages. Areas for which 2nd Watch lagged behind market averages in supporting clients on public clouds involved the total number of VMs managed, the largest volume of landing zones managed on a public cloud platform for a single client,

and SLAs involving response time and recovery point objective (RPO). With public cloud platforms, 2nd Watch trailed industry standards in assisting client use of centers of excellence (CoEs) with managed public cloud services for AWS, Azure, and Google.

Across public cloud providers, 2nd Watch's support for clients using SAP, Oracle, and Microsoft on AWS was below industry averages as was assisting clients in using Azure management tools, Azure ARC, Kubernetes clusters, API management, and bare metal along with the total volume of VMs 2nd Watch managed with the Azure platform. With Google, 2nd Watch was below industry standards in supporting customer use of development and deployment software.

Accenture

Accenture's capabilities and forward-looking strategy positioned the managed SP in the Leaders category in this 2023 IDC MarketScape for worldwide managed public cloud services.

Accenture's delivery approach for managed public cloud services is based on five key building blocks. These building blocks are business value centricity that ensures end-to-end accountability and business value commitments; a product operating model focused on increased integration between business and IT as well as team collaboration; AI-powered hyper-automation to foster experimentation and drive innovation and continuous improvement; tech evolution to enable simplification, standardization, security, and sustainability; and adaptive talent for a future-ready workforce with a continuous learning culture.

To support its customers in providing managed public cloud services, Accenture offers an end-to-end suite of services for which Accenture looks to break down the complexity of moving to the cloud into manageable steps. Key elements of these services involve applications and platforms, AI and data, and infrastructure and security. Ultimately, Accenture uses these capabilities to build a strong, integrated digital core. In addition, Accenture utilizes a multidimensional cloud delivery model to support clients. This model involves cloud capabilities, an ecosystem of partnerships, and support for industry and business process functions and is supported by multidimensional specialized teams that operate across the delivery life cycle.

When it comes to investments in cloud, Accenture has built out an extensive portfolio of talent, tools, technologies, and partnerships. As part of its Cloud First strategy and organization, Accenture has more than 180,000 cloud professionals with more than 124,000 cloud certificates. Specific areas of investments include AI and data, edge, FinOps, and sovereign and green clouds along with the full life cycle of services spanning migration, modernization, and managed services. In addition, Accenture is making strategic investments in tools and platforms that include Velocity, which is a co-funded and codeveloped platform with AWS to optimize business outcomes in building and operating enterprise-scale applications and estates in the cloud; Continuum Control Plane; OneEdge platform; Conversational AI platform; and new industry solutions. These investments also include key tools and innovation such as myNav, Cloud First Delivery Methods utilizing templates and automated routines, and a common IaC library. Finally, these investments are bolstered by strategic acquisitions to support Accenture's Cloud First strategy as reflected by 19 major companies that Accenture has acquired over the past few years.

As previously noted, key platforms in supporting provisioning of managed public cloud services include Accenture's myNav platform and Continuum Control Plane (CCP). myNav provides clients with the means in moving to the cloud by supporting the full life cycle of services from building a business case to architecting and modernizing to the cloud as well as managing cloud resources. myNav also

includes advisory services for change management, sustainability, and industry requirements. CCP provides support for stability that focuses on FinOps and budget control, monitoring and observability, and security and compliance while enabling agility by incorporating operations automation, provisioning that includes use of IaC, and service intelligence.

Finally, Accenture continues to make significant joint investments in partnerships with hyperscalers such as AWS, Azure, Google, Alibaba, and IBM in the form of dedicated Business Groups that incorporate training and certification and dedicated deep delivery teams, joint asset solutions that include developing vertical and industry-specific solutions, and joint go-to-market solutions that involve integrated sales teams, marketing and thought leadership, and joint solutioning teams. Other strategic partners include Red Hat, Dynatrace, MongoDB, HashiCorp, Atlassian, Dell, Cisco, and Equinix.

Strengths

Accenture exceeded industry standards with key service delivery and operations capabilities in providing managed public cloud services that included the share of clients for which Accenture replaced existing infrastructure with public cloud IaaS as well as migrating and modernizing applications to public cloud IaaS. Accenture also surpassed market averages in supporting client use of CI/CD, cognitive/AI, ML, and robotic process automation (RPA) with managed public cloud services.

When it comes to technologies, Accenture was above market averages in assisting clients using managed public cloud services for infrastructure that involved quantum computing and end-user computing/VDI as well as exceeded industry standards in supporting endpoint management and network software along with supporting innovative technologies involving CoEs/physical locations for IoT, 5G, and security. Accenture also surpassed market standards in the use of financial instruments as part of managed public cloud services for spot instances and service/financial credits. Further, Accenture surpassed market averages when it came to client assessments for meeting SLAs, providing access to a full array of partnerships with public cloud providers (e.g., AWS, Azure, Google, IBM, Alibaba, OVH, Tencent, Huawei), and provisioning of a client feedback/customer satisfaction mechanism.

Finally, in supporting the use of public cloud providers as part of managed public cloud services, Accenture exceeded industry standards in assisting client use of AWS across an array of areas including Oracle, Microsoft, Kubernetes clusters, and API management while surpassing market averages for Azure that involved SAP and Oracle. When it comes to Google, Accenture exceeded market standards in supporting clients in using managed public cloud services for Oracle, Microsoft, Kubernetes clusters, and bare metal. Accenture also was above industry standards in providing managed public cloud services to support client use of the IBM Cloud for development and deployment software, systems infrastructure software, IaaS, PaaS, SaaS, and IBM Private Cloud.

Challenges

To enhance its market position with managed public cloud services, Accenture should focus on some of key areas where Accenture lagged behind industry averages. On the service delivery and operational side of providing managed public cloud services, Accenture trailed industry standards in the share of clients utilizing Accenture's multicloud management platform capabilities and use of data management. When it comes to supporting public cloud providers, Accenture had lower than market averages in assisting customers in using development and deployment software with the AWS cloud platform and in using PaaS capabilities on the Azure and Google platforms.

Coforge

Coforge's capabilities and forward-looking strategy positioned the managed SP in the Major Players category in this 2023 IDC MarketScape for worldwide managed public cloud services.

Coforge Cloud Services envision to help clients leverage the full potential of emerging technologies by enabling business transformation and superior business outcomes. Coforge differentiates itself through specialization by focusing on select industries; incorporating differentiated platforms and product engineering; driving adoption of cognitive, automation, integration, data, and cloud; and looking to deliver exceptional client focus and loyalty. Coforge's growth strategy is focused on acquiring companies that complement the capabilities of Coforge; product engineering and investments in R&D to develop new IPs, assets, and accelerators; bringing differentiated services to customers; continuing to mature existing offerings while developing new offerings with particular attention to edge cloud and metaverse; and building critical capabilities including workforce transformation for resources.

Coforge provides a full life cycle of services in delivering cloud services from strategy and developing road maps to designing, building, transforming, managing, and optimizing cloud environments. This starts with its full-service cloud advisory portfolio that includes key capabilities such as road map and strategy, cloud readiness, cloud migration, and modernization planning along with critical building blocks involving CloudOps, DevOps, and FinOps assessment services and SRE planning. When it comes to cloud migration, Coforge integrates its Transition Manager Tool that helps simplify complex migrations with the goal of reducing the effort required to make key decisions. Coforge has also established a cloud-native practice with a dedicated CoE that utilizes a range of assets and accelerators to support clients in areas such as containerization strategy, DevSecOps, microservice development, cloud-native modernization, and serverless application development.

To enable a more rapid journey to the cloud, Coforge incorporates a range of assets and accelerators that span assessment to migration and agile operations utilizing Coforge's AIOps suite. These assets and accelerators include its FastStart Assessment Framework, CloudFit Analyzer, Cloud Security Framework, Discover Framework, Cloud Migration Factory, DevSecOps Maturity Model, Migration @Scale (Transition Manager), CloudDevSecOps, Legacy Modernization, Helios (AI-lead operations framework), and FinOps (cloud optimization). Coforge also incorporates its Sysdig platform to provide security for container environments.

When it comes to cloud operations, Coforge provides a full range of managed cloud services as part of its cloud operations framework. Key elements of this framework include FinOps that supports clients with a governance structure, optimization of cloud resources (e.g., rightsizing, eliminating waste), and visibility and insights as well as reporting and alerting. Operations also include Coforge's DevSecOps capabilities that span maturity assessment, transformation, and support as well as Coforge's security framework that includes governance and advisory services. Underpinning Coforge's operational capabilities is the company's propriety AI-driven operations and multicloud management platform called Helios.

Coforge Data and Analytics solutions provide an extensive portfolio of services and solutions for modern data management. These solutions include the use of advanced business analytics, data modernization and engineering, data strategy and governance, and cognitive insights. Coforge also incorporates a wide range of capabilities to support cognitive requirements such as ML Veins (accelerator for MLOps and ML Governance) and Graph X (machine learning/deep learning on knowledge graphs).

When it comes to industry capabilities for cloud, Coforge has a range of industry-based SaaS products. These products include Banking Easy for banking and financial services, AdvantageSuite for the insurance industry, Monalisa for travel and transportation, and ProcureEasy for manufacturing.

Finally, Coforge has established major partnerships with AWS, Azure, Google, IBM, Oracle, ServiceNow, and Citrix, which include joint go-to-market models and dedicated business units for AWS, Azure, and Google. With Azure, Coforge is an ITES 360-degree partner of Microsoft with Gold competency and with AWS, Coforge is a Premier (WIP) consulting partner and a managed services partner. When it comes to Google, Coforge is a Google Premier (WIP) partner and supports services such as GCP migration and transformation, cloud operations and optimization, SAP on GCP, DevSecOps on GCP, application modernization, and cloud-native application development. Coforge also supports SAP S/4HANA across Google, AWS, and Azure.

Strengths

Coforge exceeded market standards with operational and service delivery capabilities that involved supporting client use of DevOps (e.g., use of agile, scrum development processes) as well as private clouds from public cloud providers located in public cloud hosting infrastructure and data lakes with managed public cloud services. Coforge also surpassed industry averages in assisting clients in utilizing PaaS, data management services (e.g., databases, data lakes), and quality and life-cycle tools; endpoint management software; analytics technologies, and SDI with these services. When it comes to helping clients manage the financial impacts as part of utilizing public clouds with managed public cloud services, Coforge was above market averages in use of spot instances and service/financial credits. With public cloud provider partners, Coforge exceeded market standards in supporting customers using AWS EKS (Elastic Kubernetes Services) with AWS and using Microsoft and PaaS on Google as part of providing managed public cloud services.

Challenges

To enhance its market position with managed public cloud services, Coforge should focus on a number of key areas where Coforge lagged behind industry averages. Operational and service delivery capabilities for which Coforge lagged behind market standards involved supporting clients with SRE, the total number of VMs Coforge managed, sustainability, and short response time. When it comes to technologies and innovation, Coforge trailed industry averages in supporting client use of managed public cloud services for SaaS, quantum computing, edge computing, network software, and ERP SaaS applications as well as use of CoEs for AWS, Azure, and Google. Coforge's largest number of landing zones that the company managed on a public cloud platform for a single client and the largest data storage engagement as measured in terabytes that is managed on a public cloud platform for a single client were below industry averages for these types of engagements.

When it comes to public cloud providers and partners, while Coforge lagged behind industry standards when supporting clients with the use of AWS across application software (e.g., ERP, SCM, CRM) that included SaaS applications hosted on the AWS cloud, Kubernetes clusters, and total number of VMs managed, Coforge had a below average share of clients using Azure for number of SaaS applications, Kubernetes clusters, and total VMs managed. Share of clients that Coforge supported with managed public cloud services that involved use of Google trailed market averages for development and deployment software as well as for application software (e.g., ERP, SCM, CRM) including SaaS applications hosted on the Google Cloud.

Cognizant

Cognizant's capabilities and forward-looking strategy positioned the managed SP in the Major Players category in this 2023 IDC MarketScape for worldwide managed public cloud services.

Cognizant's multicloud services strategy is centered on four key building blocks. First are Cognizant's strategic offerings. Key elements of these offerings include BlueBolt, which is a program that is designed to capture and drive innovation; Skygrade, Cognizant's cloud orchestration platform; and Neuro AI Platform, which enables the journey to the cloud and continuous innovation using AI. The second key area is focused on organizational factors and talent that includes partnerships with hyperscalers and academia as well as Cognizant's training programs the company is jointly investing with hyperscalers to create horizontal and vertical solutions that leverage the innovation with Cognizant's knowledge and experience. The third building block involves providing effective customer experience by ensuring that talent and CoEs are strategically located within proximity of clients. The final building block involves investing in CoEs and labs that include opening new centers for hyperscalers as well as acquiring new capabilities and talent through mergers and acquisitions.

Cognizant also utilizes an industry and capability consulting approach that is aligned to commercial models and service lines, which include the full life cycle of services and over five major industry sectors. When it comes to managed public cloud services, Cognizant provides a full portfolio of critical capabilities that span cloud-native, professional and managed services; tools, platforms, and automation; IT carbon reporting; and DevSecOps. As part of managed public cloud services, Cognizant integrates its cloud management platforms and automation solutions that are designed to assist enterprises in automating the life cycle of services utilizing AIOps capabilities.

With tools and platforms, Cognizant has developed three key platforms to support clients in both making the journey to the cloud and delivering operational excellence. To help clients moving to the cloud, Cognizant has built its Cognizant Skygrade, which is designed to help clients rapidly transition to modern cloud-native architectures while supporting the cloud-native transformation through the entire cloud journey from building the estate and modernizing and migrating applications to managing and running the cloud estate that includes use of hyperscaler partners and platforms. Skygrade also supports clients with governance and FinOps utilizing a single pane of glass while helping identify company-specific use cases and operationalize AI with data engineering and continuous improvement. Cognizant's Neuro IT Operations is an AI-led, automation-first platform to help organizations implement an automation-first approach in delivering IT operations for cloud. Finally, Cognizant also provides its multicloud management platform, which is under the Skygrade platform, as a means of delivering end-to-end management of cloud resources while incorporating key capabilities such as AutoOps, DevSecOps, FinOps, and compliance as service.

To support its managed public cloud services business, Cognizant has invested heavily in critical partnerships. When it comes to hyperscalers, these partnerships include AWS, Azure, and Google for which Cognizant has more than 50,000 trained and/or certified personnel on just these three platforms. Cognizant is making major investments across these hyperscalers that span new technology solutions, CoEs, industry offerings, and innovative capabilities in areas such as AI and containers. Cognizant also utilizes critical partnerships with Oracle, Cisco, IBM Cloud, ServiceNow, VMware, and Dell to support delivering cloud capabilities.

Strengths

With service delivery and operations, Cognizant surpassed the industry average in providing discrete managed public cloud services and supporting client use of public clouds involving RPA, data lakes, multicloud management platforms, and total number of VMs managed as part of managed public cloud services as well as supporting clients with innovative capabilities including network and content delivery/VPN/WAN and serverless/function as a service as part of these services. Across public cloud providers, Cognizant had higher than market averages in assisting clients in utilizing AWS with managed public cloud services for IaaS along with SAP. With Google, Cognizant surpassed the industry average in the share of clients utilizing IaaS and Microsoft. Based on client interviews, Cognizant exceeded the market standard in meeting SLAs and having technology expertise.

Challenges

To enhance its market position with managed public cloud services, Cognizant should focus on a number of key areas where Cognizant trailed industry standards. Cognizant lagged behind market averages in the share of clients using backup and/or archiving, recovery services, data sovereignty, and FinOps with managed public cloud services while trailing the industry average for response time. Technology areas for which Cognizant was below market averages in supporting clients on public clouds involved the use of quantum computing, edge computing, and collaborative SaaS applications.

Across public cloud providers, Cognizant lagged behind industry standards in supporting customers utilizing AWS with application software (e.g., ERP, SCM, CRM) that included SaaS capabilities along with industry platforms while trailing market averages in providing managed public cloud services for Azure that involved the use of Microsoft and for industry platforms involving the Google Cloud. When it came to IBM, Cognizant lagged behind market standards in supporting clients utilizing development and deployment software, systems infrastructure software, IaaS, and PaaS on the IBM Cloud. Customer feedback indicated that Cognizant was below industry averages in provisioning of a client feedback/customer satisfaction mechanism.

DXC

DXC's capabilities and forward-looking strategy positioned the managed SP in the Major Players category in this 2023 IDC MarketScape for worldwide managed public cloud services.

DXC differentiates its managed public cloud services by ensuring consistent performance in delivering outcomes, providing deep industry expertise, being a trusted partner for large-scale transformation, and offering a full stack of capabilities. When it comes to its value proposition, DXC emphasizes maximizing the value of public cloud by helping clients achieve better business results using its Cloud Right approach of modernizing and integrating all resources, ensuring workloads are deployed on the right platform, and managing and optimizing cloud resources while just having clients pay for what they consume.

DXC's global strategy for managed public cloud services is built on three key pillars. First, DXC leverages its expertise in cloud and hyperscaler partnerships to help enterprises gain control over costs while ensuring the agility needed to accelerate business initiatives and improve customer and employee experiences. Second, DXC provides clients with expertise across industry, business process, systems integration, and technical know-how with the goal of delivering innovation through end-to-end solutions across any type of cloud environment. Last, DXC is technology agnostic and incorporates best-of-breed tools, automation, AI, factory models, and transformation studios to help achieve client partnership objectives while utilizing its Cloud Right strategy to assist enterprises in

transforming their IT in supporting the full range of cloud environments as well as legacy systems, mainframes, security, and network.

When it comes to service delivery, DXC's integrated delivery model supports a team structure that focuses on hybrid cloud operations centered on DevOps and SRE skills. DXC utilizes its global delivery footprint that includes its global innovation and delivery centers (GIDCs) and regional delivery centers (RDCs) to manage cloud resources locally while delivering globally.

To support its managed public cloud services customers, DXC has made significant investments in innovative capabilities. These investments include DXC Cloud Advisory that utilizes a range of capabilities including its precision-guided modernization framework along with its Insights and Air Traffic Control and Modernization Director tooling to support assured migrations, DXC's Economic Value Management for business case analysis, and Cloud Financial Management to deliver FinOps capabilities. Additional investments included its Migration and Modernization Factory, Cloud Orchestration, Digital Innovation Labs, and Hyperautomation, which is DXC's disciplined approach to scale best-in-class automation assets. Further, DXC has invested in DXC Platform X, which is DXC's data-driven intelligent automation platform that helps accelerate the journey to the cloud by creating a resilient, self-healing IT set of capabilities to support an entire estate of IT including mainframes.

DXC has also invested heavily in building strategic partnerships with Microsoft Azure, AWS, and Google Cloud. When it comes to its 30+ year partnership with Microsoft, DXC is an Azure Expert MSP Partner with advanced specialization in areas such as SAP on Azure, infrastructure and database migration, Azure Virtual Desktop, and industry clouds and mainframe migration. DXC supports this partnership with six digital transformation centers.

With AWS, DXC has more than 4,500 AWS certifications and more than 27,000 agile/DevOps professionals to support AWS clients. Key competencies on AWS include those for financial services, IoT, mainframe modernization, managed security service provider (MSSP), SAP, and security. DXC's strategy with AWS is to support data and analytics with IoT, AI/ML, and DataOps; service integration with AWS mainframe modernization platform for re-platforming and re-factoring; and PaaS services with DevSecOps and FinOps. DXC will also coinvest with AWS to incubate and harvest IP for strategic solutions for CPG, manufacturing, automotive, and insurance.

Finally, when it comes to DXC's nearly four-year partnership with Google, DXC supports clients using Google with more than 10,000 agile/DevOps professionals and 6 global delivery centers. DXC's strategy with Google includes supporting mainframe modernization to Google Cloud, SAP on Google Cloud, and analytics and support for industry clouds spanning insurance, manufacturing, and utilities.

Strengths

With service delivery and operations, DXC exceeded market averages in the share of clients for which DXC replaced existing infrastructure with public cloud IaaS and use of private clouds from public cloud providers that are located in public cloud providers' hosting infrastructure as part of managed public cloud services. DXC also surpassed market averages in assisting clients in using public clouds involving sovereign clouds and OEM as-a-service private clouds (e.g., HPE GreenLake, Dell APEX, IBM Private Cloud, Hitachi Vantara EverFlex) to create hybrid clouds as well as across a range of technology capabilities involving cognitive/AI, machine learning, RPA, and multicloud management platforms. When it came to innovation, DXC exceeded market standards in providing managed public cloud services to support client use of CoEs for AWS, Azure, and Google. Based on client feedback, DXC was above the market average in providing cost-effective solutions, enabling access to a full

array of partnerships with public cloud providers (e.g., AWS, Azure, Google, IBM, Alibaba, OVH, Tencent, Huawei) and supporting clients with a full array of security and recovery capabilities.

Across public cloud provider platforms, DXC exceeded the industry average in supporting client use of AWS for application software (e.g., ERP, SCM, CRM) including SaaS capabilities hosted on the AWS cloud, industry platforms, Microsoft, and AWS WorkSpace as part of providing managed public cloud services. DXC also surpassed market standards in assisting enterprises using Azure that involved use of application software (e.g., ERP, SCM, CRM) including SaaS capabilities hosted on the Azure cloud, industry platforms, and number of seats for managed workplace (Office 365) as part of managed public cloud services. With Google, DXC was above the market average in assisting client use of application software (e.g., ERP, SCM, CRM) including SaaS capabilities on the Google Cloud as well supporting clients using SAP while exceeding the market standard in supporting customer use of IBM Private Cloud with the IBM Cloud as part of hybrid clouds.

Challenges

To enhance its market position with managed public cloud services, DXC should focus on areas where DXC lagged behind industry averages. Operationally, DXC trailed industry averages in supporting clients with the largest data storage engagement as measured in terabytes on a public cloud managed for a single client and in the share of personnel trained and/or certified for AWS and Google as part of providing managed public cloud services. With technologies, DXC lagged behind industry averages in assisting clients in using SaaS, endpoint management software, and IoT on public clouds. When it comes to public cloud partners, DXC was below industry standards in the total number of SaaS applications DXC supported for clients on AWS, Azure, and Google while lagging behind industry standards in supporting the IBM Cloud for systems infrastructure, development and deployment software, and IaaS.

Ensono

Ensono's capabilities and forward-looking strategy positioned the managed SP in the Contenders category in this 2023 IDC MarketScape for worldwide managed public cloud services.

Ensono differentiates its managed cloud services based on the depth and breadth of expertise that span from mainframe environments to cloud, delivering flexibility that includes offering workload portability without penalty and providing complete transparency via Ensono's management platform called Envision, and a culture of talent that spans more than 3,000 experts focused on delivering business outcomes, which Ensono views as an extension of a client's own IT department.

In supporting enterprises with managed public cloud services, Ensono provides a full life cycle of services. This includes strategic consulting and technical services spanning legacy application and infrastructure management; cloud-native architecture and operations that include DevSecOps, SRE, and CI/CD; and strategic digital technology transformation. These services are supported by service delivery and datacenter hosting capabilities located globally that incorporate the extensive set of partnerships Ensono has built with hyperscalers involving AWS, Azure, and Google along with partnerships involving IBM, ServiceNow, and VMware. Further, Ensono provides support for clients that cuts across a range of industries with particular focus on retail, financial services and insurance, state and local government, education, utilities, healthcare, professional services, communications, and manufacturing.

Ensono has also launched a series of innovative offerings for managed public cloud services. First is Ensono Flex Cloud Engineering services, which is designed to support addressing skills gaps required to modernize cloud environments and which enable clients to purchase support on an as-needed basis. The second major innovation involves Ensono Envision Advisor, which is a comprehensive platform that provides optimization and guidance designed to empower IT leaders to make informed decisions that can help drive better outcomes. This platform supports a full array of technology environments from mainframes to cloud and from infrastructure to applications while supporting ability to manage complex multiplatform environments.

Strengths

When it comes to service delivery and operations, Ensono exceeded market averages in assisting clients in migrating and modernizing applications to public cloud IaaS along with supporting client use of CI/CD and multicloud management platforms and in the largest volume of public landing zones managed on a public cloud for a single client. Ensono also surpassed industry standards in the share of total Ensono personnel supporting public clouds (IaaS, PaaS, SaaS) that are trained and/or certified for Azure as part of providing managed public cloud services. Further, Ensono surpassed industry averages in assisting clients in utilizing capabilities involving PaaS, SaaS, and SDI as part of these services. Across public cloud providers, Ensono was above industry standards in supporting client use of Azure with PaaS and SaaS capabilities and the use of PaaS capabilities with the Google Cloud. When it came to customer satisfaction (CSAT) ratings, Ensono was above the market average.

Challenges

To enhance its market position with managed public cloud services, Ensono should focus on a number of key areas where Ensono trailed industry averages. Operationally, Ensono lagged behind market standards when providing managed public cloud services in supporting clients on public clouds with SRE capabilities, total number of VMs managed, ML, data sovereignty, and data lakes. On the infrastructure and middleware side, Ensono was below industry standards in supporting clients with the use of edge computing and end-user computing/VDI as well as with data management (e.g., databases, data lakes) and software involving application development and integration and orchestration middleware as part of providing managed public cloud services.

Across public cloud providers, Ensono was below industry averages in assisting customers in utilizing AWS for systems infrastructure software, AWS EKS, and API management. With Azure, Ensono trailed market standards in assisting clients with the use of development and deployment software, systems infrastructure software, and application software (e.g., ERP, SCM, CRM) including a number of SaaS applications hosted on the Azure cloud, while with Google, Ensono lagged behind industry standards in supporting clients with Microsoft.

HCLTech

HCLTech's capabilities and forward-looking strategy positioned the managed SP in the Leaders category in this 2023 IDC MarketScape for worldwide managed public cloud services.

Underpinning HCLTech's managed cloud services business is HCLTech's CloudSMART set of offerings and capabilities that span the full life cycle of services from consulting and design services to build and manage. The portfolio of CloudSMART capabilities includes more than 100 industry solutions that are driven by intelligent automation, AI, industry compliant and zero-trust architecture, and 20 different types of horizontal offerings spanning multiple types of technologies. Further, CloudSMART involves use of a wide array of dedicated business units that leverage an ecosystem of

partners, which include hyperscalers involving AWS, Azure, and Google. Further, as part of CloudSMART, HCLTech has invested in a robust Dynamic Cybersecurity framework to ensure meeting client security, risk, and compliance requirements.

Part of HCLTech's CloudSMART offerings include innovation-led enablers such as VelocITy, which is a hybrid cloud framework that incorporates all aspects of people, process, and technology; SKALE DB, which is a secure, scalable, and cloud-ready database as a service; and DeCarbonizeIT, which infuses sustainability across every decision, offering, product, and outcome. These offerings also include productivity/efficiency-led enablers such as ScaleOps, which provides end-to-end CloudOps offerings involving AgileOps, AIOps, AppOps, and FinOps along with U4X, which is a utility-based pay-as-you-go offering for private cloud, to name a few. In addition, HCLTech has expanded its labs to include HCLTech MetaLabs and HCLTech Q-Labs for quantum computing to support CloudSMART offerings.

A key pillar of HCLTech's cloud capabilities involves enabling cloud-native development and data modernization. These capabilities span the range of modernizing legacy environments (e.g., mainframe) to the cloud to utilizing SaaS, cloud-native, and composable platforms involving enterprise applications (e.g., ERP) and data transformation. Further, HCLTech supports enterprises with the required organization change management needed to effectively utilize cloud capabilities along with DevSecOps, SRE, and FinOps capabilities to ensure operational excellence and meet required business outcomes. These outcomes are tailored to specific business and industry needs.

With FinOps, HCLTech has built a full suite of capabilities. HCLTech differentiates its FinOps through its consultative approach in commissioning dedicated FinOps practitioners, providing a single pane of glass for all service management visibility, enabling customization of its platform, supporting integration across all hyperscalers, using tag-based cost allocation, and supporting different deployment models from on premises to SaaS.

When it comes to HCLTech's hyperscaler partners, HCLTech has developed extensive programs with AWS, Azure, and Google. These programs involve cocreating solutions, developing thought leadership, engineering novel commercial models, addressing skills challenges, driving value, and building industry solutions. Examples of creating industry-based solutions with these partners are HCLTech's CoE for healthcare on Azure, financial services with Google, and HCLTech 1PLMCloud solution for manufacturing on AWS.

Strengths

As part of service delivery and operations, HCLTech exceeded industry averages in the total number of VMs managed on public clouds, in utilizing private clouds from OEMs (e.g., HPE GreenLake, Dell APEX, Hitachi Vantara EverFlex) to create hybrid clouds as part of providing managed public cloud services, and in supporting the largest data storage engagement as measured in terabytes on a public cloud managed for a single client. When it comes to infrastructure, HCLTech exceeded market averages in assisting clients in using quantum computing and end-user computing/VDI with public clouds involving managed public cloud services while exceeding industry standards in supporting clients with innovative technologies involving IoT, cognitive/AI, and ML along with SaaS applications for content workflow and management, engineering, and supply chain. These aforementioned market averages also include utilizing CoEs with clients for IoT and cognitive/AI. According to client feedback, HCLTech surpassed industry standards with customer satisfaction, providing cost-effective solutions, and provisioning of a client feedback/customer satisfaction mechanism.

Across public cloud provider partners, HCLTech exceeded market standards in supporting clients utilizing AWS for SAP, Microsoft, and VMware, while with Azure, HCLTech had higher share of clients as compared with industry averages using application software (e.g., ERP, SCM, CRM) including a number of SaaS applications, VMware, Azure Stack (private cloud), and in the volume of seats managed for Office 365. In supporting client use of Google with managed public cloud services, HCLTech exceeded industry standards for Oracle, VMware, bare metal, and Workspace services while exceeding market averages in supporting industry platforms and VMware for clients on the IBM Cloud.

Challenges

To enhance its market position with managed public cloud services, HCLTech should focus on some key areas where HCLTech lagged behind industry averages. HCLTech trailed industry standards in supporting data management software on public cloud; the use of private clouds from public cloud providers (e.g., AWS Outpost, Azure Stack, IBM Private Cloud, Google Anthos) as part of providing managed public cloud services, where private cloud solutions (from public cloud providers) are located in the public cloud datacenter infrastructure/landing zones; and in the volume of VMs managed on the IBM Cloud.

IBM

IBM's capabilities and forward-looking strategy positioned the managed SP in the Major Players category in this 2023 IDC MarketScape for worldwide managed public cloud services.

IBM's strategy for the company's managed public cloud services business is centered on first delivering business impact at scale that incorporates hybrid cloud capabilities including cloud-native adoption, industry solutions with its cloud partners, and process transformation through AI, automation, and intelligent workflow. Next is driving innovation as part of these services that includes co-creation, co-development, and cooperation utilizing the IBM Garage model, with the third element of this strategy centered on having technical mastery across its partner ecosystem, which is supported by unified application and platform services and alignment of delivery across IBM's strategic partnerships while leveraging hybrid and multicloud expertise.

Key elements that comprise IBM's differentiators for its managed public cloud services business begins with the company's deep industry expertise and solutions, ability to manage complex multicloud estates, and emphasis on a product-centric versus project-centric approach to development, delivery, and automation. IBM also views its intellectual property (IP) involving its Cloud Consulting Accelerator along with its Platform Engineering Services and IBM Garage as core differentiators in delivering innovation. Finally, IBM's global workforce of 160,000 consultants and ecosystem of partnerships with hyperscalers are also foundational differentiators in delivering the technical depth needed to support these services.

IBM's services portfolio and vision of cloud transformation is underpinned by eight foundational elements and six strategic capabilities. The foundational elements begin with a product culture that looks to ensure alignment with business outcomes, engineering at the core to meet quality standards, modernization and exponential technology to ensure a future-ready technology environment utilizing deep insights, extreme automation (E2E) to help transform the developer experience and productivity, experimentation to scale that enables faster time to market, security as code that is automated across the life cycle, sustainability for long-term environmental and financial objectives, and industry solutions. The six strategic capabilities that IBM incorporates as part of these services involve IBM's

operating model dynamic delivery, quality engineering, tools and accelerators, talent transformation, hybrid cloud platform, and open partner ecosystem.

To support meeting client needs in utilizing public clouds, IBM has built an extensive ecosystem of partners spanning hyperscalers and ISVs. IBM's partnerships with hyperscalers involve AWS, Azure, and Google for which IBM has nearly 60,000 certified professionals across these hyperscalers involving nearly 57,000 certifications. A key element of these partnerships involves IBM creating industry depth with these partnerships. Some of the industries for which IBM is co-creating industry solutions with its hyperscaler partners are banking, healthcare, government, energy, telco, manufacturing, and consumer.

Part of IBM's approach to delivering multicloud services involves combining automation, multicloud management platform, and tools and technologies. Key platforms that IBM utilizes in provisioning these multicloud capabilities involves IBM Cloud Consulting Accelerator (ICCA) that provides an automated approach to support transformation and journey to hybrid cloud while currently supporting more than 100 journeys, the IBM Automation Platform to drive automation at scale, IBM AIOps Platform for automation to support application life-cycle management with DevSecOps and AIOps, and IBM's Platform Engineering Control Plane that provides automated day 1 and day 2 platform engineering to support platform engineering services.

Strengths

With service delivery and operations capabilities, IBM exceeded industry standards in bundling managed public clouds as part of a hybrid cloud (private with public), the total number of VMs managed on public clouds, and use of multicloud management platforms as part of managed public cloud services as well as IBM's short response time for these services. In utilizing CoEs to support clients of managed public cloud services, IBM surpassed market averages in use of IBM CoEs.

Across public cloud provider partners, IBM exceeded industry standards in supporting client use of AWS with managed public cloud services for private cloud (Outpost), SAP, VMware, and bare metal and use of Google for development and deployment software, SAP, and Google Workspace services. In supporting the IBM Cloud, IBM exceeded market averages in assisting clients with systems infrastructure software, SaaS capabilities, industry platforms, SAP, VMware, IBM Private Cloud, and bare metal.

Challenges

To enhance its market position with managed public cloud services, IBM should focus on a number of key areas where IBM was below industry standards. When it comes to enabling the journey to the cloud, IBM trailed market standards in supporting clients with replacing existing infrastructure with public cloud IaaS and migrating and modernizing applications to public cloud IaaS while below industry averages in supporting client use of data sovereignty and security on public clouds as part of managed public cloud services. IBM also lagged behind industry averages in the share of public cloud staff supporting AWS, Azure, Google, and Alibaba.

Across technologies, IBM trailed market standards in assisting clients in using managed public cloud services for network and content delivery/VPN/WAN, endpoint management and storage software, and SDI. When it comes to providing financial management capabilities, the share of clients utilizing FinOps with managed public cloud services was below the industry average. Across public cloud provider partners, IBM lagged behind market standards in supporting customers utilizing Oracle and

Microsoft on the AWS cloud and customers using Azure for Oracle, Microsoft, PaaS, and SaaS while trailing industry standards in assisting customers when using Google for industry platforms.

Infosys

Infosys' capabilities and forward-looking strategy positioned the managed SP in the Leaders category in this 2023 IDC MarketScape for worldwide managed public cloud services.

Infosys' cloud business is centered on Cobalt 2.0, which is designed to support clients across three major pillars. The first pillar is centered on helping clients with IT efficiency that involves the use of hybrid multicloud engineering, migration, managed services, FinOps, and SRE, while the second pillar is focused on creating business agility through cloud-native and a cloud-first approach, which involves modernization for legacy applications and data, implementing DevOps, and utilizing key technologies such as analytics, business SaaS, IoT, and AI and ML. The third pillar of Cobalt 2.0 is centered on business-led innovation, which helps with enterprise digitization and the deployment of industry cloud solutions and business platforms. Ultimately, Cobalt 2.0 looks to deliver on business outcomes that involve financial factors such as driving high growth and market cap expansion and profitability, ensuring superior customer experience, creating a cloud-native culture, delivering business process efficiencies, improving social responsibility, and implementing security by design.

The key pillars of differentiation for Infosys' managed public cloud services business are centered on Infosys Marketplace, which provides clients with a digital store to find and adopt next-generation solutions across various industries and technology domains from Infosys and its partners; committing to business outcomes; a platform-driven service delivery model that embeds critical capabilities such as best practices, security, and sustainability; and developing the talent that clients require to support multicloud needs. Differentiation also includes developing thought leadership as showcased through channels such as MIT Technology Review, joint papers with clients, and the Infosys Radar report.

In supporting customers looking to utilize cloud capabilities and transform to digital enterprises, Infosys offers a full portfolio and life cycle of services. Key areas of these services include strategy and consulting, platform engineering services, cloud migration and modernization, cloud-native development and data services, engineering cloud services, and enterprise applications and SaaS services. Infosys has also incorporated FinOps using its FinOps Framework to provide cloud cost controls and drive financial efficiency.

Infosys has made strategic investments in innovative capabilities to help transform clients to the cloud utilizing new ways of working and new technologies. When it comes to modernization, Infosys has Infosys Live Enterprise Application Development Platform to help simplify and accelerate modernization of applications and the journey to the cloud while utilizing built-in standards and best practices at every stage of the journey. Infosys has also created a cloud platform for AI-powered business process, application engineering, and IT operations; created a series of assets and capabilities to support the use of the metaverse; and has built its Living Labs that provide innovative services designed to future-proof customer businesses while de-risking transformations using emerging technologies. Finally, Infosys has developed an extensive portfolio of industry solutions involving its industry clouds such as those for financial services (Infosys Cobalt Financial Services Cloud), Airline Cloud (Global ULD Tracer Bag Runner Dispatcher), and Infosys Cobalt Manufacturing Cloud.

Finally, Infosys has built a robust ecosystem of strategic partnerships that span hyperscalers and SaaS providers as well as providers to support technology platforms and tools, private cloud, and

security capabilities. In particular, Infosys has built deep partnerships with Azure, AWS, Google, Oracle, and IBM, with nearly 60,000 certified cloud resources. Some key areas in which Infosys is investing with AWS, Google, and Azure involve industry solutions, data, AI, and IoT.

Strengths

In providing managed public cloud services for service delivery and operations, Infosys exceeded industry averages in supporting customer use of CI/CD, sustainability, and data lakes as well as with both the largest data storage engagement as measured in terabytes on a public cloud managed for a single client and the largest data lake engagement as measured in terabytes on a public cloud managed for a single client. Infosys also surpassed market averages in supporting clients with replacing existing infrastructure with public cloud IaaS and migrating and modernizing applications to public cloud IaaS.

When it comes to supporting platforms, infrastructure, and software as part of managed public cloud services, Infosys was above market standards with assisting client use of PaaS, SaaS, quantum computing, serverless/function as a service, and software for endpoint management and networks. Infosys' use of innovation with managed public cloud services is reflected by its exceeding industry averages in supporting customer use of public clouds with technologies involving augmented reality/virtual reality (AR/VR), SDI, and ML as well as the use of CoEs for technologies involving analytics, 5G, security, and SDI.

Infosys' use of public cloud provider platforms resulted in above industry averages in supporting customers utilizing application software (e.g., ERP, SCM, CRM) and PaaS capabilities with AWS, Azure, Google, and IBM. By public cloud provider, Infosys exceeded market averages in assisting clients in using AWS with Oracle and Microsoft, Azure with Oracle, Google with Oracle and Microsoft, and the IBM Cloud for development and deployment software, systems infrastructure software, and IaaS.

Challenges

To enhance its market position with managed public cloud services, Infosys should focus on a number of key areas where Infosys trailed industry averages. Infosys lagged behind market averages in supporting client use of edge computing and the largest number of public cloud landing zones within a single client engagement with managed public cloud services. When it comes to public cloud provider platforms, Infosys was below market standards in the use of VMware on AWS, Azure, and IBM with managed public cloud services as well as with the number of SaaS applications it supported on Azure and Google and assisting client use of Google for industry platforms and Anthos.

Kyndryl

Kyndryl's capabilities and forward-looking strategy positioned the managed SP in the Leaders category in this 2023 IDC MarketScape for worldwide managed public cloud services.

The foundation of Kyndryl's managed public cloud services business is centered on the company's cloud practice portfolio that combines Kyndryl Vital, which provides clients and alliance partners with an environment in which to cocreate digital solutions; Kyndryl Bridge, which is a purpose-built, open hybrid IT governance and control plane for technical operations for hybrid IT estates (datacenter, private cloud, public cloud, and edge environments) that provides visibility across enterprise technology assets while offering actionable insights to support enterprise business priorities and objectives; and Kyndryl Consult, which focuses on business-led consulting services. Kyndryl's public

cloud services portfolio is made up of 188 offerings spanning the full life cycle of services from consulting, implementing, and managed services and is designed to support client use of hyperscaler platforms, for which Kyndryl has developed alliances with AWS, Azure, IBM, and Google. Kyndryl also has developed more than 700 public cloud-native IP and assets and 35,000 certifications as well as built 12 cloud centers of excellence (CCoEs) that Kyndryl utilizes to develop new solutions and capabilities, which includes an innovation lab dedicated to Microsoft.

To help firms optimize the value of managed public cloud services, Kyndryl assists enterprises in accelerating adoption of public cloud services through the modernization journey across infrastructure, application, data, and business. Kyndryl looks to drive strategic outcomes for enterprises utilizing its portfolio of cloud services spanning cloud and application modernization services that incorporates cloud-native services and cloud-native rapid assessments using proven methods along with frameworks and accelerators based on modern ways of working; agile migration involving modernization on cloud; cloud-native services for VMware that leverage repeatable processes, methods, and automation; and operational and optimization services for AWS, Azure, and Google that is supported by cloud-native design principles and operations frameworks.

Strengths

As part of service delivery and operations, Kyndryl exceeded market standards in bundling managed public clouds with private clouds to create hybrid clouds along with providing FinOps and supporting client use of SRE with managed public cloud services. When it comes to assisting customers in utilizing public cloud platforms for platforms and software, Kyndryl was above market averages for integration and orchestration middleware, endpoint management software, and network software as well as for SaaS applications involving collaboration, content workflow and management, engineering, and supply chain management. Kyndryl also surpassed industry standards in working with clients utilizing Kyndryl's CoEs for Google and IBM. Client feedback indicated that Kyndryl surpassed the market average in providing access to a full array of partnerships with public cloud providers (e.g., AWS, Azure, Google, IBM, Alibaba, OVH, Tencent, Huawei).

When it comes to public cloud provider platforms, Kyndryl surpassed market averages in supporting client use of AWS with Microsoft and VMware, Azure with PaaS, and Google with Microsoft, VMware, PaaS, and SaaS, including the number of SaaS applications hosted on Google. With IBM, Kyndryl was above industry standards in supporting client use of the IBM Cloud with managed public cloud services for application software (e.g., ERP, SCM, CRM) including the number of SaaS applications hosted on the IBM Cloud, industry platforms, Oracle, Microsoft, VMware, Kubernetes clusters, total number of VMs managed, and bare metal.

Challenges

To enhance its market position with managed public cloud services, Kyndryl should focus on a number of key areas where Kyndryl trailed industry averages. When it comes to service delivery and operations, Kyndryl lagged behind the industry standard for the largest number of landing zones managed on a public cloud for a single client and the largest data lake managed on a public cloud platform based on volume of data by terabytes for a single client as well as trailing use of sustainability as part of providing managed public cloud services. Innovative capabilities for which Kyndryl was below industry averages in supporting client use of public clouds when delivered as part of managed public cloud services include quantum computing, ML, cognitive/AI, analytics, and RPA as well as client use of CoEs for analytics and cognitive/AI capabilities.

Across public cloud provider partners, Kyndryl was below industry standards in assisting clients in utilizing AWS with industry platforms and SAP; Azure with application software (e.g., ERP, SCM, CRM), industry platforms, SAP, and Office 365; and Google with application software (e.g., ERP, SCM, CRM), industry platforms, and Anthos. With IBM, Kyndryl lagged behind market standards in supporting client use of the IBM Cloud that involved the IBM Private Cloud.

LTIMindtree

LTIMindtree's capabilities and forward-looking strategy positioned the managed SP in the Major Players category in this 2023 IDC MarketScape for worldwide managed public cloud services.

The foundations of LTIMindtree's managed public cloud services strategy are based on five key themes that begin with solving for purpose which is centered on delivering business value and outcomes using LTIMindtree's North Star industry blueprints. These blueprints are designed to develop business cases that are centered on assessing a client's business that span six key areas of consumer experience, branding and marketing, product innovation, resilience, sustainability, and product innovation and platform enabled.

The second theme involves providing solutions and offerings that are built for specific problems that are designed to support multiple technologies and services across hyperscalers. These offerings span the full gamut across the life cycle of services with particular emphasis on what LTIMindtree refers to as 1Ops, which includes Full Stack Digital Operations (FSDO) that enables enterprises to reimagine their IT as a means to transform their businesses by adopting digital and cloud ways of working, boundaryless multicloud operations, and observability. LTIMindtree also emphasizes key areas such as industry clouds, FinOps, DevSecOps, sustainability, and data and analytics that leverage AI tools to drive hyper-personalization of services along with what LTIMindtree calls BARC, its extreme automation set of capabilities.

To support provisioning of managed public cloud services, the third theme of LTIMindtree's cloud strategy is centered on delivering platform-driven Cloud Ops across operations (observability, SRE, DevSecOps, FinOps) utilizing LTIMindtree platforms. These platforms include JORITZ, which is an AI platform for digital operations that can modernize and enhance the journey to the cloud across personas; CloudExperienz, which is a secure, agile, resilient, and integrated full-stack hybrid cloud management platform; and Infinity, which is LTIMindtree's unified cloud platform that incorporates modern engineering tools and processes to enable life-cycle management from decisions to operations.

The fourth theme of LTIMindtree's cloud strategy is focused on aligning partners with solution requirements. LTIMindtree's partnership portfolio spans a wide array of technology and services providers supporting key areas such as consulting and engineering, data, governance, and compliance. When it comes to hyperscalers, LTIMindtree looks to collaborate and pursue opportunities through joint planning across accounts, industries, regions, and competencies with AWS, Azure, and GCP for which LTIMindtree has dedicated organizations.

The fifth theme of LTIMindtree's cloud strategy is centered on hiring certified professionals. LTIMindtree ensures that its resources are cross-skilled so that these resources are skilled in solving business problems and delivering value while supporting client business outcomes.

Finally, LTIMindtree is investing strategically across six key vectors of automation, platforms, and IP; co-innovations with customers; co-investment with hyperscalers; innovation labs and experience centers; research and academia; and personnel training and certifications.

Strengths

LTIMindtree exceeded industry averages in supporting clients for DevOps (e.g., use of agile, scrum development processes), cognitive/AI, and ML with managed public cloud services. LTIMindtree also surpassed market averages in assisting clients using public clouds for quantum and edge computing, application development software, blockchain, and SaaS applications for engineering and in using CoEs for AWS, Azure, Google, and IoT technologies. In addition, LTIMindtree exceeded industry standards for incorporating spot instances with managed public cloud services.

In supporting public cloud platforms with managed public cloud services, LTIMindtree surpassed industry averages in assisting clients in utilizing AWS for SAP, Outposts (private cloud), Microsoft, number of SaaS applications managed, and WorkSpace services and Azure for Oracle and Office 365. LTIMindtree was above market standards in supporting clients using Google for industry platforms, SAP, Microsoft, bare metal, and WorkSpace services.

Challenges

To enhance its market position with managed public cloud services, LTIMindtree should focus on a number of key areas where it trailed industry standards. With service delivery and operations, LTIMindtree's largest number of landing zones that the company managed on a public cloud platform for a single client and the largest data storage engagement as measured in terabytes that is managed on a public cloud managed for a single client were below industry averages for these types of engagements. LTIMindtree was also below average share in using CoEs (physical locations) to support clients for SDI while providing managed public cloud services.

In working with public cloud providers, LTIMindtree lagged behind industry averages in supporting client use of VMware and Kubernetes clusters with AWS, Azure, and IBM and in number of seats managed for workplace with Azure. With Google, LTIMindtree was below market averages in assisting customers in utilizing the Google Cloud for Google management tools, Anthos, and in the volume of VMs supported on Google with managed public cloud services.

Lumen

Lumen's capabilities and forward-looking strategy positioned the managed SP in the Contenders category in this 2023 IDC MarketScape for worldwide managed public cloud services.

Lumen's mission is to digitally connect people, data, and applications quickly, securely, and effortlessly through the Lumen platform, which is made up of more than 400,000 global fiber route miles, more than 2,200 on-net public and private datacenters, and more than 60 edge compute nodes. When it comes to providing managed public cloud services, Lumen offers a life cycle of services focused on building and transforming secure, high-performance networks that support the use of public cloud providers and their platforms; modernizing collaboration and communication systems for workers; and enhancing workloads that are deployed across clouds and the edge. Lumen's services can assist enterprise needs across public cloud providers, including Google, Amazon, and Microsoft Azure, which are all integrated with Lumen Cloud Connect and Dynamic Connections.

As part of its Managed Services Anywhere offering, Lumen provides enterprises with the tools, processes, and people via Lumen's cloud-agnostic platform called Lumen Cloud Application Manager (CAM) to help manage applications and workloads across any hosted infrastructure. Key building blocks of Lumen's Managed Services Anywhere offering include providing globally consistent, ITIL-based IT service management practices for operational assurance and business alignment; continual operational improvement with a suite of tools powered by CAM; and ability to customize services through Lumen's Advanced Managed Services, which includes services such as design and architecture, security guidance, and adaptive help desk.

Lumen's Advanced Managed Services are centered on delivery of services via the cloud while offering flexibility in selecting the right set of managed services with the goal of helping firms accelerate their journey to the cloud and in becoming a digital business. Advanced Managed Services provides a single agreement by which clients can select the technical disciplines they require. These services can support clients by providing bursting hours without increased commitment and prepay options available with allowance hours while providing support for project-based needs or multifaceted strategic initiatives for both Lumen-managed environments and bring-your-own-cloud scenarios. Finally, Advanced Managed Services offers a wide array of key capabilities such as strategic alignment and governance, DevOps best practices, proactive security and threat insights, cloud security and architecture guidance, and advanced cloud spend optimization.

Strengths

From an operational perspective, Lumen exceeded industry averages in supporting the largest number of landing zones managed on a public cloud platform for a single client along with assisting clients in the use of cognitive/AI and ML capabilities with public clouds. Lumen also surpassed the market average for response time. When it comes to technologies, Lumen exceeded industry standards in supporting customers using edge computing, data management (e.g., databases, data lakes), and application development software with managed public cloud services. In working with public cloud providers, Lumen was above industry averages in supporting client use of AWS for PaaS and industry platforms, Azure for PaaS, and Google for industry platforms and Anthos. Finally, interviews with clients indicated that Lumen surpassed industry standards for industry and/or business process knowledge as well as provisioning of a client feedback/customer satisfaction mechanism.

Challenges

To enhance its market position with managed public cloud services, Lumen should focus on a number of key areas where Lumen trailed market averages. In the area of service delivery and operations, Lumen lagged behind industry standards in supporting clients with migrating and modernizing applications to public cloud IaaS and client use of DevOps (e.g., use of agile, scrum development processes), CI/CD, SRE, multicloud management platforms, security, and recovery with managed public cloud services. Key platforms and technologies for which Lumen was below market averages involved supporting client use of PaaS, SaaS, and network and content delivery/VPN/WAN along with software for quality and life-cycle tools, systems and service management software, and endpoint management software. When it comes to financial management, Lumen was below market standards in providing clients with use of reserve instances and service/financial credits with managed public cloud services.

Across public cloud providers, Lumen lagged behind industry averages in supporting clients utilizing AWS for development and deployment software, Microsoft, and API management and Azure for

development and deployment software and Azure management tools. With Google, Lumen trailed industry standards in assisting clients in using IaaS and PaaS with the Google Cloud.

NTT DATA

NTT DATA's capabilities and forward-looking strategy positioned the managed SP in the Major Players category in this 2023 IDC MarketScape for worldwide managed public cloud services.

NTT DATA's managed public cloud services offerings span the full life cycle of services across digital transformation and digital operations. Digital transformation includes services focused on application development and modernization, cloud transformation, enterprise applications and configured platforms, and data and intelligence services. Digital operations include services focused on application management, multicloud as a service, digital workplace services, BPO and BPaaS, network as a service, and edge as a service. In addition, NTT DATA offers customizable services to support cloud requirements spanning cloud advisory, cloud management, cloud security, cloud implementation, and continuous innovation.

To support public cloud needs of clients, NTT DATA has built strategic relationships with AWS, Google, and Azure and has designed its Unified Cloud Adoption Framework to align with public cloud provider models. This framework is structured in a series of sequential capabilities from define, discover, and plan to ready, adopt, and managed services. This framework also incorporates required security and governance capabilities while ensuring continuous improvement.

NTT DATA has invested in a range of resources focused on helping enterprises optimize the value of managed public cloud services involving both PODS and a CoE. NTT DATA's agile PODS program combines engineering automation (e.g., DevOps) and pools of talent designed to help maximize modularity, scalability, and manageability of large programs. Key areas that these PODS support include agile development, support, and operational excellence to the core; collaboration involving cohesive groups that cater to larger common business objectives; client resources for tighter collaboration; scaling up/down on demand while evolving capabilities over time; and offering flexible pricing (e.g., capacity based, outcome based, milestone based). NTT DATA has also created SRE PODS that are responsible for designing, deploying, management, and automating technology assets. Further, NTT DATA's Cloud CoE provides regular access to cloud consultants that can provide solutions for complex cloud initiatives and help design cloud-native architectures using modern design principles while providing clients access to 13 design studios.

Finally, NTT DATA has invested in Nucleus, which is a suite of software products and cloud-based platform to automate enterprise outcomes. Nucleus supports a full range of capabilities such as cloud transformation, application development and modernization, digital workplace services, data and intelligence, and cloud and hybrid infrastructure.

Strengths

NTT DATA had a higher share of clients using data lakes and quantum computing as well as using CoEs that involved AWS, Azure, Google, and IBM as part of managed public cloud services while being above the market average in the largest data storage engagement as measured in terabytes managed on a public cloud for a single client. NTT DATA also surpassed industry standards in the share of staff for Alibaba supporting managed public cloud services. Client feedback indicated that NTT DATA exceeded market averages at providing cost-effective solutions and access to a full array of partnerships with public cloud providers (e.g., AWS, Azure, Google, IBM, Alibaba, OVH, Tencent,

Huawei) along with technology expertise and provisioning of a client feedback/customer satisfaction mechanism and customer satisfaction rating.

In working with public cloud providers, NTT DATA was above industry standards in supporting clients that utilized SAP and Outposts (private cloud) on AWS and clients using Oracle on Azure as well as the number of Office 365 seats managed on Azure. NTT DATA also had above market averages in providing managed public cloud services for the Google Cloud that involved client use of SAP and Workspace services as well as above market averages with the IBM Cloud in supporting customers use of industry platforms, Microsoft, and IBM Kubernetes Services. Finally, NTT DATA surpassed industry standards in the number of SaaS applications it managed on AWS and Azure.

Challenges

To enhance its market position with managed public cloud services, NTT DATA should focus on a number of key areas where it was below industry averages. NTT DATA lagged behind market standards in supporting client use of SRE, cognitive/AI, and multicloud management platforms with managed public cloud services. In the area of platforms and technologies, NTT DATA trailed market averages in supporting clients in utilizing public clouds with SaaS capabilities along with endpoint management software, quality and life-cycle tools, and network software. Further, NTT DATA also was below the industry standard in the total number of VMs managed on public clouds.

In leveraging public cloud provider platforms with managed public cloud services, NTT DATA trailed market averages in assisting clients in using Microsoft, API management, and PaaS as well as with the number of Kubernetes clusters managed on the AWS cloud and in the number of VMs managed on the Azure cloud. With Google, NTT DATA lagged behind market standards in supporting client use of Microsoft, API management, and Anthos. Finally, NTT DATA had below average rates in the share of staff that supported Azure with managed public cloud services.

Rackspace

Rackspace's capabilities and forward-looking strategy positioned the managed SP in the Major Players category in this 2023 IDC MarketScape for worldwide managed public cloud services.

Rackspace differentiates its managed public cloud services by providing global delivery, supporting multicloud needs across all major public cloud providers (e.g., AWS, Azure, Google, VMware) along with OpenStack Private Cloud, incorporating an extensive set of certified technical experts, offering flexibility through the use of multiple service delivery models, and ensuring agility through the use of automation, proven processes, and runbooks that includes Rackspace's Fabric AI platform and analytics capabilities. Rackspace utilizes its capabilities to help clients achieve business outcomes that span key areas, including business agility, innovation, improved customer experience, and increased operational efficiency while managing operational risks of security and compliance.

When it comes to the value proposition of its managed public cloud services, Rackspace looks to meet customers where they are in their cloud journey and offer full-stack solutions that span cloud platforms, applications, data, and security. Rackspace incorporates IP and tooling to further differentiate its solutions while providing flexible engagement models for day 0 (Advisory Services), day 1 (Professional Services for cloud modernization), and day 2 and beyond (Elastic Engineering Services and Managed Services for ongoing cloud operations).

Rackspace's portfolio of capabilities spans the full life cycle of services for public cloud across four key service lines of cloud applications, cloud data, cloud platforms, and cloud security. Rackspace's life

cycle of services begins with its advisory capabilities that can assist in areas such as transformation strategy, business case and road map, and data strategy. Rackspace can then assist clients in transforming to the cloud with services such as cloud landing zone design, data migrations, establishing DevOps, and modernizing applications. Finally, Rackspace can manage and optimize public cloud environments via offerings such as Rackspace Elastic Engineering, multicloud managed services, DataOps, MLOps, and FinOps.

Rackspace also utilizes a wide array of IP and automation across each stage in this life cycle of services. Key pillars of its automation strategy involve utilizing reusable assets, accelerators, and new platforms such as Guzzle for DataOps with the goal of helping accelerate, optimize, and drive operational excellence in provisioning managed public cloud services. Rackspace also incorporates sustainability as part of its services to help clients address the impacts on the environment by making the use of green technologies with the goal of reducing carbon emissions of IT, making the economics viable by ensuring the long-term viability of the workforce, and aligning with social priorities by striving for equity in technology solutions.

Rackspace is structured so that there are now two major business units, one that is focused on private cloud and one on public cloud. In addition, across industries, Rackspace is primarily focused on healthcare, public sector, and financial services. Finally, when it comes to public cloud, Rackspace has built strategic partnerships with AWS, Azure, and Google supported by nearly 6,000 certifications and a wide array of competencies and specializations.

Strengths

With service delivery and operations, Rackspace surpassed industry standards in supporting client use of multicloud management platforms along with backup and/or archiving with managed public cloud services. Rackspace also exceeded market averages in assisting clients in using IaaS, quantum computing, edge computing, data management (databases, data lakes), and network and storage software with public clouds. Rackspace also was above the market average in supporting use of spot instances with managed public cloud services.

With its public cloud provider partners, Rackspace showed above industry averages in providing managed public cloud services to support client use of development and deployment software, systems infrastructure software, IaaS, and API management with the AWS cloud while exceeding market standards in supporting client use of development and deployment software, Microsoft, and API management on Azure. In assisting clients with use of Google via managed public cloud services, Rackspace also was above market averages in supporting development and deployment software, application software (e.g., ERP, SCM, CRM), and API management capabilities.

Challenges

To enhance its market position with managed public cloud services, Rackspace should focus on a number of key areas where it was below industry averages. When it comes to assisting clients in the journey to the cloud, Rackspace trailed industry standards in helping clients replace existing infrastructure with public cloud IaaS, migrate and modernize applications to public cloud IaaS along, and in use of SRE capabilities. Rackspace also lagged behind market averages in the largest number of landing zones managed on a public cloud platform for a single client as well as in the share of clients using data lakes with managed public cloud services.

With technologies and platforms, Rackspace trailed industry averages in supporting client use of endpoint management software, analytics technologies, cognitive/AI, ML, and SaaS applications for enterprise resource management/planning with public clouds as part of managed public cloud services. Rackspace also was below industry standards in utilizing CoEs for IBM, IoT, and cognitive/AI with clients. Further, the share of staff for Azure supporting managed public cloud services lagged behind the industry standard. When it came to client feedback, Rackspace had lower market averages in meeting SLAs, having industry and/or business process knowledge, and a full array of security and recovery capabilities as well as overall customer satisfaction.

In working with public cloud providers, Rackspace was below industry standards in supporting client use of SAP and Oracle with the AWS cloud and in assisting clients in utilizing SAP on the Azure cloud. Rackspace also trailed market standards in the number of VMs that it managed on the Azure cloud. With Google, Rackspace trailed market averages in managing Microsoft and Anthos environments on behalf of clients with the Google Cloud.

TCS

TCS' capabilities and forward-looking strategy positioned the managed SP in the Leaders category in this 2023 IDC MarketScape for worldwide managed public cloud services.

TCS differentiates its managed cloud services business and capabilities based on customer centricity for which TCS provides value through both deep contextual and industry expertise, support from a global team of more than 600,000 diverse and skilled talent and thought leaders, TCS' "Integrated Cloud Value Engine" that spans from strategy to multicloud operations, and a culture of innovation and collaboration that includes partnerships with cloud service providers as well as non-cloud SPs involving TCS' Co-Innovation Network (COIN). TCS also differentiates its managed public cloud services business by offering flexible and innovative client partnership models that include different types of pricing and outcome-based arrangements.

To support managed public cloud services, TCS provides a full array and life cycle of services. Key elements of these services involve strategy and transformation and business solutions (e.g., TCS BaNCS, TCS Optumera, industry clouds) supported by next-generation technologies (e.g., AI/ML, blockchain, 5G), migration and modernization services to support cloud-native and data platforms, operations (e.g., cloud, sustainability, ML, SRE, governance) and foundational capabilities (e.g., platform engineering, FinOps, security, and compliance). To support managed public cloud services that involve use of hybrid clouds that combine private and public clouds, TCS offers its TCS Enterprise Cloud.

As part of providing managed public cloud services, TCS has built deep relationships with AWS, Google, and Azure, for which TCS has more than 70,000 certifications across these three providers and a wide array of specializations. TCS also collaborates with each of these providers across technologies (e.g., IoT, generative AI, security), industry solutions (e.g., financial services, healthcare, manufacturing), and critical requirements (e.g., sustainability). TCS has also built an array of partnerships with a wider array of cloud providers that include IBM, Oracle, and Salesforce.com.

In provisioning managed public cloud services, TCS is investing in critical capabilities to support multicloud requirements that involves supporting the deployment of a single capability across multiple public clouds. Examples of these multicloud capabilities include applications (e.g., geo-distributed), industry clouds (e.g., telecommunications), processes (e.g., FinOps, DevOps), and technologies (e.g.,

network multicloud disaster recovery [DR], security monitoring with centralized security information and event management [SIEM]).

TCS is also making a wide array of strategic investments to support providing managed public cloud services. These investments span products, platforms, and accelerators with a heavy focus on industry clouds (e.g., TCS BaNCS, TCS Connected Plant, TCS Clever Energy), transforming talent that is focused on providing training for anyone, anywhere, at any time on any device with emphasis on creating Contextual Masters to develop leadership that utilizes TCS' Elevate program to help define career paths and TCS' Academic Interface Program that provides access to academic institutes globally. Finally, TCS continues to invest in innovation that includes TCS Pace, which offers locations where clients and partners can collaborate, and Agile Innovation Cloud (AIC), which provides a means of doing agile sprints that span strategy to ideation and agile development while allowing for rapid experimentation and the opportunity to utilize emerging technologies, ecosystems, and new processes.

Strengths

With service delivery and operations, TCS exceeded industry averages in the largest number of landing zones managed on a public cloud platform for a single client and use of OEM-as-a-service private cloud solutions (e.g., HPE GreenLake, Dell APEX, IBM Private Cloud, Hitachi Vantara EverFlex) as part of providing hybrid clouds and RPA. TCS also exceeded industry standards in supporting clients on public clouds for recovery time objective (RTO).

TCS surpassed market averages in supporting clients with the use of infrastructure that included quantum computing, edge computing, and end-user computing/VDI; software involving endpoint management software and integration and orchestration middleware; technologies involving 5G, AR/VR, and IoT; and SaaS applications for engineering, CRM, and supply chain management as part of providing managed public cloud services. Further, TCS had above industry averages with clients utilizing TCS' CoEs for AWS, Azure, and Google as well as utilizing CoEs for analytics, IoT, 5G, AI, and security.

Across its public cloud partners, TCS surpassed industry standards in supporting clients in using AWS, Azure, Google, and the IBM Cloud for application software (e.g., ERP, SCM, CRM). With AWS, TCS exceeded market averages in supporting industry platforms and bare metal while having share of clients using Google for industry platforms.

Challenges

To enhance its market position with managed public cloud services, TCS should focus on a number of key areas where it lagged behind industry standards. TCS was below industry averages in the largest data storage engagement as measured in terabytes on a public cloud managed for a single client and the largest data lake engagement as measured in terabytes on a public cloud managed for a single client. TCS also trailed industry standards in use of spot instances and service/financial credits and use of IaaS as part of managed public cloud services. Finally, TCS was below market averages in supporting client use of IaaS on the AWS Cloud and Microsoft on the Google Cloud.

Tech Mahindra

Tech Mahindra's capabilities and forward-looking strategy positioned the managed SP in the Major Players category in this 2023 IDC MarketScape for worldwide managed public cloud services.

Tech Mahindra differentiates managed public cloud services across three key foundational themes. The first theme involves providing the traditional lift and shift services involving software engineering excellence that utilizes different platforms including Migration Accelerators to the Cloud (MAC), which includes capabilities such as assessment and migration frameworks and cookbooks for automation; Passport.NXT (Tech Mahindra's cloud assessment and business value framework), and iCOPs (Intelligent Cloud Operations), a platform that provides a unified view across hybrid, multicloud operations for seamless operations. The second theme involves cloud-native and horizontal cloud offerings like D&A on cloud solutions like Sprinter and Cyber on Cloud. The third theme incorporates platforms to drive newer revenue streams for customers, such as netOps.ai, which is an end-to-end secure and automated cloud platform to support telecommunication networks and empower operators to accelerate transformation to 5G; Factory.NXT, which is a cloud platform for auto and manufacturing industries; and Blue Marble, which is a microservices framework for digital transformation targeted at communications service providers.

Tech Mahindra provides the full life cycle of services from advisory to modernization to operations and support for managed public cloud services. Key capabilities involve an engineering operations approach to delivering services that combines data-driven customer experience, API-driven systems architecture, and as-a-code infrastructure. When it comes to transformation to the cloud, key elements of Tech Mahindra's services focus on creativity and intelligent data along with cloud application and modernization that is supported by hybrid cloud infrastructure migration and automation, product engineering and SRE, and security.

As part of its managed public cloud services capabilities, Tech Mahindra incorporates its unified cloud platform called Cloud BlazeTech (CBT). This platform covers the entire journey to the cloud and provides frameworks and industry-quality standards that are designed to simplify an enterprise's ability to orchestrate and achieve its cloud ambitions. CBT offers a wide array of functional blocks and tools that align with the full life cycle of services from assess to migrate, manage, and operate hybrid multicloud environments. Key capabilities of CBT include hybrid cloud management, security and compliance management, cloud resource insights and optimization, and automation including IaC along with FinOps.

In helping drive innovation, Tech Mahindra utilizes a combination of its Makers Labs and its StartNet program that works with more than 500 partner start-ups, research institutes, and partnerships with creative and design firms. Today, Makers Labs are made up of more than 10 locations globally with additional labs to be opened in the near future.

When it comes to hyperscalers to support its managed public cloud services, Tech Mahindra has built deep relationships with AWS, Azure, Google, IBM, and Oracle. These relationships involve making strategic investments across a wide array of areas spanning process-oriented capabilities involving migration and modernization to specific technology capabilities (e.g., 5G, blockchain, data, AI). In addition, Tech Mahindra is working with its hyperscaler partners to create specific industry solutions.

Strengths

With service delivery and operational needs, Tech Mahindra had above industry averages in the largest data storage engagement as measured in terabytes on a public cloud managed for a single client and the largest data lake engagement as measured in terabytes on a public cloud managed for a single client. Across technologies, Tech Mahindra exceeded market standards in supporting client use of quantum computing, SaaS applications for supply chain management, IoT, 5G, blockchain, and AR/VR as well as was above industry standards in assisting clients in using CoEs for 5G and

blockchain with public clouds. Client interviews revealed that Tech Mahindra surpassed market averages in providing a full array of security and recovery capabilities.

With its public cloud partners, Tech Mahindra surpassed market standards in supporting clients using managed public cloud services with AWS for API management and bare metal and with Azure for volume of number of VMs managed, bare metal, and Office 365. When it comes to Google and IBM, Tech Mahindra exceeded industry standards for numbers of VMs managed on each platform. Finally, Tech Mahindra surpassed industry averages in the share of trained and/or certified staff on Google, Azure, and IBM.

Challenges

To enhance its market position with managed public cloud services, Tech Mahindra should focus on a number of key areas where it was below industry standards. On the operations side, Tech Mahindra lagged behind market averages in supporting clients on public clouds with managed public cloud services for backup and/or archiving, recovery, storage, and security as well as use of multicloud management platforms and ML. Across platforms and technologies, Tech Mahindra was below market averages in supporting customer use of public clouds with managed public cloud services for platforms involving IaaS, PaaS, and SaaS; infrastructure technologies including general computing, storage, and network and content delivery/VPN/WAN; and software including security, storage, and physical and virtual computing software. Finally, Tech Mahindra trailed industry averages in replacing existing infrastructure with public cloud IaaS.

Across public cloud providers, Tech Mahindra lagged behind industry standards in supporting client use of public cloud platforms with managed public cloud services that involved use of AWS for Microsoft, systems infrastructure software, and SaaS capabilities as well as use of Azure for IaaS and API management capabilities. When it came to IBM, Tech Mahindra lagged behind market standards in supporting clients with applications, Microsoft, IBM management tools, and IBM Private Cloud with the IBM Cloud.

Unisys

Unisys' capabilities and forward-looking strategy positioned the managed SP in the Major Players category in this 2023 IDC MarketScape for worldwide managed public cloud services.

Unisys differentiates its managed public cloud services by providing reliability, ensuring that Unisys is available to clients when required, and providing innovation and consistent delivery. Key parts of Unisys' hybrid strategy and value proposition involve placing intense focus on client objectives that are supported by rapid transformation and implementation with the goal of delivering on defined value with identification of uncommon value for client delight as well as creating operational resiliency through a client's digital transformation and journey to the cloud that maximizes ecosystem partner relationships.

As part of managed public cloud services, Unisys provides a full life cycle of services across its CA&I (cloud, application, and infrastructure) portfolio. These services span solutions for modern application, cloud data and analytics, cybersecurity, hybrid infrastructure, and cloud management. Unisys also provides customized solutions for industry requirements along with industry-specific application-centric solutions with particular focus on the public sector, transportation, and banking. Ultimately, Unisys looks to deliver on business outcomes in providing this full life cycle of services and customized solutions.

Unisys has developed a multicloud operating model to support managed public cloud services that is made up of six strategic pillars. The six pillars of this operating model are made up of a cloud business office and team that focuses on building an effective strategy for cloud; a cloud enterprise architecture team to support determining the optimal multicloud architecture, reference patterns, governance, and frameworks; digital product teams that incorporate use of application/developer/data platforms; DevSecOps that utilizes automated operations using repeatable approaches; SRE; and managed services that incorporates monitoring, alerting, patching, security, and FinOps.

To support managed public cloud services, Unisys has built deep partnerships with Azure and AWS for which Unisys has achieved a range of competencies and specializations. To help clients optimize the use of these partners, Unisys has invested in a wide array of capabilities that include an automation hub, a cloud migration CoE, an AWS practice and CoE, a transformation practice, and modernization, development, and transition hubs. Further, Unisys has invested in supporting industry solutions along with SAP, ERP, and SCM application workload types on these public cloud provider platforms.

Unisys is also embedding automation and analytics in providing managed public cloud services. When it comes to automation, Unisys incorporates its Unisys Automation Hub that combines client-defined automation with core automation across public cloud and hybrid operations. In addition, Unisys is taking a ZerOps approach aiming for zero-intervention AI-led Ops by embedding hyper-automation that incorporates embedded security and compliance based on Unisys CloudForte capability framework. When it comes to analytics, Unisys is using next-generation data analytics to measure performance and transformation results, which includes providing key performance indicators (KPIs) for delivery/service models involving capabilities such as CloudOps, FinOps, DevOps, and SecOps.

Finally, to help optimize provisioning of managed public cloud services, Unisys utilizes its CloudForte Platform. This platform supports the full life cycle of services spanning advisory, IaC, migration, modernization, and operations while supporting all public cloud providers with the ability to help drive innovation, co-creation with clients and partners, and ultimately deliver on value to clients. CloudForte is also designed to integrate with tools and solutions from partners.

Strengths

Across operational and service delivery capabilities, Unisys exceeded industry standards in supporting clients in replacing existing infrastructure with public cloud IaaS, migrating and modernizing applications to public cloud IaaS, and using SRE with public clouds. Unisys was also above the market average in supporting clients with sustainability as part of providing managed public cloud services. When it comes to technologies, Unisys surpassed market standards in supporting client use of public clouds with managed public cloud services for general and quantum computing, endpoint management, integration and orchestration middleware, and SaaS applications for collaboration.

Unisys also was above market averages in supporting client use of CoEs for public clouds with AWS and Azure as well as for use of innovative technologies involving security and SDI. Finally, when it came to client feedback from interviews that IDC conducted, Unisys exceeded market standards in providing cost-effective solutions and access to a full array of partnerships with public cloud providers (e.g., AWS, Azure, Google, IBM, Alibaba, OVH, Tencent, Huawei) as well as offering a full array of security and recovery capabilities.

Across public cloud providers, Unisys surpassed market standards in supporting client use of AWS with managed public cloud services for Microsoft, VMware, and SaaS capabilities and with the volume of VMs managed on AWS as well as exceeding industry averages in supporting client use of Azure

with VMware, Office 365, and SaaS capabilities. With Google, Unisys was above industry averages in supporting customers using VMware, SaaS capabilities, and Anthos, while with IBM, Unisys exceeded industry standards in supporting client use of the IBM Cloud across key applications including SAP, Oracle, and Microsoft.

Challenges

To enhance its market position with managed public cloud services, Unisys should focus on a number of key areas where it lagged behind industry standards. Unisys lagged behind industry averages in the largest data storage engagement as measured in terabytes on a public cloud managed for a single client and the largest data lake engagement as measured in terabytes on a public cloud managed for a single client. Unisys also trailed market averages in the share of cloud personnel that are trained and/or certified on AWS, Azure, and Google. Unisys also had below average shares in supporting clients using public clouds across technologies involving network and content delivery/VPN/WAN, end-user computing/VDI, and serverless/function as a service.

Across public cloud providers involving AWS, Azure, and Google, Unisys lagged behind industry averages in supporting client use of application software (e.g., ERP, SCM, CRM) including the number of SaaS applications hosted on these clouds. Unisys also trailed market standards in supporting client use of AWS with managed public cloud services for industry platforms and Oracle, while having below market averages in providing clients with managed public cloud services for Azure involving SAP.

Wipro

Wipro's capabilities and forward-looking strategy positioned the managed SP in the Leaders category in this 2023 IDC MarketScape for worldwide managed public cloud services.

Wipro provides managed public cloud services as part of its FullStride set of cloud services spanning the full life cycle from consulting and strategy to migration and modernization as well as ongoing management and operations of cloud environments. FullStride services is an ecosystem orchestrator that is designed to deliver tangible outcomes for unique business needs while transforming organizations into agile, sustainable intelligent enterprises. FullStride is centered on bringing together an ecosystem of partners and hyperscalers, platform expertise, and industry insight to help unlock the innovative potential of the cloud.

Wipro differentiates its cloud services by its product offerings, cloud transformation studio, and IP and accelerators. Theme-based productized offerings involving digital and cloud capabilities are designed to help create better business value, resulting in improved cloud penetration potential. Wipro's cloud transformation studio provides clients with Wipro's best engineering talent and a culture that embraces a "challenge us" mentality. IP and accelerators are specifically designed around Google Cloud Platform (GCP) portfolio components with the goal of addressing white spaces.

Utilizing FullStride, Wipro has built a blueprint that is made up of four major building blocks. Starting with a plug-and-play approach, FullStride is designed to enable a seamless multicloud adoption for industry-centric solutions via a single platform. Key elements of this approach involve cloud engineering and service management that include capabilities such as the creation of road maps, use of blueprints, domain expertise, API marketplace, orchestration and automation, and a single bill of IT, along with providing a wide array of industry stacks and solutions working with ecosystem partners including hyperscalers. Further, FullStride's capabilities also include utilizing a business operations center that supports requirements such as observability, AIOps, and FinOps.

FullStride then incorporates an engineering-led, data-driven approach to cloud services. Wipro's engineering-led approach looks to identify building blocks to drive innovation with a focus on key areas including 5G, Industry 4.0 and IoT, connected products, cloud security, and data platforms and AI. The data-driven approach offers a portfolio of services involving business advisory, insights at scale, and data transformation.

The third element of FullStride involves infusing AI across the entire spectrum of cloud services with capabilities such as Wipro's AI CoE, data science use cases, platform migration, metaverse, AI on edge, MLOps, and industrial AI on cloud. Last, the fourth key element involves assessing and designing a sustainable technology strategy and business model.

While Wipro has nearly 40,000 employees certified on AWS, Azure, and Google, it has more than 80,000 cloud professionals. Key areas of focus with these public cloud provider partnerships includes industry clouds, codeveloping solutions, and continued investment in talent with certifications.

Strengths

With service delivery and operational requirements, Wipro exceeded market averages in supporting client use of private clouds from public cloud providers (e.g., AWS Outpost, Azure Stack, IBM Private Cloud, Google Anthos) as part of providing managed public cloud services, where these private cloud solutions (from public cloud providers) are located in the public cloud datacenter infrastructure/landing zones. Wipro also surpassed the market average in assisting clients in use of OEM private cloud as-a-service solutions (e.g., HPE GreenLake, Dell APEX, IBM Private Cloud, Hitachi Vantara EverFlex) as part of providing hybrid cloud capabilities that are used in conjunction with public cloud providers and platforms. Further, Wipro exceeded industry standards in supporting client use of public clouds for sovereign clouds, sustainability, and data lakes while having an above market average for response time.

When it comes to technologies, Wipro exceeded industry standards in providing managed public cloud services to assist clients in utilizing public clouds for quantum computing, end-user computing/VDI, endpoint management, and network software along with blockchain. Wipro also was above industry averages in utilizing CoEs with clients for public cloud that involved analytics technologies, IoT, blockchain, 5G, cognitive/AI, and SDI. In addition, interviews with clients showed that Wipro exceeded market averages in providing cost-effective solutions and provisioning of a client feedback/customer satisfaction mechanism.

Wipro's capabilities across public cloud providers showed that the company was above industry standards in supporting client use of application software (e.g., ERP, SCM, CRM) including SaaS capabilities hosted across all four public cloud providers including AWS, Azure, Google, and IBM. Wipro also surpassed market averages in providing managed public cloud services to support client use of the AWS cloud for SAP, Oracle, Kubernetes clusters, and bare metal and use of the Azure cloud for SAP and Azure ARC. With Google, Wipro was above market averages in providing managed public cloud services to assist clients with Oracle, VMware, Anthos, and Workspace services as well as above market averages in supporting clients on the IBM Cloud with SAP, Oracle, and VMware.

Challenges

To enhance its market position with managed public cloud services, Wipro should focus on some key areas where it lagged behind industry standards. Wipro trailed industry averages in the largest data storage engagement as measured in terabytes on a public cloud managed for a single client and for its

recovery time objective. Wipro also lagged behind market averages in supporting client use of IaaS for AWS and Azure as well as in the number of seats (users) Wipro managed for Azure Office 365.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and service today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the share of each individual vendor within the specific market segment being assessed.

The IDC MarketScape vendor assessment represents IDC's opinion on key vendors that not only possess the key capabilities today to serve customer needs in managed public cloud services but also possess the strategies to serve evolving customer needs in the next few years. As part of the IDC MarketScape model, IDC defines measures for success by two primary categories:

- **Capabilities.** Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well it is aligned to customer needs. The capabilities category focuses on the capabilities of the company and services today. In this category, IDC reviews how well a vendor is building, pricing, positioning, and/or delivering services capabilities that enable it to execute its chosen strategy in the market. On the y-axis, a position toward the top (north of center) indicates a strong set of differentiated capabilities to be successful in today's market.
- **Strategy.** Positioning on the x-axis, or strategy axis, indicates how well the vendor's future strategy aligns with what customers will require in the next few years. The strategy category focuses on high-level strategic decisions and underlying assumptions about road maps for service offerings, customer segmentation, business, and go-to-market plans for the next few years. In this category, IDC reviews whether or not a vendor's strategy in various areas are aligned with projected customer requirements. On the x-axis, a position toward the right (east of center) indicates a strategy that is not only well aligned with customer requirements but also agile and differentiated from the pack.

The IDC MarketScape figure (refer back to Figure 1) shows each vendor's position in the vendor assessment chart. The size of the bubble reflects a vendor's share of the total revenue captured by the participants in this study.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard

characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of a review board of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Service Provider Customer Interviews

As part of this IDC MarketScape, IDC conducted interviews with vendor-provided client references. IDC utilized these customer interviews to learn about six areas: the customers' project backgrounds, how customers approached the service provider selection process and what critical criteria they used to select their vendor, what sort of results customers were able to generate from managed public cloud services, next steps for their managed public cloud services evolution, key lessons learned, and what customers felt were the differentiating and key strengths that their chosen managed SP possessed. The results of these interviews contributed to the ratings and weighting scales used in assessing the vendors participating in this analysis.

The managed public cloud services assessment is designed to evaluate the characteristics of each vendor and each vendor's global presence, measured by vendor revenue and scope of capabilities. Many managed SPs compete in various aspects of managed public cloud services. As such, this evaluation is not an exhaustive list of all the players to consider for managed public cloud services. Instead, this evaluation reviews the primary players that offer capabilities spanning the life cycle of services across designing, building, and managing cloud environments for the full stack of IT from infrastructure to applications involving public clouds. Client factors like business and information technology (IT) objectives and requirements along with culture of both vendor and client organizations play integral roles in determining which vendors should be considered as potential candidates for a managed public cloud services engagement.

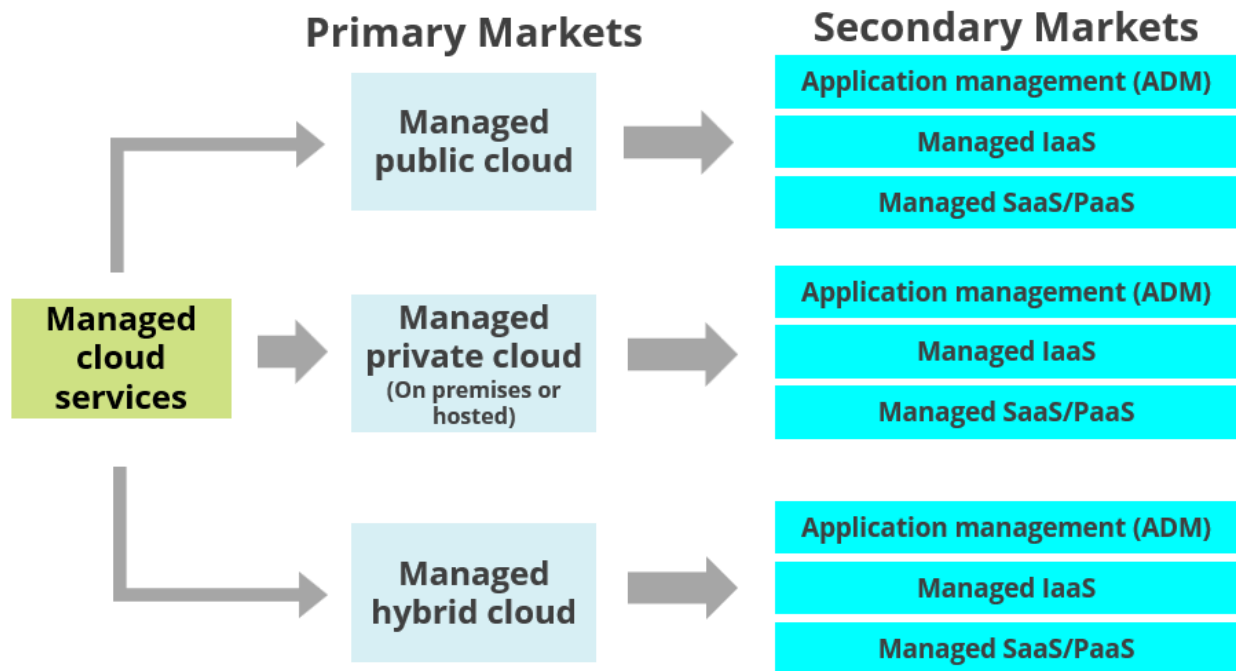
Market Definition

Managed Public Cloud Services

Managed public cloud services is a subset of managed cloud services (MCS). Essentially, managed cloud services provide a holistic view of managing all types of cloud environments as highlighted in Figure 2 (see *IDC's Worldwide Managed Cloud Services Taxonomy, 2022*, IDC #US48523822, June 2022).

FIGURE 2

Managed Cloud Services Family of Primary and Secondary Markets



Source: IDC, 2023

Managed Public Cloud (IaaS)

Managed public cloud IaaS involves providing managed services to support both application and infrastructure capabilities utilized with public cloud IaaS platforms (e.g., AWS, Azure, Google, IBM, Alibaba, OVH, Tencent, Huawei) across the following major segments:

- **Applications (including SaaS).** Applications include enterprise business applications (e.g., ERP, SCM, CRM, SFA, collaboration, operations and manufacturing, and content). Further, these types of applications involve legacy, custom-coded, packaged, and/or cloud-native coded applications.
- **Development and deployment applications.** Development and deployment applications involve areas such as structured data management software (e.g., databases), quality and life-cycle tools, application development software, integration and orchestration middleware, and data access, analysis, and delivery software.
- **Systems infrastructure software.** Systems infrastructure software involves systems management software, network software, security software, storage software, and systems software (e.g., operating systems, virtual client computing, and software-defined compute software – for example, VMs, containers, microservices, and cloud system software).
- **Infrastructure.** Infrastructure includes providing support for compute, storage, and network environments required to deliver different software capabilities using public cloud IaaS platforms.

- **Hybrid cloud.** It refers to the use of private clouds with public clouds to create hybrid clouds that include sovereign clouds, OEM as-a-service private clouds, and the private clouds of public cloud providers.

The following are some additional factors that IDC included as part of its definition on managed public cloud services:

- **Branded platforms.** This IDC MarketScape is focused on managed cloud services supporting public cloud platforms and providers (e.g., AWS, Azure, Google, IBM, Alibaba, OVH, Tencent, Huawei) across cloud operating models (hybrid, public), cloud platforms (IaaS, PaaS, SaaS), and full stack of technologies. Key characteristics of these branded platforms include:
 - **Broad technology support:** Spans broad sets of technologies (e.g., infrastructure, middleware, systems, applications, innovative technologies)
 - **Multi-branded.** Support for multiple branded software (multivendor) including ISVs and SaaS applications and vendors
 - **All operating models.** Focus on all cloud operating models (private, public, hybrid)
 - **All cloud platforms.** Can support use of all cloud platforms (IaaS, PaaS, SaaS)
 - **Own IaaS platform.** Have their own public cloud infrastructure (IaaS) on which to provision any capability
- **Services life cycle.** This IDC MarketScape is focused on managed services supporting public cloud capabilities (also referred to as *managed public cloud services*) and the professional services "embedded" as part of these managed public cloud services (e.g., migration, modernization).

Exceptions and Exclusions

In assessing the vendors competing in the managed public cloud services market, IDC excluded the following types of "discrete" engagements:

- **Discrete private clouds.** Excluded use of just private clouds (However, this study included use of private clouds as part of hybrid clouds involving public cloud platforms and providers.)
- **Branded software platforms.** Excluded branded software platforms such as Salesforce.com, Workday, Oracle, SAP, and ServiceNow
- **Discrete professional services.** Excluded "discrete" professional services (e.g., business consulting, IT consulting, systems integration, custom application development, network consulting and integration services) that are not sold as part of a managed public cloud service (This means these professional services are *not bundled* as part of a managed public cloud services engagement. However, we do include these professional services as part of [embedded with] managed public cloud services if they are bundled [included] with the managed public cloud service.)
- **Managed public cloud services bundled as part of BPO/BPaaS.** Excluded use of managed public cloud services that are bundled with managing a business process as part of a managed services engagement, referred to as BPO or BPaaS
- **Additional discrete services excluded.** Excluded use of managed public cloud services in which these services are bundled with discrete services markets involving R&D product engineering services, IT education and training services, and hardware and software support and deploy services

In addition, IDC excluded branded software platforms (e.g., Salesforce.com, Workday, Oracle, SAP, ServiceNow) in which these platforms provision capabilities that met the following criteria:

- **Narrow technology support.** Focus on their branded software
- **Single brand.** Do not support multiple branded software (not multivendor)
- **Mostly public cloud.** Focus primarily on the public cloud operating model
- **Mostly SaaS/PaaS.** Are mostly focused on just PaaS and/or SaaS cloud platforms
- **Limited or lack IaaS platform.** May have own IaaS platform but also partner for it

Situation Overview

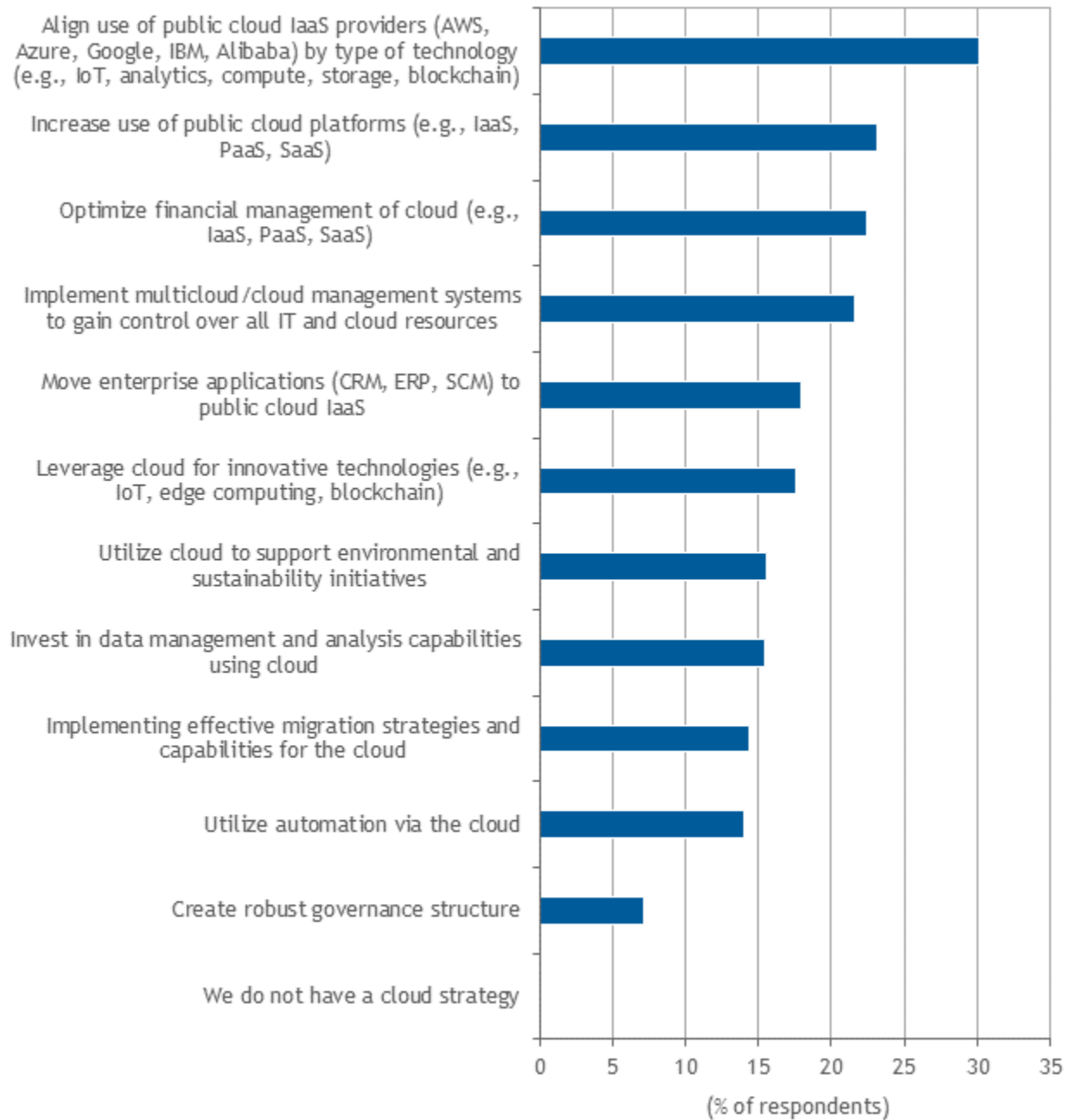
Managed SPs that are looking to meet the business and technology objectives for clients wanting to utilize managed cloud services to support use of public cloud capabilities require managed SPs to ensure that the vendor's cloud investments are aligned with client priorities in utilizing cloud capabilities, position themselves to align with the primary roles for which enterprises want them to support public cloud requirements, and help drive operational excellence and optimize financial performance. Further:

- **Aligning with enterprise cloud priorities.** The primary strategies for enterprises when it comes to utilizing cloud capabilities through 2025 starts with aligning use of public cloud IaaS providers (AWS, Azure, Google, IBM, Alibaba) by type of technology (e.g., IoT, analytics, compute, storage, blockchain) followed by increasing use of public cloud platforms (e.g., IaaS, PaaS, SaaS), optimizing financial management of cloud (e.g., IaaS, PaaS, SaaS), and implementing multicloud/cloud management systems to gain control over all IT and cloud resources (see Figure 3). IDC believes that collectively these requirements reflect the need for enterprises to find the means of gaining control over their entire estate of IT and cloud resources that includes increased focus on optimizing their investments.
- **Establishing an optimal position in supporting public cloud needs.** To position their businesses effectively when supporting public cloud providers, managed SPs need to show that they can manage software assets and technologies hosted on public cloud IaaS provider platforms (e.g., AWS, Azure, Google, IBM, Alibaba), transform IT from legacy (noncloud) technologies to public cloud via migration and modernization of applications and infrastructure, and provide value-added capabilities that public cloud providers don't deliver (e.g., migration, modernization, analytics) (see Figure 4). Essentially, managed SPs need to provide enterprises with not just a road map of how to get to the cloud but also a means of supporting any type of technology utilizing cloud capabilities spanning cloud operating models (e.g., private, public, hybrid) and cloud platforms (IaaS, PaaS, SaaS).
- **Driving operational excellence.** Helping enterprises drive operational excellence will require managed SPs to incorporate robust multicloud/cloud management platforms and systems that can support all public cloud providers (e.g., AWS, Azure, Salesforce.com, Workday), standardize IT environments including toolsets for development, and provide comprehensiveness of visibility into IT operations (see Figure 5). Ultimately, achieving operational excellence will help meet critical business objectives such as agility, resiliency, growth, and sustainability.
- **Optimizing financial performance.** Tied to achieving operational excellence is aligning investments in utilizing cloud resources to meet business objectives. This requires optimizing use of reserve and spot instances on a public IaaS cloud (e.g., AWS, Google, Alibaba, IBM, Azure); mapping costs to business units, cost centers, technologies, and projects; and optimizing spend across cloud resources (see Figure 6).

FIGURE 3

Worldwide Enterprise Future Cloud Strategy, 2022-2025

Q. Please select the two areas in which your company's/organization's cloud strategy will change over the next three years.



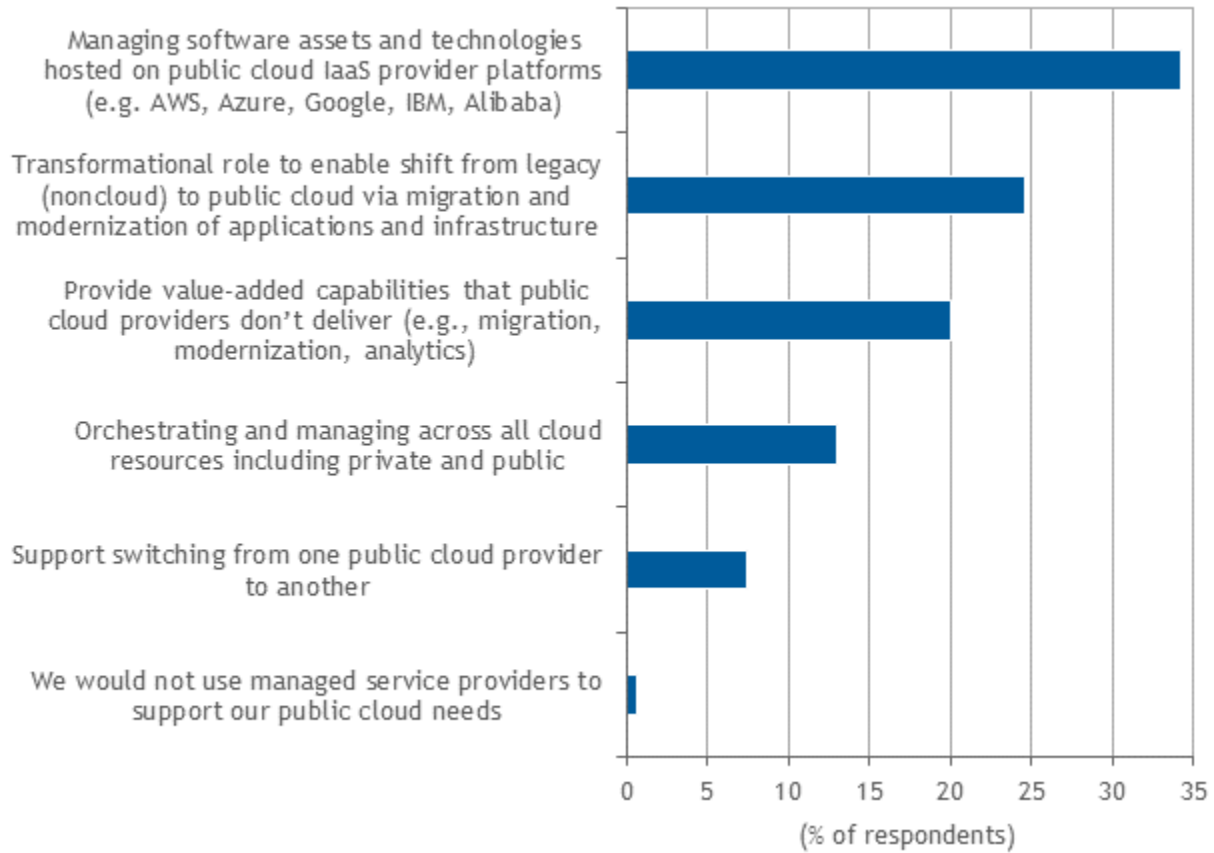
n = 1,500

Source: IDC's *Worldwide Managed CloudView Survey, 2022*

FIGURE 4

Worldwide Primary Role of Managed Service Providers for Public Cloud

Q. Please select the primary role you believe that managed service providers (e.g., Accenture, TCS, Capgemini, Fujitsu, Atos, IBM) play in your company's/organization's use of public cloud services (e.g., AWS, Azure, Google, Salesforce.com, Workday).



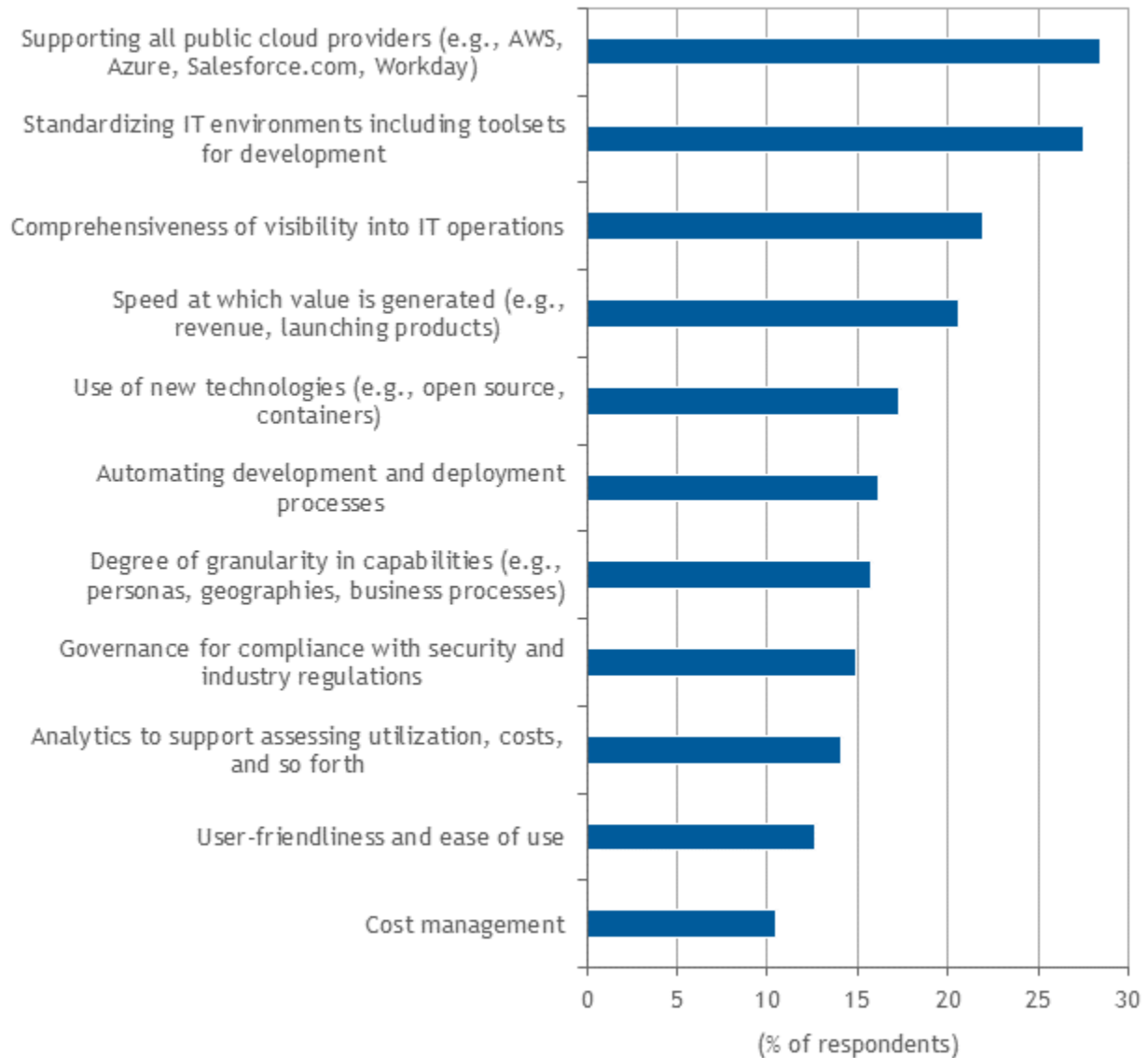
n = 734

Source: IDC's *Worldwide Managed CloudView Survey, 2022*

FIGURE 5

Worldwide Value of Cloud Management Platforms

Q. Please select the top 2 areas in which your company/organization sees value in using a cloud management platform to manage across all your IT assets and cloud resources, both private and public, including all cloud service providers (IaaS, PaaS, SaaS) with managed cloud services.



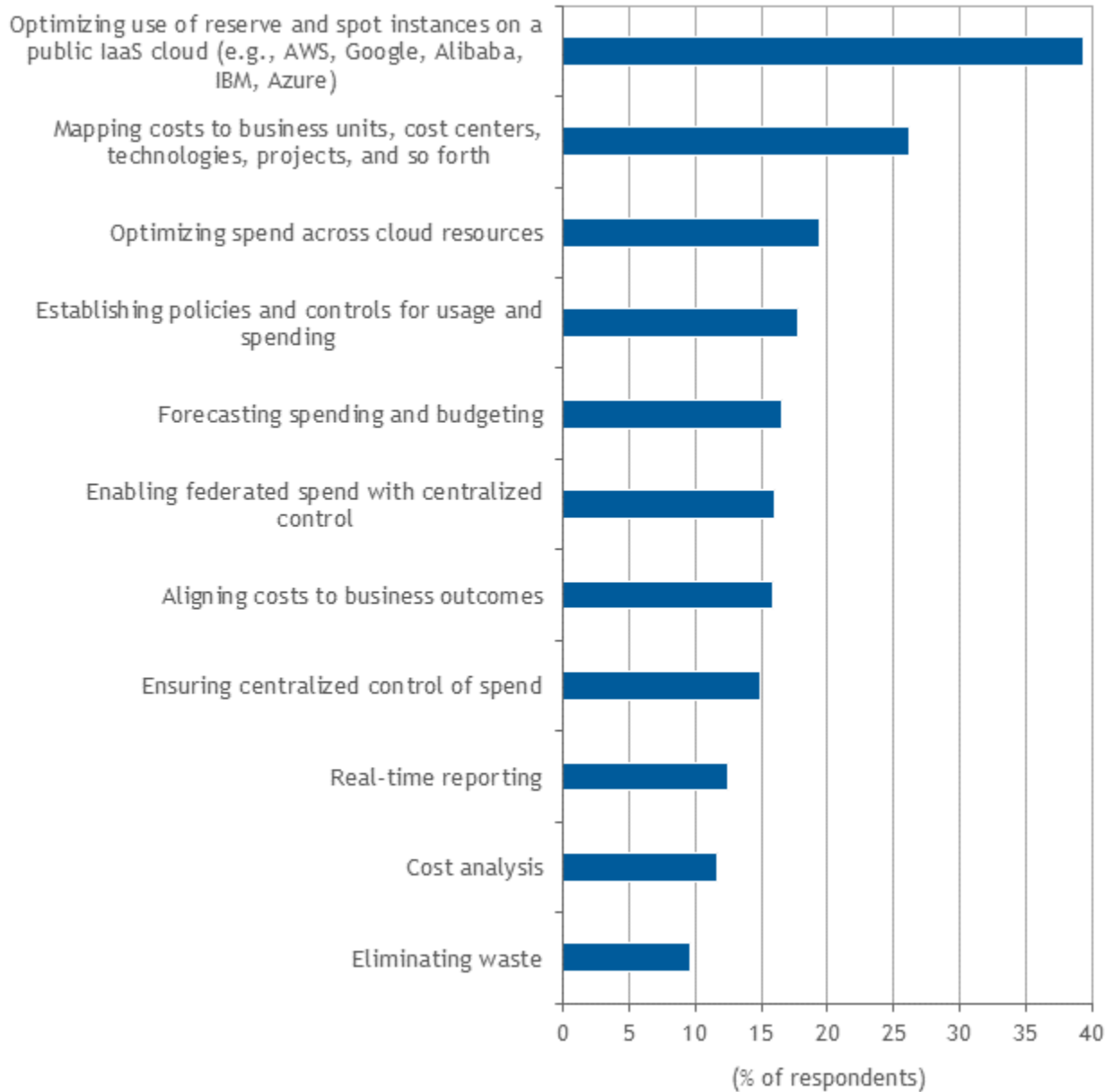
n = 1,500

Source: IDC's *Worldwide Managed CloudView Survey, 2022*

FIGURE 6

Worldwide Financial Management for Public Cloud

Q. Please indicate which two of the following your company/organization believes are the most significant issues in optimizing financial management when using private and/or public clouds (IaaS, PaaS, SaaS) with managed cloud services.



n = 1,500

Source: IDC's *Worldwide Managed CloudView Survey, 2022*

Strategies and Capabilities Criteria

This section includes an introduction of market-specific weightings definitions and includes weightings tables (see Tables 1 and 2).

IDC believes managed SPs competing in the market involving public cloud services must exhibit the characteristics shown in Tables 1 and 2 to be completely successful when crafting a future strategy and in leveraging existing capabilities to their best advantage. Weightings factored differently among criteria because IDC customer interviews indicated some criteria being more important than others as described by services customers when they recapped their vendor selection processes.

TABLE 1

Key Strategy Measures for Success: Worldwide Managed Public Cloud Services

| Strategies Criteria | Definition | Weight (%) |
|------------------------------------|--|------------|
| Delivery | <ul style="list-style-type: none"> ▪ Criterion measures the percentage of service provider's managed cloud services business that provisions private clouds on premises versus hosted. ▪ Criteria measure the percentage of service provider's managed cloud services business that involves providing managed public cloud services supporting industry SaaS applications from managed SPs versus use of industry SaaS platforms from public cloud providers. ▪ Criteria examine the investments that are made to support managed public cloud services used with public cloud providers for Azure, AWS, Google, and IBM. ▪ Criteria examine the investment priorities in utilizing cloud capabilities as part of managed cloud services across an array of areas (e.g., enterprise application on public IaaS, use more public cloud platforms, implement multicloud management, use automation, sustainability, data management, innovative technologies, financial management and operations, governance, migration to cloud). | 39.0 |
| Functionality or offering road map | <ul style="list-style-type: none"> ▪ Criteria measure the investments in new or expanded types of services capabilities (e.g., professional services, operations, innovations) to support managed public cloud services business. ▪ Criteria measure the types of investments (e.g., management platforms, technologies, tools) and strategy to drive adoption of information and data assurance capabilities (e.g., recovery, security, resiliency, data sovereignty, sovereign clouds, business resiliency/continuity) as part of managed public cloud services business. | 8.0 |

TABLE 1

Key Strategy Measures for Success: Worldwide Managed Public Cloud Services

| Strategies Criteria | Definition | Weight (%) |
|---------------------|--|------------|
| Growth | <ul style="list-style-type: none"> ▪ Criteria examine strategy for offering exceptional customer experiences for managed public cloud services and how vendor looks to differentiate this. ▪ Criteria measure potential new market segments and areas of growth to expand managed public cloud services business. ▪ Criteria measure the percentage of managed public cloud services business based on value (revenue) that will be generated from direct sales versus partnership-based sales. ▪ Criteria examine priorities across an array of outreach programs to market and sell managed public cloud services (e.g., consultancies, analyst firms, in-house [client] employees, existing/prior relationship with managed SPs, client referrals, online resources, industry associations, trade magazines, staffing agencies, cloud service providers). | 24.0 |
| Innovation | <ul style="list-style-type: none"> ▪ Criterion measures how many physical centers of excellence (CoEs)/labs will be created to support managed public cloud services. ▪ Criterion measures the percentage in the change in spending on R&D to support managed public cloud services. | 6.0 |
| Talent | <ul style="list-style-type: none"> ▪ Criteria examine how vendors will evolve partnerships with public cloud providers to expand the managed public cloud services business. ▪ Criteria examine investments in the types of talent to support managed public cloud services. ▪ Criterion measures at an aggregate level the percentage of investment on personnel needed to support the managed public cloud services business across the collective portfolio of public cloud providers (e.g., AWS, Azure, Google, Alibaba, IBM, Alibaba, Tencent, OVH, Huawei). ▪ Criteria measure the magnitude of investment (percentage) in personnel needed to support the managed public cloud services business for each public cloud, including AWS, Azure, Google, IBM Cloud, and Alibaba. | 23.0 |
| Total | | 100.0 |

Source: IDC, 2023

TABLE 2

Key Capability Measures for Success: Worldwide Managed Public Cloud Services

| Capabilities Criteria | Definition | Weight (%) |
|---------------------------|--|------------|
| Functionality or offering | <ul style="list-style-type: none"> ▪ Criteria measure the percentage of service provider's managed cloud services business spanning cloud and noncloud (legacy). ▪ Criteria measure the percentage of service provider's managed cloud services business spanning private, public, and hybrid cloud. ▪ Criterion measures the percentage of managed cloud services driven by replacement of existing infrastructure with public cloud IaaS. ▪ Criterion measures the percentage of managed cloud services driven by migration and modernization to the cloud. ▪ Criteria measure the percentage of use of private cloud with public clouds to create hybrid clouds and percentage of sovereign clouds with managed public cloud services. | 9.0 |
| Financial performance | <ul style="list-style-type: none"> ▪ Criteria measure the percentage of use of financial management capabilities including FinOps, spot instances, reserve instances, and financial credits with managed public cloud services. ▪ Criteria measure financial factors including revenue generated from managed public cloud services, average and largest deals sizes, and growth rates. ▪ Criteria measure size of client base for managed public cloud services and marketing budget (by percentage). ▪ Criteria measure direct and partner-based revenue based on percentages. ▪ Criteria measure managed public cloud services business by geographies and industries (by percentages). | 12.0 |
| AWS | <ul style="list-style-type: none"> ▪ Criteria measure the percentage of clients utilizing IaaS, PaaS, and SaaS with the AWS cloud with managed public cloud services. ▪ Criterion measures the number of SaaS applications managed on the AWS cloud. ▪ Criteria measure the length of partnership and number of clients involving AWS. ▪ Criteria measure the percentage of clients using managed public cloud services to support ISVs (e.g., Microsoft, SAP, Oracle) on the AWS cloud. ▪ Criteria measure client use of managed public cloud services across a range of capabilities on the AWS cloud (e.g., AWS Management Tools, AWS EKS, Kubernetes Clusters, Private Cloud [Outpost], API management, VM volume, bare metal, AWS WorkSpace) using different metrics. ▪ Criteria measure the percentage of clients using managed public cloud services to support the stack of software technologies on the AWS cloud (e.g., development and deployment software, systems infrastructure software, applications, and industry platforms). | 11.0 |

TABLE 2

Key Capability Measures for Success: Worldwide Managed Public Cloud Services

| Capabilities Criteria | Definition | Weight (%) |
|-----------------------|---|------------|
| Azure | <ul style="list-style-type: none"> ▪ Criteria measure the percentage of clients utilizing IaaS, PaaS, and SaaS with the Azure cloud with managed public cloud services. ▪ Criterion measures the number of SaaS applications managed on the Azure cloud. ▪ Criteria measure the length of partnership and the number of clients involving Azure. ▪ Criteria measure the percentage of clients using managed public cloud services to support ISVs (e.g., Microsoft, SAP, Oracle) on the Azure cloud. ▪ Criteria measure client use of managed public cloud services across a range of capabilities on the Azure cloud (e.g., Azure Management Tools, Kubernetes Clusters, Private Cloud [Azure Stack], API management, VM volume, bare metal, Office 365, seats managed) using different metrics. ▪ Criteria measure the percentage of clients using managed public cloud services to support the stack of software technologies on the Azure cloud (e.g., development and deployment software, systems infrastructure software, applications, and industry platforms). | 12.0 |
| Google | <ul style="list-style-type: none"> ▪ Criteria measure the percentage of clients utilizing IaaS, PaaS, and SaaS with the Google Cloud with managed public cloud services. ▪ Criterion measures the number of SaaS applications managed on the Google Cloud. ▪ Criteria measure the length of partnership and the number of clients involving Google. ▪ Criteria measure the percentage of clients using managed public cloud services to support ISVs (e.g., Microsoft, SAP, Oracle) on the Google Cloud. ▪ Criteria measure client use of managed public cloud services across a range of capabilities on the Google Cloud (e.g., Google Management Tools, Anthos, Kubernetes Clusters, API management, VM volume, bare metal, AWS WorkSpace, the number of seats managed for AWS WorkSpace). ▪ Criteria measure the percentage of clients using managed public cloud services to support the stack of software technologies on the Google Cloud (e.g., development and deployment software, systems infrastructure software, applications, and industry platforms). | 10.0 |

TABLE 2

Key Capability Measures for Success: Worldwide Managed Public Cloud Services

| Capabilities Criteria | Definition | Weight (%) |
|--------------------------|---|------------|
| IBM | <ul style="list-style-type: none"> ▪ Criteria measure the percentage of clients utilizing IaaS, PaaS, and SaaS with the IBM Cloud with managed public cloud services. ▪ Criterion measures the number of SaaS applications managed on the IBM Cloud. ▪ Criteria measure the length of partnership and the number of clients involving IBM. ▪ Criteria measure the percentage of clients using managed public cloud services to support ISVs (e.g., Microsoft, SAP, Oracle) on the IBM Cloud. ▪ Criteria measure client use of managed public cloud services across a range of capabilities on the IBM Cloud (e.g., IBM Management Tools, IBM Kubernetes Services, Kubernetes Clusters, IBM Private Cloud, API management, VM volume, bare metal) using different metrics. ▪ Criteria measure the percentage of clients using managed public cloud services to support the stack of software technologies on the IBM Cloud (e.g., development and deployment software, systems infrastructure software, applications, and industry platforms). | 8.0 |
| Cloud provider ecosystem | <ul style="list-style-type: none"> ▪ Criterion measures the percentage of clients using private clouds from public cloud providers located in public cloud hosting infrastructure with managed public cloud services. ▪ Criteria measure the largest volume of landing zones, largest storage engagement, and largest data lake engagement with a single client involving managed public cloud services. ▪ Criteria measure the percentage of clients utilizing CoEs for public cloud providers (e.g., AWS, Azure, Google, IBM) involving managed public cloud services. ▪ Criteria measure the percentage of clients utilizing public cloud provider platforms (e.g., AWS, Azure, Google, IBM) as part of managed public cloud services. | 4.0 |
| Customer satisfaction | <ul style="list-style-type: none"> ▪ Criterion measures the percentage of clients utilizing multicloud management platforms as part of managed public cloud services. ▪ Criteria measure key operational criteria delivered with managed public cloud services (e.g., highest level of availability, shortest response time, RTO and RPO). ▪ Criteria measure client assessment of vendors across array of variables in using managed public cloud services (e.g., customer satisfaction rating, SLAs, cost-effective solutions, access to partnerships, business expertise, technology expertise, security and recovery, provisioning of client feedback) via a rating process. | 7.0 |

TABLE 2

Key Capability Measures for Success: Worldwide Managed Public Cloud Services

| Capabilities Criteria | Definition | Weight (%) |
|---------------------------|--|------------|
| Innovation | <ul style="list-style-type: none"> ▪ Criteria measure the percentage of clients utilizing CoEs for different types of innovative technologies (analytics technologies, Internet of Things [IoT], blockchain, 5G, cognitive/artificial intelligence [AI], security, software-defined infrastructure [SDI]). ▪ Criterion measures the percentage of clients utilizing different types of automation with managed public cloud services (e.g., cognitive/AI, machine learning, and robotic process automation [RPA]). | 9.0 |
| Customer service delivery | <ul style="list-style-type: none"> ▪ Criteria measure the percentage of clients utilizing different public cloud platforms as part of managed public cloud services (e.g., IaaS, PaaS, SaaS). ▪ Criteria measure the percentage of clients utilizing different infrastructure technologies as part of managed public cloud services (e.g., general computing, storage, quantum computing, edge computing, network and content delivery/VPN/WAN, end-user computing/VDI, serverless/function as a service). ▪ Criteria measure the percentage of clients utilizing different development and deployment software technologies as part of managed public cloud services (e.g., data management, application development, quality and life cycle tools, integration, and orchestration middleware). ▪ Criteria measure the percentage of clients utilizing different systems infrastructure software technologies as part of managed public cloud services (e.g., systems and service management software, endpoint management software, network software, security software, storage software, physical and virtual computing software). ▪ Criteria measure the percentage of clients utilizing different SaaS applications as part of managed public cloud services (e.g., collaborative applications [SaaS], content workflow and management applications [SaaS], CRM applications [SaaS], engineering applications [SaaS], enterprise resource management/planning applications [SaaS], supply chain management [SCM] applications [SaaS]). ▪ Criterion measures the percentage of clients utilizing sustainability with managed public cloud services. | 13.0 |
| Talent management | <ul style="list-style-type: none"> ▪ Criteria measure the percentage of clients utilizing processes as part of managed public cloud services (e.g., CI/CD, DevOps, SRE). ▪ Criteria measure total operational staff across IaaS, PaaS, and SaaS providers and the percentage of cloud talent across public cloud providers used with managed public cloud services (e.g., public cloud staff for public cloud providers, AWS, Google, Microsoft Azure, IBM, Alibaba). | 5.0 |
| Total | | 100.0 |

Source: IDC, 2023

Scoring Criteria and Definitions

While IDC's *Worldwide Managed Cloud Services Survey*, conducted in 3Q22 and involving 1,500 respondents across six countries and three regions, helped shape many of the scoring criteria and definitions in this 2023 IDC MarketScape for worldwide managed public cloud services, IDC utilized an array of other IDC buyer studies on managed cloud services. These buyer studies probed buyers on maturity levels, interests, and preferences for managed cloud services, which included use of public clouds. IDC utilized all this data in addition to buyer interviews to establish the right scoring elements reviewed in the evaluation.

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Synopsis

This IDC study represents a vendor assessment of providers offering managed public cloud services through the IDC MarketScape model. The assessment reviews both quantitative and qualitative characteristics that define current market demands and expected buyer needs for managed public cloud services. The evaluation is based on a comprehensive and rigorous framework that assesses how each vendor stacks up against the defined scoring criteria, and the framework highlights the key factors that are expected to be the most significant for achieving success in the managed public cloud services market over the short term and the long term.

"Organizations are increasingly faced with managing public cloud environments and related resources that are becoming highly complex while needing to address an ever changing and expanding set of business and IT requirements that has led many organizations to utilize managed SPs to support their public cloud needs via the use of managed public cloud services. Ensuring successful use of managed public cloud services from managed SPs in delivering the operational performance clients need requires that enterprises develop a robust blueprint that incorporates a strategic road map and plan,

define risk management and accountability, require an integrated organizational structure and agile culture, ensure availability of the right type of talent and quality of services, establish a collaborative environment with effective communications, and implement a robust governance with FinOps capabilities." – David Tapper, VP, Outsourcing and Managed Cloud Services at IDC

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