NEAT EVALUATION FOR INFOSYS:

Cloud Infrastructure Brokerage, Orchestration & Management

Market Segments: Overall, Cloud Brokerage Services,
Cloud Orchestration Services

Introduction

This is a custom report for Infosys presenting the findings of the NelsonHall NEAT vendor evaluation for *Cloud Infrastructure Brokerage, Orchestration & Management* in the *Overall*, *Cloud Brokerage Services*, and *Cloud Orchestration Services* market segments. It contains the NEAT graphs of vendor performance, a summary vendor analysis of Infosys for cloud infrastructure brokerage, orchestration & management, and the latest market analysis summary.

This NelsonHall Vendor Evaluation & Assessment Tool (NEAT) analyzes the performance of vendors offering cloud infrastructure brokerage, orchestration & management services. The NEAT tool allows strategic sourcing managers to assess the capability of vendors across a range of criteria and business situations and identify the best performing vendors overall, and with specific capability in brokerage services and orchestration services.

Evaluating vendors on both their 'ability to deliver immediate benefit' and their 'ability to meet client future requirements', vendors are identified in one of four categories: Leaders, High Achievers, Innovators, and Major Players.

Vendors evaluated for this NEAT are: Atos, Capgemini, Cloudify, Coforge, DXC Technology, IBM, Infosys, LTI, Mindtree, Mphasis, NTT DATA, Sopra Steria, TCS, Tech Mahindra, Unisys, UnitedLayer, and Zensar Technologies.

Further explanation of the NEAT methodology is included at the end of the report.

NEAT Evaluation: Cloud Infrastructure Brokerage, Orchestration & Management (Overall)
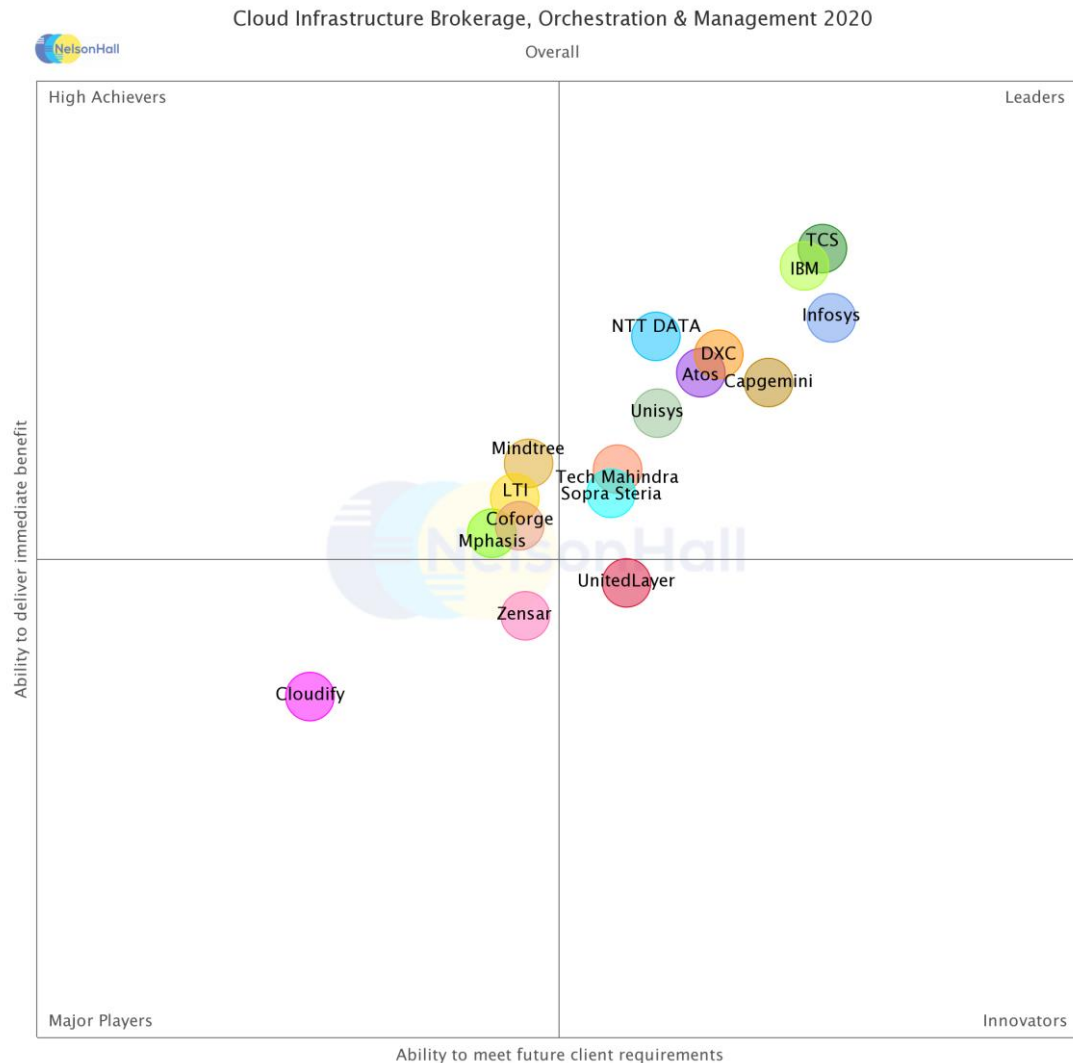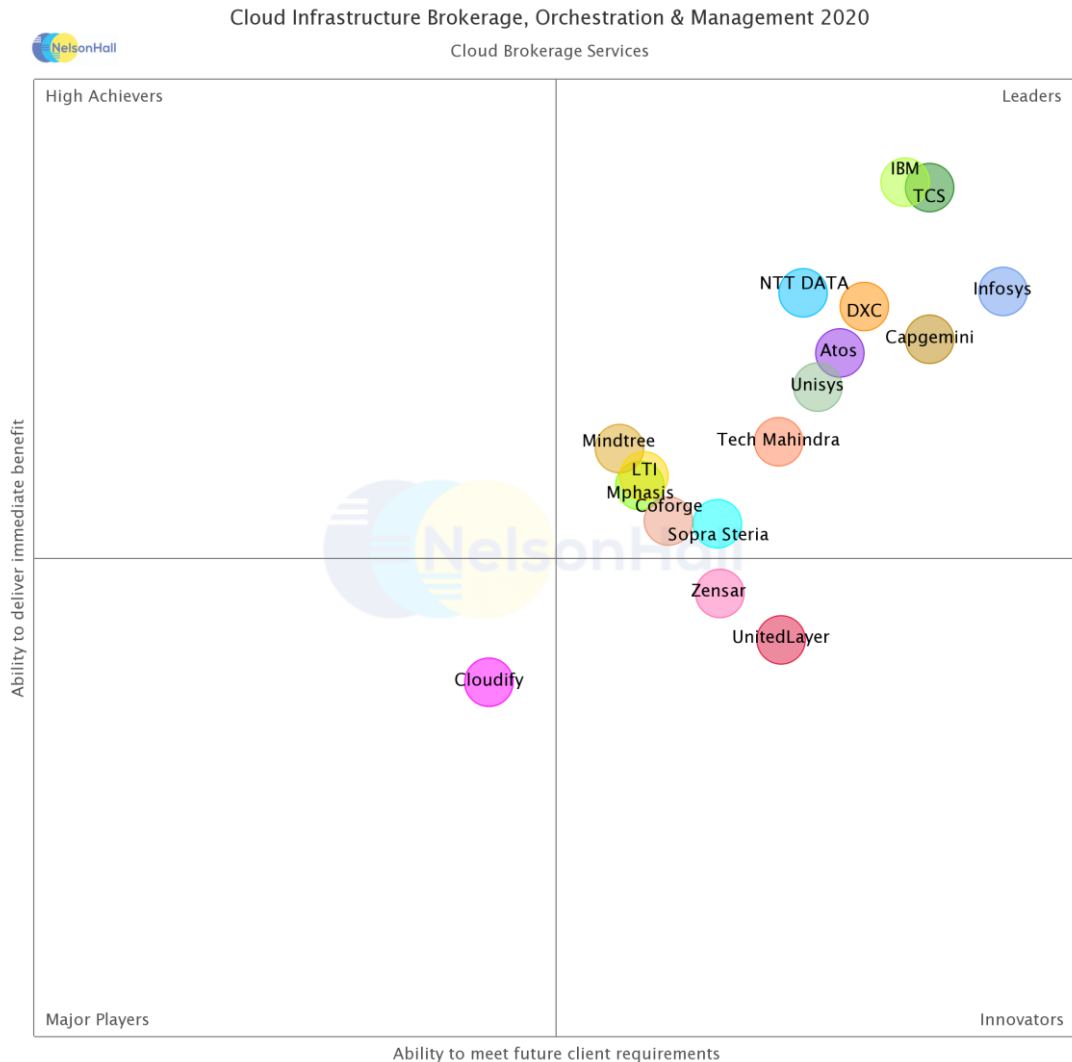

NelsonHall has identified Infosys as a Leader in the *Overall* market segment, as shown in the NEAT graph. This market segment reflects Infosys' overall ability to meet future client requirements as well as delivering immediate benefits to its cloud infrastructure brokerage, orchestration & management clients.

Leaders are vendors that exhibit both a high capability relative to their peers to deliver immediate benefit and a high capability relative to their peers to meet future client requirements.

Buy-side organizations can access the *Cloud Infrastructure Brokerage, Orchestration & Management* NEAT tool (*Overall*) here.

NEAT Evaluation: Cloud Infrastructure Brokerage, Orchestration & Management
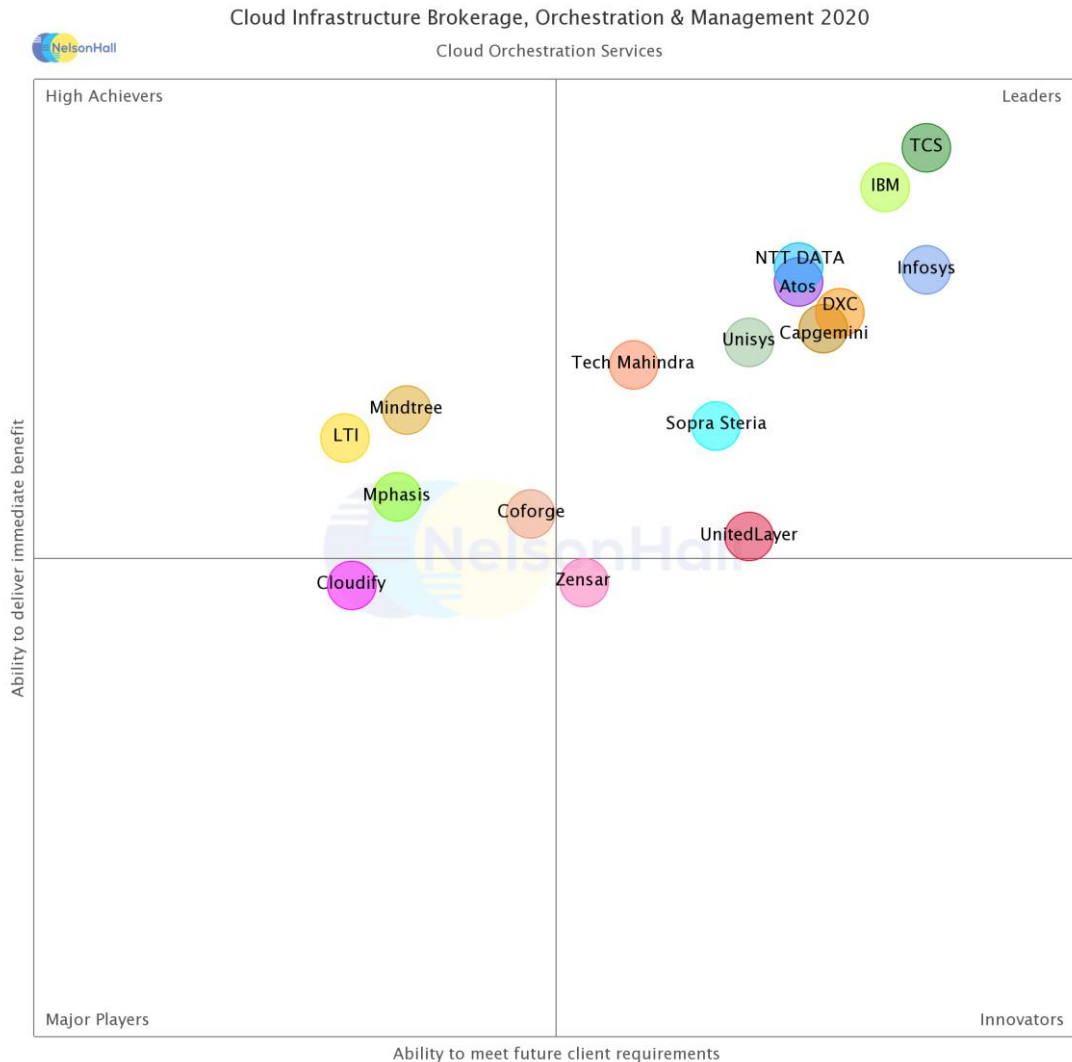# (Cloud Brokerage Services)

Cloud Infrastructure Brokerage, Orchestration & Management 2020
Cloud Brokerage Services

NelsonHall has identified Infosys as a Leader in the *Cloud Brokerage Services* market segment, as shown in the NEAT graph. This market segment reflects Infosys' ability to meet future client requirements as well as delivering immediate benefits to its cloud infrastructure brokerage, orchestration & management clients with a specific focus on brokerage services.

Buy-side organizations can access the *Cloud Infrastructure Brokerage, Orchestration & Management* NEAT tool (*Cloud Brokerage Services*) here.

NEAT Evaluation: Cloud Infrastructure Brokerage, Orchestration & Management
(Cloud Orchestration Services)

NelsonHall has identified Infosys as a Leader in the *Cloud Orchestration Services* market segment, as shown in the NEAT graph. This market segment reflects Infosys' ability to meet future client requirements as well as delivering immediate benefits to its cloud infrastructure brokerage, orchestration & management clients with a specific focus on cloud orchestration services.

Buy-side organizations can access the *Cloud Infrastructure Brokerage, Orchestration & Management* NEAT tool (*Cloud Orchestration Services*) here.

NelsonHall
TRANSFORM THROUGH INSIGHT

Vendor Analysis Summary for Infosys

Overview

Through Live Enterprise, Infosys seeks to drive rapid transformation through an automated-first, integrated operating model. Infosys is focused on four key transformation levers:

- *Elevated end-user experience*: how Infosys can improve service quality

- *Enhanced monitoring & visibility*: capturing enterprise telemetry and being able to present in a way that will improve visibility and transferability within the enterprise and mine data for future use

- *Self-healing ecosystems*: constructs around deriving insights from the data and then using the insights to drive autonomous operations across the entire IT operations stack

- *Faster time to market*: a context-aware, cloud-agnostic brokerage engine (for anywhere, anytime environments). Infosys has a generic blueprint for hybrid cloud orchestration, brokerage, and governance. It can de-couple from platforms itself and build at scale and speed an enterprise hybrid cloud management platform and brokerage capabilities across a multi-cloud landscape. The entire lifecycle of cloud resources is managed through a platform-first approach.

Infosys provides cloud infrastructure brokerage, orchestration, and management services through Infosys Cobalt. This includes a set of IP (Polycloud Platform (upgraded version of IIMS), NIA, Edge Suite, Wingspan, and ESM Café), third-party services, solutions, and platforms to accelerate enterprises' cloud journey. It also includes 14k cloud assets and 200 industry cloud solution blueprints.

Infosys is adopting SRE to transform operations leveraging tools, including Polycloud, for advanced observability and automation. It also takes an agile approach to cloud delivery utilizing Kanban dashboards to keep track of progress and, in the initial planning and execution phase with a client (1-2 months), will seek to build out an automation backlog. It will then deliver user stories in short 4-5-week sprints to define use cases and enable the immediate realization of benefits (i.e., from automation and AI-ops engine). It further provides ongoing support and automation use case monitoring and performance reporting, and automation platform health monitoring.

Infosys has a number of tenets it focuses on to drive multi-cloud adoption regardless of platform. These include bringing a de-coupled team structure across infrastructure, DevOps, and middleware into a single team to manage everything as code. It seeks to empower developers and business users to build their own environments via self-service to consume through their DevOps pipeline. In addition to providing empowerment, it also ensures all enterprise standards and governance are baked in to keep tabs on consumption patterns, cost, etc. Through innovation, it provides the ability to support and onboard multiple services as they come in from the hyperscalers (AWS, Azure, and GCP). Here, Infosys has a framework to analyze early pilot programs and assess for enterprise readiness, onboard them, and make available as plug-ins to its platforms and solutions.

Through smart brokerage, it provides the ability for comparison of IaaS and PaaS across different clouds, and forecasting to see what costs are across clouds and a recommendation engine to ensure best-fit cloud for requirements. This has been matured recently through its Polycloud Platform. Infosys is also focused on agile and collaboration to provide the ability to gain rapid insights as provisioning is going on. It seeks to drive greater collaboration between infrastructure and developer teams as they are building out environments.

Another key focus area through the Polycloud Platform has been efficient operations, as SRE and the ability to ingest large volumes of telemetry, logs, and data across different layers of the application stack starting from load balancers down to underlying networks, storage, underlying datacenter telemetry, and service mesh telemetry. This is pushed into a big data engine with real-time analytics running on top to search for anomalies, or issues, events, and error logs that can go into its AI-Ops engine. Infosys ensures services are delivered in conformance with ITILv3 and enterprise standards, including service request management, change management, and how it manages the state of CI and analyzes data to ensure continuous feedback to enable efficient operations.

Through Infosys' blueprint for hybrid cloud orchestration, brokerage and governance, it utilizes a number of cloud providers across IaaS (VMware, OpenStack, Hyper-V, and OVM), IaaS public cloud (AWS, Azure, GCP), PaaS (Azure PaaS, AWS Outpost, Google Anthos) and containers (K8s, Istio, Envoy, K3s, Docker, and LxD) as its resource layer. These partnerships enable it to provide an option for clients to have an enterprise stack that is supported by enterprise technology providers and an open stack that is more geared toward cloud-native technologies in the hyperscaler space. It seeks to enable SRE as the default to manage across what it classes as three horizons. Horizon one is cloud-native, horizon two where a client is subscribing to cloud commodity services, and horizon three is a mix. It seeks to provide the tooling and instrumentation to run these environments in a highly automated way through Polycloud and the talent and skills required to run these, including utilization of its Wingspan training platform.

Infosys looks to build a platform that integrates with everything across the enterprise toolset to provide a 'single pane of glass' solution that brings in elements of governance, security, operations, monitoring, etc., in a unified manner with automation baked in. It is presented as a single unified interface for end-users that abstracts the underlying management plane and infrastructure to drive a seamless experience with an AWS or Azure-like feel. It enables end-users to pick from catalog items based on their specific requirements.

Infosys takes a three-phased approach to end-to-end cloud resource lifecycle management, including orchestration, brokerage, governance, and management in a Polycloud ecosystem which includes:

- *Design & Publish*: cloud architects and cloud administrators build infrastructure blueprints as part of the Polycloud ecosystem and publish these into a catalog. It is agnostic to an underlying cloud platform and provides the ability to stitch together different offerings into a single blueprint for consumption and publish to entitled end-users

- *Choose & Subscribe*: the entitled end-users, including developers, DevOps teams, SRE, and infrastructure administrators who can consume these services either via the portal, or ServiceNow front-end if required, or via a set of APIs, or through CI/CD pipelines. This triggers an orchestration workflow that requires just a single click on request for services, integrating with all different systems to provide an enterprise-hardened service. It includes ITSM, monitoring, security, all encompassed within. Infosys treats all services as a subscription, and in order to keep consumption low, it provides a default lease. Here, for all services, it forces users to continually extend the lease, or it will terminate resources that are not required anymore (i.e., when applications are end-of-life but continue to run for many years)

- *Administer & Operate*: the end-user has the ability to manage their ecosystem environments through a single pane of glass view, which includes the ability to administer and extend leases, look at telemetry to see issues, scale-up, scale-down and scale-out policies, and modify back-up policies. This can be done either via a console or by SRE engineers programmatically.

Financials

Infosys' CY 2019 revenues were $12.6bn. NelsonHall estimates that ~40% of this is associated with digital services. NelsonHall further estimates that a significant part of these revenues relates to cloud services.

NelsonHall estimates the geographical breakdown of Infosys' cloud infrastructure brokerage, orchestration, and management services revenues in CY 2019 to be:

- North America: 60%
- EMEA: 25%
- Rest of World: 15%.

NelsonHall estimates the vertical industry breakdown of Infosys' cloud infrastructure brokerage, orchestration, and management services revenues in CY 2019 to be:

- Financial services: 32%
- Retail: 15%
- Communication: 13%
- EURS: 12%
- Manufacturing: 9%
- High-Tech: 9%
- Life sciences: 7%
- Other: 3%.

Strengths

- Significant IP (Polycloud Platform, NIA, Edge Suite, Wingspan, and ESM Café); and strategic investment in the cloud as a key focus area for Infosys
- Infosys Cobalt Cloud Community and dedicated resources to curate assets
- Cobalt Labs at its global digital centers to enable clients to rapidly prototype and co-create new cloud-first solutions
- Cloud assets (14k) and 200 industry cloud solution blueprints
- Comprehensive partner ecosystem in support of Polycloud Platform and automation framework
- Partnerships with academic institutions to seed skilled workforce
- Significant investment in the training of personnel.

Challenges

- The transition from IIMS to Polycloud Platform for managed services clients will take time

- Significant reliance on the North American market

- Continuing to increase onshore presence in EMEA

- Ramping cloud certifications

- Scaling consulting & advisory capabilities.

Strategic Direction

Infosys is looking to expand its cloud infrastructure brokerage, orchestration, and management services capabilities through the following initiatives over the next 12-18 months:

Investments in IP and accelerators

- Continued investment in support of Infosys Cobalt Cloud Community and dedicated resources curating assets from the cloud community; and expanding cloud assets and industry cloud solution blueprints

- Investing in capabilities in support of containerization and PaaS as an industry standard, with capabilities across manage, observe, and administer, utilizing Kubernetes and OpenShift platforms and within the constraints of cloud brokerage, orchestration and governance

- Evolving Polycloud Platform roadmap to shift from PaaS to cloud-native with an increasing emphasis on SRE and observability; and XaaS support across a Polycloud ecosystem

- Investing in smart brokerage engine capability in Polycloud Platform

- Enabling Infra as code utilizing Ansible and Terraform

- DevSecOps: investing in capabilities in support of cloud-native apps (microservices and serverless); and investments in site reliability engineering (SRE) capabilities and observability.

Investment in Expand Localization initiative in support of cognitive and AI services

- Enhancing consulting, advisory, and design thinking capabilities through utilization of WONGDOODY and Brilliant Basics acquisitions to support IT transformation initiatives

- Expanding digital studios, Cobalt Labs, and innovation hubs globally (to provide localized support), and investing in digital skills, and in partnerships with academia to better enable clients' IT infrastructure and cloud transformation roadmaps and initiatives.

Digital reskilling initiatives

Infosys is investing in digital skills training to enhance automation capabilities, with initiatives including:

- Expanding partnerships with individual universities to curate curricula for Infosys employees in areas such as ML, autonomous technologies, blockchain, design thinking (the latter, e.g., at Rhode Island School of Design)

- Investing in training programs focusing on competencies, including UX, cloud, big data, digital offerings, and core technology and computer science skills; and utilizing Wingspan in support of cloud-specific training initiatives.

Outlook

Infosys has recently launched its Cobalt Cloud Community to drive grassroots level innovation on cloud platforms. It aims to help enterprises redesign from the core and build cloud-first capabilities across multi-cloud utilizing IaaS, PaaS, and SaaS. Infosys operates a marketplace model through its Infosys Cobalt Store, providing access to all capabilities and enabling clients to add their assets to solve specific business problems. It has a dedicated team (~50 FTEs) curating assets from the cloud community, and we expect Infosys will ramp these resources as the cloud community expands.

Infosys provides extensive IP in support of end-to-end cloud services, including Infosys Infrastructure Management Suite (IIMS), ESM Café (ServiceNow), NIA, Edge Suite, and Wingspan learning platform. However, it has made a significant investment in its Infosys Polycloud Platform, which effectively enables multiple cloud providers (e.g., AWS, Azure, GCP) and private cloud (e.g., VMware) to operate within an enterprise concurrently with portability across cloud providers to enable an enterprise to be cloud-agnostic while transitioning to a cloud-native organization. Infosys Polycloud supports multiple cloud services across IaaS, PaaS, and CaaS and builds entire application blueprints in a templatized manner like Terraform or CloudFormation but abstracted from the underlying cloud. All clients currently on IIMS will be upgraded to Polycloud Platform, although this transition will take time.

Infosys has extensive ecosystem partnerships across IaaS, PaaS, SaaS, and CaaS to provide multiple options to clients. We expect Infosys will increase its partnerships across Polycloud in particular in support of cloud-native services and capabilities. From a cloud management perspective and through its enterprise cloud store, it effectively looks to provide everything 'as a service'. A key investment includes its smart brokerage engine, which can make recommendations and automatically provision a best-fit cloud based on client requirements and criteria. It is further investing in its recommendation engine in order to enact real-time brokerage, which will provide additional differentiation for Infosys in this area.

Polycloud also provides API-driven architecture for IaC to expedite SDLC and can also automate and integrate with the client's CI/CD pipelines. In addition, through intelligent event management (AI-Ops), it aims to move clients from a DevOps to No-Ops construct. Infosys is taking an SRE-enabled approach as the default to manage end-to-end cloud services in a highly automated way through Polycloud. We expect it will continue to expand its SRE resources in support of its cloud approach. It is also investing in wider talent and skills to provide support through the utilization of its Wingspan platform. Infosys will need to expedite its training and its cloud certifications in support of clients' ongoing cloud transformation initiatives.

From an observability perspective, Infosys is investing in a number of OpenSource monitoring systems as clients move to a container-first approach to provide monitoring and observability for this technology stack. This will provide good opportunities for Infosys, as these services are still relatively nascent. Within CaaS, Polycloud enables entire Kubernetes environments to be provisioned irrespective of cloud on-demand, providing the ability to build applications and templatized applications with pre-built reference architecture baked into templates on top of individual blueprints. We expect Infosys will increase its capabilities in this area.

As clients increasingly look for help in managing hybrid cloud environments from a cost perspective, Infosys has developed billing policies across a number of services, including security, monitoring, back-up, and compute, and rolls these up under a subscription-based model. It then provides cost modeling capabilities for clients to enable them to determine

specific costs. Infosys also enables clients to opt in to different managed service tiers, which will provide further flexibility and control for clients.

Finally, Infosys is creating Cobalt Labs at its global innovation centers to support its cloud-first approach and enable rapid prototyping of cloud-first solutions and co-innovation with clients. We expect Infosys will continue to ramp consulting and advisory personnel in support of this initiative and in support of large deal transformation engagements.

Cloud Infrastructure Brokerage, Orchestration & Management Market Summary

Overview

Cloud infrastructure brokerage, orchestration and management services are enabling clients to expedite, manage, secure, and govern hybrid multi-cloud environments, and expand cloud-native capabilities. COVID-19 is increasing the uptake of cloud services in response to both business continuity and remote homeworking requirements, and improving collaboration and UX.

Vendors are increasingly focused on utilizing cloud to deliver value across every business function within an enterprise, for example, enabling HR to drive positive employee engagement and experience, and improving security, compliance and governance for the CSO. In addition, through cloud management and FinOps providing CFOs with greater visibility and management of cloud ecosystem to control and optimize cloud costs. Vendors are further creating cloud-native industry-specific solutions to expedite an enterprise's ability to create and develop new products and services by sector, and developing dedicated CoEs and innovation centers in support.

Key investment areas include increasing development of container support and cloud native capabilities with a greater focus on DevSecOps to support cloud native applications and AI-Ops to drive automation across cloud operations.

Buy-Side Dynamics

The key decision factors in selecting a vendor to deliver cloud infrastructure brokerage, orchestration and management services are:

- Ability to manage increasing cloud infrastructure consumption across hybrid multi-cloud through single cloud management platform (CMP)

- Enhancing security, governance and compliance through increased monitoring (secure & compliant ops)

- Enabling business continuity plans (remote working capabilities), and flexibility in engagements (driven by COVID-19)

- Increasing productivity of cloud environments to expedite new cloud services, and improving time to market for new products and services

- Ability to scale and optimize workloads; and increased agility, flexibility and resiliency, with improved visibility, control and optimization of usage through FinOps

- Driving infrastructure and application modernization, and enabling DevSecOps and agile, including CI/CD pipeline automation and infrastructure as code integration

- Driving cloud-native development capabilities and architecture, including container management (docker, Kubernetes, OpenShift), microservices, mesh services and serverless

- Ability to expedite ERP migration to cloud (e.g. SAP)

- Accelerating adoption of Device as a Service, Workspace as a Service, VDI, Office 365, G-Suite, MMD, MVD, Amazon Workspaces, ServiceNow, VMware Workspace ONE; and enabling a more collaborative and productive workforce through the enablement of social and collaboration platforms

- Enabling AI-Ops (use of resolver bots and diagnostics engine to drive further insights), including use of auto-remediation and ML

- Creation of cloud industry blueprints and templates and providing an open approach to orchestration including cloud-native provisioning and discovery with cloud APIs (e.g. CloudFormation, Azure ARM, Terraform).

Market Size & Growth

The global cloud infrastructure brokerage, orchestration and management services market is estimated by NelsonHall as ~$155,790m in 2020. It is expected to grow at 10.0% CAGR to reach ~$227,950m by 2024.

North America will account for 45% of overall cloud infrastructure brokerage, orchestration and management services market in 2024, with overall growth of 9.0%, with EMEA growing at 11.3% and making up 33% of the overall market by 2024. LATAM will see higher growth through to 2021 driven by greater propensity to adopt cloud in support of remote working, with APAC maintaining steady growth through 2024.

Success Factors

The key success factors for cloud infrastructure brokerage, orchestration and management services vendors include:

- *Increasing skill-sets*: building a bench of resources with cloud-native development capabilities and expand hyperscaler capabilities and certifications. In addition, ramping cloud architects, hybrid cloud SMEs, integration SMEs, and site reliability engineers (SRE) in support of cloud operations

- *Consulting and advisory services*: offering onshore consulting and advisory services, supported by cloud SMEs, providing a design thinking and collaborative approach to define clients cloud transformation roadmap. This includes modernization from monolithic to microservices, landing zone and platform build, including cloud-native, and adoption of DevOps and serverless architecture

- *Cloud Management Platform (CMP)*: providing single-pane management view and cloud-native PaaS support including microservices and containers, utilizing APIs to bring tools into the cloud ecosystem, including cloud-native provisioning. Enhancing FinOps capabilities in the management of cloud costs, and increasing monitoring and observability to enhance dashboard performance across the cloud ecosystem

- *DevSecOps and agile*: expanding agile and DevSecOps capabilities, AI insights, recommendations and automated actions for DevOps process, including governance in support of SDLC. In addition, CI/CD automation, including CI/CD toolchain integration, infrastructure as code (IaC) integration with templates and API-driven architecture, and container as a service (CaaS) with DevOps

- *Increasing AI-Ops and automation*: using AI-Ops to trigger automation and enable automated remediation, enacting event and incident automation to diagnose and remediate (self-heal) incidents through AI, cognitive bots, and proactive and predictive

analytics. Expanding AI-Ops to No-Ops cloud managed services and developing more complex use case creation through ML and training for orchestration and resolver bots

- *Vertical-specific offerings*: developing service patterns and blueprints to enable repeatable service through a combination of hyperscaler technologies and IP to address a client-specific need. In addition, re-modernizing or re-factoring applications to align with client industry-specific trends

- *Focus on innovation*: Expanding digital transformation centers, innovation hubs and cloud CoEs in support of AI, analytics and automation. Combining CMP, DevOps and AI-Ops to manage a hybrid multi-cloud environment. In addition, creating dedicated experience centers to monitor XLA performance and end-user satisfaction across a hybrid multi-cloud environment

- *Expediting Digital Workplace Services*: increasing support of modern management cloud-based management toolsets (e.g. Microsoft Autopilot, Intune and VMware Workspace One), and across Unified Endpoint Management (UEM). Ramping capabilities in virtualization support for remote working, including Microsoft WVD, and Amazon Workspaces and in collaboration tools, supporting longer-term business continuity requirements

- *Smart brokerage capabilities*: developing smart brokerage capability to expedite cloud comparison across IaaS and PaaS, with the utilization of a recommendation engine to decide on best-fit cloud based on client requirements (e.g. regulatory, compliance, industry-specific). Further applying ML to enable the engine to learn from consumption patterns to build real-time brokerage capability

- *Ecosystem partnerships and IP*: developing IP, joint GTM, and strategic cloud initiatives with hyperscalers in support of hybrid multi-cloud support from both an industry and client-specific level. In addition, providing cloud-native PaaS support, and expanding partnerships with start-ups, in particular in support of container management and mesh services.

Outlook

The future direction for cloud infrastructure brokerage, orchestration and management services will include:

- Greater focus on driving containerization (CaaS) and PaaS services at scale, including Kubernetes and Docker, mesh capabilities and serverless architecture services. This will increase adoption of cloud-native services including microservices, and utilizing DevSecOps to provide fully managed container services, and tooling to build complete solution in the cloud

- Vendors will increase investment in CMP with more focus on a single-pane view on the health and state of cloud environments across hybrid and multi-cloud, with a deeper focus by persona. In addition, through smart brokerage and recommendation engines learning from real-time data on cloud consumption patterns to build models for real-time brokerage functionality

- Vendors will expand AI, ML, and analytics investments to provide greater insights on workflows and informed decisions on cost reduction, including landing zones and automating the decision on where deployments go

- Expanding AI-Ops to No-Ops cloud managed services, and developing more complex use cases through ML and training for orchestration and resolver bots, serverless capability on top of orchestration platforms, and next-gen cloud management observability based on

AI-Ops. In addition, developing real-time monitoring in a data center environment, utilizing ML technologies and AI on a video feed for object detection

- Increasing hybrid management capabilities in partnership with cloud providers (e.g. VMware/Pivotal) to enable private cloud for on-premise business-critical workloads (although public cloud consumption will increase significantly)

- Greater focus on the development of industry-specific personas to create solutions and use cases to fit specific industry requirements for cloud services

- Vendors will increase joint GTM approaches with strategic ecosystem partners, and build dedicated business units (e.g. Microsoft, AWS, VMware, Google)

- Vendors will increase networks of innovation hubs and Cloud CoEs to deliver collaboration sessions in close proximity to clients. They will expand the site reliability engineering (SRE) approach as the default to manage end-to-end cloud services in a highly automated way.

NEAT Methodology for Cloud Infrastructure Brokerage, Orchestration & Management

NelsonHall's (vendor) Evaluation & Assessment Tool (NEAT) is a method by which strategic sourcing managers can evaluate outsourcing vendors and is part of NelsonHall's *Speed-to-Source* initiative. The NEAT tool sits at the front-end of the vendor screening process and consists of a two-axis model: assessing vendors against their 'ability to deliver immediate benefit' to buy-side organizations and their 'ability to meet client future requirements'. The latter axis is a pragmatic assessment of the vendor's ability to take clients on an innovation journey over the lifetime of their next contract.

The 'ability to deliver immediate benefit' assessment is based on the criteria shown in Exhibit 1, typically reflecting the current maturity of the vendor's offerings, delivery capability, benefits achievement on behalf of clients, and customer presence.

The 'ability to meet client future requirements' assessment is based on the criteria shown in Exhibit 2, and provides a measure of the extent to which the supplier is well-positioned to support the customer journey over the life of a contract. This includes criteria such as the level of partnership established with clients, the mechanisms in place to drive innovation, the level of investment in the service, and the financial stability of the vendor.

The vendors covered in NelsonHall NEAT projects are typically the leaders in their fields. However, within this context, the categorization of vendors within NelsonHall NEAT projects is as follows:

- **Leaders**: vendors that exhibit both a high capability relative to their peers to deliver immediate benefit and a high capability relative to their peers to meet future client requirements

- **High Achievers**: vendors that exhibit a high capability relative to their peers to deliver immediate benefit but have scope to enhance their ability to meet future client requirements

- **Innovators**: vendors that exhibit a high capability relative to their peers to meet future client requirements but have scope to enhance their ability to deliver immediate benefit

- **Major Players**: other significant vendors for this service type.

The scoring of the vendors is based on a combination of analyst assessment, principally around measurements of the ability to deliver immediate benefit; and feedback from interviewing of vendor clients, principally in support of measurements of levels of partnership and ability to meet future client requirements.

Note that, to ensure maximum value to buy-side users (typically strategic sourcing managers), vendor participation in NelsonHall NEAT evaluations is free of charge and all key vendors are invited to participate at the outset of the project.

'Ability to deliver immediate benefit': Assessment criteria

Assessment Category	Assessment Criteria
Offerings	Cloud management platform capability
	Cloud brokerage and FinOps capability
	Cloud orchestration capabilities including cloud-native provisioning
	Industry specific cloud offerings, including re-usable assets and blueprints
	Cloud AI-Ops capabilities
	API and data-driven services in support of hybrid multi-cloud
	Advanced analytics, cognitive and ML capabilities in support of hybrid multi-cloud
Delivery	Cloud Infra BOM North America delivery capabilities
	Cloud Infra BOM EMEA delivery capabilities
	Cloud Infra BOM APAC delivery capabilities
	Cloud Infra BOM LATAM delivery capabilities
	Dedicated cloud SMEs, architects, engineers, hyperscaler-certified, and SRE's
	Dedicated cloud CoEs, experience centers and innovation hubsAbility to provide IP and accelerators in support of Cloud Infra BOM
	Ability to incorporate DevOps and agile methodologies in cloud services
	Extent of third-party and hyperscaler partnerships in support of Cloud Infra BOM
	Ability to provide advanced analytics, cognitive, and ML in support of hybrid multi-cloud ecosystem
Presence	Scale of Ops - Overall
	Scale of Ops - NA
	Scale of Ops - EMEA
	Scale of Ops - APAC
	Scale of Ops -LatAm
	Number of clients overall for Cloud Infra BOM
Benefits Achieved	Improvement in infrastructure and application performance, reliability and availability
	Level of cost savings achieved
	Improvement in provisioning times
	Increased end-user/business satisfaction
	Improved speed of problem resolution

Exhibit 2

'Ability to meet client future requirements': Assessment criteria

Assessment Category	Assessment Criteria
Overall Future Commitment to Cloud Infra Brokerage, Orchestration and Management Services	Financial rating Commitment to Cloud Infra BOM Commitment to innovation in Cloud Infra BOM
Investments in Cloud Infra Brokerage, Orchestration and Management Services	Investment in IP and platforms in support of cloud infra brokerage, orchestration and management Investment in cloud brokerage capabilities including smart brokerage Investment in cloud orchestration including cloud native services Investment in industry-specific offerings, cloud assets and blueprints Investment in support of cloud AI-Ops managed services Investment in support of hyperscaler GTM initiatives Investment in analytics, cognitive and ML services
Ability to Partner and Evolve Services	Key partner Ability to evolve services

For more information on other NelsonHall NEAT evaluations, please contact the NelsonHall relationship manager listed below.

Sales Enquiries

NelsonHall will be pleased to discuss how we can bring benefit to your organization. You can contact us via the following relationship manager:

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