

Hybrid Enterprise Cloud Services 2021–2022 RadarView: Report Excerpt

From optimization to automation

December 2021

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RadarView

1

Organizations have realized that hosting applications on the cloud and leveraging cloud infrastructure are the best ways to sustain a business in the long run. They are leveraging service provider capabilities in cloud advisory services, cloud migration and modernization, and cloud operations and management to make their IT systems reliable, secure, cost effective, and more outcome driven.

2

Our interactions with enterprise digital leaders indicate that there has been a gradual shift from the traditional lift and shift migration to the use of cloud-native architecture for modernization and implementation of different automation techniques to reduce time to market. In order to address this shift, service providers are increasingly building in-house tools/accelerators or acquiring cloud-native companies.

3

The Hybrid Enterprise Cloud Services 2021–2022 RadarView report helps companies use the hybrid cloud to accelerate their digital journeys. It also provides information to identify the right cloud service provider to aid in that plan.

4

Avasant evaluated 40 cloud service providers through a rigorous methodology across key dimensions of practice maturity, partnership ecosystem, and investments and innovation to recognize the top 28 cloud service providers that brought the most value to the market over the past 12 months.




5

We also highlight the current backdrop of the market and our view on the road ahead for enterprises leveraging hybrid enterprise cloud services over the next 12 to 18 months.



Executive summary

Defining hybrid enterprise cloud managed services

	Public cloud	Private cloud	On-premises
			
Hybrid environment	✓ ✓ ✗ ✓	✓ ✗ ✓ ✓	✗ ✓ ✓ ✓

• Hybrid environments must include workloads (compute, storage, data, services, and applications) spread over at least two out of three computing models.

Multicloud environment

A multicloud environment can be defined as consisting any of the below options:

- Includes at least two public clouds
- Includes at least two private clouds
- Includes at least one public and one private cloud

Hybrid enterprise cloud managed services

This report defines hybrid enterprise cloud managed services as those offerings and capabilities from service providers that help enterprises strategize, implement, integrate, and orchestrate their hybrid IT environments, while also adhering to security, compliance, and backup/disaster recovery requirements.

Key enterprise hybrid cloud trends shaping the market

Hybrid cloud strategy is moving towards cloud-native transformations

- Seventy-nine percent of organizations are increasing their spend in cloud applications. This is shifting the business focus from a "lift and shift" approach to refactoring or replatforming to utilize cloud-native architectures for improving delivery cycles, increasing scalability, and reducing costs.
- Rapid development and deployment of cloud-native applications using CI/CD automation, DevOps, and containers/microservices is increasing, with a focus on business outcomes.

Enterprises are focusing on measuring cloud spend and deployment efforts

- Enterprises are increasingly implementing automation methods such as FinOps, AIOps, and DevOps to achieve benefits such as a reduction in deployment efforts and cloud spend on business operations.
- To address this, service providers are strengthening their cloud-native capabilities by building tools and platforms for efficient containerization. Also, they are integrating advanced technologies like AI in existing tools to improve applications analysis for IT modernization and gain insights during compilation.

Industry-specific platforms and services continue to gain momentum

- Service providers are bringing their industry-specific assets and knowledge to extend functionalities of their existing solutions or codeveloping new solutions with other cloud platform providers to help enterprises in different industries improve performance while meeting regulatory requirements.
- Service providers are developing solutions to solve different use cases such as humanizing customer interaction, improving operational safety in plant operations, and enhancing monitoring.

ESG initiatives are becoming a corporate priority

- As organizations commit to becoming carbon neutral in the future, they are looking for solutions to effectively track their emission reduction goals.
- Service providers and cloud platform providers are developing digital services to accelerate implementation of sustainability strategy. Cloudification and digitalization are gradually becoming popular methods to tackle sustainability challenges.

Enterprise hybrid cloud adoption: The road ahead



Ease of adoption for cloud solutions through marketplaces

- Service providers are increasingly leveraging cloud platforms' marketplaces as partners to develop a sales channel to sell its popular solutions to a wide range of customers.
- Additionally, service providers are building their own marketplaces. They are providing opportunities to customers in these marketplaces to co-innovate solutions meeting their requirements or select from readily available solutions.

Integrated cloud solutions becoming explicit

- Enterprises are shifting away from deploying point solutions to taking a more holistic approach towards workplace services, service desks, data centers, and migration to hybrid clouds.
- To cater to this need, service providers are integrating their cloud solutions by bringing together their consulting and advisory services and deep engineering capabilities.

Greater collaboration among service and platform providers

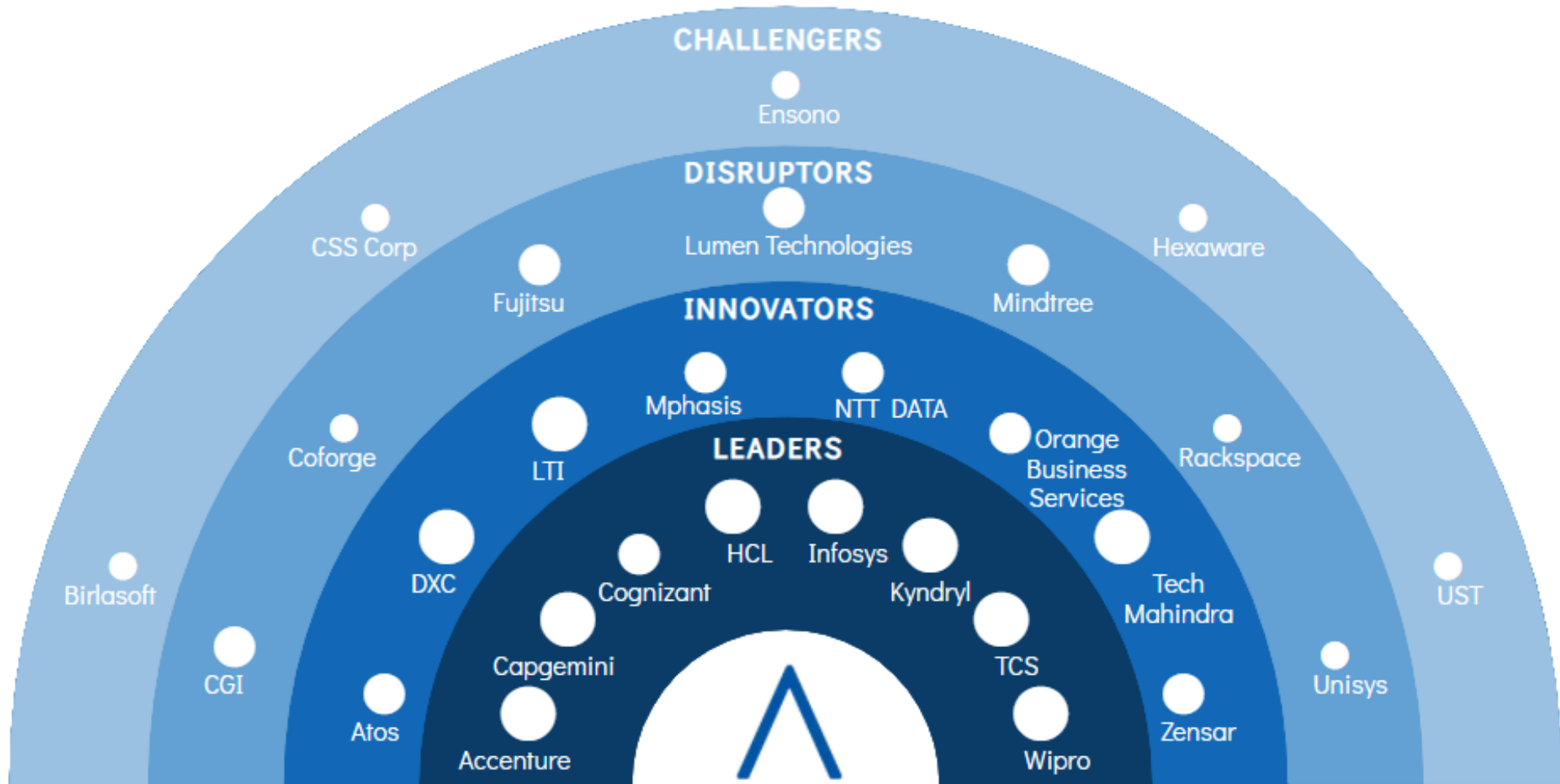
- Enterprises are looking for services providers who are continuously strengthening their collaboration with cloud platform providers by developing industry-specific solutions, expanding certified professionals, and creating innovative tools or accelerators.
- All the major service providers have developed dedicated business units with cloud platform providers. We expect this approach to be adopted by mid-tier and other providers.

Developing digital talent is a constant challenge

- Companies are facing pressure to reinvent themselves to stay competitive, fueling demand for digital skills.
- Companies are looking for service providers who are investing to address the shortage in digital talent through various initiatives such as creating specified courses, partnering with online course providers, and developing digital learning platforms.

Avasant recognizes 28 top-tier providers supporting enterprise adoption of hybrid enterprise cloud services

Practice maturity ○ ○ ○



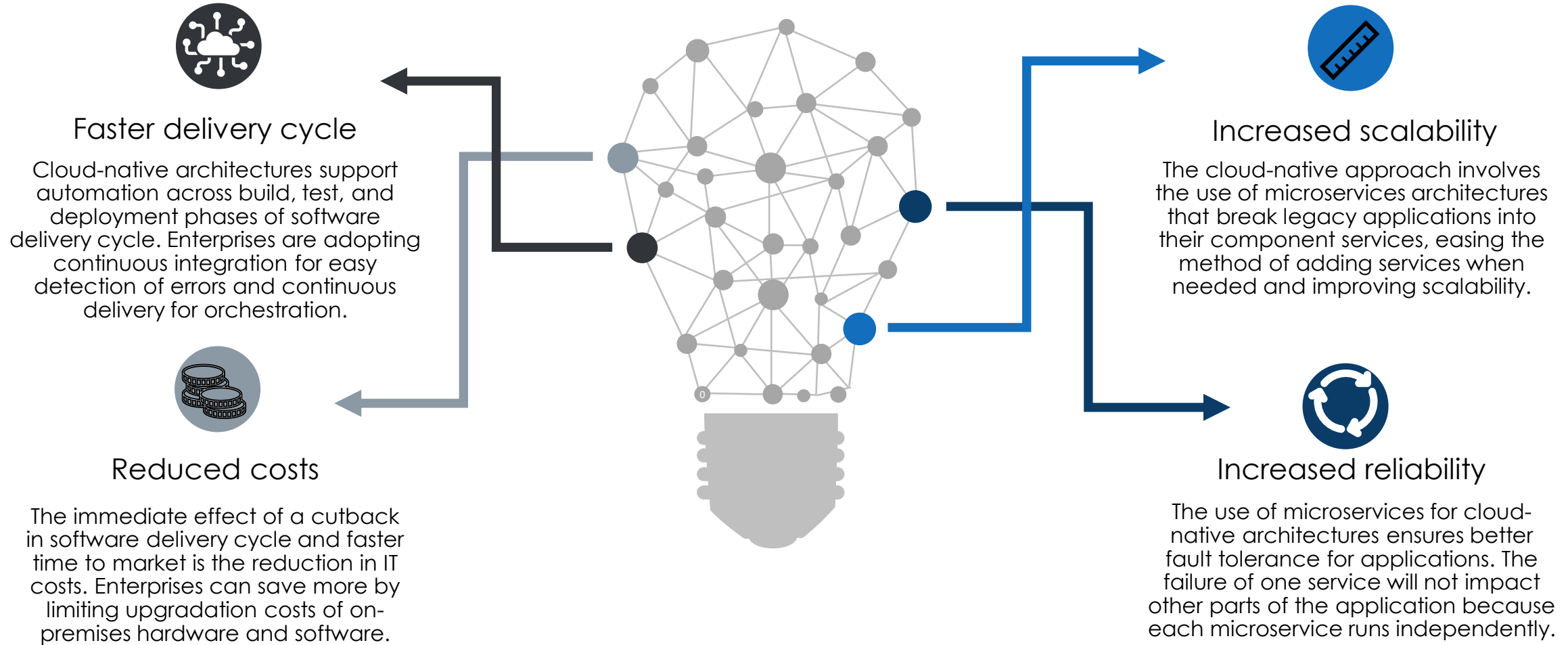


Current backdrop

Business focus is shifting from a “lift and shift” cloud migration approach to using cloud-native architectures

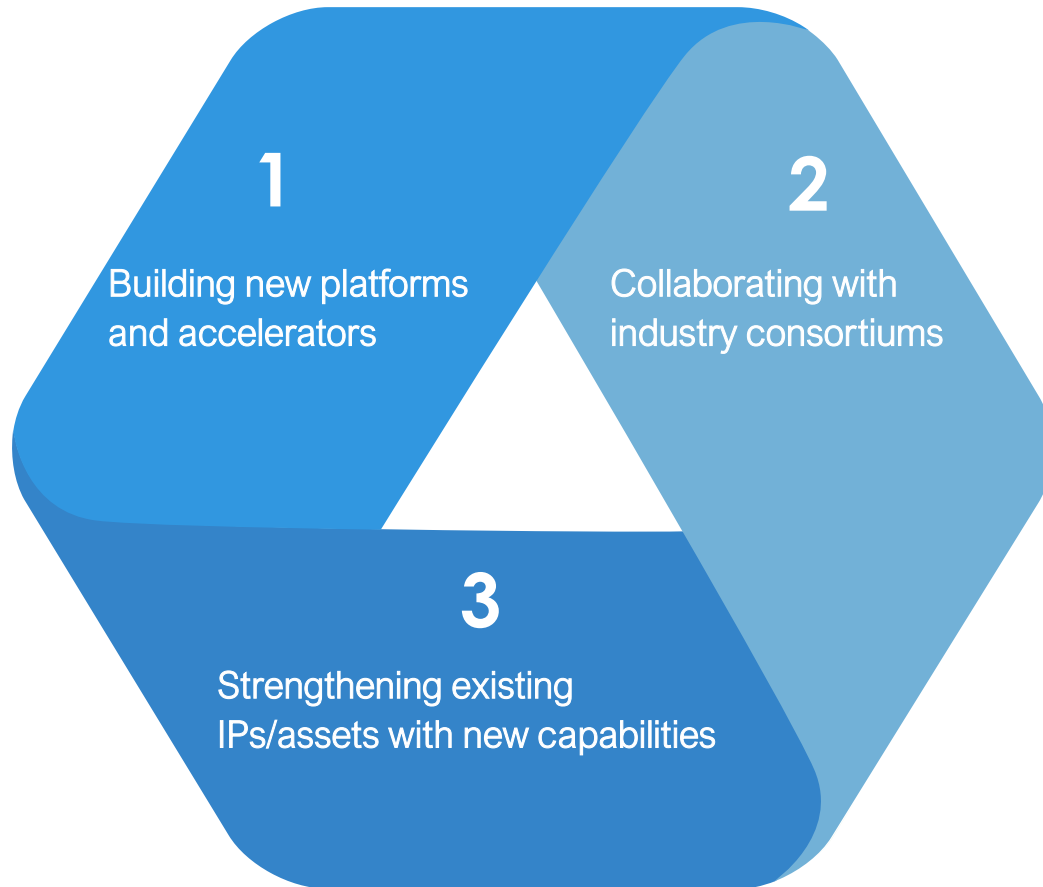


Seventy-nine percent of organizations are increasing their spend in cloud applications. This is shifting the business focus to refactoring or re-platforming for improving delivery cycles, increasing scalability, and reducing costs.



Service providers are doubling down on cloud-native capabilities by developing in-house skills

Service providers are building new platforms and accelerators, joining hands with industry consortiums, and strengthening their existing IPs with advanced technologies.



zensar™

1

In 2020, Zensar launched accelerators such as ZenKubeV2C and ZenKubePort for easing migration of applications in a containerized environment. The V2C aims to provide 5x times containerization and a 20% reduction in cloud-native efforts, while KubePort aims to offer 2x times application mobility by increasing data compatibility in the Kubernetes environment.

HCL

2

In June 2020, HCL joined Cloud Native Computing Foundation (CNCF) as a Gold Member to take CNCF developments promptly to its clients through HCL Cloud Native Labs and integrate open-source technologies in its portfolio of cloud-native services.

tcs | TATA CONSULTANCY SERVICES

3

In 2021, TCS augmented its microservices offering, TCS MasterCraft TransformPlus, by integrating machine learning and launching a new version to improve application rationalization during modernization and gain insights during compilation.

Note: Examples from select service providers

Source: Avasant Research

Service providers are also depending on inorganic ways for developing their cloud-native capabilities

Service providers are augmenting their portfolios with new capabilities or obtaining complementary capabilities through acquisitions.

Illustrative examples

Acquiring net new capabilities to accelerate time to market

In April 2021, Ensono acquired Amido to develop cloud-native software engineering capabilities and enhance its ability in application modernization. Amido gave Ensono access to its project accelerator Amido Stack that provides pre-loaded templates and packages for accelerating project delivery.



In 2021, Tech Mahindra acquired two new companies, DigitalOnUs and BrainScale, for application modernization through Kubernetes and DevOps. BrainScale specializes in application development in Azure and DigitalOnUs' expertise lies in DevOps and cloud-native development.



Acquiring complementary capabilities to augment solution portfolio

In March 2020, Accenture acquired Imaginea, a cloud-native product company, as part of its Accenture Cloud First initiative. The intention was to strengthen its existing team with personnel possessing cloud data and cloud modernization skills.



In the past two years, Cognizant has acquired six companies to strengthen its cloud-related capabilities. As part of this acquisition spree, it acquired Contino in 2019, a company that helps clients accelerate business transformation through enterprise DevOps methodologies and advanced data platforms.



Note: Examples from select service providers

Businesses are leveraging different automation methods for cloud operations

Enterprises are looking for automation of cloud operations through DevOps, FinOps and AIOps.

zensar™

Hybrid cloud operation automation

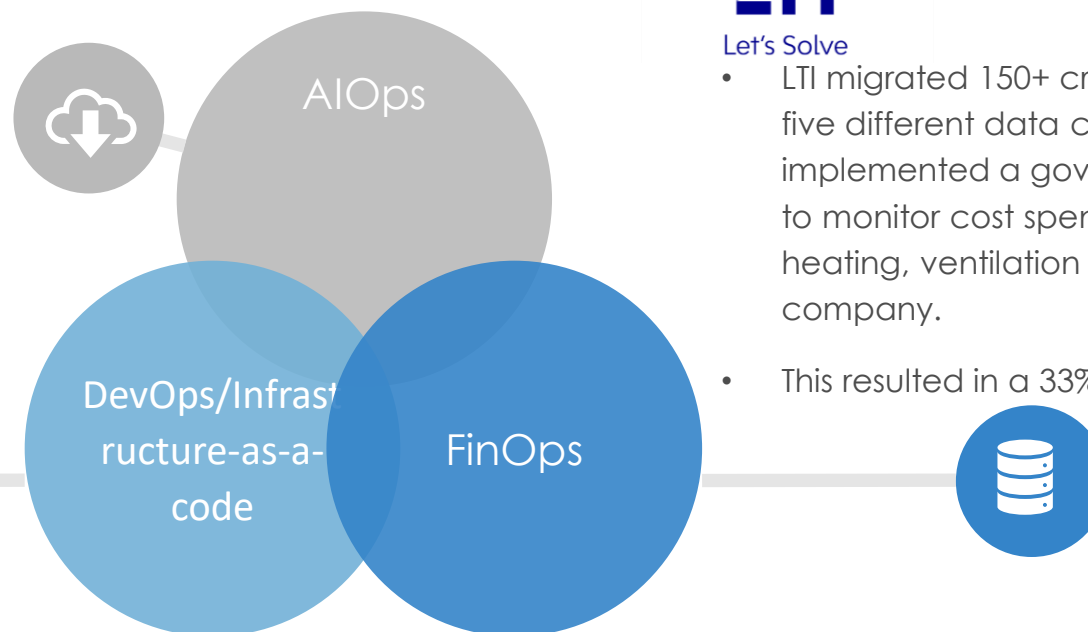
- Zensar migrated its on-premise Guidewire solutions to Azure for an insurance player based in the UK and enabled integrated monitoring through its AIOps platform, The Vinci.
- This helped the insurance player to achieve 99.4% application uptime and an 80% reduction in MTTR.



HCL

Hybrid cloud infra-automation

- HCL implemented fully automated DevOps to provide Zero touch CI/CD for a British gas distribution company's production and nonproduction systems.
- This resulted in a 30% reduction in deployment efforts and a 40% reduction in release cycle time.



LTI

Automated resource management and spend tracking

Let's Solve

- LTI migrated 150+ critical applications spread across five different data centers to Azure and implemented a governance model through FinOps to monitor cost spends regularly for a global heating, ventilation and air conditioning (HVAC) company.
- This resulted in a 33% reduction in cost.

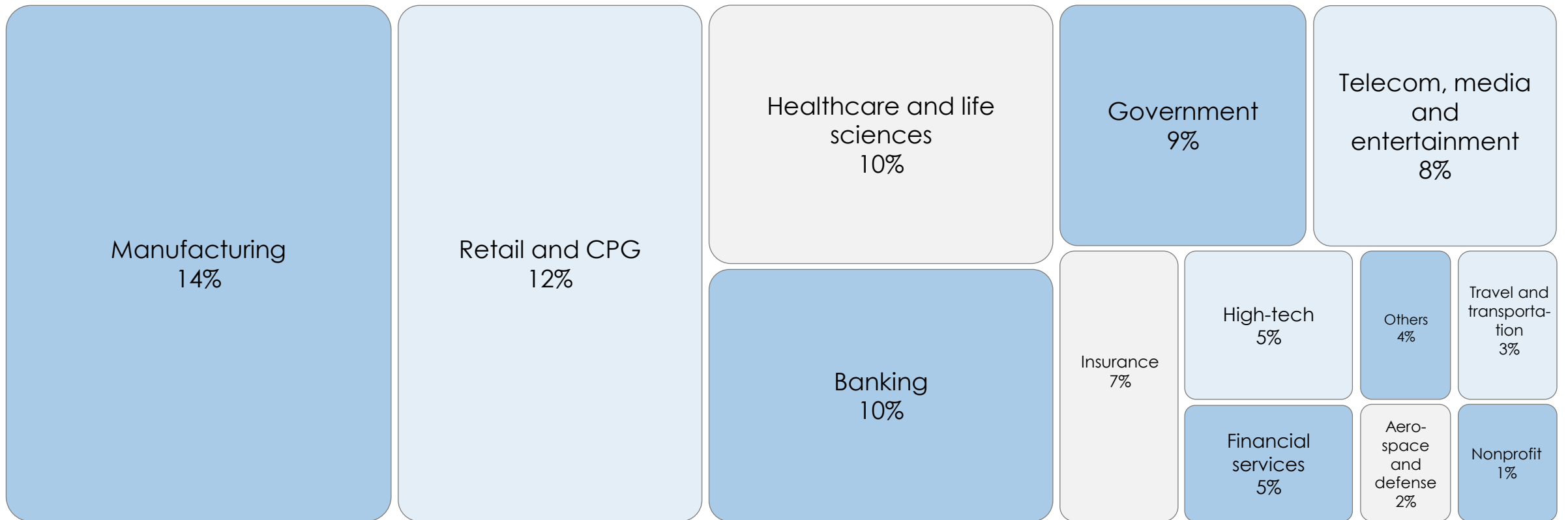


Hybrid cloud services continue to be adopted across all industry verticals with growth in manufacturing



As providers are seeing maximum revenue return from manufacturing, retail, healthcare, banking, and government sectors, they are also investing to develop industry-specific offerings for these sectors.

Percentage of revenue coming from different verticals for hybrid cloud services



Note: The "Others" category includes agriculture, education, nonprofit, and professional services.

Sources: Avasant Enterprise Cloud Services RadarView Survey, May–September 2021

Service providers are developing customized industry-specific solutions on cloud

While some service providers have introduced a completely new set of solutions, others have been constantly upgrading existing platforms and solutions with new features to meet the growing demands of enterprise customers.

Banking



In October 2021, Wipro collaborated with Cynergy Bank and Google Cloud to develop a "human digital bank" solution for keeping the essence of human interaction intact while digitalizing the bank's services.

Life sciences



In October 2021, HCL partnered with Google Cloud to deliver a healthcare and life sciences solution that helps to derive insights to improve patient and healthcare-employee experience.

Manufacturing



In April 2021, Accenture collaborated with SAP to build a cloud-based solution for asset management to improve operational safety in plant operations.



Utilities and resources



Capgemini has developed a digital seer solution for better monitoring of energy assets for large organizations, reducing time utilized for reactive maintenance by 10–30%.

Retail and CPG



In 2021, CSS Corp created a virtual e-commerce experience solution on AWS to improve shopping experience by providing AI-based product recommendations.

Travel and transportation



In 2021, Unisys collaborated with PayCargo to develop a payment-integrated cargo processing solution to improve cargo management operations for airlines, freight forwarders, and importers.

Note: Examples from select service providers










Source: Avasant Hybrid Enterprise Cloud Services RadarView Survey August-September 2021

Service providers are solving new horizontal use cases in collaboration with cloud platform providers

Use cases addressed

- Increase ease of compliance to sovereignty rules of the government
- Incorporate cognitive automation in customer care for improving customer satisfaction
- Efficient IoT implementation to accelerate time to market
- Optimize energy consumption through intelligent monitoring systems

Illustrative examples

Service provider	Technology provider	Summary
 		<ul style="list-style-type: none"> • Capgemini collaborated with Orange and Microsoft to set up a new company, named Bleu to provide a "Cloud de Confiance" service. The company aims to provide customers with a trusted cloud platform equipped with tools that will help them to meet the sovereignty requirements of the French government.
		<ul style="list-style-type: none"> • In 2021, Infosys launched a customer engagement platform, Cortex, by leveraging Genesys' cloud customer experience expertise and Google Cloud's Contact Center AI services. The platform, built in collaboration with Google Cloud, will be part of Infosys Cobalt and aims to help customers with improved contact center operations
		<ul style="list-style-type: none"> • HCL IoTWorks practice focusses on building IoT-related solutions, IoT WoRKST™ FORCE and IoT WoRKST™ ASSET. • HCL announced a partnership with AWS to leverage AWS IoT Core service and develop connected device solutions on AWS IoT Core to optimize cost, reliability, and performance.
		<ul style="list-style-type: none"> • In January 2021, Atos announced its collaboration with IBM Cloud to leverage IBM Watson and Red Hat OpenShift to help manufacturing, energy and utilities, oil and gas, retail and transportation sectors to optimize energy consumption by implementing energy monitoring solutions.

Note: Examples from select service providers

Source: Avasant Research

Service providers are adopting multiple go-to-market strategies to reduce time to market

The go-to-market strategies include leveraging cloud platform's marketplaces, building their own marketplace, or creating dedicated units to accelerate the process.

01 Capgemini

- Capgemini co-sells its Guidewire on Cloud solution in AWS Marketplace to reach AWS customers.
- The solution offers Guidewire cloud implementation on AWS, DevOps pipeline for integration, and access to Guidewire reporting and AI/ML analytics.

04 tcs | TATA CONSULTANCY SERVICES

- In October 2021, TCS launched an advanced version of TCS BaNCST[™] Marketplace that offers a portfolio of solutions and APIs for fintechs and insuretechs.
- The marketplace gives an opportunity to customers to co-innovate solutions as per their requirement or select from readily available solutions.



02 DXC.technology

- In 2021, DXC expanded its partnership with VMware and AWS by launching the VMware Cloud on AWS platform with a pay-per-use cloud consumption model.
- The new platform helps enterprises extend their existing VMware Cloud infrastructure to AWS while keeping mission-critical workloads on premise.

03 Mindtree

- In December 2020, Mindtree launched Microsoft go-to-market business unit, headquartered in Redmond, dedicated to build Microsoft platforms and solutions and develop cloud talent.
- This is part of its investment plans for cloud-related developments.

Service providers are increasingly setting up dedicated business units for major cloud platform providers

Key elements for dedicated business units

Develop industry-specific solutions

- To accelerate development of industry-specific solutions by leveraging expertise of cloud platform providers.

Dedicated certified cloud professionals

- To develop a team of professionals certified in a particular cloud platform to handle specific client requests.

Specialized assets or accelerators

- To improve cloud platform-specific assets that can be utilized for cloud operations for a provider.



- HCL has launched dedicated business units with all the major cloud platform providers. The latest is with AWS in November 2021. It plans to accelerate the development of industry-specific solutions. One solution developed on AWS is 1PLM, that helps manufacturers transform their computer-aided design (CAD) and product lifecycle management.



- In February 2021, Accenture opened a dedicated business unit with VMware with more than 2,000 cloud professionals trained in VMware. Through this new business group, Accenture aims to train more company professionals in VMware for developing new service offerings, assets, and accelerators supported by VMware technologies.



- In February 2021, TCS launched AWS Business Unit to develop specialized teams to enhance TCS' cloud library of frameworks, accelerators, and toolsets such as TCS' DATOM consulting framework for data modernization, Cloud Counsel™, and iCMC™ decision support engine for modernization and migration.

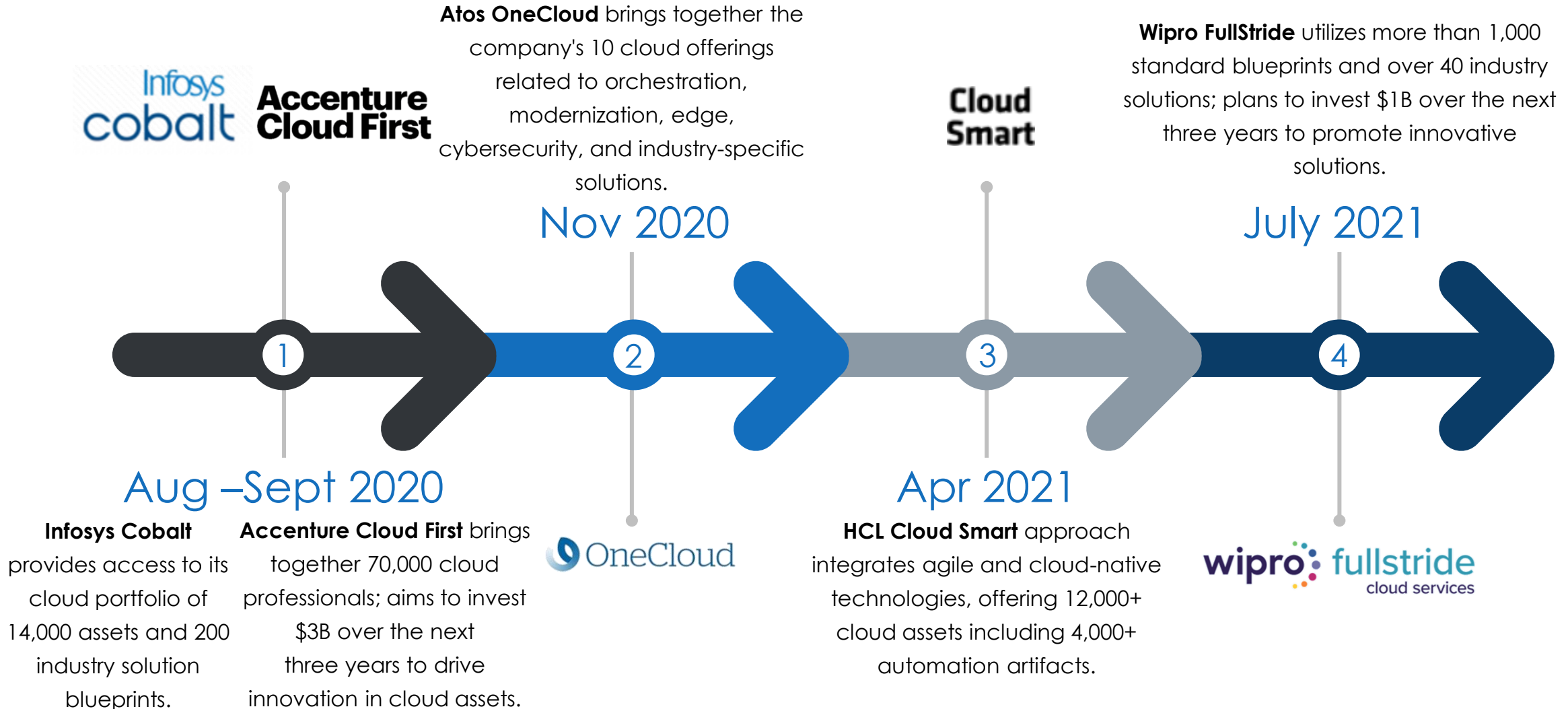
Note: Examples from select service providers

Source: Avasant Research

Bigger firms are integrating all cloud-related initiatives under a single umbrella



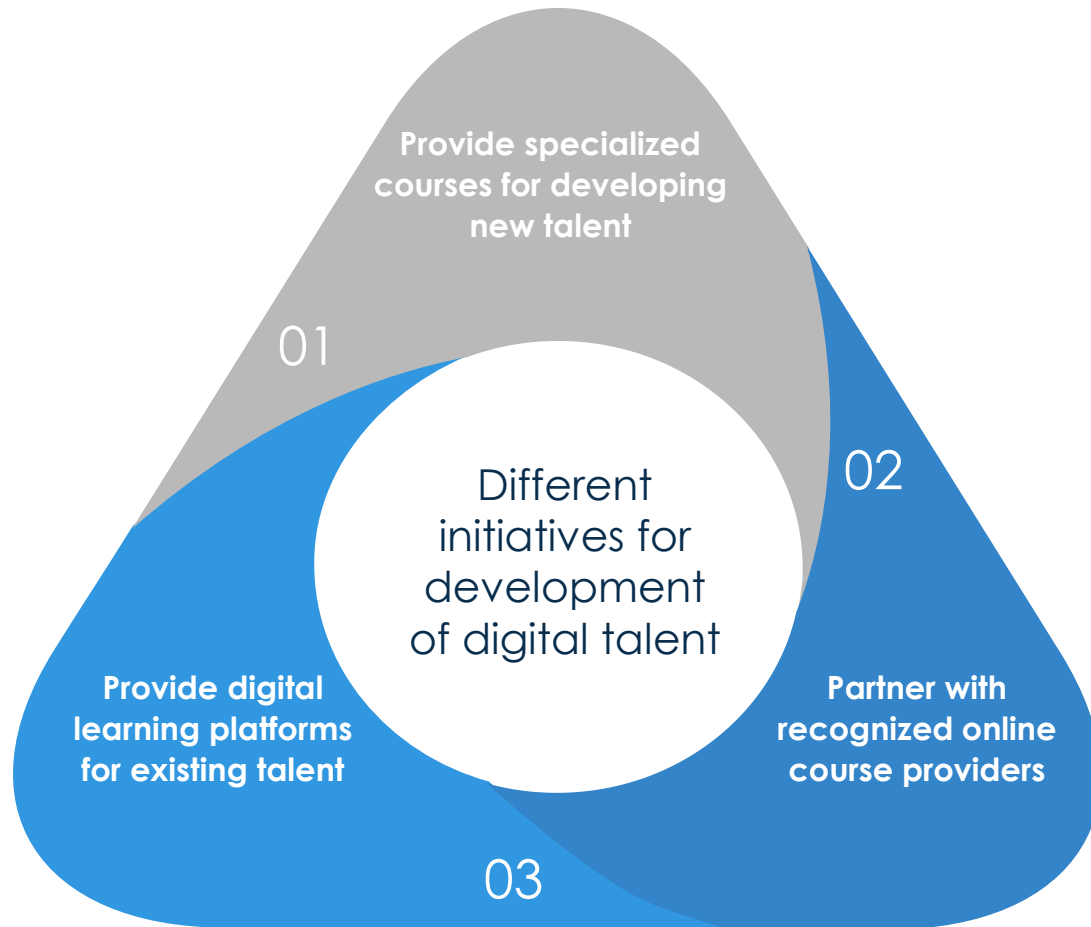
This initiative is increasing the interaction between sales and consulting teams for new opportunities.



Companies are facing the pressure to reinvent themselves to stay competitive, fueling demand for digital skills



Service providers are investing to address the issue of shortage in digital talent. For the next 12 months, nearly 30% share of investment is planned for training and certification.



enson^o

- 1 Ensono offers a two-year training program, Cloud Academy, to tap new talent searching for jobs. The program gives flexibility to individuals enrolling to choose the cloud provider for their curriculum, AWS or Azure, and then concentrate on acquiring specific skills and proficiencies on that cloud platform.

Capgemini

- 2 Capgemini has developed SkillPath, a skill advancement portal, to provide visibility to various technologies and skill paths for cloud professionals within the organization. It has also developed NEXT by Degree, a digital learning hub for developing skills across cloud platform providers.

Infosys

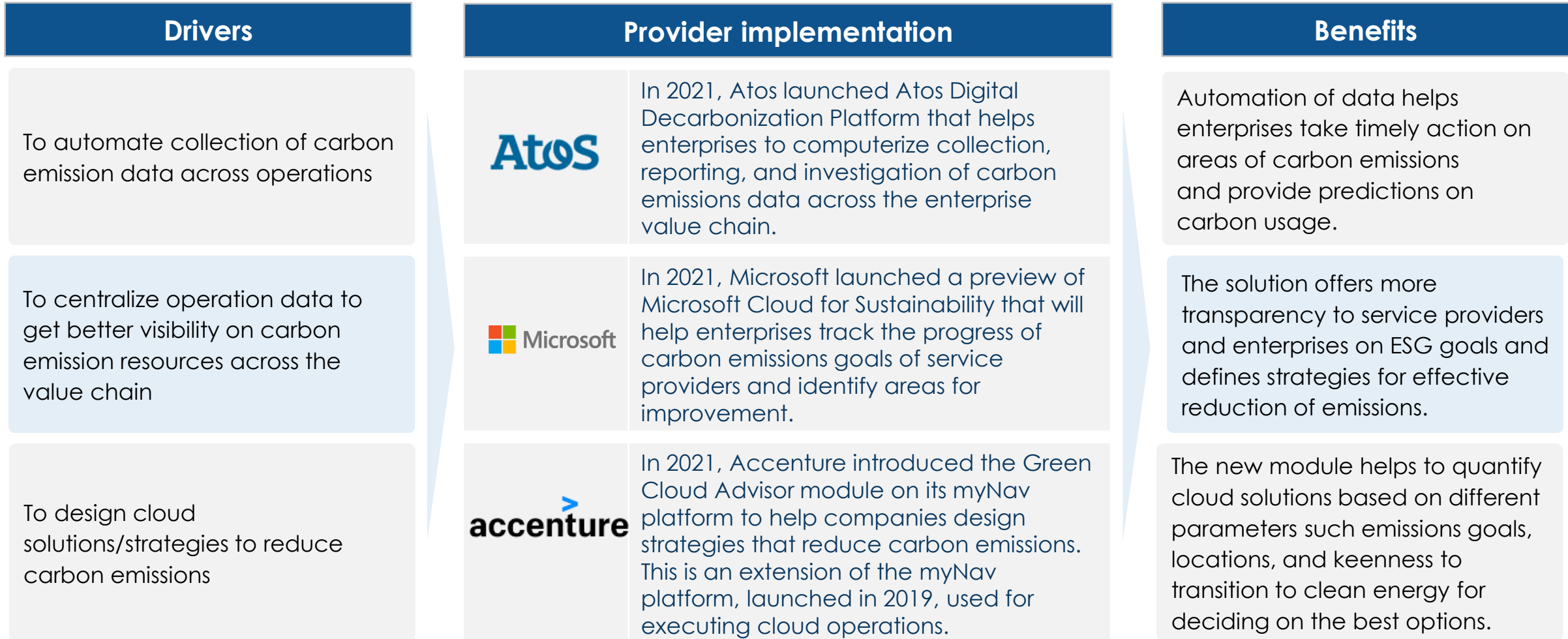
- 3 In 2021, Infosys partnered with recognized online course providers such as Udacity, NPTEL, UpGrad, and Coursera to provide certification workshops. This initiative gives opportunity to its employees to show their capabilities in the market and achieve personal goals.

Note: Examples from select service providers

Source: Avasant research

Both service providers and cloud platform providers are developing sustainable solutions

These solutions are helping enterprises to track and achieve their ESG goals



Note: Examples from select service providers

Source: Avasant Research



RadarView overview

Avasant's Hybrid Enterprise Cloud Services RadarView 2021–2022 assesses service providers across three critical dimensions



Practice Maturity

- This dimension considers the current state of a provider's hybrid enterprise cloud services practice in terms of its strategic importance for the provider, the maturity of their offerings and capabilities, and client engagement.
- The width and depth of the client base, usage of proprietary/outsourced tools and platforms, and the quality of talent and execution capabilities are all important factors that contribute to this dimension.

Partnership ecosystem

- This dimension assesses the nature of the ecosystem partnerships that the provider has entered, the objective of the partnerships (for example, co-development and co-innovation), its engagement with solutions providers, startup communities, and industry associations.
- It evaluates the joint development programs around offerings, go-to-market approaches, and the overall depth in partnerships.

Investments and Innovation

- This dimension measures the strategic direction of investments and resultant innovations in the offerings and commercial model and how it aligns with the future direction of the industry.
- The critical aspects of this dimension include both organic and inorganic investments toward capability and offering growth, technology development, and human capital development, along with the innovative solutions developed with strategic partners.

Avasant based its analysis on several sources

Public disclosures Publicly available information such as SEC filings, annual reports, quarterly earnings calls, executive interviews, and statements

Market interactions Discussions with enterprise executives leading digital initiatives and influencing selection of and engagement with cloud SIs

Provider inputs Inputs collected through an online questionnaire and structured briefings during September–October 2021

Of the 40 service providers assessed, the final 28 featured in the Hybrid Enterprise Cloud Services RadarView for 2021-2022 are:



Note: Assessments for Accenture, Atos, CGI, Coforge, Cognizant, DXC, Fujitsu, Hexaware, Kyndryl, Lumen, Mindtree, NTT Data and UST have been conducted based on public disclosures and market interactions only



Hybrid Enterprise Cloud Services 2021–2022 RadarView

Avasant has recognized cloud SIs across four classifications



Leaders show consistent excellence across all the key dimensions of the RadarView assessment, practice maturity, partnership ecosystem, and investments and innovation, and have had a superior impact on the market as a whole. These providers have shown true creativity and innovation and have established trends and best practices for the industry. They have proven their commitment to the industry and are recognized as thought leaders in their space, setting the standard for the rest of the industry to follow. Leaders display a superior quality of execution and a reliable depth and breadth across verticals.



Innovators show a penchant for reinventing concepts and avenues, changing the very nature of how things are done from the ground up. Unlike the Leaders, Innovators have chosen to dominate in a few select areas or industries and distinguish themselves on the basis of superior innovation. These radicals are always hungry to create pioneering advancements in the industry and are actively sought after as trailblazers, redefining the rules of the game.



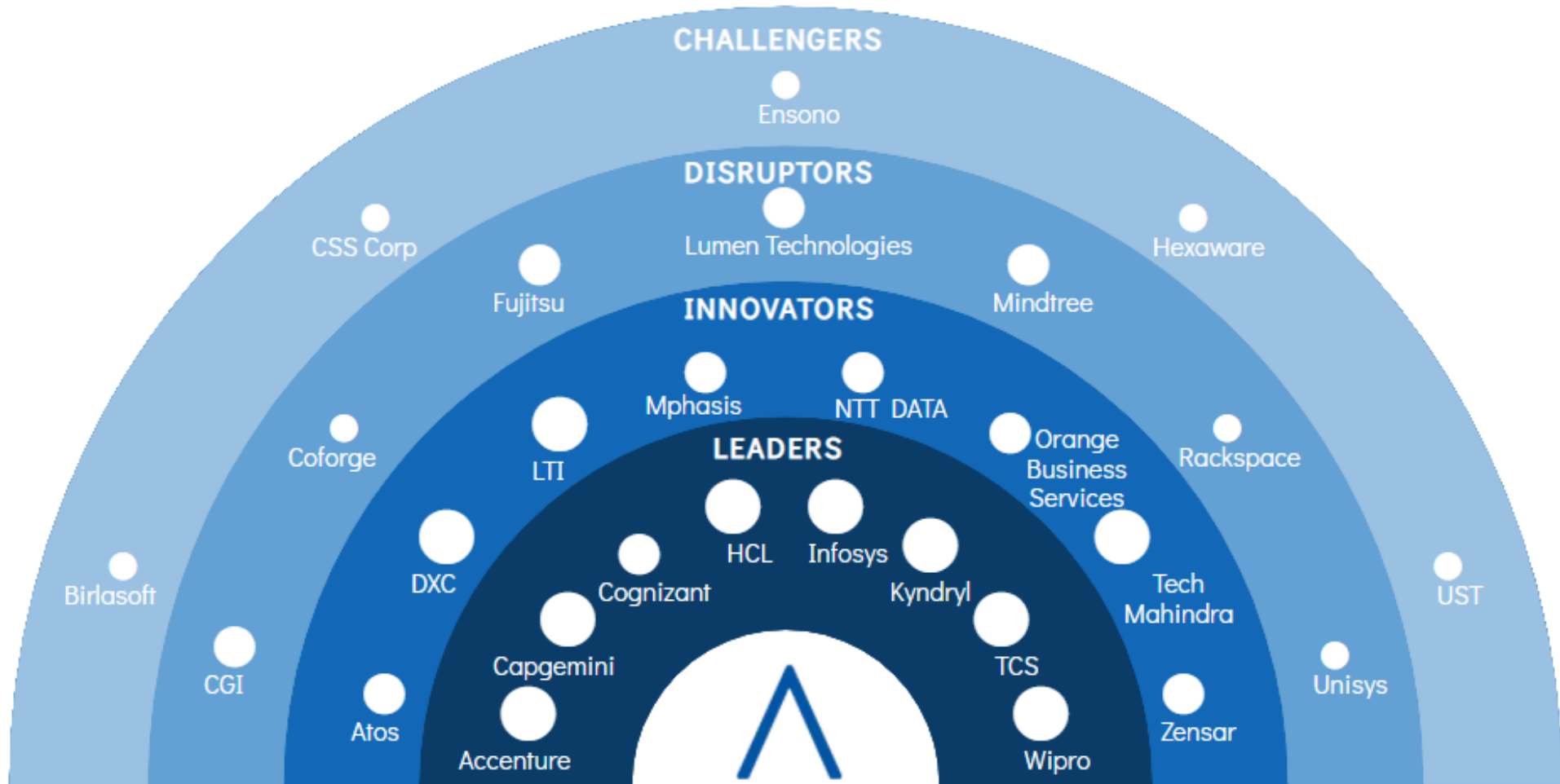
Disruptors enjoy inverting established norms and developing novel approaches that invigorate the industry. These providers choose to have a razor-sharp focus on a few specific areas and address those at a high level of granularity as well as demonstrate commitment that results in tectonic shifts. While Disruptors might not have the consistent depth and breadth across many verticals like the Leaders or the innovation capabilities of the Innovators, they exhibit superior capabilities in their areas of focus.



Challengers strive to break the mold and develop groundbreaking techniques, technologies, and methodologies on their way to establishing a unique position. While they may not have the scale as providers in other categories, Challengers are eager and nimble, and use their high speed of execution to great effect as they scale heights in the industry. Challengers have a track record of delivering quality projects for their most demanding Global 2000 clients. In select areas and industries, Challengers might very well have capabilities that match or exceed those of the providers in other categories.

Hybrid Enterprise Cloud Services 2021–2022 RadarView

Practice maturity   



AVASANT

Wipro profile

Wipro: RadarView profile



Practice overview

- Practice size: 29,000
- Active clients: 1,170
- Certified/trained resources: 13,000+
- Delivery highlights: 97 delivery centers in five regions worldwide

\$1Bn–\$3Bn Cloud service revenue, FY 2021	20%–30% Cloud services revenue growth, FY 2021
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Client case studies

- Designed and implemented Boundaryless Enterprise (BLE) architecture on hybrid cloud (AWS + Azure + on-premises) for E.ON. Also, it delivered it through Cloud Studio, offering a single-pane dashboard across IaaS/PaaS. Achieved 30% cost savings with the help of new architecture.
- Helped to manage highly sensitive data as Corning modernized its legacy infrastructure by moving its workloads to a combination of AWS and private cloud. The migration helped provide more security and scalability for the workloads.
- Took over the IT units of Metro AG and helped them undergo digital transformation by implementing hybrid cloud-based digital Infrastructure through Wipro BLE with 40 plus available integrations.
- Provided cloud management services across the hybrid-infrastructure on AWS, Azure, GCP and on-premises for a Spanish multinational telecommunications company. It aims to help enterprises build use-cases around 5G technology.

- Practice maturity ★★★★★
- Partner ecosystem ★★★★★
- Investments & innovation ★★★★★

Introduced Wipro FullStride to consolidate cloud offerings under one umbrella. Acquisition-based strategy to augment digital practices.

Key IP and assets

- Cloud Studio: A phygital studio, including collaboration pods and experience zones
- Enterprise Digital Operation Center (EDOC): A cloud management solution
- BoundaryLess Universal Edge: A framework to address different aspects of delivering robust and production-grade edge services
- Wipro devNXT

Partnerships/alliances

Cloud platform providers

Cloud management partners

Software Partners

Sample clients

- Corning
- Citibank
- Dell
- E.ON
- eSilicon
- HSBC
- METRO AG
- Nestle
- Royal Sun Alliance
- S&P Global Ratings
- Woolworths
- A Spanish multinational telecommunications company

Industry coverage

Aerospace & defense
Banking
Financial services
Government
Healthcare & life sciences
High-tech
Insurance
Manufacturing
Nonprofits
Retail & CPG
Telecom, media & entertainment
Travel & transportation
Utilities & resources

Darker color indicates higher industry coverage through digital services ●●●●●

Analyst insights

Practice maturity



- As cloud remains the top spending priority for most enterprises, Wipro announced its new cloud transformation approach with FullStride Cloud Services in July 2021. The new approach focuses on augmenting its cloud existing capabilities by building new industry-specific solutions and increasing its investments in its partner network and possible acquisitions. It will also focus on developing new talent to run its new initiative.
- Wipro's cloud services focus on the combination of cloud economy, gig economy, and API economy, and it offers these as a service to customers through its proprietary cloud management tool, Cloud Studio. This also includes strategies to attain its sustainability goals through transformation.
- Cloud Studio handles cloud project delivery, and it is integrated with major cloud platform providers like AWS, Azure, Google Cloud, IBM, and Oracle. It offers more than 200 container orchestration flows and 160 DevSecOps pipelines for deployment automations.
- Wipro offers API marketplace, which consists of more than 50 custom APIs and over 30 ServiceNow workflow compositions to gain rapid outcomes. These APIs address different areas, such as standardization, security, versioning, and authentication.

Partner ecosystem



- As part of its FullStride Cloud Services initiative, in September 2021, Wipro announced its collaboration with Google Cloud to open Wipro-Google Cloud Innovation Arena in India. This will strengthen Wipro's partnership with Google Cloud. It aims to augment its cloud capabilities and build solutions across industries to drive accelerated business transformation.
- Wipro continues to leverage its partner ecosystem, including SAP, HP, Equinix, and Red Hat, to address the accelerated adoption of ERP services, such as SAP S/4HANA in a hybrid service model. These partnerships helped them achieve 40% client growth with recent client wins.
- In 2021, Wipro added ScienceLogic as its cloud governance platform provider.

Investments and innovation



- In March 2021, Wipro acquired Capco, a global management company providing technology consulting services to financial institutions. The acquisition augmented Wipro's capabilities in digital transformation, consulting practices, and operations offerings to clients.
- In April 2021, Wipro acquired Ampion, an AUS-based managed service provider. The deal strengthened Wipro's capabilities in digital engineering services, such as DevOps, and helped to expand its footprint in the Asia-Pacific region.
- Wipro has developed a large enterprise cloud community that consistently interacts through its crowdsourcing platform, Topcoder. Wipro evaluates different algorithms and APIs received over its Topcoder platform from coders across the world, thus opening opportunities for IT talent development.

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