

NEAT EVALUATION FOR DXC TECHNOLOGY:

End-to-End Cloud Infrastructure Management Services

Market Segments: Overall, Microsoft Azure Capabilities, AWS Capabilities

Introduction

This is a custom report for DXC Technology (DXC) presenting the findings of the NelsonHall NEAT vendor evaluation for *End-to-End Cloud Infrastructure Management Services* in the *Overall*, *Microsoft Azure Capabilities*, and *AWS Capabilities* market segments. It contains the NEAT graphs of vendor performance, a summary vendor analysis of DXC for end-to-end cloud infrastructure management services, and the latest market analysis summary.

This NelsonHall Vendor Evaluation & Assessment Tool (NEAT) analyzes the performance of vendors offering end-to-end cloud infrastructure 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 capabilities around cloud management, cloud orchestration, Microsoft Azure, and AWS.

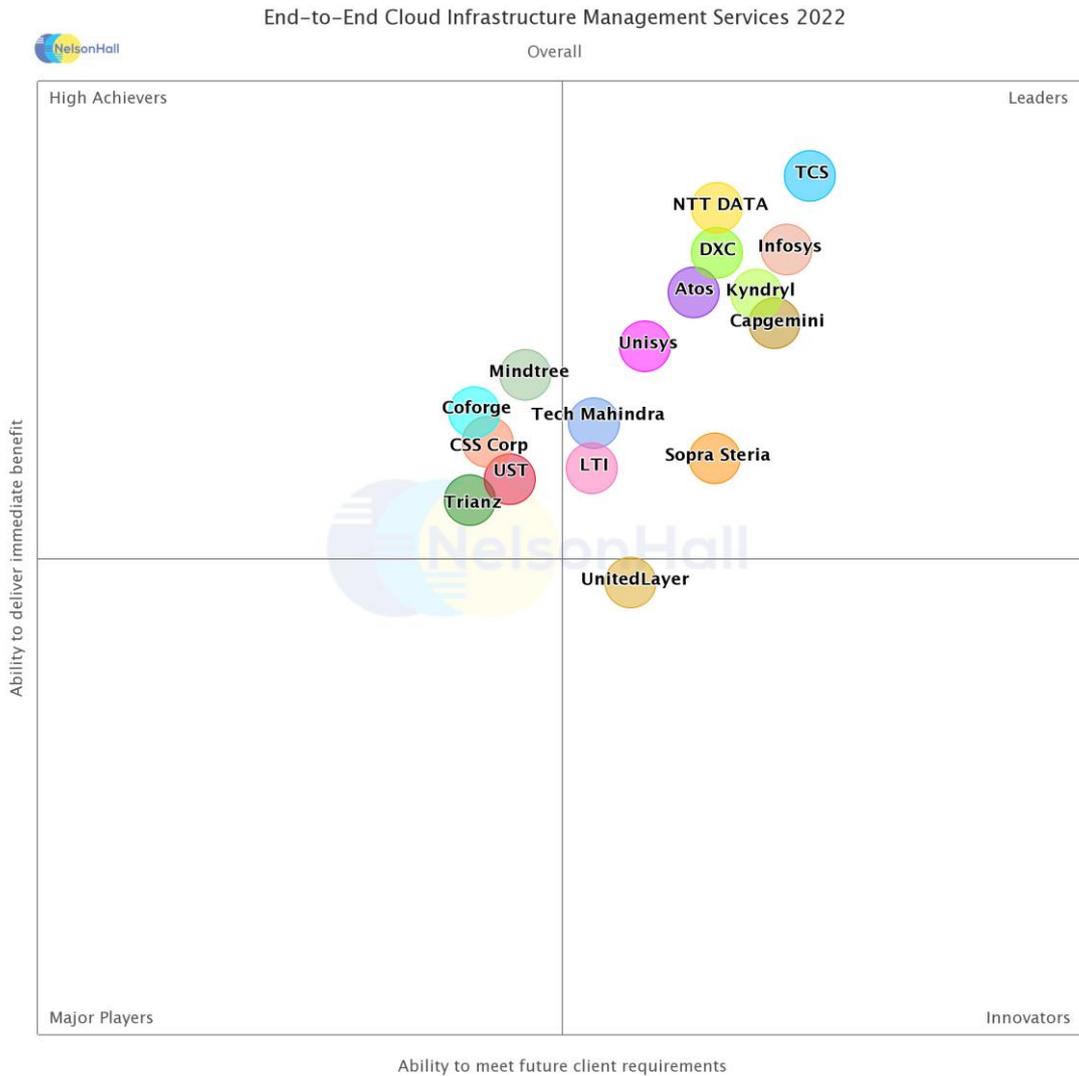
Evaluating vendors on both their 'ability to deliver immediate benefit' and their 'ability to meet client future requirements', vendors are identified in one of four categories: Leaders, High Achievers, Innovators, and Major Players.

Vendors evaluated for this NEAT are: Atos, Capgemini, Coforge, CSS Corp, DXC Technology, Infosys, Kyndryl, LTI, Mindtree, NTT DATA, Sopra Steria, TCS, Tech Mahindra, Trianz, Unisys, UnitedLayer, and UST.

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



NEAT Evaluation: End-to-End Cloud Infrastructure Management Services (Overall)



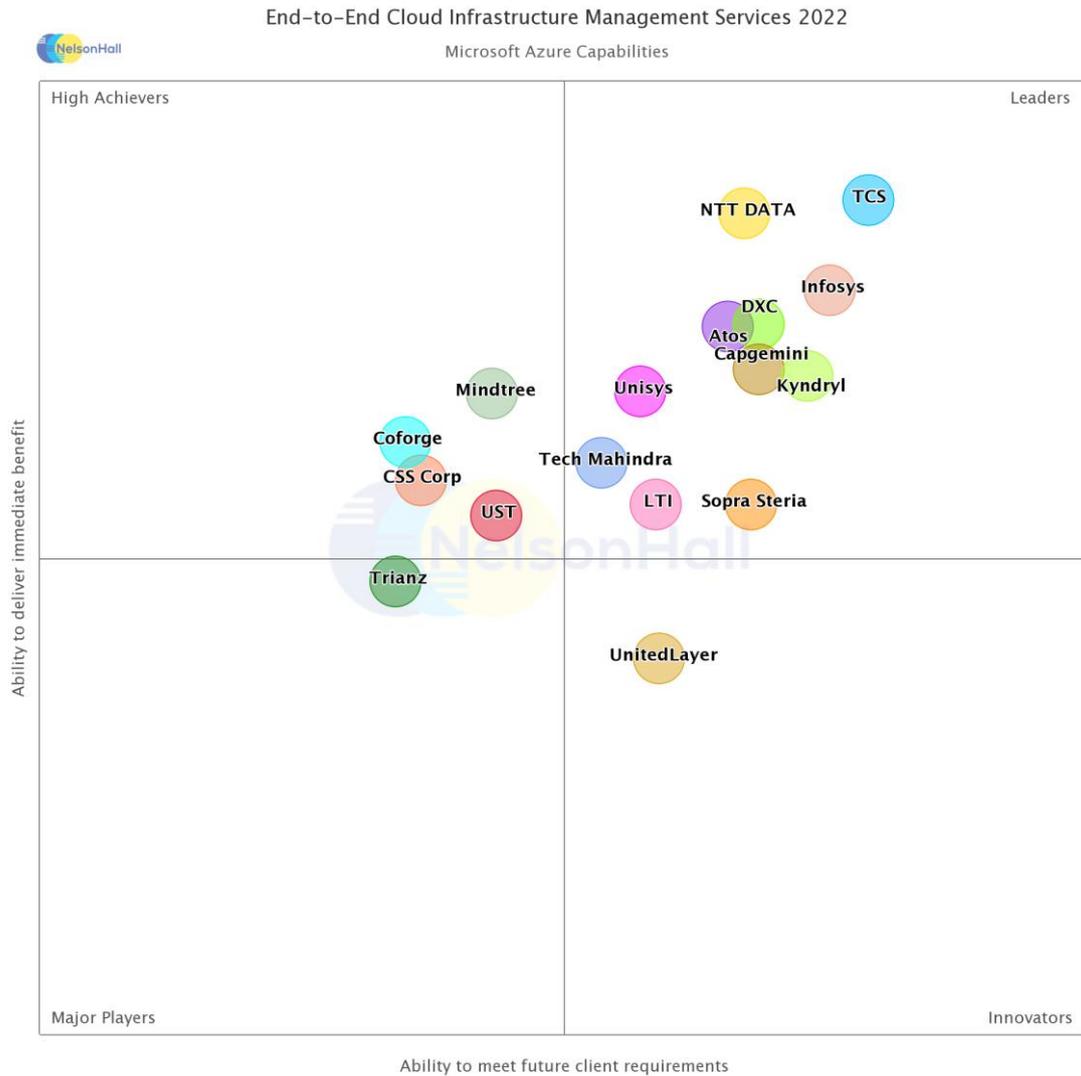
NelsonHall has identified DXC as a Leader in the *Overall* market segment, as shown in the NEAT graph. This market segment reflects DXC’s overall ability to meet future client requirements as well as delivering immediate benefits to its cloud IT infrastructure management services clients.

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

Buy-side organizations can access the *End-to-End Cloud Infrastructure Management Services* NEAT tool (*Overall*) [here](#).



NEAT Evaluation: End-to-End Cloud Infrastructure Management Services (Microsoft Azure Capabilities)

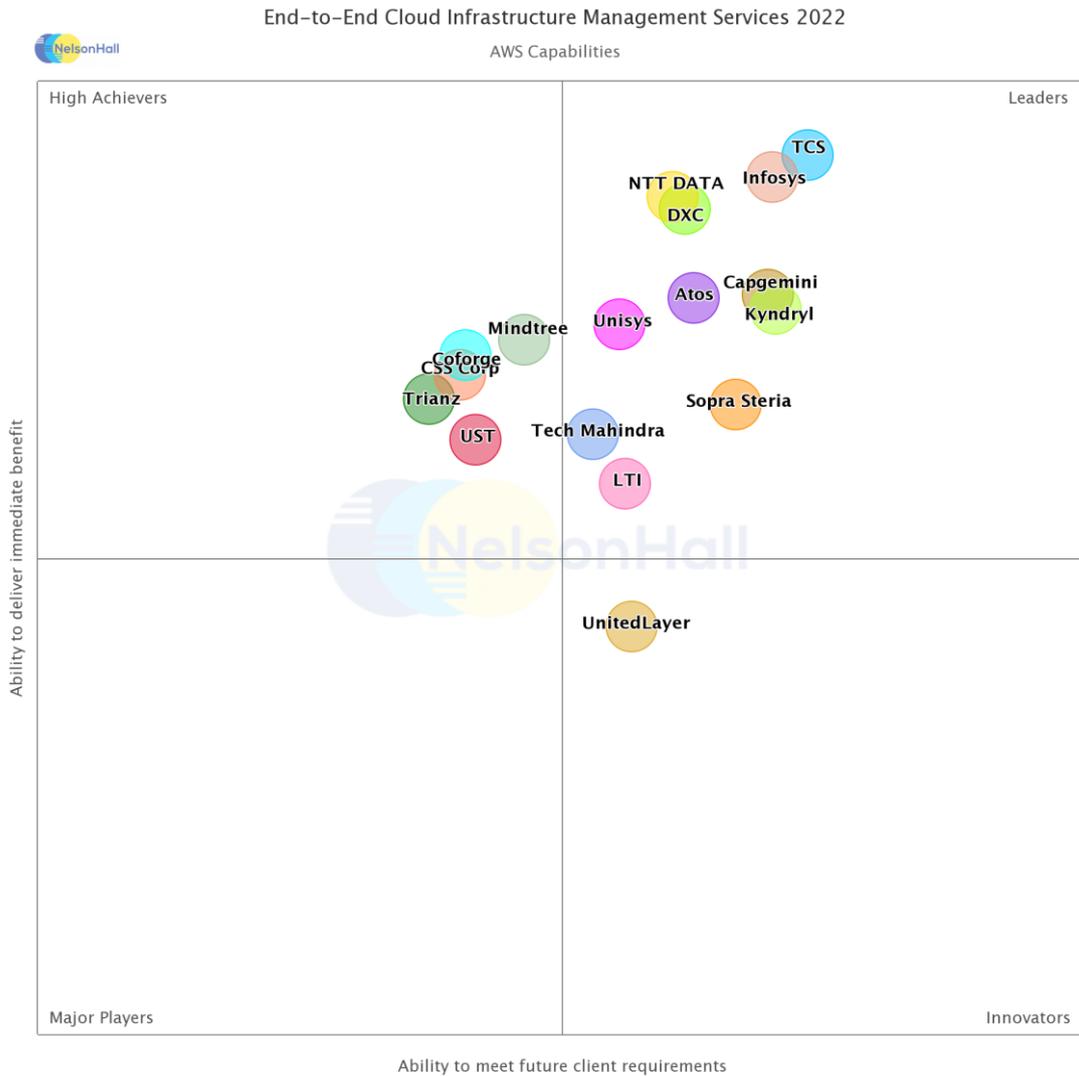


NelsonHall has identified DXC as a Leader in the *Microsoft Azure Capabilities* market segment, as shown in the NEAT graph. This market segment reflects DXC's ability to meet future client requirements as well as delivering immediate benefits to its cloud IT infrastructure management services clients with specific capability around the Microsoft Azure product.

Buy-side organizations can access the *End-to-End Cloud Infrastructure Management Services* NEAT tool (*Microsoft Azure Capabilities*) [here](#).



NEAT Evaluation: End-to-End Cloud Infrastructure Management Services (AWS Capabilities)



NelsonHall has identified DXC as a Leader in the *AWS Capabilities* market segment, as shown in the NEAT graph. This market segment reflects DXC’s ability to meet future client requirements as well as delivering immediate benefits to its cloud IT infrastructure management services clients with specific capability around the AWS product.

Buy-side organizations can access the *End-to-End Cloud Infrastructure Management Services* NEAT tool (*AWS Capabilities*) [here](#).



Vendor Analysis Summary for DXC

Overview

The four key areas DXC focuses on to enable IT modernization for clients are:

- *Time to market*: helping clients move faster and get new services into the market quicker, including agile delivery models with continuous development and delivery
- *Business agility*: cloud adoption, cloud-native development, application modernization, and data insights
- *Secure growth*: provides a foundation for secure growth and multi-cloud integration, platform management, and a secure ecosystem
- *Simplified operations*: everything as a service, continuous optimization, and intelligent automation supporting IT modernization.

Through Cloud Right, DXC helps clients make choices across the spectrum of the data center, mainframe, private cloud, public cloud, SaaS, and out to the edge and where workloads go. This becomes more complex across the number of technology and SaaS partners and investments a client will already have. DXC then looks to unlock the value and use the right platform at the right time to enable the client's business safely and securely. DXC will engage clients at whatever stage they may be in on their cloud journey to drive business outcomes across cost, agility, and resiliency, and access new business models (e.g., access talent and new sources of capability).

Modernization and Migration Services

DXC's approach to modernization includes a set of techniques and tools called Precision Guided Modernization, providing a data-driven approach. It enables DXC to simultaneously analyze thousands of applications providing a 360-degree view of a client's current state, combining technical, risk, compliance, and financial factors to support decision making.

DXC's migration services encompass advisory services (business case, sprint plans, landing-zones, and readiness assessments). Its factory fabric includes automated migration planning, workflow automation, automated factory line installation, and real-time dashboards; also, agile lifecycle management, lean metrics-driven processes, DevOps automation, and a plug-and-play approach.

Multi-Cloud Management

DXC supports a native integration to multiple clouds, including AWS, Azure, Google, and VMware. Its multi-cloud management approach supports clients in their journeys, providing a single control plane to manage multi-clouds. It provides a traditional integration through a catalog and dashboard-based approach and uses DevOps to integrate with multiple clouds, supporting traditional applications and containerized apps. These can be in a virtual environment (e.g., VMware) or Kubernetes platform and supports any cloud, whether private (VMware-based, or VMware on AWS, Azure, etc.), and public clouds. This is supported by DXC's underlying operations platform (Platform X).

DXC Platform X

Platform X is an AIOps-enabled delivery platform designed for NoOps. It delivers clients' offerings, services, and solutions to improve standardization, governance, visibility, and



automation for cost efficiency and CX. The client environment utilizing Platform X includes analytics & engineering, applications, cloud & security, modern workplace, and IT outsourcing.

Platform X key components include:

- *Automation at the Edge*: starts with instrumentation and automation basics and goes through to full-stack IT management and AIOps. It provides the ability to monitor, manage and govern with intelligent automation, including task automation (health checks, project implementation automation, RBA, and routine tasks)
- *ITSM*: DXC has created a single management control plane through ServiceNow. Clients and DXC operators can converge in one platform to receive and deliver IT services in a curated, standard, and orchestrated fashion
- *Data hub*: DXC is bringing in mission-critical data and telemetry to make it more available and self-service to the data user community. This allows them to bring the data on their own and efficiently expand the data hub to encapsulate all the data areas and verticals supporting the business. It also utilizes Azure and AWS native capabilities, including AWS Data Mover and Data Broker
- *AIOps*: applying cognitive patterns to detect anomalies and reduce noise and alerts across operations. It also looks to recognize service patterns and predict outages, moving to a predictive approach and alerting operations of issues ahead of time. It will automate where possible to quickly detect and fix impending issues, including corrections, remediation, and self-healing
- *Visualizations*: DXC has developed an insight portal providing a single view for operations to monitor and govern delivery. It includes data visualizations, dashboards, and benchmarking of account performance comparison against a global average and top performers. DXC engineers use journey visualizations to drive continuous service improvements and accelerate a client's technology modernization transformation.

NelsonHall estimates DXC has ~35k certified and trained resources supporting cloud infrastructure management services, including:

- ~14k Microsoft certifications and ~20k Microsoft trained
- ~3k AWS certified professionals
- ~3k certified VMware professionals
- ~1.5k Google analytics professionals and ~900 GCP certified resources.

Overall, DXC has ~850 managed cloud clients globally. It has a number of industry-specific cloud offerings in addition to joint hyperscaler offerings, which include:

- *Healthcare and Life Sciences*: DXC Healthcare Cloud on Microsoft Azure enables regulatory compliance and lowers the time, risk, and cost of taking workloads to the cloud
- *Travel, Transportation, and Hospitality*: DXC Connected Transportation Platform (CTP) provides the cloud-based ecosystem for the enterprise's intelligent transportation systems
- *Manufacturing and Automotive*: DXC's data center and managed container services enable automotive IT teams to collect, manage and analyze vast amounts of data in support of autonomous vehicle development.



Financials

DXC 's FY 2021 revenues were ~\$17.7bn. Of this, NelsonHall estimates ~9% (~\$1.6bn) is associated with cloud infrastructure services.

NelsonHall estimates the geographical breakdown of DXC 's cloud infrastructure management services revenues in FY 2021 to be:

- Americas: 40% (~\$640m)
- North and South Europe: ~27% (~\$432m)
- APAC: ~21% (~\$336m)
- U.K.I.: ~12% (~\$192m).

Strengths

- Strong cloud partner ecosystem and dedicated practices (particularly Microsoft, AWS, VMware, and Google CP); and across DevOps tooling and suppliers and resellers
- Expanding AI, analytics, and ML capabilities, including with Infinia ML
- Ongoing investment in Platform X and CloudOps capabilities
- Zero-touch automation, agile delivery, and cloud optimization capabilities
- Investing in industry-specific GTM offerings with hyperscalers
- Integrated delivery model across all layers of the stack (apps, platform, and infrastructure), including dedicated DevSecOps and site reliability engineering resources
- Large IT infrastructure services client base across multiple sectors
- Developing XLAs to improve UX and business outcomes
- Global cloud footprint across multiple industry verticals.

Challenges

- Recruitment and retention of high-performing talent, considering recent workforce reduction programs; and attracting next-generation talent
- Needs to expedite digital reskilling initiative across the company
- Increasing site reliability engineering resources (SRE)
- Ramping AI and ML capabilities in support of cloud.



Strategic Direction

DXC is looking to expand its cloud infrastructure management services capabilities through the following initiatives over the next 12-18 months:

Investing in IP and accelerators

- Investing in Platform X service delivery platform and supporting IP and partner ecosystem integration
- DXC's Cloud Right approach to carefully assesses the strategic, operational, financial and technical realities of the entire IT estate and provide an integrated vision for the future enterprise
- Supporting environmental, social, and governance (ESG) initiatives with a focus on customers, people, and communities, and a commitment to sustainable and responsible business practices
- Expanding CloudOps, FinOps, cloud optimization, and containerization services
- Investing in edge computing and providing seamless integration and analysis from the edge to the cloud
- Increasing network capabilities around SDN and zero-trust environments as clients move into hybrid or multi-cloud environments, including utilization of Viptela/Cisco
- Focus on AIOps and partnership with Infinia ML for advanced machine learning and data analytics
- Increasing capabilities across agile, DevSecOps, and SRE to accelerate innovation
- Investing in cloud practices and joint industry offerings and GTM (AWS, Azure, Google, and VMware)
- Expanding repository of assets in GitHub to enable the development of industry-specific offerings at speed
- The increasing ecosystem of third-party tools to drive further automation use cases.

Investing in digital re-skilling

- DXC internal university master program to develop skill sets across next-gen data scientists, analytics, and cloud engineers
- Utilizing global innovation and delivery centers (GIDC) to enable skills and certifications that do not fall into the remit of the everyday role (i.e., re-skilling existing IT infrastructure personnel with new skills such as cloud technologies) and supporting new projects to upskill resources further
- Ramping digital hires in particular with cloud certifications, including Lambda, data scientists, SREs, and DevOps engineers with the ability to build a continuous delivery pipeline
- Deploying agile and SRE techniques and creating a lean culture and mindset throughout DXC Technology
- Scaling DevSecOps across tools, architecture, processes, and operating models throughout DXC.



Outlook

DXC's Cloud Right approach focuses on clients through a business lens, enabling them to make the right investment, at the right time, on the right platform. DXC will engage with clients at whatever stage they are in with their cloud journey. In support of modernization and migration services, DXC utilizes its Precision Guided Modernization framework and tools to enable a data-driven approach. It also provides advisory services, automated factory line installation, workflow automation, and automated migration planning. It then layers application treatment lines from lift and shift to cloud-native modernization of applications. DXC also applies its agile delivery model to accelerate the client's modernization journey further, utilizing IaC, DevSecOps, and SRE in support of its lean run approach.

DXC's multi-cloud management approach through Platform X supports clients in their multi-cloud journey with a single control plane to manage multiple clouds, with cloud-agnostic blueprints to provision cloud resources. It provides AIOps-enabled delivery designed for No-Ops, with key components including automation at the edge, ITSM, data hub, AIOps, and visualization. It is further utilizing cloud-native data capabilities, including AWS Data Broker. It has also created data management utilities to bring all data into a single hub framework and a data factory approach to utilize these utilities and broaden the data subjects. It will need to continue to expand its AI and ML use cases and capabilities in support of Platform X. We expect DXC to continue expanding its ecosystem of partners in this area, particularly across startups.

Another key focus area for DXC is around CloudOps, providing an SRE approach to operations and utilizing DevSecOps from an application perspective. DXC has developed an integrated delivery model across all layers of the stack (applications, platforms, and infrastructure), with dedicated CTOs, DevOps, site reliability engineers, and cloud SMEs further supporting the client's IT transformation programs. Cloud optimization helps clients take advantage of cloud-native tools and utilizes its software license management capabilities to drive cost savings in consumption design and FinOps capabilities to enforce governance and provide a view on cloud spending. This is important as clients seek to improve monitoring and observability and manage cloud spending across more complex hybrid multi-cloud environments.

DXC has developed extensive practice capabilities in support of hyperscalers (AWS, Azure, GCP) and has developed a number of joint industry solutions across Azure, AWS, GCP, and VMware. We expect DXC to expand its GTM and joint innovation pursuits to support industry-specific uses cases in partnership with hyperscalers.

Finally, DXC is investing in digital re-skilling, utilizing its global innovation and delivery centers (GIDC) and internal DXC University to develop next-gen skillsets for the future. It will need to ensure it continues to ramp its dedicated skillsets in support of the client's multi-cloud initiatives, particularly across SREs.



End-to-End Cloud Infrastructure Management Services

Market Summary

Overview

In the current market for cloud infrastructure management services, vendors are expanding cloud management platforms (CMP) to expedite automation and AI and provide complete toolsets for cloud-native development, adopting an open approach to orchestration including cloud-native template provisioning through APIs; also, focusing on FinOps and cloud optimization, including software-license management and increasing persona-based cloud delivery.

There is increasing focus on DevSecOps and agile, including agile squads making recommendations for modernization, and greater utilization of IaC to expedite creation, deployment, and modernization of applications and infrastructure.

There is also focus on developing new skill-sets including machine coaches, automation and AI architects, cloud-native SMEs, data analytics, and business value specialists. Vendors are also ramping cloud academies, experience centers and site reliability engineers (SRE) to monitor performance of cloud ecosystems through a data-driven approach, and building capabilities and enhancements based on what SRE teams learn from operating cloud environments for clients.

Looking ahead, vendors will increase investment in CMP including dedicated hyperscaler platforms, with more focus on persona-based cloud delivery; plus, more focus on driving containerization (CaaS) and PaaS services at scale, including Kubernetes, Docker, mesh services and serverless architecture. From a cloud-native perspective, application transformation will be driven from multi-tiered apps to microservices-based applications with API gateways and CaaS.

There will be greater focus on developing full-stack organizational structure for delivery of cloud transformation and through productized offerings; also, expanding cloud data services to increase insights and enable new revenue-generating models, with supporting data engineers and dedicated CoEs.

Investment will focus on edge cloud, 5G networks, and hybrid edge data centers connecting edge to the core in support of distributed cloud. In addition, there will be increasing focus on mainframe modernization-as-a-service.

Buy-Side Dynamics

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

- Organizations are utilizing cloud infrastructure management services as an enabler for wider digital transformation and to enhance overall experience
- Ability to monitor, manage, automate, and orchestrate in a SaaS-based CMP model across hybrid multi-cloud
- Enabling cloud optimization, including software license management and utilizing cloud-native tools, and enhancing security, governance, and compliance through increased monitoring (secure & compliant ops)



- Utilizing private cloud for business-critical applications
- Ability to scale and optimize workloads; and increased agility, flexibility and resiliency
- Improved visibility, control, and optimization of usage through FinOps
- Utilizing cloud-native architectures to modernize and re-architect applications
- Enabling DevSecOps and agile, including CI/CD pipeline automation and infra as code integration
- Deploying microservices-based applications using Kubernetes orchestration (EKS, AKS, GKE), mesh services and serverless
- Utilizing CaaS and container-managed service model instead of IaaS to reduce cost and get the most out of cloud
- Data-driven, change responsive architecture and everything as an API
- Enabling a real-time data insights-driven approach supported by SREs approving machine recommendations
- Expediting resources building automation use cases, including low code/no code, and system capability by industry, and dedicated automation and AI leads by client account
- Accelerating adoption of DaaS, WaaS, VDI, M365, Cisco WebEx, Win11, AR/XR and driving a human-centric approach across DWS in support of hybrid working and improving employee experience
- Open approach to orchestration including cloud-native provisioning and discovery with cloud APIs (i.e., CloudFormation, Azure ARM, Terraform).

Market Size & Growth

NelsonHall estimates the global end-to-end cloud infrastructure management services market to be ~\$195,200m in 2021. It is expected to grow at 6.5% CAGR to reach ~\$250,805m by 2025.

Success Factors

The key success factors for cloud infrastructure management services vendors include:

- Building a bench of resources with cloud-native development capabilities. In addition, ramping automation architects, machine first developers, cloud architects, business value specialists, hyperscaler SMEs (AI/ML) and SREs in support of hybrid multi-cloud operations
- Utilizing consulting and advisory services early in the process to define clients' cloud transformation roadmap, including cloud-native advisory. This includes modernization from monolithic to microservices, and platform build including cloud-native, to drive an autonomous infrastructure environment
- 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, infra as code (IaC) integration with templates and API-driven architecture, and container as a service (CaaS) with DevOps



- Providing Evergreen services to enable clients to keep up to date with latest hyperscaler features and release updates, including Evergreen CoE to drive adoption of new features. Also, providing support for Windows 365, Windows 11 and Apple DaaS. Increasing modern management cloud-based toolsets including Microsoft Autopilot, Intune, and VMware Workspace ONE
- 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
- Expanding catalog-based self-service and bot store for reusable automation assets developed by cloud CoE. Continued development of solution accelerators based on repeatable patterns across the managed services client base. Also, providing a marketplace model enabling clients to add their assets and solve their specific business challenges and choose the service and capabilities required
- Expanding cloud CoEs and innovation labs, and industry-specific cloud offerings. Supporting complex cloud transformation and designing cloud-native architectures through modern design principles. Also, utilizing cloud in support of clients' ESG initiatives and driving carbon neutral agendas
- Utilizing citizen development principles to reduce ongoing IT costs and increase the value of adopting low code platforms (e.g., Microsoft Power Platform), vendors need to ensure they have defined a robust and encompassing capability to support this transformation. This capability should span training the individuals, building foundational tools and processes, and defining governance structures
- 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 optimization, monitoring and observability to enhance dashboard performance across the cloud ecosystem
- Developing IP, joint GTM and strategic initiatives with hyperscalers, in particular across AI and ML in support of hybrid multi-cloud support from both an industry and client-specific level. Also, developing use cases in the management of hybrid edge data centers and 5G. In addition, expanding partnerships with start-ups, in particular in support of cloud-native PaaS services.

Challenges

- Clients are placing greater focus on expediting cloud migration and modernization initiatives, across mainframe, applications and cloud-native. They need to better utilize analytics to drive decision making and enable IT infrastructure landscape insights. They want to better utilize hyperscaler modernization capabilities to design and deliver full-stack cloud-native apps and re-architect existing workloads to the cloud; also, to move from multi-tiered apps to microservices-based apps with API gateways and utilize containerization as a service (CaaS), and immutable code and serverless (PaaS)
- Clients want vendors to enable AI-based operations, utilizing ML, predictive analytics and AI-Ops platforms to enable full-stack monitoring of resources on-premise and in the cloud; also, deploying cognitive patterns to detect anomalies, reduce noise and alerts across operations. They want to utilize an SRE-led cloud operating model combined with DevSecOps and AI-Ops to enable integrated programmable infrastructure; also, increasing



automation bots across IT infrastructure to self-heal. Clients need a single control plane for multi-cloud management and AI-Ops across hybrid multi-cloud environments. In addition, greater use of self-healing and analytics to support AI-Ops to No-Ops

- Clients are looking to align talent strategies to business needs, market, and technology trends. They want vendors to help them to develop a cloud-native culture across the enterprise to attract skills required. In addition, to use cloud as a catalyst for change across the enterprise with, for example, the reskilling of infrastructure specialists to become full-stack architects. They need to increase access to hyperscaler certified resources to support infrastructure and application modernization roadmaps. Vendors need to ramp digital re-skilling initiatives to enable more productivity for clients and a greater focus on purpose, wellbeing, experience and sustainability as primary drivers for enterprises
- Clients are increasingly looking for vendors to demonstrate the innovation they bring to cloud RFPs through IP, methodologies, toolsets, innovation hubs, and ecosystem partnerships. They want vendors to focus on innovation in the cloud roadmap planning stages to develop solutions to meet specific business requirements. In addition, providing continuous innovation and optimization and cross-functional teams managing backlogs to optimize workloads and identify improvement opportunities. Clients are looking for innovation in support of infrastructure, development, governance, and security.

Outlook

The future direction for cloud infrastructure management services will include:

- Vendors will increase investment in CMP, including dedicated hyperscaler platforms, and more focus on persona-based cloud delivery. More focus on driving containerization (CaaS) and PaaS services at scale, including Kubernetes, Docker, mesh services and serverless architecture. From a cloud-native perspective, driving application transformation from multi-tiered apps to microservices-based applications with API gateways and CaaS
- Greater focus on developing full stack organizational structure for delivery of cloud transformation and through productized offerings. Also, expanding cloud data services to increase insights and enable new revenue-generating models, with supporting data engineers and dedicated CoEs
- Investing in edge cloud, 5G networks, and hybrid edge data centers connecting edge to the core in support of distributed cloud. In addition, increasing focus on mainframe modernization-as-a-service
- Increased focus and investment in sustainability and IP and management services to help clients reduce their IT and carbon footprints; including continuous monitoring through CMP, Green apps and observability tools
- Expanding AI-Ops to No-Ops cloud infrastructure managed services and developing more complex uses cases. Also, next-gen cloud management observability based on AI-Ops, and using ML for real-time data center monitoring
- 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
- More demand for self-funded cloud transformation in collaboration with hyperscalers including joint IP and GTM, and committing to reduce costs on day one, and free up budget to reduce TCO and drive the acceleration of cloud adoption



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



NEAT Methodology for End-to-End Cloud Infrastructure Management Services

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.



Exhibit 1

‘Ability to deliver immediate benefit’: Assessment criteria

Assessment Category	Assessment Criteria
Offering	<ul style="list-style-type: none"> Cloud platform functionality Cloud management including migration and observability capabilities 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	<ul style="list-style-type: none"> Cloud Infra Mngt North America delivery capabilities Cloud Infra Mngt EMEA delivery capabilities Cloud Infra Mngt APAC delivery capabilities Cloud Infra Mngt LatAm delivery capabilities Dedicated cloud SMEs, architects, engineers, hyperscaler-certified, and SREs Dedicated cloud CoEs, experience centers and innovation hubs Ability to provide IP and accelerators in support of Cloud Infra Mngt Services Ability to incorporate DevOps and agile methodologies in cloud services Extent of third-party and hyperscaler partnerships in support of Cloud Infra Mngt Services Ability to provide advanced analytics, cognitive, and ML in support of hybrid multi-cloud ecosystem
Presence	<ul style="list-style-type: none"> 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 Mngt Services
Benefits Achieved	<ul style="list-style-type: none"> Improvement in infrastructure and application performance, reliability and availability Level of cost savings achieved Improved access to next-gen cognitive capabilities 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 Infrastructure Management Services	<ul style="list-style-type: none"> Financial rating Commitment to Cloud Infra Mngt Commitment to innovation in Cloud Infra Mngt
Investments in Cloud Infrastructure Management Services	<ul style="list-style-type: none"> Investment in IP and platforms in support of cloud infrastructure management services Investment in cloud management across IaaS, PaaS, SaaS and CaaS 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	<ul style="list-style-type: none"> Key partner Ability to evolve services

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



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Sales Inquiries

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

Beth Lindquist at beth.lindquist@nelson-hall.com

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