

NEAT EVALUATION FOR NTT DATA:

End-to-End Cloud Infrastructure Management Services

Market Segments: Overall, Cloud Management Services, Cloud Orchestration Services, Microsoft Azure Capabilities, AWS Capabilities

Introduction

This is a custom report for NTT DATA presenting the findings of the NelsonHall NEAT vendor evaluation for *End-to-End Cloud Infrastructure Management Services* in all market segments: *Overall, Cloud Management Services, Cloud Orchestration Services, Microsoft Azure Capabilities, and AWS Capabilities*. It contains the NEAT graphs of vendor performance, a summary vendor analysis of NTT DATA 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.

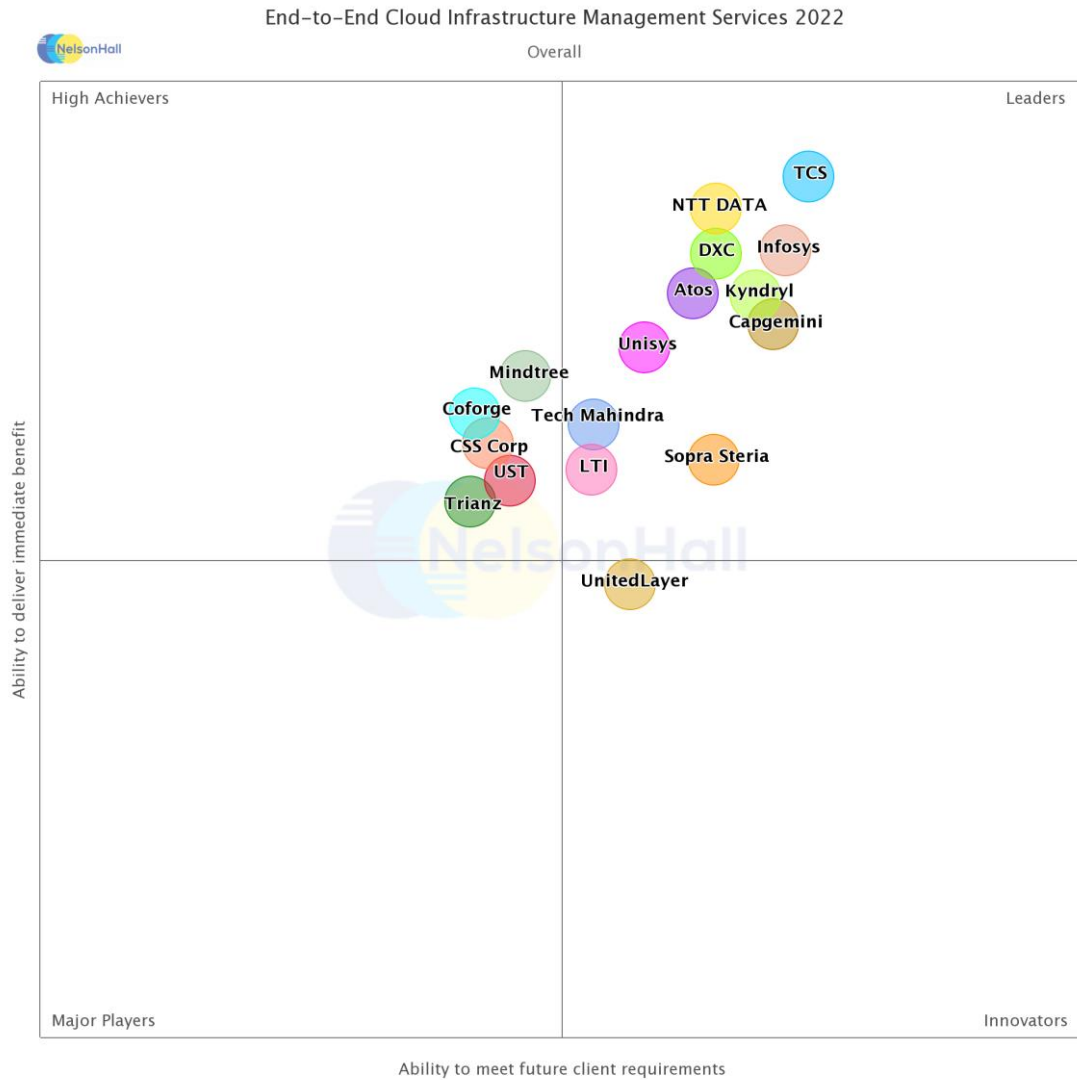
Evaluating vendors on both their 'ability to deliver immediate benefit' and their 'ability to meet client future requirements', vendors are identified in one of four categories: Leaders, High Achievers, Innovators, and Major Players.

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)



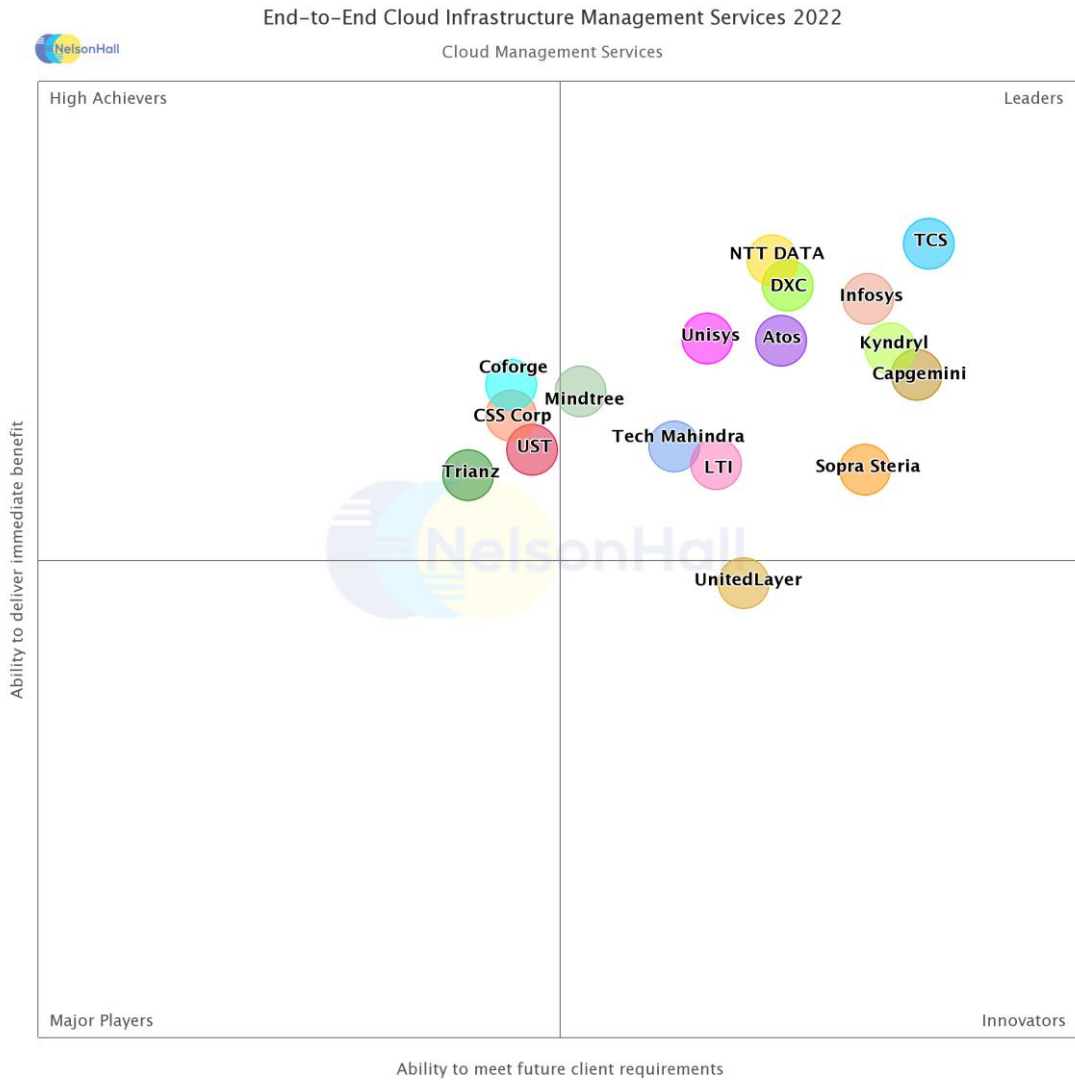
NelsonHall has identified NTT DATA as a Leader in the *Overall* market segment, as shown in the NEAT graph. This market segment reflects NTT DATA’s overall ability to meet future client requirements as well as delivering immediate benefits to its cloud IT infrastructure management services clients.

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 (Cloud Management Services)

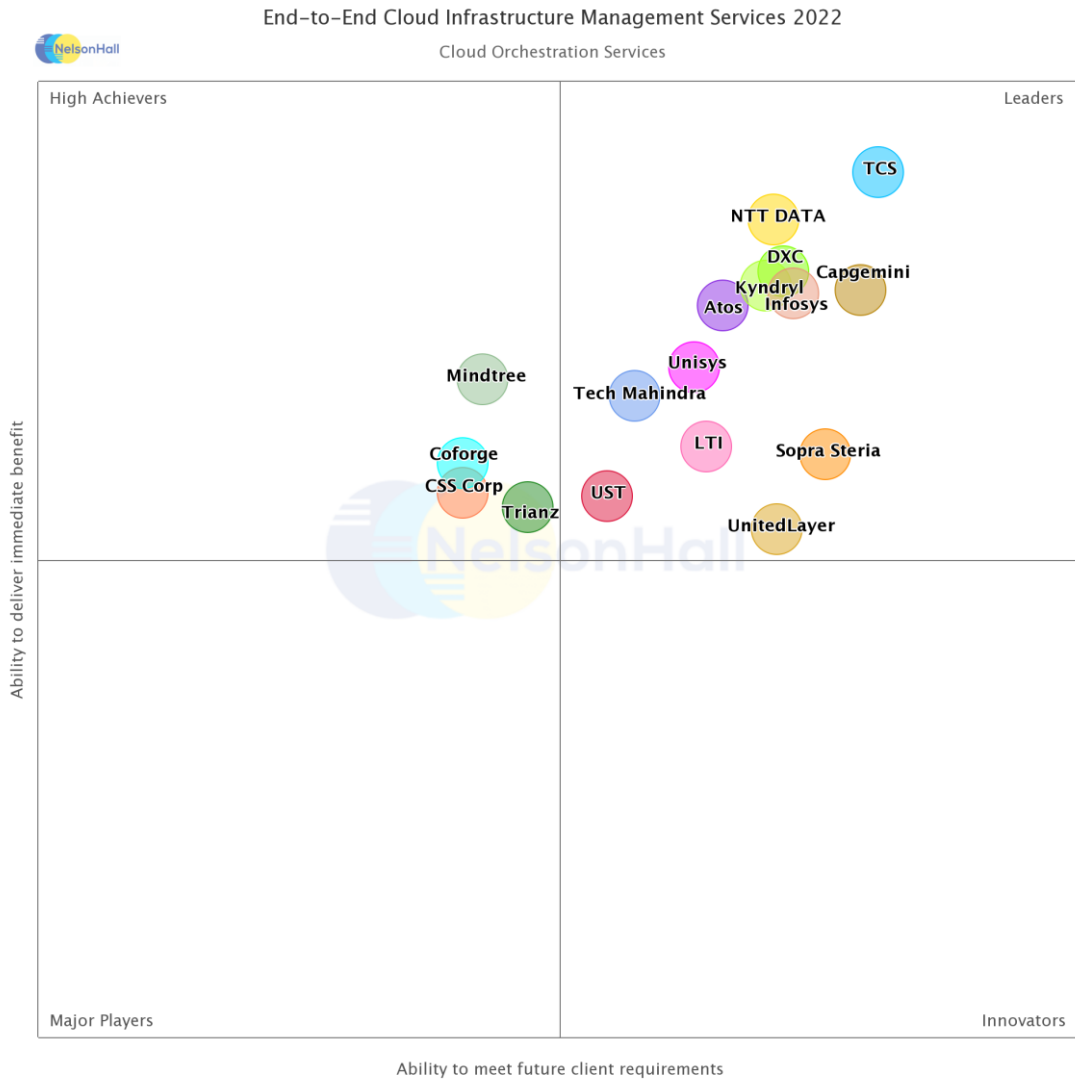


NelsonHall has identified NTT DATA as a Leader in the *Cloud Management Services* market segment, as shown in the NEAT graph. This market segment reflects NTT DATA’s ability to meet future client requirements as well as delivering immediate benefits to its cloud IT infrastructure management services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

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



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

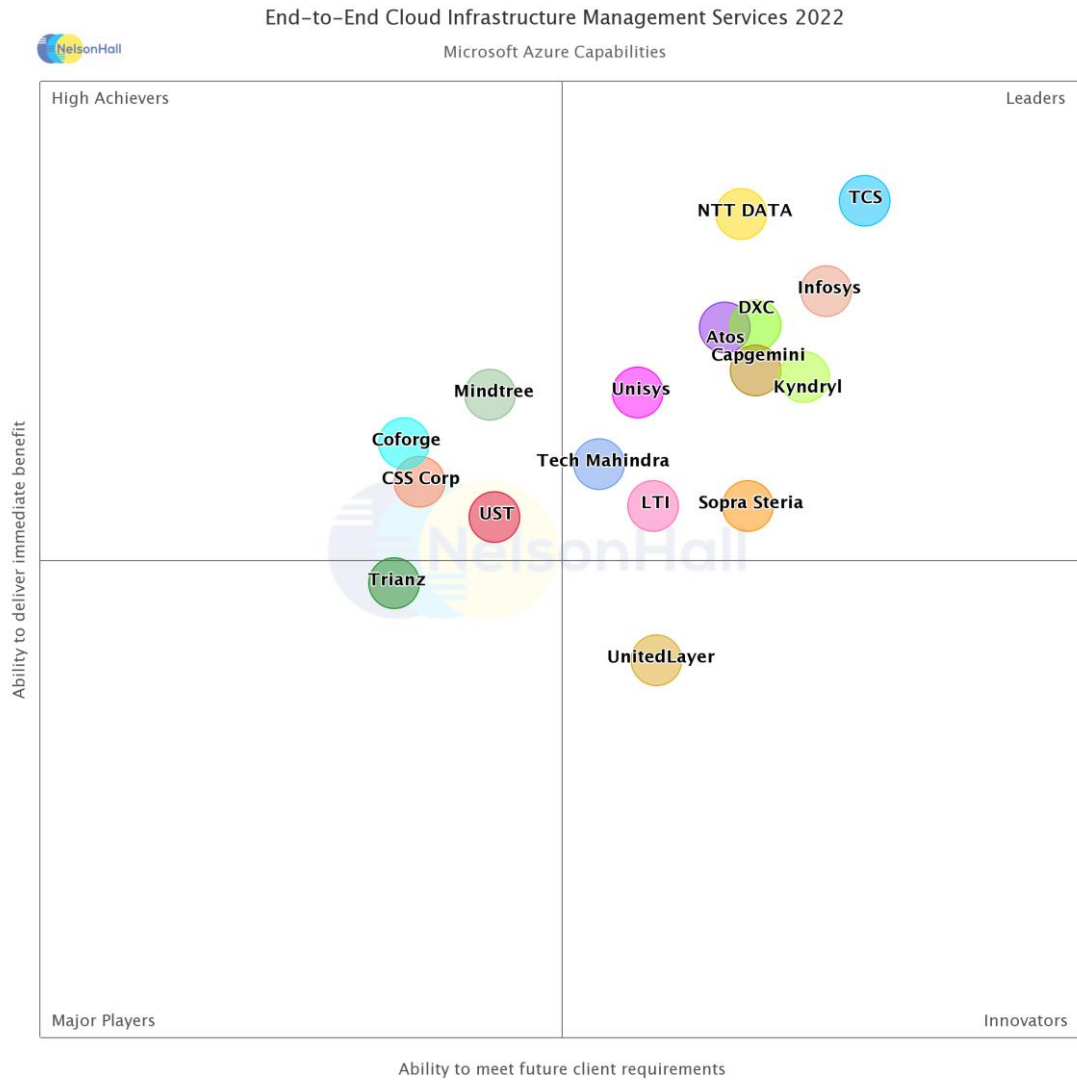


NelsonHall has identified NTT DATA as a Leader in the *Cloud Orchestration Services* market segment, as shown in the NEAT graph. This market segment reflects NTT DATA’s ability to meet future client requirements as well as delivering immediate benefits to its cloud IT infrastructure management services clients with specific capability in cloud orchestration.

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



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

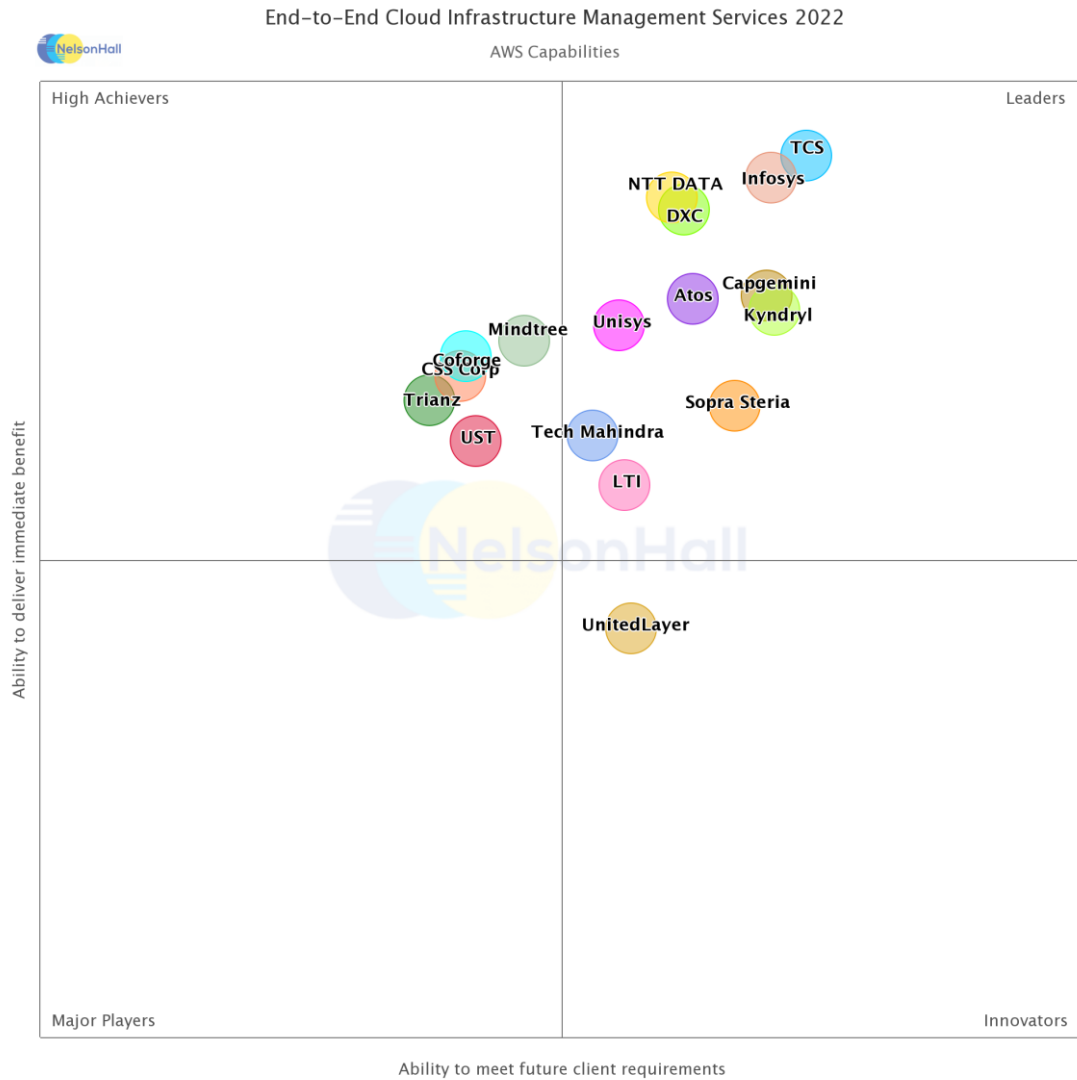


NelsonHall has identified NTT DATA as a Leader in the *Microsoft Azure Capabilities* market segment, as shown in the NEAT graph. This market segment reflects NTT DATA's ability to meet future client requirements as well as delivering immediate benefits to its cloud IT infrastructure management services 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 NTT DATA as a Leader in the *AWS Capabilities* market segment, as shown in the NEAT graph. This market segment reflects NTT DATA’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 NTT DATA

Overview

NTT DATA's guiding principles in the delivery of managed cloud services are:

- *Client-First*: a clear focus on driving business value
- *Foresight*: leading with consulting to facilitate client innovation in the planning stages of developing solutions to meet business requirements
- *Application Focus*: focusing on the application, not the infrastructure, and enabling developers to build and maintain applications. Also, increasing modernization principles around applications
- *Data-Bias*: making decisions based on data insights to influence new application features and developments and architectural improvement
- *Cloud-Native Bias*: utilizing cloud-native tools from cloud providers versus third-parties to minimize cloud resource cost and shorten time to introduce new features.

NelsonHall estimates that NTT DATA has ~16k FTEs supporting cloud infrastructure management services globally.

The company's key cloud infrastructure management services offerings are:

NTT DATA Cloud Services

NTT DATA provides a number of customizable services helping clients to plan for, move to, and run their workloads in the cloud securely in a hybrid multi-cloud environment. It supports the end-to-end cloud transformation journey for the client across strategize, assess and plan, design, deploy and transition, migrate, broker and provision, and operate and manage. This includes:

- *Cloud Advisory*: takes a consulting-led approach providing transformation planning engagements or two to three-day sprint workshops. It targets specific-use case identification and development with clients
- *Cloud Implementation*: building cloud foundation and secure, scalable enterprise landing zones and application infrastructure supporting modern apps
- *Cloud Management*: providing operational support for foundational cloud services (IaaS) and modern support services
- *Continuous Innovation*: cross-functional teams focused on innovating, updating, and optimizing the client's environment
- *Cloud Security*: including the provision of security by design, security advisory, implementation, and managed services for cloud workloads.

NTT DATA Application Transformation Consulting

In addition to cloud infrastructure, NTT DATA provides application modernization working with program management leads to ensure application teams understand how to develop applications on the public cloud. Its acceleration methodology consists of three processes supported by IP and automation, including:



- *Application Discovery*: separating business value from technology and understanding current application use, dependencies, business value, and rules
- *Destination Mapping*: driving transformation based on new functionality and UX, defining future state, and gaining insight into overall business impact
- *Transformation Management*: creating an adaptive and traceable model of business, architectural, and data changes that removes risk and expedites innovation.

NTT DATA is also focused on becoming more agile in delivering cloud services across the full stack and has developed an agile methodology for custom consulting projects.

NTT DATA Unified Cloud Adoption Framework (NUCAF)

NTT DATA has incorporated cloud adoption frameworks for Azure, AWS, and GCP to define what end-to-end projects look like. An internal document repository backs this up for teams to use, whether from advisory, implementation, or delivery teams. It enables teams to find a process document for each piece of the journey. NUCAF includes:

- *Define*: includes motivation, outcomes, justification, advisory, and vision
- *Discover*: cloud maturity, a digital estate, skillset, application delivery, and toolset
- *Plan*: desired outcomes, addressing gaps, transformation roadmap, and design
- *Ready*: aligning the organization, transforming skills, creating landing zones and automation
- *Adopt*: migrating applications, data, database, and modernizing applications
- *Manage*: includes infrastructure, applications, and data.

NTT DATA Cloud Management Services

Once applications have been transformed and moved into the cloud, NTT DATA helps clients run their applications through its cloud management practice, providing comprehensive management of a cloud virtual data center:

- *Multi-cloud brokerage*: providing a unified view across the cloud landscape, with a service catalog and API-driven approach
- *Optimization*: includes capacity and performance, cost management, cloud comparisons, reduction and RI planning, and lifecycle management services
- *Service & security management*: including full-stack integration, service requests with automated approvals and workflows. In addition, security configuration, logging, and RBAC
- *DevOps enablement*: enabling governance and automation throughout the application lifecycle and CI/CD automation, including CI/CD toolchain integration, infra-as-a-code integration (including CloudFormation and ARM templates). In addition, configuration management integration (Chef, Puppet, and Ansible) and application lifecycle and completion workloads
- *Container management*: Flux7 brings IP here and enables NTT DATA to provide the full spectrum of container (Docker and Kubernetes) management and microservices
- *Intelligent placement*: providing real-time data-driven policy adherence provision, including control placement for compliance, policy-based governance, multi-cloud cost and capacity criteria, and provisioning decision support.



NTT DATA Cloud Accelerators include:

- *Accelerated cloud advisory*: identifying improvements across business agility, resiliency, and cost, and accelerating cloud adoption through two to three-day workshops
- *Accelerated cloud implementation*: quickly deploying resilient workloads and containing costs with ongoing automation and multi-cloud support
- *Accelerated application development*: designing and developing apps using cloud services, cloud-native architectures, and lean practices
- *Application transformation*: transforming legacy to modern applications, removing old architectures' constraints, and helping clients beyond COVID-19.

Financials

NelsonHall estimates NTT DATA's CY 2021 revenues at ~\$22.0bn, and of this, NelsonHall estimates that revenues from cloud services to be ~\$2.4bn.

NelsonHall estimates the geographical split of NTT DATA's CY 2021 cloud infrastructure management services revenues was:

- North America: 45% (~\$1,080m)
- EMEA: 25% (~\$600m)
- Asia Pacific/Japan and APAC: 30% (~\$720m).

Estimates of the vertical industry split of NTT DATA's CY 2021 cloud infrastructure management services revenues are:

- Financial services and insurance: 35% (~\$840m)
- Manufacturing/Telco/Energy: 25% (~\$600m)
- Healthcare: 15% (~\$360m)
- Government/public sector: 15% (~\$360m)
- Commercial industries (including retail and others): 10% (~\$240m).

Strengths

- Strong toolsets across both proprietary (Nucleus Cloud Management Platform), acquired IP (Flux7, acorio, and Nexiant) and third-party in support of hybrid multi-cloud services; plus NTT DATA cloud accelerators
- Driving a migration factory approach with CloudHedge
- Ongoing investment in automation, AI, ML, and analytics
- Increasing cloud-native use cases
- Broad global delivery footprint across cloud and infrastructure services
- Strong ecosystem of cloud partners (e.g., GCP in healthcare)
- Expanding global serverless CoEs and innovation centers



- Flux7 DevOps and cloud-native (container management) capabilities
- NTT Group innovation fund.

Challenges

- Limited client footprint in EMEA
- Expediting digital re-skilling initiatives across NTT DATA, including site reliability engineering (SRE) capabilities
- Expanding consulting & advisory capability
- Needs to expedite cognitive and AI capabilities in support of cloud services.

Strategic Direction

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

Investing in Nucleus Cloud Management Platform

- Strategic expansion of Nucleus cloud and hybrid management platform
- Investments in composable and modular support for clients and cloud-native use cases and tying in the hybrid environment
- Investing in CloudHedge containerized migration and optimization capabilities and delivering a migration factory approach with wider migration services
- Continued integration and expansion of acquired IP (i.e., Flux7, acorio, Nexient)
- Expanding the ecosystem of integrated third-party tooling providers within the established reference architecture of Nucleus.

Increasing cloud-native use cases

- Expanding services supporting cloud-native, from development to migration and operations
- Continued platform development for multi-cloud usage.

Enhancing security capabilities

- Continued iteration of security framework and integrating latest CSP security capabilities
- Advancing security framework to unify the multi-cloud ecosystem, including utilizing capabilities across NTT Security.

Expanding strategic ecosystem

- Increasing strategic engagement and joint open source projects with cloud service providers
- Developing multi-cloud capabilities, including in partnership with Dell Technologies (based on VMware/Pivotal) and RedHat
- Accelerators for transforming and integrating strategic applications.



Developing skillsets across hybrid multi-cloud

- Expanding migration capabilities and skillsets for hyperscale cloud, including Cloud Academy to drive digital re-skilling, in-person, and on-demand training
- Enhancing Kubernetes container services
- Increased investment in Agile PODs and CloudOps
- Enhancing global serverless COEs with joint R&D.

Outlook

NTT DATA enables clients to plan for, migrate to, and run workloads in the cloud securely across a hybrid multi-cloud environment. Through cloud advisory, it takes a consulting-led approach, including application modernization supported by IP, cloud accelerators, and automation. It also focuses on OCM to support clients' cloud transformation roadmaps. NTT DATA will need to continue to expand its consulting and advisory resources in support.

The company is also focused on the agile delivery of cloud services, with an agile methodology for custom consulting projects. Here, it creates an agile pod that utilizes the best engineering automation e.g., DevOps/SRE) and resource mix to maximize large programs' modularity, scalability, and manageability. We expect NTT DATA to expand its agile framework across infrastructure and application groups with key ecosystem partners to target agile go-to-market models for clients.

Key investments include its Nucleus Cloud Management Platform, where it continues to expand the composability and modularity of services. It integrates and expands acquired IP, including Flux7 DevOps consulting and container management services. It is also increasing its cloud-native use cases. We anticipate NTT DATA will continue to invest in automation, AI, ML, and analytics capabilities in support of CMP, and is an area it will need to expedite; however, this is part of its planned roadmap investments.

NTT DATA also invests in joint open source projects with cloud services providers supporting multi-cloud capabilities. We expect NTT DATA to continue enhancing its joint GTM capabilities with CSPs and key ecosystem partners to target cloud-native use cases and industry-specific use cases.

Finally, NTT DATA is increasing its digital re-skilling through its Cloud Academy program to facilitate on-demand and in-person training. It is also re-skilling across its existing employee base. It will need to continue to expedite this program to build requisite skills for future hybrid multi-cloud services. As NTT DATA continues to expand its cloud-native capabilities, including Kubernetes container services, we expect it will look to make additional bolt-on acquisitions in support of its cloud strategy.



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	Financial rating Commitment to Cloud Infra Mngt Commitment to innovation in Cloud Infra Mngt
Investments in Cloud Infrastructure Management Services	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	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: Guy Saunders at guy.saunders@nelson-hall.com

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