

NEAT EVALUATION FOR NTT DATA:

Cloud Infrastructure Brokerage, Orchestration & Management

Market Segment: Overall

Introduction

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

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

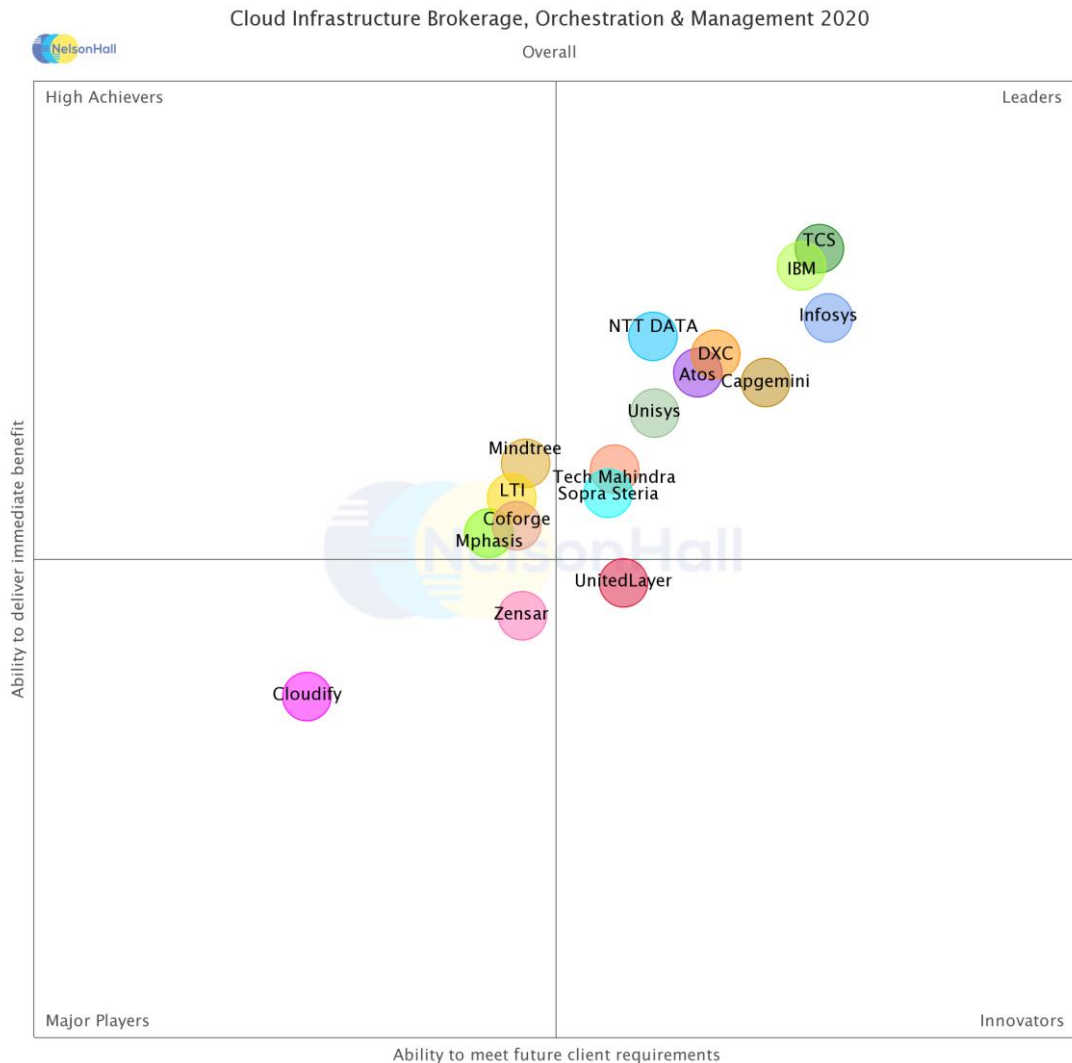
Evaluating vendors on both their 'ability to deliver immediate benefit' and their 'ability to meet client future requirements', vendors are identified in one of four categories: Leaders, High Achievers, Innovators, and Major Players.

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

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



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



NelsonHall has identified 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 infrastructure brokerage, orchestration & management clients.

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

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



Vendor Analysis Summary for NTT DATA

Overview

Across cloud services, NTT DATA provides a complete range of customizable services helping clients to plan for, move to, and run their workloads in the cloud securely in a hybrid multi-cloud environment. Here, it takes a three-phased approach across *advise, build, and run*.

Advise: NTT DATA takes a consulting-led approach across advise, where it will provide transformation planning engagements that can last up to two months. However, it is focusing more on two to three-day sprint workshops to identify issues, quick wins, and moving quickly to POC and pilot stage and further utilizing Flux7 capabilities. It is focused on targeted specific-use case identification and development with clients.

It helps clients to choose the right strategy for their cloud journey, which may be lift & shift to the cloud and providing advisory services to help clients understand which applications fall into which categories to reduce cost. The next stage is cloud infrastructure ready, cloud services ready, and finally, cloud-native. All of this uses an iterative approach (across lift & shift, transformative migration, and application modernization), enabling the client path identified today to be modified as the application and enterprise mature. In support of transformative migration, which is the area where NTT DATA sees a lot of client activity, the company follows a systematic process across six stages, which are:

- *Inventory and assess applications:* to capture business requirements
- *Automate infrastructure deployment:* including infra-as-a-code
- *Automate application deployment:* integrating into CI/CD pipelines, and setting up the DevOps toolchain and creating new CI/CD pipelines for clients where required
- *Leverage accelerators:* to rapidly prototype customizable patterns
- *Build pipelines:* creating full-stack (infrastructure and application) automated deployment pipelines
- *Migrate:* migrating the application and data.

Build: NTT DATA takes an iterative approach on a given application where a client may move it to the cloud and continue to build and iterate this. And also, from a journey perspective, clients gradually move workloads in phases over to the cloud and add more incrementally over time.

Run: within run, NTT DATA provides managed services, including managed security, application management, cloud management, application development, and modernization services.

NTT DATA also provides full application transformation capabilities through its Application Transformation Lab, providing a modernization acceleration methodology consisting of three processes (application discovery, destination mapping, and transformation management) supported by IP and automation.

NTT DATA is also focused on becoming more agile in the delivery of cloud services and across the full stack and has developed an agile methodology for custom consulting projects. It creates an agile pod including agilist (previously scrum manager), DevOps engineer, architect, and technical writer (as required). It starts with design sprints (workshops) and delivers the sprints with a focus on incremental value, with sprints typically lasting one week. It also provides weekly knowledge transfer (demo, runbooks, and code repo), effectively upskilling



client resources. In parallel with traditional delivery methods, NTT DATA is also looking to charge clients per sprint, and what gets done in a sprint based on client focus areas, is negotiated on a weekly basis.

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*: ability to quickly deploy resilient workloads and contain costs with ongoing automation and multi-cloud support. This could include, for example, helping clients remediate a new environment they have created or are concerned about, or expediting new opportunities with business-critical applications
- *Accelerated application development*: designing and developing apps using cloud services, cloud-native architectures, and lean practices
- *Application transformation*: transforming legacy to modern applications and removing the constraints of old architectures and helping clients beyond COVID-19.

Once applications have been transformed and moved into the cloud, NTT DATA helps clients to run their applications through its cloud management practice, providing comprehensive management of a cloud virtual data center. NTT DATA's philosophy is centered on multi-cloud, with many clients going in this direction, and it supports multiple cloud providers, including Microsoft Azure, Hyper-V, AWS, GCP, Oracle, IBM, Alibaba, and VMware.

Key cloud services include:

- *Multi-cloud brokerage*: providing a unified view across the cloud landscape, with a service catalog and API-driven approach. It includes automation workflow management, orchestration, policy-based governance, and ARM, CloudFormation and IaC integration
- *Optimization*: includes capacity and performance, cost management, cloud comparisons, reduction and RI planning, and lifecycle management services
- *Service & Security*: 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. For example, it can set up the Kubernetes cluster through to the management of the Kubernetes cluster on EKS, AKS, and GKE. It also includes application blueprints
- *Intelligent placement*: providing real-time data-driven provisioning with policy adherence, including control placement for compliance, policy-based governance, multi-cloud cost and capacity criteria, and provisioning decision support.

NTT DATA's cloud services are powered by its Nucleus CMP, which provides a consolidated view of IT operations across data center and cloud, application management, and workplace. It also supports business operations. It provides an integrated tool suite (third-party, IP, and open source) to reduce platform complexity, with configuration interfaces to enable client-specific SLAs, compliance, and orchestration rules. End-users access through a self-serve portal, through both a catalog and API-based approach.



Financials

NelsonHall estimates NTT DATA's CY 2019 revenues were ~\$20.0bn, and of this, NelsonHall estimates that revenues from cloud services were ~\$2.1bn. Furthermore, NelsonHall estimates that ~85% (~\$1.8bn) of these revenues relate to cloud infrastructure brokerage, orchestration, and management services.

NelsonHall estimates that the geographical split of NTT DATA's CY 2019 cloud infrastructure brokerage, orchestration, and management services revenues is:

- North America: 35% (~\$630m)
- EMEA: 25% (~\$450m)
- Asia Pacific/Japan: 40% (~\$720m).

NelsonHall estimates that the vertical industry split of NTT DATA's CY 2019 cloud infrastructure brokerage, orchestration, and management services revenues is:

- Financial services and insurance: 35% (~\$630m)
- Manufacturing/Telco/Energy: 25% (~\$450m)
- Healthcare: 15% (~\$270m)
- Government/public sector: 15% (~\$270m)
- Commercial industries (including retail and others): 10% (~\$180m).

Strengths

- Strong toolsets across both proprietary (Nucleus Cloud Management Platform), and third-party in support of hybrid multi-cloud services; and NTT DATA cloud accelerators
- Ongoing investment in automation, AI, ML, and analytics
- Broad global delivery footprint across cloud and infrastructure services
- Strong ecosystem of partners (e.g. GCP in healthcare)
- Expanding global 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
- Expanding consulting & advisory capability
- Needs to expedite cognitive and AI capabilities.



Strategic Direction

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

Investing in Nucleus Cloud Management Platform

NTT DATA is investing in AI, ML, and analytics over the next 12 months in support of its Nucleus CMP, including:

- Strategic expansion of Nucleus automation platform and CMP
- Enhancing automation, analytics, and value delivery capabilities in Nucleus to translate to XLA enablement
- Investments in preventive maintenance and predictive analytics in support of the infrastructure environment, with more sophistication around failures and incident prevention and real-time reaction to data analytics workload
- Developing cognitive assisted development across cloud services
- Integrating acquired IP into Nucleus CMP, including Flux7
- Investing in CloudHedge containerized migration and optimization capabilities
- Expanding the ecosystem of integrated third-party tooling providers within the established reference architecture of Nucleus.

Increasing cloud-native use cases

- Expanding cloud-native use cases as part of an overall hybrid IT approach
- Increasing integration between hybrid legacy extension use cases into NTT DATA private cloud and cloud-native use cases across hyperscaler platforms.

Enhancing security capabilities

- Advancing the security framework to unify the hybrid IT ecosystem, including utilizing capabilities across NTT Security.

Expanding strategic ecosystem

- Increasing strategic engagement and joint open-source projects with cloud service providers
- Utilizing GCP to accelerate AI capabilities in support of its Unified Clinical Archive (UCA) platform
- Developing hybrid management capabilities in partnership with Dell Technologies (based on VMware/Pivotal), IBM, and Lenovo.

Developing skillsets across hybrid multi-cloud

- Increased investment in Agile PODs and go-to-market approach
- Enhancing global serverless COEs with joint R&D.



Outlook

NTT DATA is evolving its approach to cloud services through its journey to the cloud framework in support of hybrid multi-cloud environments. It takes a consulting-led approach to engage clients on quick-wins expedited through two to three-day sprint workshops focused on targeted specific use case identification and developments. It will also provide longer-term transformational engagements where required.

It is further utilizing its Flux7 acquired capabilities, in particular across cloud-native services and its IP across DevOps consulting and container management services. It also provides capabilities for the integration and automation of CI/CD pipelines and the use of DevOps toolchains, which is an area of increasing opportunity as clients look to modernize and transform their application and infrastructure environments. We expect NTT DATA will make further niche acquisitions, in particular across AI, analytics, and ML, in support of cloud-native capabilities and services.

NTT DATA is enhancing its agile capabilities through the development of Agile PODs, including agilists, DevOps engineers, SMEs, and architects, to further reinforce its sprint-based workshop approach. It is also looking at the negotiation of price points based on the outcome of weekly sprint iterations. We expect NTT DATA will further 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 is further integrating IP from Flux7 and other third-party tools to provide clients with a full end-to-end cloud management platform, and the ability for clients to manage their own environments through CMP. It also provides added security across Nucleus CMP through NTT Security capabilities. 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 is also investing in joint open-source projects with cloud services providers and hybrid management capabilities. In addition, it is further expanding its partnership with Google CP in the healthcare space, in support of its Unified Clinical Archive (UCA) platform, further integrating Google AI and analytics capabilities. NTT DATA has also developed industry-specific use cases, including A-gate, to enable financial institutions in Japan to use AWS and Azure public clouds securely. We expect NTT DATA will continue to enhance its joint GTM capabilities with key ecosystem partners in particular to target cloud-native use cases and industry-specific use cases.

Finally, NTT DATA is increasing its skillsets and supporting COEs and innovation centers across the cloud. This is an area it will need to expedite to build requisite skills for future hybrid multi-cloud services, in particular in support of cloud-native services, as recently demonstrated with the acquisition of Flux7.



Cloud Infrastructure Brokerage, Orchestration & Management Market Summary

Overview

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

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

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

Buy-Side Dynamics

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

- Ability to manage increasing cloud infrastructure consumption across hybrid multi-cloud through single cloud management platform (CMP)
- Enhancing security, governance and compliance through increased monitoring (secure & compliant ops)
- Enabling business continuity plans (remote working capabilities), and flexibility in engagements (driven by COVID-19)
- Increasing productivity of cloud environments to expedite new cloud services, and improving time to market for new products and services
- Ability to scale and optimize workloads; and increased agility, flexibility and resiliency, with improved visibility, control and optimization of usage through FinOps
- Driving infrastructure and application modernization, and enabling DevSecOps and agile, including CI/CD pipeline automation and infrastructure as code integration
- Driving cloud-native development capabilities and architecture, including container management (docker, Kubernetes, OpenShift), microservices, mesh services and serverless
- Ability to expedite ERP migration to cloud (e.g. SAP)



- Accelerating adoption of Device as a Service, Workspace as a Service, VDI, Office 365, G-Suite, MMD, MVD, Amazon Workspaces, ServiceNow, VMware Workspace ONE; and enabling a more collaborative and productive workforce through the enablement of social and collaboration platforms
- Enabling AI-Ops (use of resolver bots and diagnostics engine to drive further insights), including use of auto-remediation and ML
- Creation of cloud industry blueprints and templates and providing an open approach to orchestration including cloud-native provisioning and discovery with cloud APIs (e.g. CloudFormation, Azure ARM, Terraform).

Market Size & Growth

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

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

Success Factors

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

- *Increasing skill-sets*: building a bench of resources with cloud-native development capabilities and expand hyperscaler capabilities and certifications. In addition, ramping cloud architects, hybrid cloud SMEs, integration SMEs, and site reliability engineers (SRE) in support of cloud operations
- *Consulting and advisory services*: offering onshore consulting and advisory services, supported by cloud SMEs, providing a design thinking and collaborative approach to define clients cloud transformation roadmap. This includes modernization from monolithic to microservices, landing zone and platform build, including cloud-native, and adoption of DevOps and serverless architecture
- *Cloud Management Platform (CMP)*: providing single-pane management view and cloud-native PaaS support including microservices and containers, utilizing APIs to bring tools into the cloud ecosystem, including cloud-native provisioning. Enhancing FinOps capabilities in the management of cloud costs, and increasing monitoring and observability to enhance dashboard performance across the cloud ecosystem
- *DevSecOps and agile*: expanding agile and DevSecOps capabilities, AI insights, recommendations and automated actions for DevOps process, including governance in support of SDLC. In addition, CI/CD automation, including CI/CD toolchain integration, infrastructure as code (IaC) integration with templates and API-driven architecture, and container as a service (CaaS) with DevOps
- *Increasing AI-Ops and automation*: using AI-Ops to trigger automation and enable automated remediation, enacting event and incident automation to diagnose and remediate (self-heal) incidents through AI, cognitive bots, and proactive and predictive



- analytics. Expanding AI-Ops to No-Ops cloud managed services and developing more complex use case creation through ML and training for orchestration and resolver bots
- *Vertical-specific offerings*: developing service patterns and blueprints to enable repeatable service through a combination of hyperscaler technologies and IP to address a client-specific need. In addition, re-modernizing or re-factoring applications to align with client industry-specific trends
 - *Focus on innovation*: Expanding digital transformation centers, innovation hubs and cloud CoEs in support of AI, analytics and automation. Combining CMP, DevOps and AI-Ops to manage a hybrid multi-cloud environment. In addition, creating dedicated experience centers to monitor XLA performance and end-user satisfaction across a hybrid multi-cloud environment
 - *Expediting Digital Workplace Services*: increasing support of modern management cloud-based management toolsets (e.g. Microsoft Autopilot, Intune and VMware Workspace One), and across Unified Endpoint Management (UEM). Ramping capabilities in virtualization support for remote working, including Microsoft WVD, and Amazon Workspaces and in collaboration tools, supporting longer-term business continuity requirements
 - *Smart brokerage capabilities*: developing smart brokerage capability to expedite cloud comparison across IaaS and PaaS, with the utilization of a recommendation engine to decide on best-fit cloud based on client requirements (e.g. regulatory, compliance, industry-specific). Further applying ML to enable the engine to learn from consumption patterns to build real-time brokerage capability
 - *Ecosystem partnerships and IP*: developing IP, joint GTM, and strategic cloud initiatives with hyperscalers in support of hybrid multi-cloud support from both an industry and client-specific level. In addition, providing cloud-native PaaS support, and expanding partnerships with start-ups, in particular in support of container management and mesh services.

Outlook

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

- Greater focus on driving containerization (CaaS) and PaaS services at scale, including Kubernetes and Docker, mesh capabilities and serverless architecture services. This will increase adoption of cloud-native services including microservices, and utilizing DevSecOps to provide fully managed container services, and tooling to build complete solution in the cloud
- Vendors will increase investment in CMP with more focus on a single-pane view on the health and state of cloud environments across hybrid and multi-cloud, with a deeper focus by persona. In addition, through smart brokerage and recommendation engines learning from real-time data on cloud consumption patterns to build models for real-time brokerage functionality
- Vendors will expand AI, ML, and analytics investments to provide greater insights on workflows and informed decisions on cost reduction, including landing zones and automating the decision on where deployments go
- Expanding AI-Ops to No-Ops cloud managed services, and developing more complex use cases through ML and training for orchestration and resolver bots, serverless capability on top of orchestration platforms, and next-gen cloud management observability based on



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

- Increasing hybrid management capabilities in partnership with cloud providers (e.g. VMware/Pivotal) to enable private cloud for on-premise business-critical workloads (although public cloud consumption will increase significantly)
- Greater focus on the development of industry-specific personas to create solutions and use cases to fit specific industry requirements for cloud services
- Vendors will increase joint GTM approaches with strategic ecosystem partners, and build dedicated business units (e.g. Microsoft, AWS, VMware, Google)
- Vendors will increase networks of innovation hubs and Cloud CoEs to deliver collaboration sessions in close proximity to clients. They will expand the site reliability engineering (SRE) approach as the default to manage end-to-end cloud services in a highly automated way.



NEAT Methodology for Cloud Infrastructure Brokerage, Orchestration & Management

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

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

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

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

- **Leaders:** vendors that exhibit both a high capability relative to their peers to deliver immediate benefit and a high capability relative to their peers to meet future client requirements
- **High Achievers:** vendors that exhibit a high capability relative to their peers to deliver immediate benefit but have scope to enhance their ability to meet future client requirements
- **Innovators:** vendors that exhibit a high capability relative to their peers to meet future client requirements but have scope to enhance their ability to deliver immediate benefit
- **Major Players:** other significant vendors for this service type.

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

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



Exhibit 1

‘Ability to deliver immediate benefit’: Assessment criteria

Assessment Category	Assessment Criteria
Offerings	<ul style="list-style-type: none"> Cloud management platform capability Cloud brokerage and FinOps capability Cloud orchestration capabilities including cloud-native provisioning Industry specific cloud offerings, including re-usable assets and blueprints Cloud AI-Ops capabilities API and data-driven services in support of hybrid multi-cloud Advanced analytics, cognitive and ML capabilities in support of hybrid multi-cloud
Delivery	<ul style="list-style-type: none"> Cloud Infra BOM North America delivery capabilities Cloud Infra BOM EMEA delivery capabilities Cloud Infra BOM APAC delivery capabilities Cloud Infra BOM LATAM delivery capabilities Dedicated cloud SMEs, architects, engineers, hyperscaler-certified, and SRE's Dedicated cloud CoEs, experience centers and innovation hubs Ability to provide IP and accelerators in support of Cloud Infra BOM Ability to incorporate DevOps and agile methodologies in cloud services Extent of third-party and hyperscaler partnerships in support of Cloud Infra BOM Ability to provide advanced analytics, cognitive, and ML in support of hybrid multi-cloud ecosystem
Presence	<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 BOM
Benefits Achieved	<ul style="list-style-type: none"> Improvement in infrastructure and application performance, reliability and availability Level of cost savings achieved Improvement in provisioning times Increased end-user/business satisfaction Improved speed of problem resolution



Exhibit 2

‘Ability to meet client future requirements’: Assessment criteria

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

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



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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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