

NEAT EVALUATION FOR IBM:

Cloud Infrastructure Brokerage, Orchestration & Management

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

Introduction

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

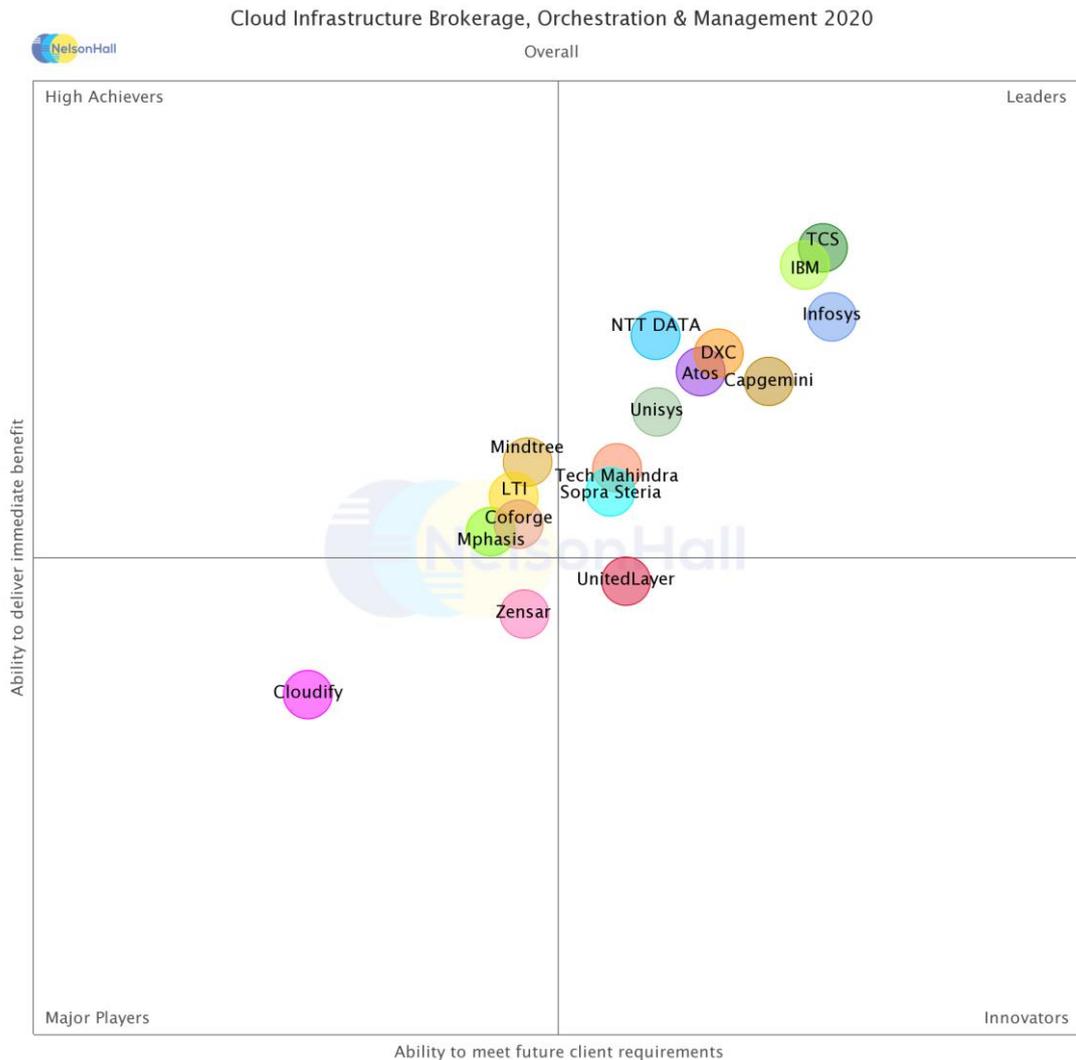
Evaluating vendors on both their 'ability to deliver immediate benefit' and their 'ability to meet client future requirements', vendors are identified in one of four categories: Leaders, High Achievers, Innovators, and Major Players.

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)



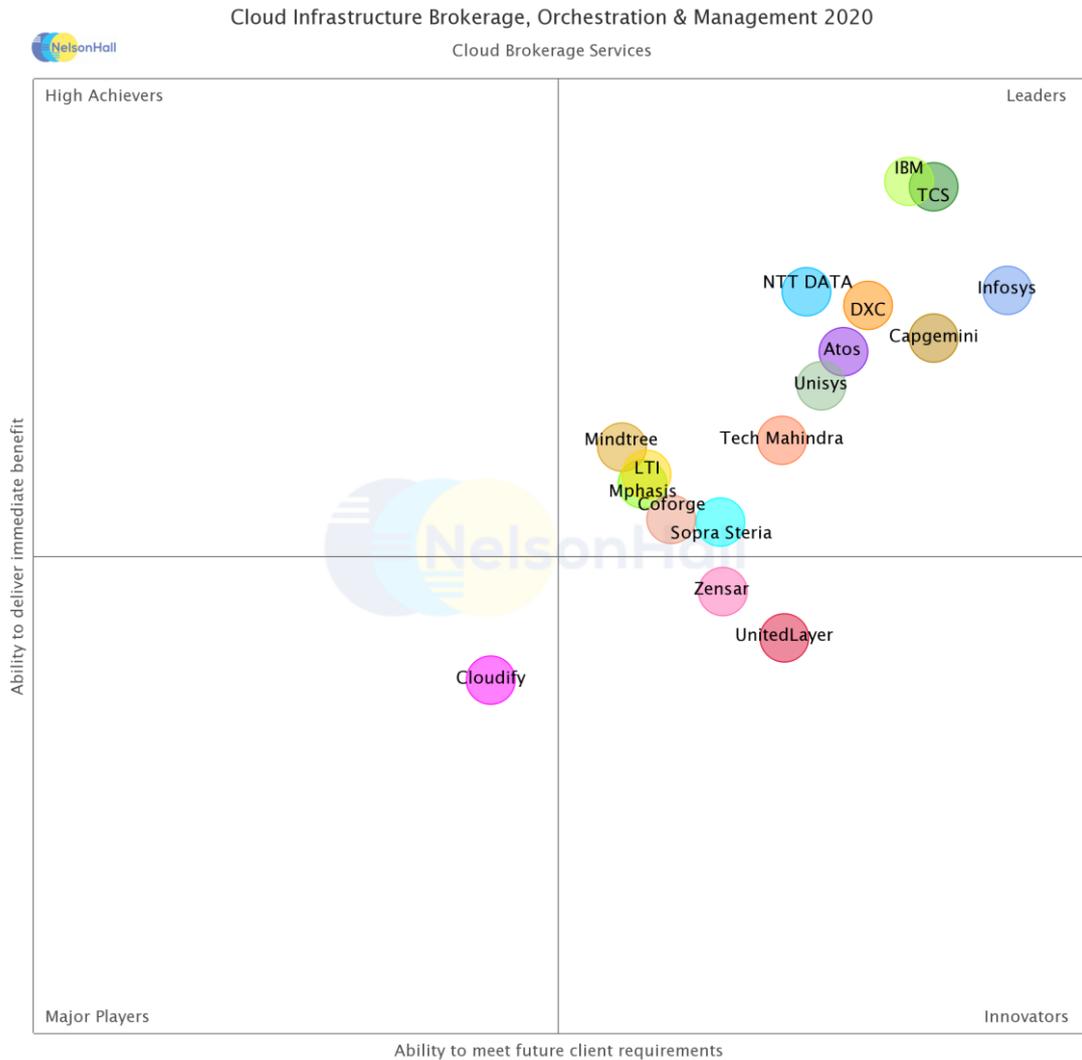
NelsonHall has identified IBM as a Leader in the *Overall* market segment, as shown in the NEAT graph. This market segment reflects IBM’s overall ability to meet future client requirements as well as delivering immediate benefits to its cloud infrastructure brokerage, orchestration & management clients.

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](#).



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



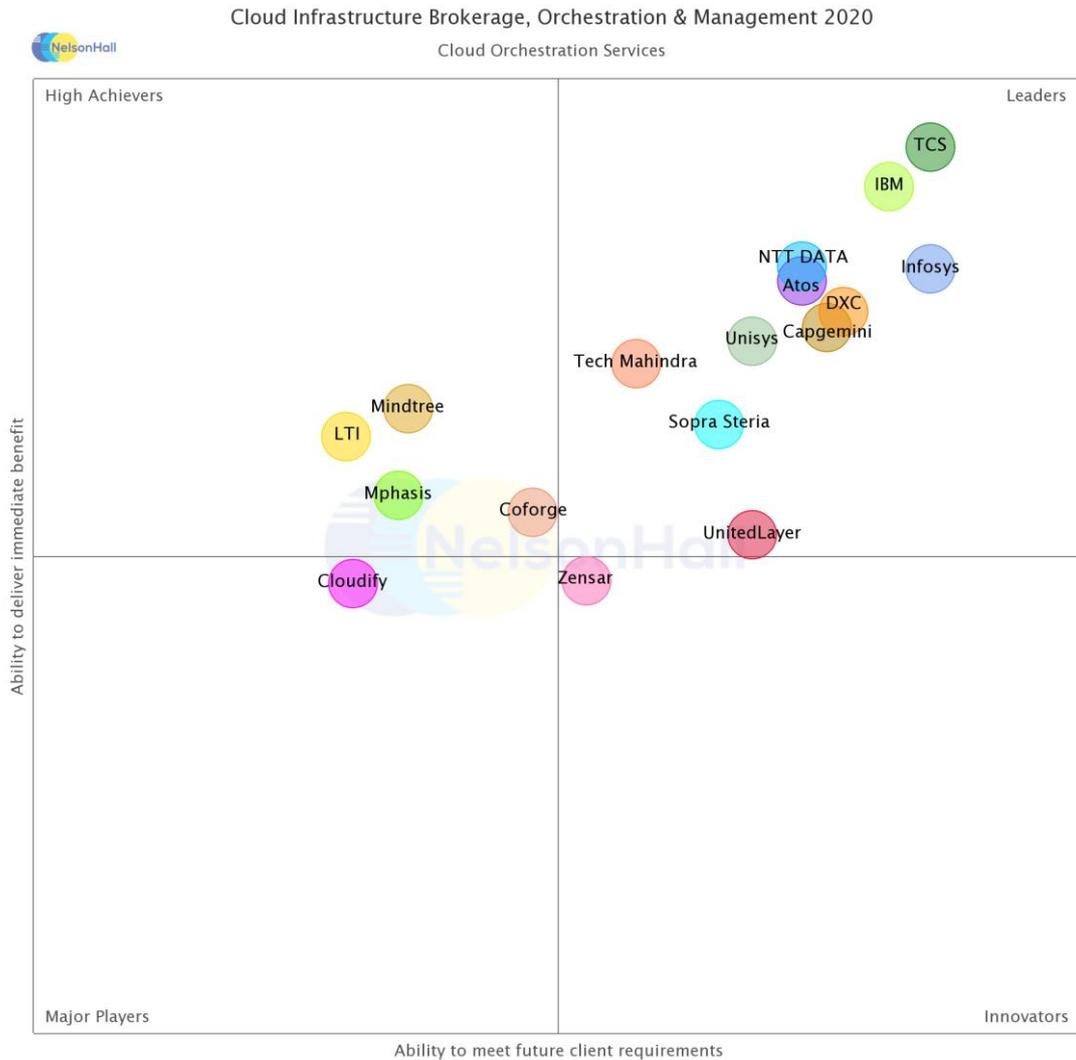
Source: NelsonHall 2020

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

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



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



Source: NelsonHall 2020

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

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



Vendor Analysis Summary for IBM

Overview

IBM's Cloud Infrastructure Brokerage, Orchestration, and Management Services are provided through its IBM Services for Multicloud Management on its IBM Multicloud Management Platform (MCMP), providing a single management control pane with Digital Workflows. IBM MCMP provides fully managed services and is also available as a standalone product.

IBM Multicloud Management Platform

IBM MCMP provides an integrated, single management and operations platform to consume, orchestrate, and govern a multi-cloud environment. IBM's MCMP enables consistent engagement across existing IT and multiple public and private clouds, including:

- Provisioning of dev, test, and production environments, using Infra-as-a-code
- DevOps toolchains to manage the development, build, test, and deployment of applications, including apps-specific ops lifecycle
- AI-enabled operational management across multiple teams and applications
- Security and compliance management across the multi-cloud landscape, budgets, cost, and financial governance.

IBM's MCMP can be accessed by personas across four consoles, which include Consumption, DevOps, Operations, and Governance. These are effectively an integration point and launch pad for applications. Users trying to compare and order services would go the Consumption console (i.e., catalog, marketplace, and curated content). SREs and developers would access the DevOps console to view their pipelines and handle DevOps at scale. The operations console is where day two operations happen and enable administrators to see across cloud, containers, and traditional IT datacenter. The governance console provides access to cost and asset management.

The consoles are focused on the appropriate personas and provide role-based access controls that show what roles a user has access to, which determines what their tasks are as they go through different parts of the application. It also has the ability to provide APIs exposed in Swagger for all the applications. IBM has developed a repository of ~30 personas through its design-thinking approach in support of MCMP, which have clusters that fall into each of the consoles.

It has an open and federated approach to orchestration, including native provisioning and discovery with cloud APIs (AWS CloudFormation, Azure ARM Templates, Google Jinja Templates, and IBM Public Cloud Terraform Templates), VMware vRealize Automation (vRA), and other ITSM tools, including Service Now/ICD.

These four consoles are described in more detail below:

Consumption Console

The MCMP Consumption console enables Enterprise IT departments or Managed Service Providers to provide their users with a self-service experience to browse, search, order, and manage their hybrid cloud services through a single unified storefront, including provisioning and orchestration of services.

Through Enterprise Marketplace, it provides type-1 content (out of the box) across the different cloud providers to establish a catalog. In addition, through a service composer



product, the user can create their content, or IBM can import cloud provider native templates such as AWS CloudFormation, Azure ARM, Google Deployment Manager, and IBM Terraform to enable the curation of a catalog that the enterprise makes available across their enterprise. MCMP also provides provisioning and orchestration of services, including integration with ServiceNow. Once a request is approved and provisioned, a user can view it in the inventory and perform any day-2 operations required.

DevOps Console

DevOps console provides clients with a view of the maturity and health of the DevOps pipeline. It enables the integration of multiple CI/CD tools across multiple clouds, gathering KPIs to measure quality across teams, products, and applications. It also supports the monitoring of CI/CD tools and Kubernetes clusters supported by major cloud providers.

IBM is looking to provide transparency within the organization around any contributors or barriers to getting code into production as fast as possible, allowing developers and SREs to look at toolchain performance. It provides an aggregated view of CI/CD pipelines, showing the status of build, test, deploy, and run, and enables clients to identify pipeline bottlenecks and efficiency issues. IBM also has a tool called DevOps Commander that assists in setting up toolchains, including Jenkins, and integrates with any additional tools a client may have in the DevOps toolchain, which are then visible in the console across each status stage, as highlighted above. The DevOps console also provides an aggregated view of container health and utilization, including geographic locations.

Operations Console (AI-Ops)

The Cloud Operations console provides clients and IT administrators with complete visibility to view and manage cloud and data center operations, all governed by analytics, intelligence, and automation across their traditional IT, private and public clouds. It enables Integration with ITSM/Service Management and DevOps management, and automated remediation.

It enables day-2 operations with a single pane of glass to view everything that is going on across the environment, including integration with IBM Service Platform with Watson providing actionable and pervasive insights, and automated remediation. A user can analyze by application or environment, the inventory and health of their data center and cloud estate, including details on pending tickets. It provides a multi-cloud and also hybrid-cloud view across the traditional data center, offering on-premise data center self-service reporting with real-time access to critical incidents & contributing assets.

For a global vertically-integrated healthcare provider, IBM is deploying AI-Ops and is bringing all the different operational data into the data lake (i.e., incidents, problems, changes, and utilization data), and also the logs generated at both an infrastructure and application level. The client needed real-time insights on Pharmacy Application sub-systems bottlenecks resulting from capacity and performance demands due to COVID-19 traffic. It also required predictive alerts from benchmarking across the pharmacies to identify issues relating to application performance from application and infrastructure logs correlated with events and metrics and take immediate remedial action. IBM provided insights in real-time across 50TB of indexed logs, metrics, and events data across all teams in pandemic systems health calls and provided cross-tower collaboration and transparency on the performance, load, and conditions of the pharmacy critical systems in one unified format.

IBM provided a dashboard with an end-to-end operational view of IT operational metrics for the business applications, with a time series of parameters and health of critical business applications & associated infrastructure with benchmarking at hourly, daily, and weekly status, providing a view of bottlenecks. It also uses ML across log file pattern anomalies to identify system load stresses due to transaction/volume change behavior patterns, such as from COVID-19 impact.



Governance Console

The Governance console provides a data-driven view of assets, costs, and recommendations for cost optimization across multiple clouds, utilizing AI and data analysis to drive insights. It enables a financial administrator to look at an aggregated cost over time, inclusive of all different providers. It also provides a view of budgets to enable the user to understand how it is performing relative to a budget, and how it is billing by costs versus set budget by month. The asset dashboard also enables a user to review the utilization of assets.

IBM will also provide insights based on ML across each provider, and intelligence and recommendations for reserved instances across five areas (retire or renew, enhance the scope, and buy or refund) based on usage patterns to improve utilization and reduce costs. It can also set policies for specific assets with IBM default, or a user can enable, disable, or change the threshold for over- or under-utilization, to view where there may be a violation on these and take the necessary action.

Financials

IBM's total revenues for CY 2019 were \$77.1bn. IBM Services revenues were \$44.0bn, and of these, NelsonHall estimates that ~31% (~\$13.8bn) relates to cloud services, and further estimates ~62% (~\$8.6bn) of these revenues relate to cloud infrastructure brokerage, orchestration, and management services.

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

- Americas: 48% (~\$4.1bn)
- EMEA: 35% (~\$3.0bn)
- APAC: 17% (~\$1.5bn).

Strengths

- IBM Multicloud Management Platform (MCMP), providing modular services in the management of traditional IT and hybrid multi-cloud environments; with ~30 personas developed to date
- IBM Service Platform with Watson providing extensive data lake in support of MCMP
- IBM maturity framework for hybrid multi-cloud development
- IBM has a clear focus and investment on analytics, cognitive, and automation in support of IT infrastructure
- An open and federated approach to orchestration across multiple ecosystems
- Ability to utilize broader IBM capabilities (i.e., iX and IBM Garage)
- Acquisitive to add complementary capabilities.



Challenges

- Lack of partnerships with digital ISVs
- Expanding industry-specific automation capabilities
- Increasing outcome-based contracts
- Expediting self-healing and auto-remediation capabilities in support of AI-Ops, which is underway in the planned roadmap.

Strategic Direction

IBM is looking to expand its cloud infrastructure brokerage, orchestration, and management services capabilities over the next 12-18 months, with the following key investments being made in support of MCMP's consoles:

- *MCMP AI-Ops*: incorporates IBM Watson AI-Ops for continuous optimization, projecting, locating, and resolving systemic issues in traditional, cloud, and cloud-native components of the delivery stacks. IBM continues to invest in AI-Ops, particularly in the areas of:
 - Data source and operations integration, including an increasing level of support for third-party data management packages
 - Expansion and enhancement of next-generation events management, monitoring, and remediation frameworks – for hybrid and multi-cloud day-two operations
 - Expansion and enhancement of AI and automated actions for resolution
 - Expansion and enhancement of user experience and business outcome traceability capabilities.
- *MCMP DevOps*: IBM will continue to invest and expand AI Insights, recommendations, and automated actions for DevOps processes. In addition, IBM plans to widen partnerships with third-party tools and service providers
- *MCMP Cost & Asset Management*: IBM will continue to expand and enhance its capabilities, including:
 - Out of the box and custom support for Provider Services – Red Hat OpenShift, Ansible Tower, IBM CloudPaks, and third-party providers, including cloud hyperscalers
 - AI for Cost & Asset Management, including more ML, pattern recognition and insights, recommendation delivered to users in the self-service experiences
 - Data source and operations integration, including an increasing level of support for third-party data sourcing and input from third-party packages
 - Expansion and enhancement of events management, monitoring, and remediation for IT spend visibility and optimization
 - IBM is expanding its routes to market by investing in several MCMP editions, which are packages with capability focused on partners, including Service Providers and Franchises for smaller and specialized markets.



Additional investments include:

- Increasing capabilities in support of MCMP with IBM as the key provider in the ecosystem to accelerate clients' move to the cloud, including across migration, management, and security, and other capabilities to plug into MCMP, including Cloud Paks for multi-cloud management
- Continuing to bridge the gap between on-premise and virtualized environments being managed in the data center to move out to cloud environments using Red Hat and OpenShift
- Observability and consistency across hybrid environments
- Increased investment in Kubernetes, clustered environments, and containerization through MCMP modularity, enabling Cloud Paks plugin for data and containerization piece
- Community Edition (starting with AI-Ops) to enable extensibility of the platform
- Consumption metering and pricing to enable lower price points and 'pay as you go'
- Mainframe integration support in Operations view of Hybrid IT
- Expanding multiple orchestration engines, including native orchestration for cloud services providers, and vRA for VMware private cloud, and also bringing in support for Red Hat CloudForms, to retain an open and federated approach.

Outlook

IBM is taking a pragmatic approach to the management of hybrid IT through its IBM Multicloud Management Platform (MCMP), enabling consistent management across existing IT and multiple public and private clouds. It is supporting traditional IT, including data center, cloud (public & private), and containerized applications and environments, providing a single-pane view across multiple providers and services.

IBM has created a maturity model to enable clients to progress from their entry-points into their desired states predicated by their cloud transformation roadmaps, moving up the stack from traditional IT (on-premise) to cloud-enabled and cloud-native based on their requirements. We expect IBM will increase its capabilities in support of this initiative, including its iX capabilities to drive design thinking and UX-UI consulting engagements in support of clients' cloud maturity roadmaps and transformation.

IBM is also taking a partnership approach to multi-cloud management, providing skill sets, expertise, domain experience, and toolsets, looking at IT as a self-service, supply, and demand model. This approach ensures that IBM is also taking into consideration the cultural mindset changes that are required in addition to tools and technologies in transforming to cloud environments.

IBM provides an enterprise control plane to manage multi-cloud environments through MCMP and has developed ~30 specific personas in support of this, with access across four consoles. We expect IBM will continue to evaluate personas through its design-thinking workshops with clients to further enhance UX. The Consumption console provides a single unified storefront (Enterprise Marketplace), enabling catalog-based provisioning, which provides greater choice to clients and the ability to avoid vendor lock-in. Through the DevOps console, it allows application modernization with an open DevOps toolchain, and we expect IBM will continue to ramp its SRE and DevOps resources in support of this capability as the automation of and integration with clients' CI/CD pipelines is an increasing requirement.



The Operations (AI-Ops) console provides a collaborative cloud operating model with DevSecOps and SRE, and roadmap investments include a greater focus on self-healing and automated remediation, including through the use of Ansible. This is an area in which IBM will need to expedite its capabilities to further improve MTTR and rapidly diagnose and remediate incidents. The final console is the Governance console to manage cloud service supply chain providers. This should present good opportunities for IBM, as CIOs increasingly need visibility and control over expanding IT processes, and cloud consumption by resources, type, and regions.

IBM is also taking an open and federated approach to orchestration and a template agnostic approach, which presents good cost options for enterprises. Some clients, for example, may have an AWS or Google shop and do not want the cost of an orchestration engine. Here, IBM would send those templates to the cloud provider's orchestration capabilities. It is also looking to bring in Red Hat CloudForms. Clients also have the option to create Terraform templates and utilize IBM's orchestration engine.

Finally, IBM is investing in provider management capabilities across SLAs and XLAs to further improve UX. We also expect IBM will increase its hybrid cloud ecosystem in support of MCMP, in particular across digital startups in support of cloud-native and containerized capabilities.



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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