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The Forrester Wave™: Multicloud Managed Services Providers, Q4 2020

The 11 Providers That Matter Most And How They Stack Up

by Bill Martorelli
December 3, 2020

Why Read This Report

In our 24-criterion evaluation of the multicloud managed services provider (MMSP) market, we identified the 11 most significant ones — Accenture, Capgemini, Cognizant, Deloitte, HCL Technologies, IBM, Infosys, NTT DATA, Rackspace Technology, Tata Consultancy Services (TCS), and Wipro — and researched, analyzed, and scored them. This report shows how each provider measures up and helps infrastructure and operations (I&O) professionals select the right one for their needs.

Key Takeaways

Deloitte, Accenture, Rackspace Technology, Infosys, And Capgemini Lead The Pack
Forrester's research uncovered a market in which Deloitte, Accenture, Rackspace Technology, Infosys, and Capgemini are Leaders; HCL Technologies, Tata Consultancy Services, IBM, Cognizant, and Wipro are Strong Performers; and NTT DATA is a Contender.

Breadth, Investment, And Cloud Partnerships Are Key Differentiators
Suppliers limited to cloud infrastructure-related support won't suffice when your cloud journey shifts to containers and functions. And if they can't advise you on getting started or guide your migration strategy via advisory services, they'll come up short. Providers with expansive capabilities; the means to invest in new capabilities; and deep, broad hyperscaler partnerships will lead the pack.

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by Bill Martorelli
with Lauren Nelson, Amanda LeClair, Rich Lane, Duncan Dietz, and Diane Lynch
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A Full Scope Of Services Differentiates Leaders In The MMSP Market

As workloads migrate to the cloud, managed services are stepping up with care and feeding. I&O professionals understand traditional infrastructure services well, but the dynamics of managed services provisioning in the cloud environment are quite different. Services are evolving quickly and span everything from applications to infrastructure. Companies are seeking partners that can help them evolve as they embrace this technology platform at a time when the ability to adapt with speed is of the utmost importance. This necessitates full capabilities, from advisory through operations. Suppliers best able to address enterprise requirements offer a broad range of capabilities.

As a result of these trends, multicloud managed services providers customers should look for suppliers that:

› **Can help throughout their cloud journeys.** Many customers still require external assistance in devising their cloud strategies, including migration and execution, so advisory capabilities are important. Furthermore, as cloud usage matures, so must operations support. Operational services on infrastructure may be the initial focus in some engagements, but the priority moves up the stack as enterprises become more conversant in containers, platform as a service (PaaS), and other elements of cloud-native software architecture functions. Infrastructure services alone won't get the job done. Suppliers in this area must deliver strong capabilities for build and run across the entire stack.

› **Have the ability to invest in capability expansion.** Cloud technologies and services are diverse. Successful suppliers include a wide array of technologies and constantly invest in their capabilities — the ability to make substantive investments in supportive tooling and capability expansion via acquisition tends to separate Leaders from Strong Performers and others. This may include cloud management platform and cloud cost optimization capabilities.

› **Have demonstrated qualifications and partnerships with major cloud suppliers.** Qualified multicloud managed services suppliers generally possess relevant certifications, such as participation in hyperscaler managed services provider (MSP) programs and premier consulting programs. While these qualifications may initially strike you as merely "me too," don't dismiss them. Obtaining these qualifications takes substantial effort and expense, shows commitment to that cloud platform, and often indicates that the supplier will be quick to adapt to new hyperscaler innovations. Many have also begun to establish hyperscaler-specific business units with which to go to market. In evaluating these, make sure that suppliers aren't merely building new silos but can also work effectively across different cloud options.

Evaluation Summary

The Forrester Wave™ evaluation highlights Leaders, Strong Performers, Contenders, and Challengers. It's an assessment of the top vendors in the market and doesn't represent the entire vendor landscape. You'll find more information about this market in our reports on managed cloud services, including "Now Tech: Multicloud Managed Services Providers, Q4 2020."

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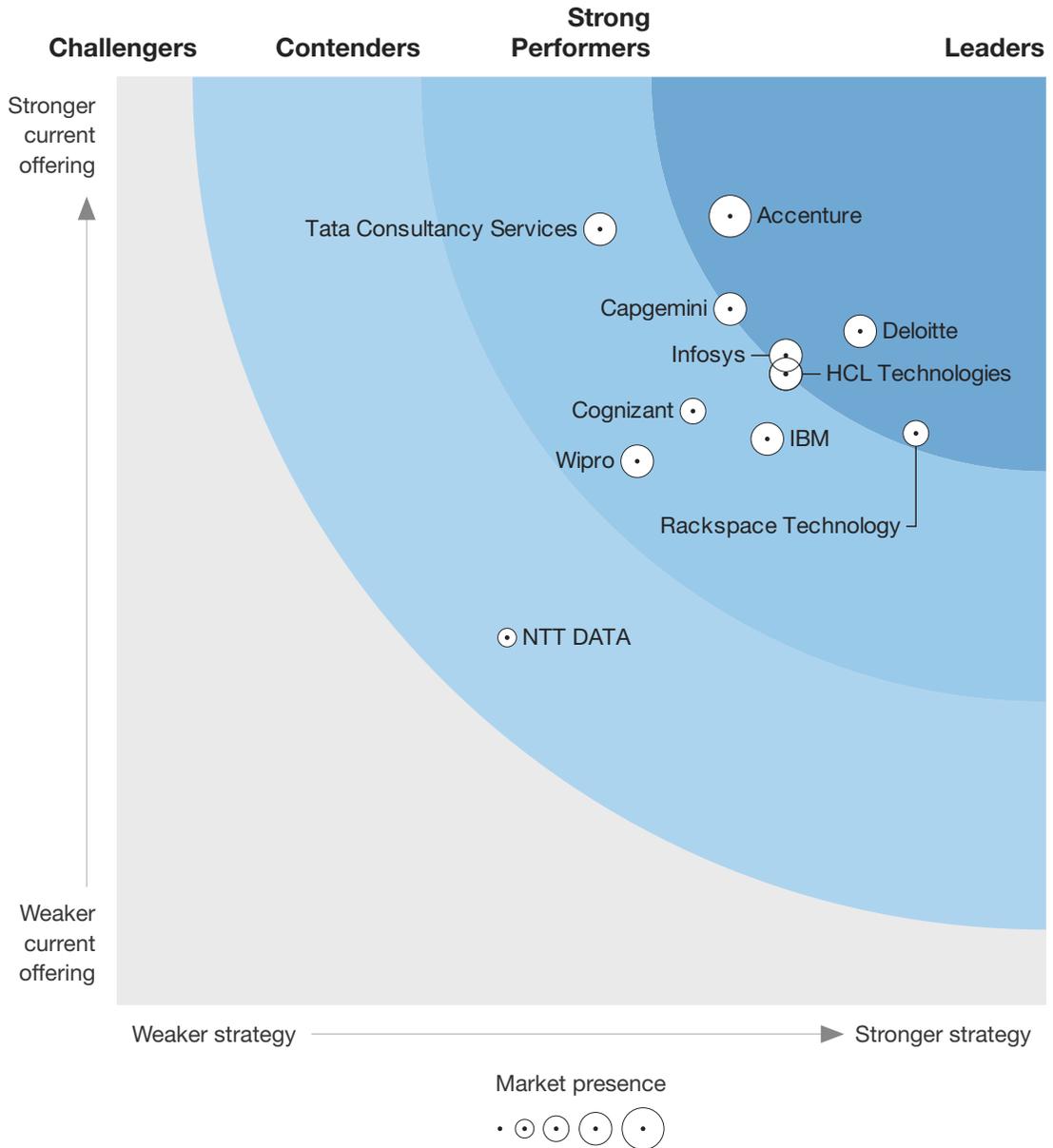
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We intend this evaluation to be a starting point only and encourage clients to view product evaluations and adapt criteria weightings using the Excel-based vendor comparison tool (see Figure 1 and see Figure 2). Click the link at the beginning of this report on Forrester.com to download the tool.

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FIGURE 1 Forrester Wave™: Multicloud Managed Services Providers, Q4 2020

THE FORRESTER WAVE™

Multicloud Managed Services Providers

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FIGURE 2 Forrester Wave™: Multicloud Managed Services Providers Scorecard, Q4 2020

	Forrester's weighting	Accenture	Capgemini	Cognizant	Deloitte	HCL Technologies	IBM
Current offering	50%	4.25	3.75	3.20	3.63	3.40	3.05
Strength of multicloud support	25%	4.40	3.00	3.50	2.50	4.10	3.00
Categories of multicloud services	25%	5.00	3.60	4.10	3.60	3.50	4.00
Cloud management tooling	10%	5.00	5.00	3.00	5.00	3.00	3.00
Contracts and service-level agreements	10%	3.00	3.00	1.00	1.00	3.00	3.00
Pricing models	10%	3.00	5.00	3.00	5.00	3.00	1.00
Engagement profile	10%	5.00	3.00	3.00	5.00	3.00	3.00
Customer experience	10%	3.00	5.00	3.00	5.00	3.00	3.00
Strategy	50%	3.30	3.30	3.10	4.00	3.60	3.50
Vision	20%	3.00	5.00	3.00	5.00	3.00	5.00
Execution roadmap	20%	3.00	1.00	5.00	3.00	3.00	5.00
Innovation roadmap	15%	3.00	3.00	3.00	5.00	3.00	3.00
Planned enhancements	15%	3.00	3.00	1.00	3.00	5.00	3.00
Partner ecosystem	15%	5.00	3.00	3.00	3.00	5.00	3.00
Commercial model	15%	3.00	5.00	3.00	5.00	3.00	1.00
Market presence	0%	4.50	3.50	3.00	4.00	3.75	4.00
Number of customers	25%	5.00	4.00	3.00	3.00	4.00	4.00
Total service revenue	25%	5.00	5.00	2.00	4.00	3.00	4.00
Geographic presence	25%	5.00	2.00	4.00	4.00	5.00	5.00
Average engagement size	25%	3.00	3.00	3.00	5.00	3.00	3.00

All scores are based on a scale of 0 (weak) to 5 (strong).

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FIGURE 2 Forrester Wave™: Multicloud Managed Services Providers Scorecard, Q4 2020 (Cont.)

	Forrester's weighting	Infosys	NTT DATA	Rackspace Technology	Tata Consultancy Services	Wipro
Current offering	50%	3.50	1.98	3.08	4.18	2.93
Strength of multicloud support	25%	4.70	1.30	3.90	4.10	3.00
Categories of multicloud services	25%	2.50	1.40	3.20	5.00	3.50
Cloud management tooling	10%	5.00	3.00	3.00	3.00	1.00
Contracts and service-level agreements	10%	5.00	3.00	1.00	3.00	3.00
Pricing models	10%	3.00	3.00	3.00	5.00	5.00
Engagement profile	10%	1.00	3.00	1.00	5.00	1.00
Customer experience	10%	3.00	1.00	5.00	3.00	3.00
Strategy	50%	3.60	2.10	4.30	2.60	2.80
Vision	20%	3.00	3.00	3.00	3.00	1.00
Execution roadmap	20%	3.00	3.00	5.00	1.00	1.00
Innovation roadmap	15%	3.00	1.00	5.00	3.00	3.00
Planned enhancements	15%	5.00	3.00	5.00	3.00	5.00
Partner ecosystem	15%	5.00	1.00	3.00	3.00	3.00
Commercial model	15%	3.00	1.00	5.00	3.00	5.00
Market presence	0%	3.75	2.00	2.25	3.75	4.00
Number of customers	25%	4.00	1.00	3.00	5.00	5.00
Total service revenue	25%	3.00	1.00	2.00	5.00	2.00
Geographic presence	25%	5.00	3.00	3.00	2.00	5.00
Average engagement size	25%	3.00	3.00	1.00	3.00	4.00

All scores are based on a scale of 0 (weak) to 5 (strong).

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Vendor Offerings

Forrester included 11 vendors in this assessment: Accenture, Capgemini, Cognizant, Deloitte, HCL Technologies, IBM, Infosys, NTT DATA, Rackspace Technology, Tata Consultancy Services, and Wipro. We invited Atos and DXC to participate in this Forrester Wave, but they chose not to participate, and we couldn't make enough estimates about their capabilities to include them in the assessment as nonparticipating vendors.

Vendor Profiles

Our analysis uncovered the following strengths and weaknesses of individual vendors.

Leaders

› **Deloitte marries digital transformation with its managed cloud services capabilities.** Deloitte cloaks its managed cloud services capabilities in the mantle of digital transformation and is one of the strongest competitors in the market; the OpenCloud Platform is its cloud management platform. Deloitte's acquisition of modernization toolmaker innoWake in 2017 and cloud migration platform provider Atadata in 2018 set the stage for substantial migration and modernization strengths. Deloitte offers an almost ideal balance of services, from analysis through ongoing operations, and is one of the more credible suppliers for the Google stack, although the firm's audit relationship with Microsoft precludes it from participation in some of the typical certification programs. Deloitte is surprisingly strong on the cloud operations side but lacks a conventional infrastructure management capability. The company is also notable in its focus on risk management. Deloitte handles heavy transformation well, paired with strong ongoing operational support.

Client references like Deloitte's transparency, partnership, and spirit of innovation, together with what they say is greater commercial flexibility than they've found with other transformational players. It has a reputation of being expensive, but client references rave about the value they receive from the company's services offerings, noting that they're willing to pay a premium for the privilege of working with the firm. Deloitte is a good fit for large enterprises focused on digital transformation, especially where cloud managed services are part of a larger engagement.

› **Accenture sets the pace with its enormous scale and breadth of capability.** Accenture's presence looms in managed cloud services by virtue of its significant scale and the depth of its relationships with the major cloud hyperscalers. Its significant certifications across major cloud platforms signal its depth of capability. Accenture's Amazon Web Services (AWS) and Microsoft Azure capabilities are extensive and delivered through the Accenture AWS Business Group and Accenture Microsoft Business Group, respectively. Its Google capabilities, while smaller in scale, are growing rapidly. Accenture is now complementing its longtime investment in Accenture Cloud Platform with myNav, a solution to help customers navigate more effectively across the cloud landscape with simulation capabilities.

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The firm has extensive advisory capability as well as significant capability throughout the entire cloud services lifecycle and has established business groups with all the leading public cloud suppliers. With its great strength in applications services, Accenture merits strong consideration for engagements heavy on migration and modernization. Accenture is a good fit for enterprises seeking complete cloud services support across advisory, migration/modernization, and operations.

› **Rackspace Technology is a cloud specialist embracing a new commercial approach.**
Newly renamed Rackspace Technology was one of the pioneers of managed public cloud after changing its strategy from attempting to compete head-on with the hyperscalers to pairing with and enhancing them. It's again setting the pace with its Rackspace Service Blocks methodology, promising variability in service delivery and pricing as compared with traditional steady-state service delivery. This concept also promises significant flexibility in its commercial model, which will help dissipate Rackspace Technology's one-time reputation for high pricing. From its roots in infrastructure services, the company has moved decisively down the path of expanding advisory, build/migrate, and cloud-native development services. It retains significant capability in managed hosting but isn't otherwise a conventional infrastructure management player. Rackspace Technology also targets a client base balanced between midsize and large enterprises.

Customer references praised Rackspace Technology's cultural affinity and its uncanny knack to expand its capabilities in line with customers' evolving needs. Although client references say its pricing has improved, they sometimes still struggle with transparency in billing. Nevertheless, the company combines some of the best elements of cloud specialists and global systems integrators. Rackspace Technology is a good fit for midsize or large enterprise customers seeking cloud expertise from a specialist that's particularly well versed in cloud-first technologies.

› **Infosys brings applications services strength to bear in managed cloud services.** Infosys' managed cloud practice focuses on applications services, including build, migrate, operate, and modernize. Its revenue concentration reflects this; modernization is a particularly strong focal point. However, Infosys is relatively light on the advisory side when it comes to percentage of revenues. Its recently introduced Cobalt cloud offering is a collection of services, solutions, and platforms powered by development assets, engineering assets, and other elements of services delivery under a unified framework. Infosys is ramping up its strength in Google Cloud and with Microsoft, but its activities with AWS and Azure are still slightly larger by customer count and revenues. Infosys has been a long-standing player in cloud management technology; Polycloud is the latest iteration, tracing its history back to the original Cloud Ecosystem Hub.

Customers praise Infosys's technical capability but note that in some cases, its robust processes can stand in the way — the company has made strides under recent leadership to rectify its reputation for commercial inflexibility, but its adherence to internal procedures can slow things down in comparison with firms that have a more entrepreneurial bent. Infosys is nevertheless a good fit for companies seeking particularly strong migration and modernization services to assist a smooth and speedy migration.

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› **Capgemini brings extensive applications skills to bear on managed cloud services.** Based in France, Capgemini is one of the few suppliers with a larger proportion of revenues derived from EMEA than from North America. The company prefers to eschew lift-and-shift migration in favor of more substantive modernization, where its capabilities are significant. Its eAPM is one of the most visually appealing portfolio analysis toolsets in the market. Capgemini has a unique philosophy regarding its hybrid cloud management tooling, Unity CMP, emphasizing operations primarily at the app and dev services, not the infrastructure layer. This is part of its broader Capgemini Cloud Platform, which is a program-level collection of capabilities encompassing services, frameworks, and accelerators.

Capgemini embraces the concept of "service blocks," promising variability and flexibility in managed services delivery. Some client references would like to see more process orientation and faster resource onboarding. However, they give high marks for Capgemini's overall technical expertise and proactive recommendations for optimization. With its strength in applications services, Capgemini is a good fit for enterprises looking for expertise in migration and modernization.

Strong Performers

› **HCL Technologies offers strength across IT outsourcing and managed cloud services.** HCL Technologies has dedicated cloud ecosystem business units around the leading hyperscalers; most recently, it has established a partnership with Google. However, the company is primarily an Azure player, with its activity in the Microsoft cloud dwarfing its second leading hyperscaler concentration (AWS) by a two-to-one margin. HCL is well known for its strong IT outsourcing services; the company boasts a vast array of home-grown best-of-breed tools, including the MyCloud Fenix 2.0 platform.

HCL emphasizes its engineering capabilities. Its cloud-native development capabilities are limited in comparison with those of other suppliers in this evaluation, but capabilities are otherwise well balanced across the managed cloud services lifecycle. Customers speak of an almost unmatched flexibility and client orientation on the part of the company, but it can struggle at times with supplying the right resources, at least initially. HCL Technologies is a good fit for enterprises looking to extend their managed services support from other towers of service to their cloud solutions, especially for those focused on Azure.

› **Tata Consultancy Services brings operational prowess to cloud-based transformation.** TCS's positioning is tilted toward its Industry 4.0 vision, with an eye toward reimagining industry value chains by creating borderless business enterprises on the cloud. Unlike most of its direct India-centric peers, TCS derives the majority of its managed cloud services revenues in EMEA and from Microsoft Azure. TCS's Enterprise Cloud Platform is its hybrid cloud management platform, which is only part of the TCS vision for catalog-based cloud services delivery through its Cloud Exponence delivery model. Having long been aggressive in intelligent automation, TCS brings its machine-first operating model to bear on managed cloud services, arguing that failure to trust AI and other intelligent automation inevitably yields an "agility debt."

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Customer references say the company's personnel tend to stay in their own lane with regard to their technical specialty but give strong praise for the company's ability to scale rapidly. TCS is the most balanced of all the leading India-centric providers in applications management and infrastructure management capability. Tata Consultancy Services is a good fit for enterprises looking for a multifaceted provider that brings balanced app and infrastructure strengths to the table, especially those that align to its Industry 4.0 vision.

› **IBM's cross-cloud solutioning highlights its revamped cloud strategy.** The Red Hat acquisition in 2019 helped redefine IBM's strategic vision, shifting it toward the role of a multicloud player that happens to possess a public cloud offering of its own. IBM's vision of multicloud, with true interoperability between cloud platforms rather than independent silos built around individual hyperscaler platforms, is differentiating, but the company must now fulfill it. IBM also stresses the power of its Multicloud Management Platform (MCMP) solution, derived from the company's acquisition of Gravitant in 2015. IBM's well-regarded Garage method of application development highlights a growing emphasis on cloud-native development.

Despite its recent emphasis on "one IBM," clients believe that the company still has work to do before eliminating internal discontinuities. While it's capable of working effectively within standard IBM offerings, additional complexity brought on by custom requirements may entail cross-silo complications, but IBM's lingering reputation for inflexibility is countered by its reputation for stability and breadth of capability. IBM has strength in conventional applications management and infrastructure management and is a good fit for enterprises that seek cloud services support across infrastructure and applications, especially where IBM Cloud or IBM legacy platforms are involved.

› **Cognizant has beefed up its Microsoft Azure skills with recent acquisitions.** Cognizant has made two significant acquisitions in Microsoft Azure services in recent months, acquiring Microsoft specialist New Signature as well as Azure boutique 10th Magnitude. Its earlier acquisition of Softvision in 2018 has expanded its capabilities for engineering-style development, extending into cloud-native domains. Cognizant's ability to leverage its offshore capability gives it a leg up in competition with cloud boutiques that lack it. The company's Integrated Cloud Management Platform (iCMP) combines classic hybrid cloud management functionality with cloud financial management (FinOps). Cognizant offers a strong roadmap to DevOps.

Cognizant has struggled with turnover at senior levels after hiring new CEO Brian Humphries, but client references have been pleased with its ability to retain key personnel on individual client accounts. Attrition at lower levels, however, remains a concern. In an age when cloud skill profiles are yielding to T-shaped and other characterizations of deep but broader skill sets, some customers say Cognizant's skill sets remain highly compartmentalized. Customer references don't view automation as a differentiating strength. Cognizant is a good fit for companies focused on cloud migration and modernization services.

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› **Wipro's strength in cloud-native development highlights its cloud services strategy.** Wipro's approach to managed cloud services is motivated by its "business first" vision. The company combines significant scale and breadth of capability under new CEO Thierry Delaporte, formerly of Capgemini. Wipro has a strong balance across major cloud platforms but is relatively light on alternative platforms such as IBM, Oracle, VMware, and other alternatives to the big three. Despite extensive overall managed cloud capabilities, Wipro lacks expansive advisory capabilities; its advisory capability by percentage of revenue is among the lowest in this evaluation. However, its percentage of operational revenues is significant, as are its build capabilities. Wipro has strong capability in automation infrastructure management and employs its Enterprise Digital Operations Center as the focal point of its integrated operations solution.

Wipro is capable of being a very cost-effective supplier and uses this strength to good effect in competitive situations. Some customer references perceive execution issues on the project side but share no such concerns on the operational side. Wipro is a good fit for enterprises that want a single provider to manage cloud alongside other towers of services, with an extensive capability in new development.

Contenders

› **NTT DATA brings a managed services sensibility to managed cloud services.** NTT DATA has enjoyed the benefits of its significant capabilities in infrastructure and applications management, and the acquisition of Flux 7 in 2019 has helped expand the company's capabilities up the cloud stack. It may lack the scale of some larger players, but it has a solid vision for managed cloud services and for expanding its capabilities. NTT DATA's revenues in managed cloud services are derived primarily from applications build, migrate, and modernize services. The company is also a big player on the solutions side of the managed cloud services ledger, with a large capability in software-as-a-service (SaaS)-based solutions in insurance, healthcare, banking, and financial services. The company is in the process of infusing more internally developed IP into its Nucleus hybrid cloud management platform. With a strong market presence in the Asia Pacific region, NTT DATA provides support for Alibaba cloud, although this represents only a small percentage of its overall customer base.

NTT DATA is primarily an AWS player, with a secondary concentration in Azure. Not surprisingly for a company based in Japan, roughly half of NTT DATA's commercial activity in managed cloud services is in APAC, with roughly equivalent revenue concentrations in North American and EMEA. The company did not complete any customer references for this evaluation. NTT DATA is a good fit for companies focused on migration/modernization and those looking for application support to tackle vertical specific challenges.

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Evaluation Overview

We evaluated vendors against 24 criteria, which we grouped into three high-level categories:

› **Current offering.** Each vendor's position on the vertical axis of the Forrester Wave graphic indicates the strength of its current offering. Key criteria for these solutions include strength of capability across major cloud platforms, service capabilities (across advisory, build and migrate, run and operate, and traditional infrastructure services), cloud management tooling support, strength and flexibility across contracts and service-level agreements (SLAs), well-conceived pricing models, a balanced engagement profile, and ability to deliver a positive customer experience.

› **Strategy.** Placement on the horizontal axis indicates the strength of the vendors' strategies. We evaluated each vendor's vision, roadmap for innovation and market execution, planned enhancements, partner ecosystem, and commercial model.

› **Market presence.** Represented by the size of the markers on the graphic, our market presence scores reflect each vendor's number of customers, total services revenues, geographic breadth, and average deal size.

Vendor Inclusion Criteria

Forrester included 11 vendors in the assessment: Accenture, Capgemini, Cognizant, Deloitte, HCL Technologies, IBM, Infosys, NTT DATA, Rackspace Technology, Tata Consultancy Services, and Wipro. Each of these vendors has:

› **Operational capabilities across major cloud platforms.** This includes the ability to provide services such as monitoring, patching, and other operational "run" services for cloud platforms.

› **Significant market presence.** Each vendor has MMSP revenue of $150 million and/or at least 1,500 customers. Forrester has seen significant interest via end user inquiries on these services.

› **Support of major cloud platforms.** Each vendor has managed services offerings for AWS, Google Cloud Platform (GCP), and Microsoft Azure.

› **Support of additional cloud platforms.** Vendors have managed services offerings for at least two of the following: Alibaba, IBM Cloud, Oracle, or VMware vSphere-/vCloud-based providers.

› **Participation in multiple cloud MSP programs.** Vendors have certified participation in at least two cloud MSP programs (AWS, Azure, or GCP) as of June 1, 2020.

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Supplemental Material

Online Resource

We publish all our Forrester Wave scores and weightings in an Excel file that provides detailed product evaluations and customizable rankings; download this tool by clicking the link at the beginning of this report on Forrester.com. We intend these scores and default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs.

The Forrester Wave Methodology

A Forrester Wave is a guide for buyers considering their purchasing options in a technology marketplace. To offer an equitable process for all participants, Forrester follows The Forrester Wave™ Methodology Guide to evaluate participating vendors.

In our review, we conduct primary research to develop a list of vendors to consider for the evaluation. From that initial pool of vendors, we narrow our final list based on the inclusion criteria. We then gather details of product and strategy through a detailed questionnaire, demos/briefings, and customer reference surveys/interviews. We use those inputs, along with the analyst's experience and expertise in the marketplace, to score vendors, using a relative rating system that compares each vendor against the others in the evaluation.

We include the Forrester Wave publishing date (quarter and year) clearly in the title of each Forrester Wave report. We evaluated the vendors participating in this Forrester Wave using materials they provided to us by August 31, 2020, and did not allow additional information after that point. We encourage readers to evaluate how the market and vendor offerings change over time.

In accordance with The Forrester Wave™ and New Wave™ Vendor Review Policy, Forrester asks vendors to review our findings prior to publishing to check for accuracy. Vendors marked as nonparticipating vendors in the Forrester Wave graphic met our defined inclusion criteria but declined to participate in or contributed only partially to the evaluation. We score these vendors in accordance with The Forrester Wave™ And The Forrester New Wave™ Nonparticipating And Incomplete Participation Vendor Policy and publish their positioning along with those of the participating vendors.

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We conduct all our research, including Forrester Wave evaluations, in accordance with the Integrity Policy posted on our website.

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