

Multi Public Cloud Solutions

A research report comparing vendor strengths,
challenges and competitive differentiators





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ISG observes a rapid increase in the adoption of multiplatform and multicloud approaches for cloud-native technology. Enterprises seek to harness the native capabilities and technical tooling of public clouds across on-premises, multicloud, hybrid and edge environments. With such capabilities, cloud-native security has become a primary concern for many enterprises seeking to expand the adoption and use of container-based IT architecture. The use of cloud-native observability platforms and security solutions for monitoring and securing applications across microservices architecture and infrastructure layers has become critical.

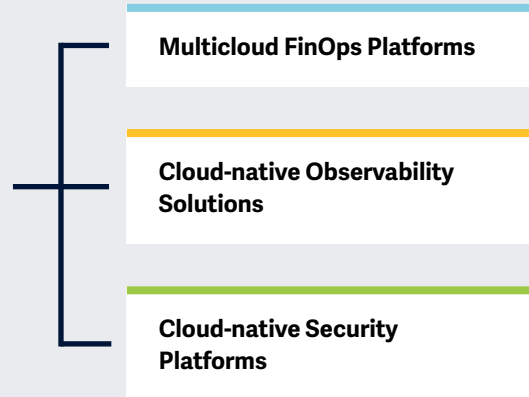
Also, organizations realized that cloud costs need to be optimized due to rapid cloud adoption, leading to uncontrolled and untracked use of cloud resources. Many enterprises face challenges while managing their cloud spending due to the complex and vast cloud ecosystem offered by a hybrid environment. The concept of cloud cost management has existed for over a decade but did not gain prominence until the last few years. Implementing a FinOps strategy has

become critical in enterprises, especially who have siloed teams operating across the globe. In such scenarios, FinOps platform vendors help enterprises of all sizes manage their complex global IT assets while reducing operational costs. These vendors offer proprietary tools and platforms that they have developed over the years. They use principles and frameworks of FinOps to help organizations increase their business value of cloud by combining technology, business and finance professionals and enabling a new set of processes to efficiently monitor and track cloud resources. FinOps also brings financial accountability to organizations' dynamic and complex expenditure of cloud resources.



This 2023 **Multi Public Cloud Solutions** report examines vendors regarding three key areas for global region.

Simplified Illustration; Source: ISG 2023



The ISG Provider Lens™ Multi Public Cloud Solutions 2023 study offers the following to business and IT decision-makers:

- Transparency on the strengths and weaknesses of relevant vendors
- A differentiated positioning of technology providers by segments on their competitive strengths and portfolio attractiveness
- Focus on the global market

Our study serves as an important decision-making basis for positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use the information from these reports to evaluate their current vendor relationships and potential engagements.



Multicloud FinOps Platforms

Definition

This quadrant assesses independent software vendors (ISVs) that offer dedicated / proprietary platforms and solutions for cloud financial management across multiple public clouds. The inherent objective of these vendors is to help clients across various functional teams and business lines and support stakeholders to maintain financial accountability for their cloud services. Maintaining accountability involves defining shared cost responsibilities across businesses, IT teams and the finance department. Cloud FinOps experts are responsible for managing variable costs and the usage of cloud services. They require FinOps platforms that allow them to report on cost and usage, allocate the costs to appropriate stakeholders/users, optimize both usage and price models, recommend engineering changes that would provide value, and continuously assess the effective use of cloud services in lieu of budgets and business objectives.

This quadrant assesses vendors that offer cloud FinOps as a standalone solution and sell it as a licensing or any other standard pricing model. Vendors can leverage AI and ML technologies to analyze usage patterns, forecast consumption trends and subsequently recommend the right public cloud resources to optimize cloud costs.

Eligibility Criteria

1. **Report** and **optimize** cloud costs that can be tailored to the needs of various units (such as finance, IT and business) based on similar data sources and through a **single console**
2. Offer a **single interface** for multiple public cloud infrastructure providers and other tools to **collaborate** and combine data via **APIs**
3. **Search** and **identify** irregularities, and **eliminate** underutilized services
4. Allocate **shared costs** for shared resources, functions or services and **track** them to create a business case with actionable financial insights
5. **Forecast** to better plan cloud **expenditures**, with the ability to conduct cost-trend and **benchmarking** analyses
6. Present a **centralized, commitment-based** cloud infrastructure buying process and ensure **transparency** in **reporting** and optimizing costs
7. Offer FinOps **support** for **multicloud** environments
8. Provide **accreditation** by the FinOps foundation



Cloud-native Observability Solutions

Definition

This quadrant assesses software vendors that provide dedicated / proprietary platforms and solutions for cloud-native observability (logging, tracing and measuring) of containerized applications and infrastructure. Understanding the behavior of these has become more complex, especially in case of a traditional monolith application. Telemetry data is collected from different locations and is analyzed to generate meaningful insights. IT teams must ensure high observability in the cloud environment for reading data flows and system logs. Developers and operators must understand the behavior of each containerized application or its associated service, including how they communicate with one another. Vendors developed standard monitoring tools without considering the fact that cloud-native applications could fail to provide the necessary information to enterprises. Hence, a paradigm shift from host-based monitoring to container and orchestrator-level monitoring is the cloud-native standard to ensure optimum performance and round-the-clock data availability.

Cloud-native observability vendors typically offer metrics generated by containerized infrastructure, microservices applications and business services through dashboards and alerts. They also help with predicting future incidents and resolving them proactively.

Eligibility Criteria

1. Offer capabilities to help enterprises **understand** their inner workings and **predict the performance** of their application environments through in-depth **monitoring**
2. Supply dedicated tools meant for **observability**, specifically **multi-container** applications, with support for highly granular **microservices architecture** and applications that comprise a small number of complex services
3. Possess the capability to work **across multiple infrastructure** environments under a **hybrid cloud** model
4. Offer **root cause analysis** of incidents; use of **AI and ML** technologies is preferred
5. Offer **resources** to help enterprises **understand** and **implement** the software within their environment
6. Establish a **strong connection** between the solution's **business model** and enterprise **outcomes** (such as financial and performance benefits)



Cloud-native Security Platforms

Definition

This quadrant assesses independent software vendors (ISVs) that offer dedicated / proprietary platforms and solutions for securing infrastructure and applications in a cloud-native environment, ranging from application development to production and runtime. Traditional monolithic security tools are incompatible with the elastic, distributed and dynamic nature of the cloud-native environment. The cloud-native applications in this environment are disseminated across multiple locations (both multicloud and hybrid) and continually created and updated by multiple users and developers. Cloud-native security vendors typically offer a unified platform, providing visibility of the orchestration and container network environment. They provide features such as scans for detecting vulnerabilities, interpreting anomalies, misconfigurations during development and at runtime, topology maps, AI-enabled risk assessment, micro segmentation of the container environment, and auto generation of network policies, which include least-privilege

access, regulatory compliance monitoring and validation, and identity and access management. These vendors cover the entire CI/CD lifecycle and integrate with the DevOps workflow to seamlessly secure infrastructure and application layers.

Eligibility Criteria

1. **Unified platform**, covering infrastructure and applications, capable of working across **multi-** and **hybrid-cloud** environments
2. Ability to **integrate** with **third-party** data sources and open-source cloud-native **security** software
3. Unified **visibility** for **DevSecOps**, including intelligent container image **screening** integrated into CI/CD pipelines
4. Ability to **block unscanned** or **vulnerable** images
5. **AI and ML** adoption for the intelligent **discovery** of container **topology** and **automated** remediation
6. Robust **identity and access management** features, including automated least-privilege management and network policies, password management and zero trust boundaries
7. Out-of-the-box mapping to major **regulatory compliance controls** (such as GDPR and HIPAA)
8. Relevant **certifications** for cloud-native security such as CNCF, GIAC and CCSP



Quadrants by Region

As a part of this ISG Provider Lens™ quadrant study, we are introducing the following three quadrants on Multi Public Cloud Solutions 2023:

Quadrant	Global
Multicloud FinOps Platforms	✓
Cloud-native Observability Solutions	✓
Cloud-native Security Platforms	✓



The research phase falls in the period between June and August 2023, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in December 2023.

Milestones	Beginning	End
Survey Launch	June 5, 2023	
Survey Phase	June 5, 2023	June 30, 2023
Sneak Previews	October 2023	
Press Release & Publication	December 2023	

Please refer to this [link](#) to view/download the ISG Provider Lens™ 2023 research agenda.

Access to Online Portal

You can view/download the questionnaire from [here](#) using the credentials you have already created or refer to instructions provided in the invitation email to generate a new password. We look forward to your participation!

Research Production Disclaimer:

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing the work identified by clients. This data is collected as part of the ISG FutureSource™ process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of the information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.



ISG Star of Excellence™ – Call for nominations

The Star of Excellence™ is an independent recognition of excellent service delivery based on the concept of “Voice of the Customer.”

The Star of Excellence™ is a program, designed by ISG, to collect client feedback about service providers’ success in demonstrating the highest standards of client service excellence and customer centricity.

The global survey is all about services that are associated with IPL studies. In consequence, all ISG Analysts will be continuously provided with information on the customer experience of all relevant service providers. This information comes on top of existing first-hand advisor feedback that IPL leverages in context of its practitioner-led consulting approach.

Providers are invited to [nominate](#) their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

It is our vision that the Star of Excellence™ will be recognized as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments.

To ensure your selected clients complete the feedback for your nominated engagement please use the Client nomination section on the Star of Excellence™ [website](#).

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply.

Here is the email address:
ISG.star@isg-one.com



Contacts For This Study



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**Swathi
Amin**

**Global Project
Manager**



ISG Provider Lens™ Advisors Involvement Program

ISG Provider Lens™ offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context.

In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three consultant advisors participate as part of each study's quality and consistency review process.

The consultant advisors:

- Help define and validate quadrants and questionnaires,
- Advise on service provider inclusion, participate in briefing calls,
- Give their perspectives on service provider ratings and review report drafts.

ISG Advisor to this study



**Bernie
Hoecker**

**Partner, Enterprise Cloud
Transformation Lead**



Invited Companies

If your company is listed on this page or you feel your company should be listed, please contact ISG to ensure we have the correct contact person(s) to actively participate in this research.

AllCloud	CloudZero	Harness	IBM (Nordcloud)
Anodot	Contino (Cognizant)	HCLTech (MyXalytics FinOps)	Opsani
Apptio (Cloudability)	Control Plane	Hitachi	Orca Security
Aqua Security	CoreStack	Honeycomb	Palo Alto Networks
BMC Software	Costimize	Hystax	ProsperOps
Centilytics	Datadog	IBM (Turbonomic)	Qualys
Chronosphere	Deloitte	kreuzwerker	Red Hat
Cisco AppDynamics	DoiT International	Kubecost	Replex
Cisco (Portshift)	Dynatrace	McKinsey	Reply
CloudBolt	Exivity	Morpheus Data	Rudder
Cloudeasier	Fairwinds	Mphasis	SADA
Cloudsoft	Finout	Neos (CloudVane)	ServiceNow
Cloudthread	Flexera	NetApp (Spot)	Softchoice
CloudWize	Google	New Relic	SoftwareOne



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Sophos	Tenable (Accurics)
Splunk	Ternary
Stacklet	Thebes
StackState	Timspirit
StormForge	TO THE NEW
Strategic Blue	Traefik Labs
Sumo Logic	Vaxowave
SUSE (Rancher)	Virtasant
Synk (Fugue)	VMware (CloudHealth)
Sysdig	Yotascale
TechNative	



iSG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens™ research, please visit this [webpage](#).

iSG Research™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

ISG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: [Public Sector](#).

For more information about ISG Research™ subscriptions, please email contact@isg-one.com, call +1.203.454.3900, or visit research.isg-one.com.

iSG

ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 900 clients, including more than 75 of the world's top 100 enterprises, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis.

Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,600 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.

For more information, visit isg-one.com.





JUNE, 2023

BROCHURE: MULTI PUBLIC CLOUD SOLUTIONS