

Cloud Native Services and Solutions

Cloud-native Observability Solutions

A research report comparing provider/software vendor strengths, challenges and competitive differentiators

Customized report courtesy of:



Executive Summary 03

Provider Positioning 06

Introduction

Definition 13

Scope of Report 15

Provider Classifications 16

Appendix

Methodology & Team 25

Author & Editor Biographies 26

About Our Company & Research 28

Cloud-native Observability Solutions 17 – 23

Who Should Read This 18

Quadrant 19

Definition & Eligibility Criteria 20

Observations 21

Provider Profile 23

Report Author: Mark Purdy

Cloud-native technologies are reaching the maturity stage.

After several years of booming growth and attendant hype, cloud-native technologies finally seem to be coming of age. The number of cloud-native developers stood at 6.8 million in early 2021, according to *The State of Cloud Native Development* report published by SlashData, with 4.6 million developers using container tools and management platforms, and 4.0 million using cloud functions or serverless architecture. A more recent survey by the Cloud Native Computing Foundation (CNCF), of its own members, indicates that about 96 percent of those organizations are either using or evaluating Kubernetes, with approximately 93 percent currently using or planning to

use containers in production. The growing maturity of cloud-native technologies is bringing both new opportunities and challenges.

Developers, and the IT community in general, now have a greater understanding around the benefits of adopting modern, container-based microservices architectures for IT organizations and business performance. Optimal scalability of IT resources to meet fluctuations in demand, rapid cycle times for new software development and improved integration with DevOps and CI/CD pipelines are but a few examples. But, as some of the hype around cloud native begins to fade, there is also a newfound maturity and a more sober assessment around the challenges that cloud-native technologies can bring. These challenges include the need for new skills and ways of working, surging volumes of observability data from ever more distributed

Cloud native technologies come of age—with new uses and solutions.



Executive Summary

systems, and new security threats and vulnerabilities from more open, distributed ways of working.

Enterprises are choosing to address these challenges in several ways: by configuring DIY solutions on their own infrastructure, using a mix of open-source and proprietary solutions; by working with managed service providers that can architect and operate container-based services with elements such as observability, maintenance, governance, policy compliance and security; by opting for a commercial container management platform distribution with preconfigured capabilities; or by turning to one of the many cloud-native/container-based services offered by the major hyperscalers.

ISG has identified three broad themes shaping this more mature phase of cloud-native technology adoption, presented below.

First, we are seeing the rapid rise of multi-platform, multi-cloud approaches for cloud-native technology adoption and use. Providers we interviewed emphasized that enterprises are increasingly looking to harness the native capabilities and technical tooling of public clouds, across on-premises, multi-cloud, hybrid and edge environments. The reasons are many: a need to simplify DevOps across different environments, regulatory compliance restrictions that require segregated data in on-premises environments; a desire to avoid technical debt or lock-in; or simply a wish to choose among the best in the cloud-native ecosystem.

Second, cloud-native security has emerged as a top concern for many enterprises seeking to increase the adoption and use of container-based IT architecture. Protecting cloud-native systems raises new and profound challenges. Traditional network

security is based on protecting perimeters — stopping unauthorized agents or software from getting in. By contrast, cloud-native architectures are based on the use of highly distributed, often ephemeral containers in a multi-developer, multi-platform environment. In addition, cloud-native applications draw on a much greater range of open-source and third-party software components and images. The large attack surface associated with container-based systems makes it necessary to have specialized cloud-native security solutions that can scan container images, assess misconfigurations and vulnerabilities, manage identity and access, and microsegment different parts of the Kubernetes clusters.

Third, open-source software and standards are becoming of prime importance, with enterprises starting to eschew solutions that are purely proprietary in nature. The

cloud-native ecosystem is largely built on open-source foundations, with Google Cloud making the original upstream Kubernetes open source, in 2014, and the CNCF contributing large numbers of open-source projects across the cloud-native ecosystem. The difference now is that open-source standards and tooling are increasingly a *sine qua non*; enterprises expect that even a commercial observability or cloud-native security platform will integrate with some open-source solutions such as Prometheus, OpenTrace or Falco. Enterprises are looking for solutions that tame the complexity of open-source, but ultimately, they want open-standard best-of-breed solutions, not closed platforms.

Looking specifically at the market for cloud-native services and solutions in the U.S., ISG notes several trends, which are summarized below.



Executive Summary

The available data suggests that adoption and use of containers and Kubernetes are high among the developer community in the U.S., but are showing some signs of plateauing. This finding is consistent with our view that cloud-native technologies are entering a more mature phase, focused on integration and optimization of these technologies. Sixty percent of backend developers in North America used containers in 2021 (slightly down from 62 percent the previous year); 33 percent used container orchestration (32 percent in 2020), according to SlashData's *The State of Cloud Native Development* report. However, the use of serverless architecture appears to be increasing (36 percent in 2021 versus 30 percent in 2020), as is the use of overall cloud-native technologies (for example, service meshes, microservices and declarative APIs), rising from 47 percent to 50 percent of developers.

A more recent, separate report from the CNCF indicates that 55 percent of its members in North America now use Kubernetes in production, with 30 percent using it in the proof-of-concept stage, and 11 percent not using Kubernetes, but evaluating it. While more than half of the North American CNCF members are using Kubernetes in production, it is notable that this proportion is lower than Europe (69 percent) and South and Central America (62 percent).

Automation, machine learning and AI are increasingly becoming important to cloud-native technologies and applications within the U.S. market. Providers and enterprises are looking to intelligent automation platforms and products as a way to automate traditionally time-consuming aspects of cloud-native operations and development. They are using them to reduce noise in increasingly large volumes of observability data

and provide advanced detection and remediation capabilities in cloud-native security, incidence and alert management systems.

The range of use cases for containers and cloud-native technologies is expanding, beyond the traditional focus on software applications, to encompass infrastructure-as-code (IaC) and use in machine learning applications. Another development is the growing use of containers with persistent data storage capabilities. Containers, by their nature, are often ephemeral, with their data usage transitory and short-lived. Persistent storage containers have tools or bridges to databases, making them more suitable for data-centric applications or in uses with stringent compliance requirements around data.

Finally, it is worth remembering that legacy applications and infrastructure remain important, even in an increasingly

cloud-native environment. Amidst the cloud-native revolution, the majority of applications for many enterprises in the U.S. are still legacy, often residing in on-premises environments. Migrating these applications is often difficult, for technical, regulatory or cost reasons. For these reasons, providers need to maintain skills and offerings in legacy infrastructure and applications, and to offer graduated solutions that bridge the gap between the legacy and cloud-native worlds.

Cloud native technologies are increasingly multi-cloud in scope.



Provider Positioning

Page 1 of 7

	Managed Container Services	Container Platform Solutions	Hyperscaler Cloud-native Platforms	Cloud-native Observability Solutions	Cloud-native Security Platforms
Accenture	Leader	Not In	Not In	Not In	Not In
Alibaba Cloud	Not In	Not In	Contender	Not In	Not In
Aqua Security	Not In	Not In	Not In	Not In	Product Challenger
Aspire Systems	Product Challenger	Not In	Not In	Not In	Not In
Atos	Product Challenger	Not In	Not In	Not In	Not In
AWS	Not In	Not In	Leader	Not In	Not In
Canonical	Not In	Product Challenger	Not In	Not In	Not In
Capgemini	Leader	Not In	Not In	Not In	Not In



Provider Positioning

Page 2 of 7

	Managed Container Services	Container Platform Solutions	Hyperscaler Cloud-native Platforms	Cloud-native Observability Solutions	Cloud-native Security Platforms
Chronosphere	Not In	Not In	Not In	Contender	Not In
Cisco	Not In	Not In	Not In	Market Challenger	Not In
Cisco (Portshift)	Not In	Not In	Not In	Not In	Product Challenger
Cognizant	Leader	Not In	Not In	Not In	Not In
Computacenter	Product Challenger	Not In	Not In	Not In	Not In
Control Plane	Not In	Contender	Not In	Not In	Not In
D2iQ	Not In	Product Challenger	Not In	Not In	Not In
Datadog	Not In	Not In	Not In	Leader	Product Challenger



Provider Positioning

Page 3 of 7

	Managed Container Services	Container Platform Solutions	Hyperscaler Cloud-native Platforms	Cloud-native Observability Solutions	Cloud-native Security Platforms
Diamanti	Not In	Contender	Not In	Not In	Not In
DigitalOcean	Not In	Not In	Contender	Not In	Not In
DXC	Leader	Not In	Not In	Not In	Not In
Dynatrace	Not In	Not In	Not In	Leader	Leader
Fairwinds	Not In	Not In	Not In	Not In	Contender
Giant Swarm	Not In	Product Challenger	Not In	Not In	Not In
Google	Not In	Not In	Leader	Not In	Not In
HCL	Leader	Not In	Not In	Not In	Not In



Provider Positioning

Page 4 of 7

	Managed Container Services	Container Platform Solutions	Hyperscaler Cloud-native Platforms	Cloud-native Observability Solutions	Cloud-native Security Platforms
Hitachi Vantara	Product Challenger	Contender	Not In	Not In	Not In
Honeycomb	Not In	Not In	Not In	Contender	Not In
HPE	Not In	Leader	Not In	Not In	Not In
IBM	Market Challenger	Not In	Product Challenger	Product Challenger	Not In
Infinite	Contender	Not In	Not In	Not In	Not In
Microsoft Azure	Not In	Not In	Leader	Not In	Not In
Mirantis	Not In	Leader	Not In	Not In	Not In
Mphasis	Product Challenger	Not In	Not In	Not In	Not In



Provider Positioning

Page 5 of 7

	Managed Container Services	Container Platform Solutions	Hyperscaler Cloud-native Platforms	Cloud-native Observability Solutions	Cloud-native Security Platforms
New Relic	Not In	Not In	Not In	Leader	Not In
Oracle	Not In	Not In	Product Challenger	Not In	Not In
Orca Security	Not In	Not In	Not In	Not In	Contender
OvHcloud	Not In	Not In	Product Challenger	Not In	Not In
Palo Alto Networks	Not In	Not In	Not In	Not In	Leader
Persistent Systems	Product Challenger	Not In	Not In	Not In	Not In
Platform9	Not In	Contender	Not In	Not In	Not In
Qualys	Not In	Not In	Not In	Not In	Contender



Provider Positioning

Page 6 of 7

	Managed Container Services	Container Platform Solutions	Hyperscaler Cloud-native Platforms	Cloud-native Observability Solutions	Cloud-native Security Platforms
SUSE Rancher	Not In	Leader	Not In	Not In	Product Challenger
Red Hat	Not In	Leader	Not In	Not In	Leader
Rudder	Not In	Not In	Not In	Not In	Contender
ServiceNow	Not In	Not In	Not In	Market Challenger	Not In
SLK Software	Contender	Not In	Not In	Not In	Not In
Sophos	Not In	Not In	Not In	Not In	Contender
Spectro Cloud	Not In	Contender	Not In	Not In	Not In
Splunk	Not In	Not In	Not In	Leader	Not In
Sumo Logic	Not In	Not In	Not In	Product Challenger	Contender



Provider Positioning

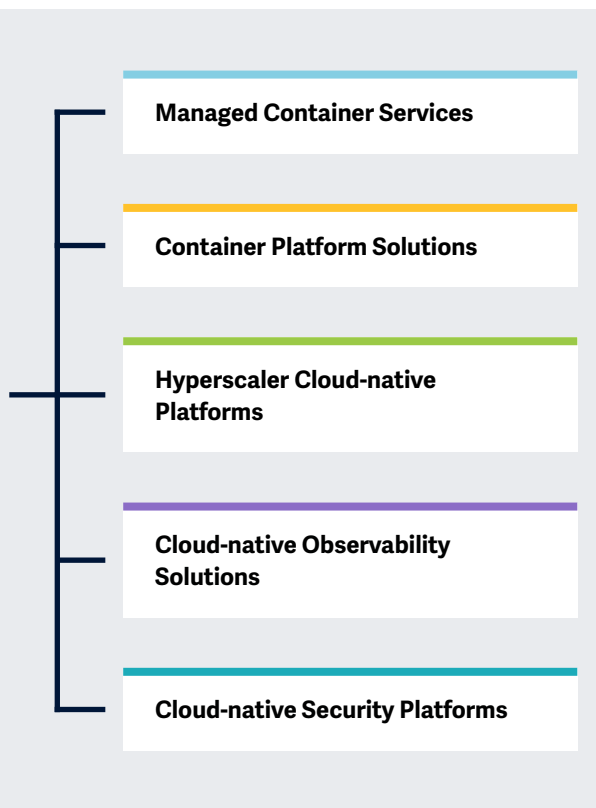
Page 7 of 7

	Managed Container Services	Container Platform Solutions	Hyperscaler Cloud-native Platforms	Cloud-native Observability Solutions	Cloud-native Security Platforms
Synk (Fugue)	Not In	Not In	Not In	Not In	Product Challenger
Sysdig	Not In	Not In	Not In	Leader	Leader
Tech Mahindra	Rising Star ★	Not In	Not In	Not In	Not In
Tenable (Accurics)	Not In	Not In	Not In	Not In	Product Challenger
Traefiklabs	Not In	Not In	Not In	Contender	Not In
UST	Product Challenger	Not In	Not In	Not In	Not In
Valuelabs	Product Challenger	Not In	Not In	Not In	Not In
VMware	Not In	Leader	Not In	Leader	Leader
Wipro	Leader	Not In	Not In	Not In	Not In



This study is on what ISG notes as critical in 2022 for **cloud-native services and solutions.**

Simplified Illustration Source: ISG 2022



Definition

In recent years, the development of lightweight software containers and orchestration tools has revolutionized the enterprise IT market, liberating enterprises, large and small, from the constraints of a fixed, monolithic IT infrastructure. This cloud-native approach focuses on building applications that are highly modular, adaptable, fault-tolerant and better capable of delivering value to end users. By decoupling applications from the underlying infrastructure, container solutions offer major advantages over traditional on-premises applications, which include light-touch updating of applications, faster scaling of compute and other resources to accommodate peaks in demand, the freedom to work in web-based programming languages, easier development of new applications, and better integration with DevOps and continuous integration/continuous

delivery CI/CD pipelines. Kubernetes, an open-source container orchestration system created by Google and maintained by a massive community of technologists, aids in this approach. As cloud-native technologies become more prevalent, however, attention is increasingly on managing some of the attendant challenges such as the need for new ways of working between development and operations (DevOps). Enterprises, therefore, take a variety of approaches to adopting cloud-native technologies across their technology environments. Some choose to work with managed service providers and system integrators (SIs) that offer managed container services, backed by skilled employees who can help configure entire platforms for cloud-native applications, migrate legacy workloads to containers and build new applications for enterprises to run on the platform. Others opt to directly procure container management



and orchestration capabilities, either by turning to independent software vendors (ISVs) for packaged Kubernetes distributions or by using the cloud-native offerings of hyperscalers as the foundation for their future. Increasingly, enterprises are also looking to the hyperscalers for cloud-native services and applications that span multiple clouds. With the shift to containerization, cloud-native observability and security are becoming top concerns for enterprises. Cloud-native technologies trigger many unique security challenges. The distributed and dynamic nature of containers makes monitoring, incident resolution and compliance more difficult. Containers make much greater use of third-party software and components, which can introduce vulnerabilities.

Identity and access/entitlement management are more difficult to manage in the multi-developer world. For these and other reasons, enterprises are increasingly turning to cloud-native security software providers, which have developed specialized solutions to map and protect the expanding attack surface in cloud-native environments.



Scope of the Report

In this ISG Provider Lens™ quadrant study, ISG includes the following five quadrants on managed container services, container platform solutions, hyperscaler cloud-native platforms, cloud-native observability solutions, and cloud-native security platforms.

This ISG Provider Lens™ study offers IT-decision makers:

- Transparency on the strengths and weaknesses of relevant providers and software vendors
- A differentiated positioning of providers by segments
- Focus on regional market

Our study serves as the basis for important decision-making in terms of positioning, key relationships and go-to-market considerations.

ISG advisors and enterprise clients also use information from these reports to evaluate their existing vendor relationships and potential engagements.

Provider Classifications

The provider position reflects the suitability of IT providers/ software vendors for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, and the corporate structures of customers and positions IT providers according to their

focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

Midmarket: Companies with 100 to 4,999 employees or revenues between \$20 million and \$999 million with central headquarters in the respective country, usually privately owned.

Large Accounts: Multinational companies with more than 5,000 employees or revenue above \$1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product Challenger, Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens quadrant may include a service provider(s) that ISG believes has

strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

Number of providers in each quadrant: ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).





Provider Classifications: Quadrant Key

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/services and a follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not in means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.





Cloud-native Observability Solutions

Who Should Read This

This report is relevant to enterprises of all sizes in the U.S. evaluating cloud-native observability vendors.

In this quadrant report, ISG highlights the current market positioning of cloud-native observability software vendors in the U.S. and how they address the key challenges faced by enterprises in the region.

ISG observes that a major challenge inherent in multicontainer applications is lack of real-time monitoring in container integrations. Enterprises require specialized tools that can help application developers and operators to identify the specific cause of a problem in a cloud-native environment. Data storage and monitoring applications need to comply with cloud-native observability regulations in the U.S.

Enterprise leaders are looking for vendors with AI and machine learning capabilities to understand application performance and detect anomalies in cloud-native solutions. Service providers continue to invest in building their AI capabilities to improve platform automation and accuracy through enhanced incident detection and eliminate false-positive errors in data observability.

Therefore, enterprises focus on implementing observability solutions in their platforms, as they are critical for the successful development of cloud-native applications.



IT leaders should read this report to better understand the relative strengths and weaknesses of cloud-native observability solution vendors and how their approaches to the market can affect the adoption of cloud-native technology among enterprises.



Sourcing, procurement and vendor management professionals should read this report to gain a better understanding of the current landscape of cloud-native observability solution vendors in the U.S.

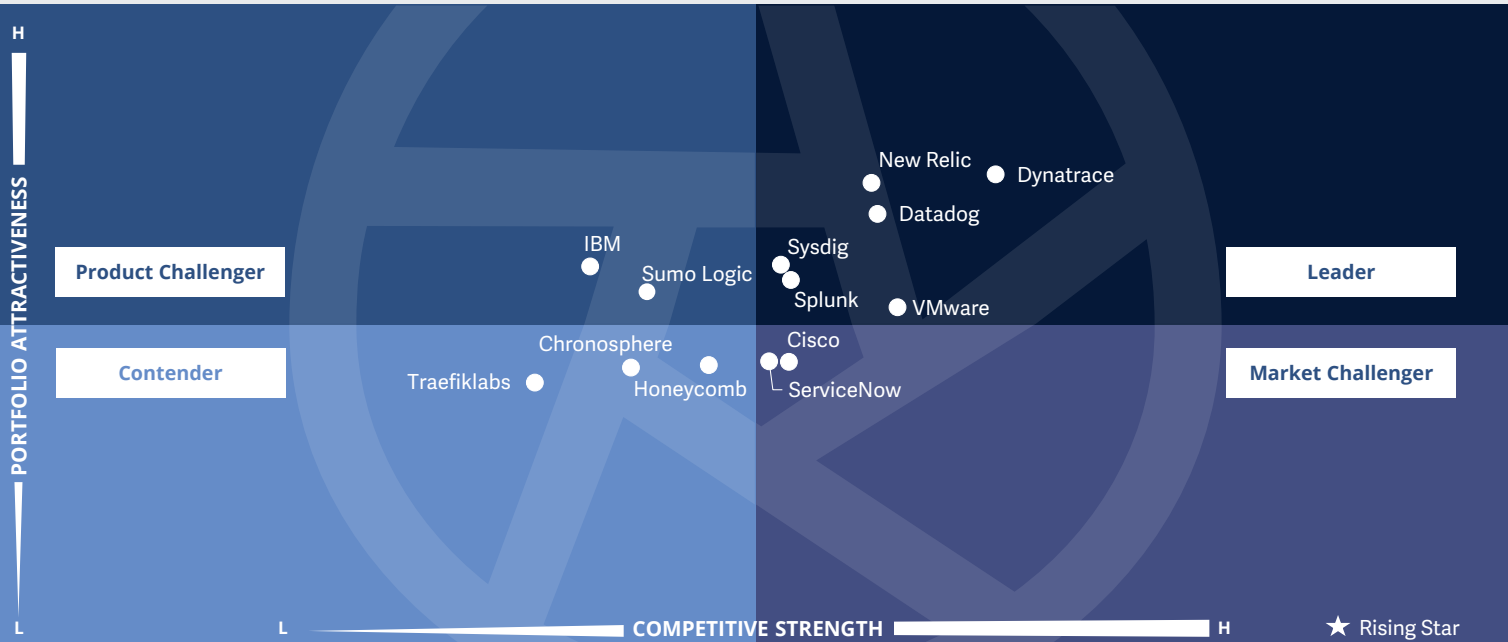


Software development and technology leaders should read this report to understand the positioning of cloud-native observability solution vendors and how their offerings can affect the development of cloud-native software, new skills and application platforms.



Cloud-native Services and Solutions
Cloud-native Observability Solutions

U.S. 2022



This quadrant assesses software providers offering dedicated solutions for observability. These providers are making increasing use of **machine learning** to better understand the **state of complex, highly distributed** cloud-native systems.

Mark Purdy



Cloud-native Observability Solutions

Definition

This quadrant assesses software vendors that provide dedicated solutions for observability (logging, tracing and measurement) of containerized applications. Understanding the behavior of these applications can be more complex than a traditional monolith. Developers and operators must understand the behavior of each containerized app or service, including how they communicate with one another. Using standard monitoring tools that have been built without considering 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 new cloud-native standard to ensure availability and performance. Thus, enterprises need to opt for specialized capabilities.

Eligibility Criteria

1. Software with **novel capabilities** to help enterprises understand the **inner workings and performance** of their containerized application environments
2. **Dedicated tools** meant for observability, specifically **multi-container applications**, with **support for highly granular microservices architecture**, and for applications that comprise a smaller number of complex services
3. Capability to work across **multiple infrastructure environments** under a hybrid cloud model
4. Resources to help enterprises **understand and implement the software** within their environment
5. Strong **connection between the solution's business model and enterprise outcomes** (for example, financial and performance benefits).



Cloud-native Observability Solutions

Observations

The cloud-native observability segment continues to evolve steadily. Four distinct trends can be discerned here.

Firstly, providers continue to invest heavily in bolstering their AI capabilities, both to improve the automation features of their platforms and to improve accuracy through increased detection of incidents and weeding out false positives and other elements of noise in observability data.

Secondly, an interesting development this year is the growth of industry-specific observability solutions focused on sectors such as financial services (for example, regulatory compliance and fraud), healthcare (for example, patient data protection), defense and the public sector.

Thirdly, enterprises are increasingly expected to retain and audit network data for regulatory purposes, for example, when providing services in the public sector. Observability providers are, therefore, adding new functionalities to enable the rapid and accurate auditing of observability data for regulatory purposes.

Finally, we are seeing an increasing convergence between the cloud-native observability and cloud-native security spaces, and several players in this quadrant are indeed active in both sectors.

From the 68 companies assessed for this study, 13 have qualified for this quadrant with six being Leaders.

Datadog

Datadog has recently launched Audit Trail, a regulatory checking tool to help enterprises track changes made on the Datadog platform. In May 2022 Datadog announced its intention to acquire Hdiv Security, a cloud-native security company, to bolster its capabilities at the intersection of observability data and security.



Dynatrace has continued to invest heavily in its AI-powered, all-in-one observability platform, based on the unified analysis of logs, metrics, trace, behavioral and topology data. It has recently acquired Njinn, a Dynatrace-native workflow automation platform, and SpectX, a rapid parsing and query analytics company.

New Relic

New Relic has demonstrated impressive growth in recent years. It offers observability solutions tailored to different industries, startups, the public sector and nonprofits. In May 2022, it announced enhancements to its platform to collect logs in the context of application metrics and traces.

Splunk

Splunk offers an observability platform that combines application and infrastructure monitoring with IT service intelligence. It is notable for its array of strong industry solutions in areas such as aerospace and defense and energy, and has significant penetration among large blue-chip enterprises.



Cloud-native Observability Solutions



Sysdig provides cloud-native observability through its Sysdig Monitor platform, and also offers managed services for Prometheus. It has invested heavily in expanding its workforce, made several acquisitions and is actively expanding its partner network through its new Global Channel-First approach. Sysdig remain an active contributor to the open-source cloud-native community.

VMware Tanzu Observability

VMware Tanzu Observability offers a full-stack observability platform that includes Kubernetes monitoring, application observability and application service insights. It also benefits from an extensive range of technology integrations. In May 2022, Broadcom, a global semiconductor and infrastructure software company, announced its intention to acquire VMware.





“Sysdig is emerging as a major force in cloud-native security.”

Mark Purdy

Sysdig

Overview

Sysdig is a cloud native observability and security company, based in San Francisco. Founded in 2013, it primarily serves large enterprises the midmarket, and multinationals. The company offers Sysdig Secure and Sysdig Monitor, which are based on the Sysdig platform architecture that encompasses cloud-native monitoring and security capabilities. It has more than 700 customers worldwide and a workforce of approximately 500 professionals globally.

Strengths

Managed Prometheus: Sysdig offers a managed Prometheus service designed to eliminate the maintenance burden encountered by organizations running their own open-source, DIY Prometheus on servers.

Right-sizing cloud: An interesting feature of Sysdig Monitor is its ability to show organizations where they are over- or under-provisioned on cloud resources. This can help them optimize their overall cloud spend.

Kubernetes Monitoring: Sysdig offers deep visibility and troubleshooting capabilities for Kubernetes.

Extending reach: In February 2022 Sysdig announced its new Global Channel-First approach to enhance sales with direct channel partners. Backed by investment in incentives and training, the initiative aims to broaden Sysdig’s customer base beyond the traditional G5000 group of very large enterprises.

Support for open standards: Sysdig created and maintains Sysdig Inspect, an open-source solution for investigating container faults. Its team of open-source experts also created projects such as Falco and Sysdig open source, along with contributing to eBPF libraries.

Caution

Sysdig’s pricing is generally seen as simple and competitive, which undoubtedly places it at an advantage. However, it may want to consider a larger variety of pricing models, especially as it extends its reach beyond its traditional base of large clients.





Appendix

Methodology & Team

The ISG Provider Lens™ 2022 – Cloud Native Services and Solutions – U.S. study analyzes the relevant software vendors/ service providers in the U.S. market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

Lead Author:

Mark Purdy

Editors:

Iphita Sengupta and John Burnell

Research Analyst:

Manoj M.

Data Analyst:

Sumit Kumar

Consultant Advisor:

Bernie Hoecker

Project Manager:

Mohammed Safwan

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The research and analysis presented in this report includes research from the ISG Provider Lens program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of June 2022, for providers who actively participated and for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

All revenue references are in U.S. dollars (\$US) unless noted.

The study was divided into the following steps:

1. Definition of Cloud Native Services and Solutions – U.S market
2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & use cases
4. Leverage ISG’s internal databases & advisor knowledge & experience (wherever applicable)
5. Use of Star of Excellence CX-Data
6. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
7. Use of the following key evaluation criteria:
 - * Strategy & vision
 - * Tech Innovation
 - * Brand awareness and presence in the market
 - * Sales and partner landscape
 - * Breadth and depth of portfolio of services offered
 - * CX and Recommendation



Author & Editor Biographies

Author



Mark Purdy
Principal Analyst

Mark Purdy is a Principal Analyst at ISG Provider Lens™ and brings over 25 years of experience working on economics and technology research in business and government. Mark has a focus on next-generation technologies, especially artificial intelligence and intelligent automation, digital twins, digital olfaction, machine learning, virtual reality, and edge computing. He is the author of several ISG Provider Lens™ studies, including

the 2021 Container Solutions and Services study for Europe, and the 2021 Intelligent Automation studies for the UK and the Nordics. He has published widely in tier-1 media and business publications such as Harvard Business Review and Sloan Management Review. He speaks on economics and technology issues at conferences, client workshops and seminars around the world.

Research Analyst



Manoj M.
Research Analyst

Manoj is a research analyst at ISG and supports ISG Provider Lens™ studies on Cloud Native Services & Solutions and Public Cloud Data Center Solution and Services. He also supports the lead analysts of multiple regions in the research process. Prior to this role, he supported the ROI process in sales intelligence platform and was an individual contributor in handling research requirements for advanced technologies in different sectors.

He has considerable expertise in predicting the automation impact by considering certain parameters such as productivity, efficiency and time reduction. During his tenure, he has supported research authors and authored Enterprise Context and Global Summary reports with market trends and insights.





IPL Product Owner

Jan Erik Aase
Partner and Global Head – ISG Provider Lens™

Jan Erik Aase brings extensive experience in implementation and research for service integration and management of both IT and business processes. He has more than 35 years of experience, is highly skilled at analyzing vendor governance trends and methodologies, adept at identifying inefficiencies in current processes, and capable of advising the industry. Jan Erik has experience in all four sides of the sourcing and vendor governance lifecycle — as a client, an industry analyst, a service provider and an advisor.

Now as the Research Director, Principal Analyst and Global Head of ISG Provider Lens™, he is well positioned to assess and report on the state of the industry and make recommendations to both enterprises and service provider clients.



*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](#).

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SEPTEMBER 2022

REPORT: CLOUD NATIVE SERVICES AND SOLUTIONS