Critical Capabilities for Public Cloud IT Transformation Services

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Initiatives:IT Sourcing Strategy Development and Execution

Public cloud is the foundational core to most organizations' digital transformation ambitions. Sourcing, procurement and vendor management leaders can use this research to assess public cloud transformation service provider capabilities, ensuring alignment with their strategic cloud business goals and objectives.

This Critical Capabilities is related to other research:

Magic Quadrant for Public Cloud IT Transformation Services

View All Magic Quadrants and Critical Capabilities

Overview

Key Findings

- Public cloud adoption involves a range of migration patterns that require diverse strategies, transformational capabilities and management approaches that result in distinct business outcomes.
- A sustained emphasis on adopting and modernizing digital technologies — such as AI, automation, data analytics, digital product engineering and enterprise applications — continues to drive the adoption of public cloud infrastructure as the foundational core.
- Customers that leverage service provider experience and capabilities in multicloud, automation/AI and complex migrations deliver public cloud transformation that achieves faster innovation, modernization and internal change management.

Recommendations

As a sourcing, procurement and vendor management (SPVM) leader responsible for public cloud solutions, you should:

- Identify a managed service provider (MSP) aligned to your organization's desired business outcomes, migration patterns and ongoing management styles to help ensure the success of your public cloud transformation initiative.
- Engage prospective service providers in co-solutioning your cloud strategy and solution design to better understand their approach, methodologies, capabilities and engineering insights. Use these engagements to establish shared expectations and to improve collaboration and joint innovation.
- Ensure the selected MSP for public cloud transformation has the prerequisite industry knowledge and geographical alignment to properly deliver the required capabilities and priority use cases.

What You Need to Know

Demand for public cloud IT transformation services (PCITS) continues to grow as organizations seek deeper expertise and specialization to help them realize their business objectives. The providers covered in this research aim to bridge organizational gaps in public cloud maturity by offering services suitable for migration, adoption, modernization and transformation requirements. These services combine the provider's expertise, resources, proven modernization/transformational processes and highly automated tooling to address client challenges while producing positive business outcomes.

In 2024, Gartner handled a significant volume of inquiries seeking cloud cost optimization advice. Clients spent less time moving to the cloud and more time rightsizing what they already had, adding incrementally. Gartner saw clients more eager to embrace hybrid multicloud for the right reasons (see A Multicloud Strategy Is Complex and Costly, but Improves Flexibility). Gartner's 2024 Gartner End-User Buying Behavior Study found that greater than 50% of respondents prefer a more agile/lean approach to sourcing that starts with outcomes and moves to solutions rather than traditional request for information/request for proposal (RFI/RFP)-driven approaches. [1]

In 2024, the major differentiator for a public cloud IT transformation services (PCITS) provider is similar to 2023, but increased — focusing on a client's business outcomes. More and more, providers are understanding that, with the complexity of cloud and multienvironments, business-outcome-driven engagements are the most successful for both client and provider.

This research should be reviewed by separating the groups into two kinds of providers::

- Innovative, cloud smart, business-driver-led, and cloud-native-focused (such as Magic Quadrant Leaders and Visionaries)
- More traditional and infrastructure-led, with a focus on optimization, but not necessarily business transformation (such as Magic Quadrant Challengers and Niche Players)

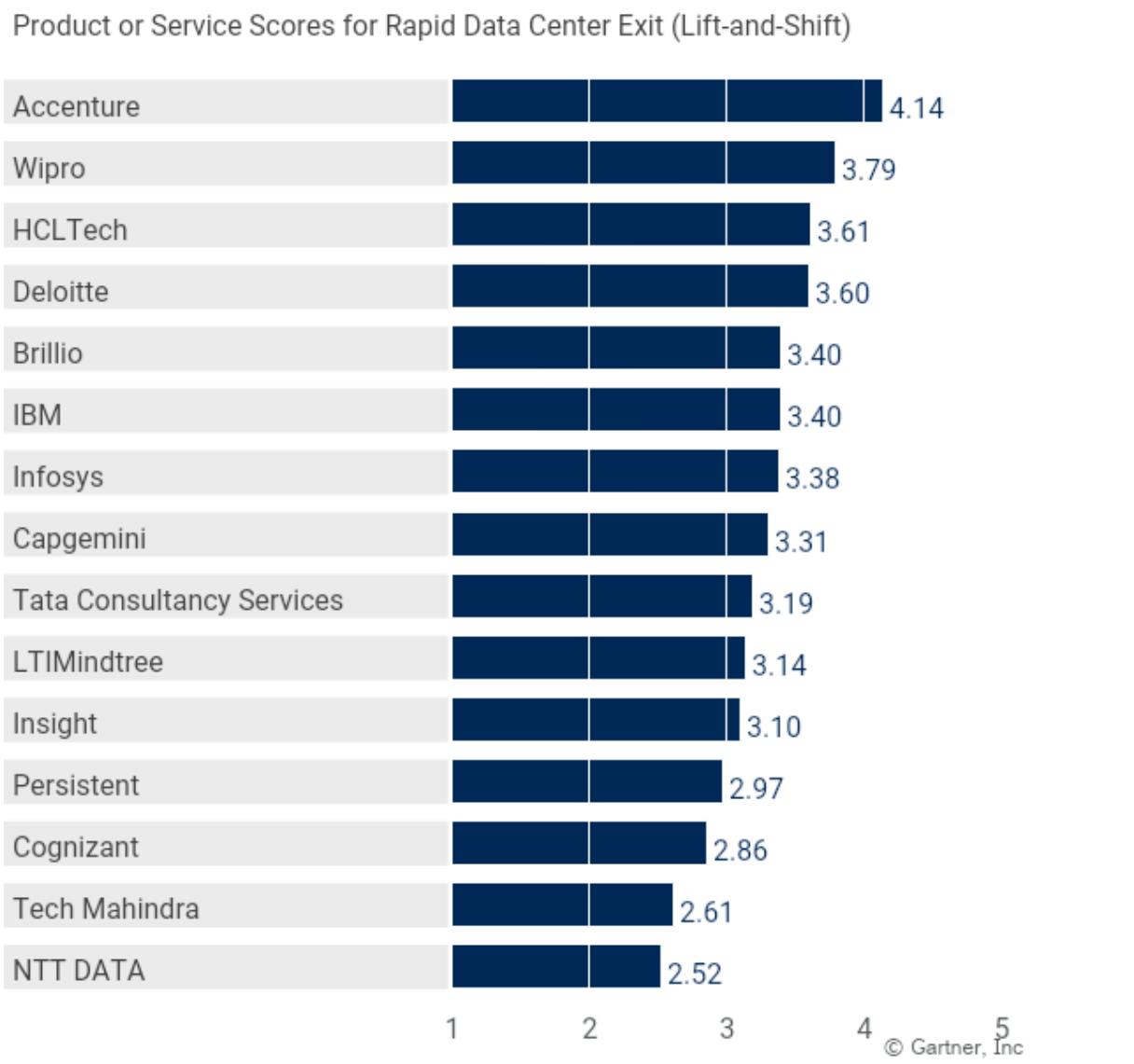
All of the providers in this Critical Capabilities and its companion Magic Quadrant continue to serve an increasingly large, diverse set of customers, ranging from small businesses and midsize enterprises (MSEs) to global corporations, spanning various industries and geographies.

You can use this research as a companion to the Magic Quadrant for Public Cloud IT Transformation Services to understand what to look for in a provider and which solution capabilities support your key business use cases. For a more in-depth determination, use the interactive version of this research, which allows you to adjust weighting for each use case to match your needs more specifically.

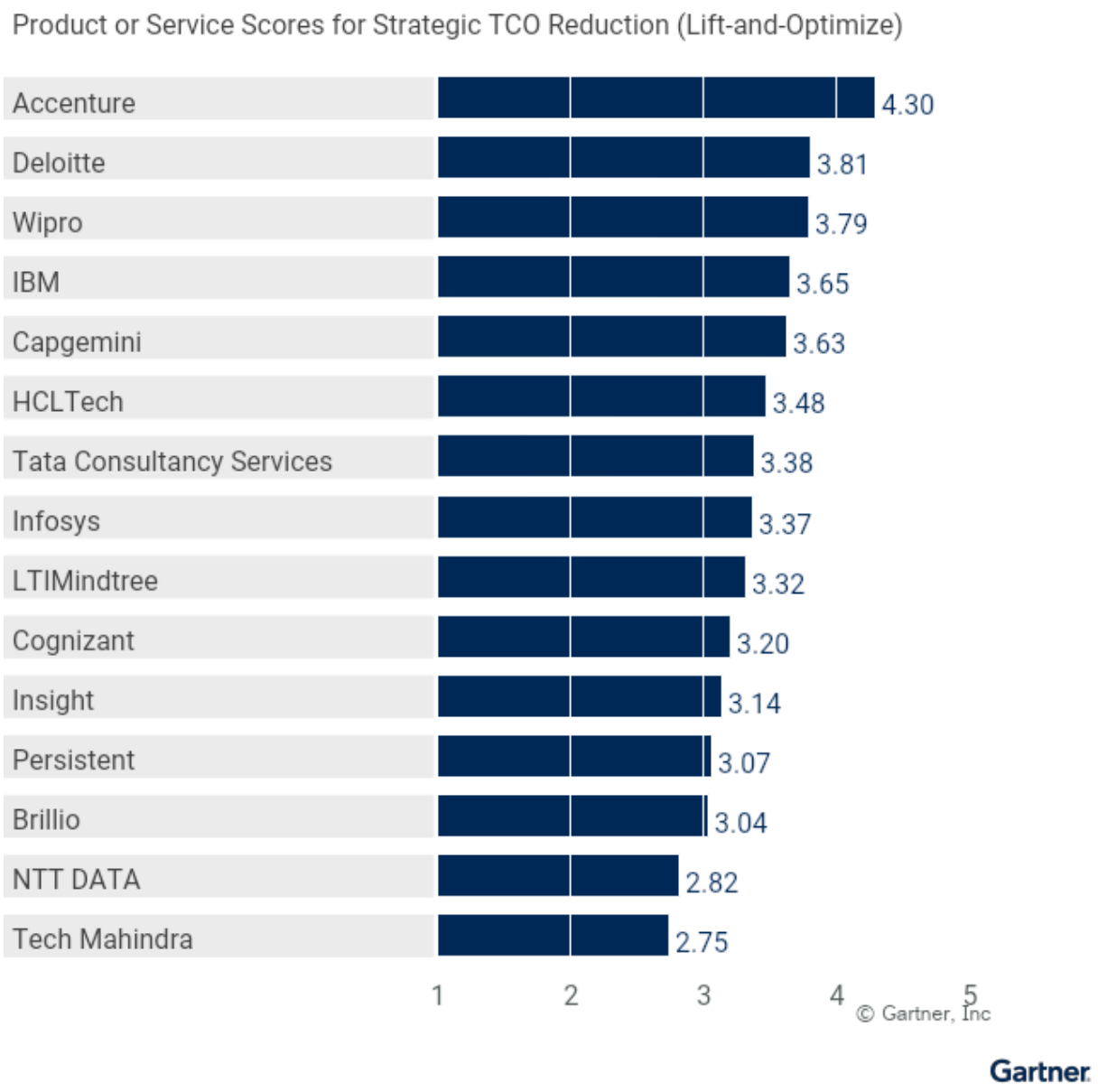
Analysis

Critical Capabilities Use-Case Graphics

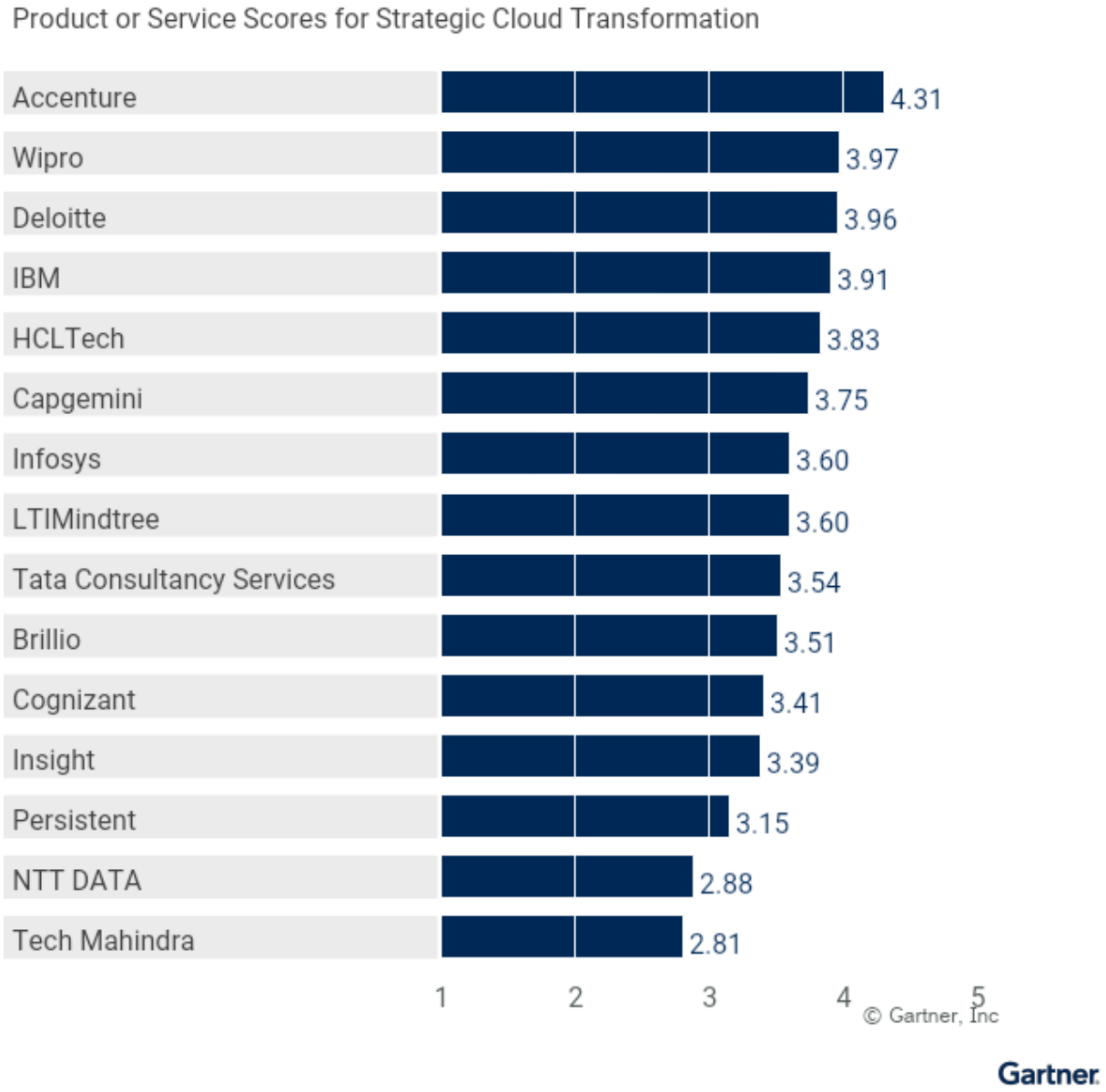
Vendors' Product Scores for Rapid Data Center Exit (Lift-and-Shift Mass Migration) Use Case



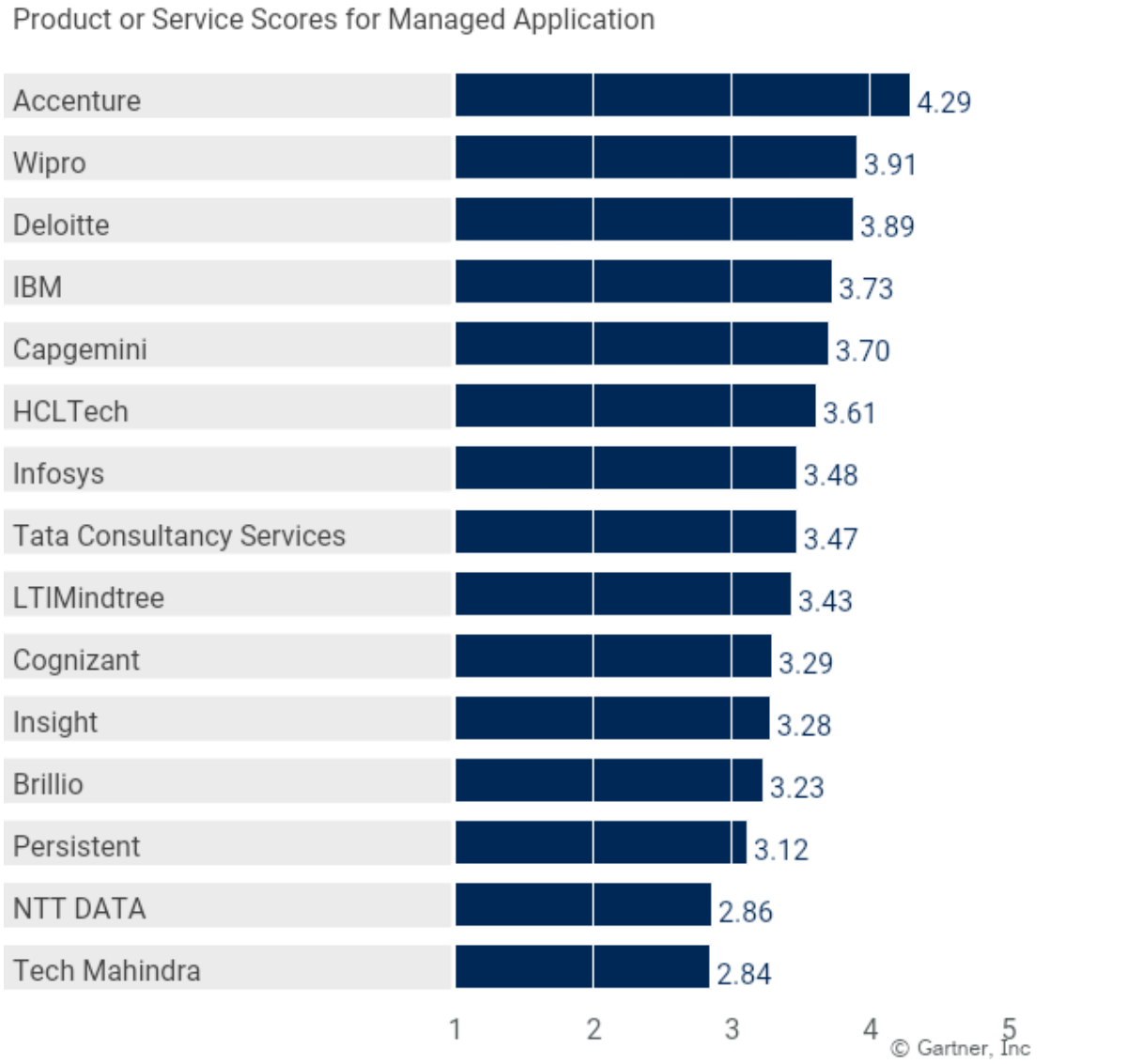
Vendors' Product Scores for Strategic TCO Reduction (Lift-and-Optimize Mass Migration) Use Case



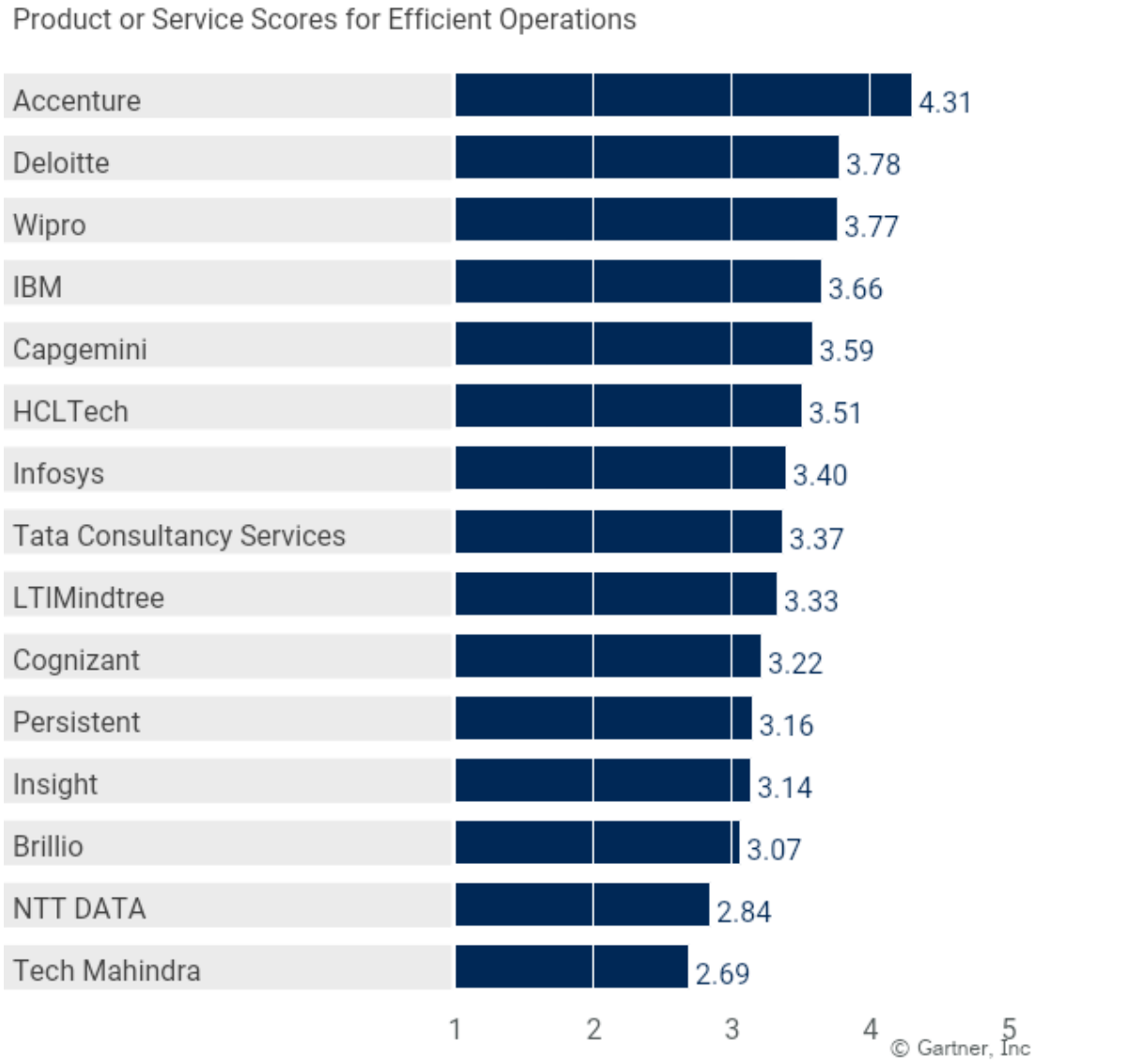
Vendors' Product Scores for Strategic Cloud Transformation Use Case



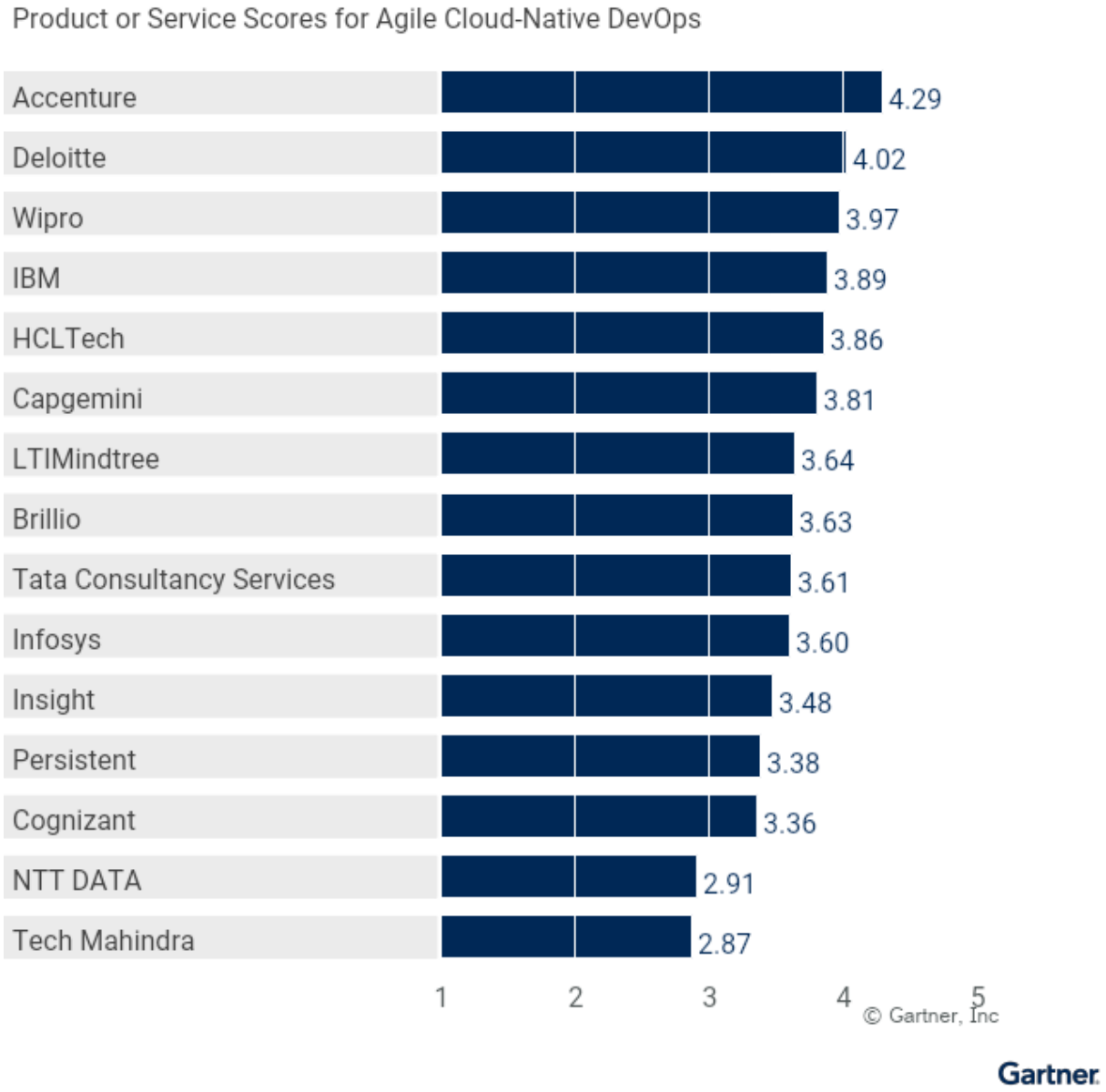
Vendors' Product Scores for Managed Application Use Case



Vendors' Product Scores for Efficient Operations Use Case



Vendors' Product Scores for Agile Cloud-Native DevOps Use Case



Vendors

Each provider's description starts with an introduction that includes its PCITS migration project count across cloud providers: Amazon Web Services (AWS), Google Cloud (formerly Google Cloud Platform), Microsoft Azure and Oracle Cloud Infrastructure (OCI).

Additionally, the sections within the profiles are presented to highlight the five critical capabilities that emphasize each provider's key strengths.

Accenture

Accenture is a leading global services company with 781,000 employees, of which nearly 29,000 are focused on public cloud IT transformation services. The company saw its PCITS business grow by a below-average 9% in 2024. Its capabilities are well-balanced across the different PCITS use cases and equally suited to both cloud-optimized and cloud-native transformations. It performed more than 4,500 PCITS migration projects for its more than 6,900 PCITS clients across Microsoft Azure, AWS, Google Cloud and OCI. Accenture's breadth and depth of expertise is highlighted in its long-term, large-scale, global business outcomes, and it continues to focus on global enterprise clients facing complex transformations.

Solution design: Accenture's Method One methodology differentiates itself by continuously optimizing the digital transformation process, including tollgate reviews and process reinvention. This allows for real-time evaluation as it builds, creating a solid foundation that meets or exceeds client requirements. This normally co-created solutioning is specifically helpful to clients still creating a business case.

Timely delivery: Accenture emphasizes an accelerated delivery approach, yet clients should understand that this is primarily regarding its solution design and not necessarily fast delivery outside of this phase. Its Synops platform enables its services, underpinning quality control and client delivery operations. Synops tracks and responds to resources, risks and change alerts to ensure optimal work and quality requirements.

Cloud workload optimization: Accenture offers tiered FinOps services, from foundational optimization for 2,000 clients (included in nearly all infrastructure managed services) to full FinOps services. Its FinOps by Design integrates economic considerations into architecture, engineering and operational decisions to achieve basic optimizations like shift-left resourcing. Pricing models vary, excluding a percentage of cloud spend, and clients must negotiate it in addition to their standard managed services.

Cloud-native toolchains: Accenture prioritizes cloud-native toolchains to boost developer productivity, integrating provisioning and enablement to accelerate its clients' cloud transformation journey. It provides tools, along with composable building blocks and business-domain-oriented microservices, that are readily available to unlock productivity quickly and avoid delays. This establishes the right cloud-native pipelines for automated build, test security and DevSecOps. Its cloud application factory investments is enabled through a structured engineering enablement and training approach.

Knowledge sharing: Accenture's LearnVantage tools upskill client resources, keeping them up-to-date on the latest certifications, directly transferring knowledge and building capabilities within the client's team. It is experienced in sharing and building cloud centers of excellence (CCoEs), but it continues to receive mixed client feedback. This reinforces its preference for doing what it feels is best-in-class, even if misaligned with the client's needs.

Brillio

Brillio is the smallest digital technology and solutions company included in this research with 6,000 enterprise employees, of which 5,000 are PCITS-focused. The company saw its PCITS business grow by a market average of 14% in 2024. Its scale makes it suited to smaller clients or focused strategic cloud transformation or managed application transformations that align with its expertise in leveraging emerging technologies to accelerate digital journeys. In 2024, it performed 55 PCITS projects for more than 100 PCITS clients across Microsoft Azure, AWS, Google Cloud and OCI. Brilio seeks to provide tailored solutions that drive business outcomes through collaboration and by understanding a client's unique challenges to devise effective digital strategies.

Solution design: Brillio employs a consulting design-led approach, favoring co-creation projects, but lacks the extensive experience of all other providers in this research. As Brillio scales, clients should request recent vertical case studies to understand its abilities. With 60% of its staff dedicated to application and product development and high certification rankings per resource, it's progressing well.

Timely delivery: Brillio begins with its pulse-led design thinking discovery model that utilizes structured workshops (typically lasting six to eight weeks) to build an enterprise transformation approach, which is designed to help enterprises that have grown organically over time. These identify projects and showcase transformation possibilities within a relatively short time frame. Brillio typically serves customers that are time bound by critical events, such as needing to exit a VMware Cloud Foundation (VCF) scenario due to approaching license renewals and increased pricing. Brillio welcomes clients seeking to expedite their processes as a deliverable.

Cloud workload optimization: Brillio offers CloudOps as a service to manage the cloud environments after migration, aiming to reduce costs. A specific focus is placed on cloud financial capabilities, ensuring its spend is limited to avoid overruns, especially for its multicloud clients. Its BilOps service, an extension of FinOps that is applicable for a large number of Gartner inquiries, significantly reduces VMware core usage and costs.

Cloud-native toolchains: Brillio leverages several tools and platforms, which align with elements of cloud-native toolchains, to optimize cloud workloads. It includes infrastructure automation (IaC templates) with Terraform, site reliability engineering (SRE) and observability platforms with Log.io and CoreStack. Brillio's large number of multiskilled certified resources across at least three hyperscalers implies an agile utilization capability for native and integrated tools.

Knowledge sharing: It specifically developed a Train-the-Trainer program to onboard and organically build broader competency across its workforce. Brillio codified knowledge assets embed repeatable processes and best practices for delivery, with infrastructure automation templates, created by Brillio, retained in the customer's repository.

Capgemini

Capgemini is a large global services provider with over 340,000 enterprise employees, of which the company claims approximately 150,000 are PCITS-focused. In 2024, its PCITS business grew by just 9%, significantly lower compared with other providers in this research. Capgemini's capabilities make it particularly suited to large-scale enterprise application transformations, cloud optimization delivery for multicloud enterprises, or a strong European presence. Capgemini performed about 500 PCITS migration projects for more than 5,000 PCITS clients across Microsoft Azure, AWS, OCI and Google Cloud. Capgemini is proficient in delivering cost optimization, enhanced performance and business value outcomes.

Solution design: Capgemini actively engages clients in co-creating optimal solutions, reflected in positive client feedback. It utilizes deep industry expertise and global assets (Industry Cloud Accelerator [ICA], Clear Sight and Enterprise Automation Fabric [EAF]), plus workshops, to build structured business cases for public cloud value, which covers efficiency, scalability, risk and compliance. Its broad experience building transformational solutions across infrastructure as a service (IaaS), platform as a service (PaaS) and SaaS reinforces this capability.

Timely delivery: Capgemini's extensive global delivery network comprises 130 centers across more than 50 countries. This network provides access to skilled talent, supporting its Rightshore approach that blends onshore, nearshore and offshore delivery models. It utilizes standardized methodologies, advanced tools and continuous improvement practices, along with cross-functional teams and training programs, to maintain performance. Client feedback in a shared case study highlighted Capgemini's responsiveness to feedback as a positive deciding factor.

Cloud workload optimization: Capgemini integrates FinOps in managed services to optimize cloud spend and total cost of ownership (TCO), achieving average savings up to 30% with some of its tools, such as Cloudability. Gainshare is a key model, reinvesting savings into transformation. Automated recommendations optimize cloud-native deployments. Projects show reducing infrastructure and optimizing operations for cost/environmental gains.

Cloud-native management: Capgemini's offerings focus on agile cloud-native DevOps. It provides fully managed Kubernetes and container platforms for 3,030 clients (Azure Kubernetes Service [AKS], Elastic Kubernetes Service [EKS] and Google Kubernetes Engine [GKE] orchestration). Provider-agnostic cloud-spanning solutions (Azure Arc and Google Anthos) are supported. Managed infrastructure monitoring/AIOps and application monitoring platforms are supported.

Cloud-native toolchains: Capgemini uses its platforms (X-Gen, Production Line) and standard tools like Azure DevOps, GitHub, Helm and Kubernetes. Automation covers continuous integration/continuous delivery (CI/CD), security scans and Terraform infrastructure as code (IaC). Toolchains augment staff and enable self-service via portals/templates. It provides fully managed CI/CD for 3,530 clients.

Cognizant

Cognizant is a large global services provider with over 330,000 enterprise employees, of which nearly 100,000 are PCITS-focused. In 2024, Cognizant's PCITS business grew by only 7%, considerably lower than other providers in this research. Cognizant's PCITS capabilities tend to be application-led, making it more suited to enterprise application and cloud optimization transformations, particularly in healthcare and financial services industry verticals. Given its size and peer set, the number of migration projects performed in 2024 (135) was also exceptionally low; the sizes of the projects were also below average. It claims more than 1,300 PCITS clients across Microsoft Azure, AWS, Google Cloud and OCI.

Solution design: Cognizant offers a consulting-led approach, with 75% of its PCITS deals involving precontract co-creation. Early client engagement through frameworks and workshops enables understanding of needs and challenges, allowing for solution refinement based on client priorities. This co-creation and articulation demonstrates Cognizant's capability to meet its clients' objectives in migration and modernization.

Timely delivery: Cognizant leverages a global delivery network and strong program management to ensure timely outcomes. Its Skygrade platform accelerates migration timelines by 35% to 40% annually for complex implementations. Using agile principles, generative AI (GenAI) mechanisms and integrated IT service management (ITSM) tools, Cognizant manages progress effectively. A healthcare case study showcased achieving a client's data center exit target by delivering the platform migration on schedule.

Cloud workload transformation: Cognizant modernizes and migrates clients' IT landscapes, including legacy and monolithic application architectures, to the cloud using a structured factory approach. Its application modernization practices cover various aspects like legacy modernization, application-led cloud migration and data modernization, supported by domain expertise and strategic provider partnerships.

Cloud-native management: Its services include managed Kubernetes and container platforms, which support 200 clients, as well as infrastructure monitoring, observability and AIOps platforms, which support 280 clients. These services use its Neuro IT Operations, an integrated set of solutions designed to understand customer requirements and help ensure that the developed solutions meet those needs. It supports cloud-native DevSecOps with AIOps features and integration with industry-standard tools to improve resilience and visibility over native IT operations, but it is average in efficient operations. Clients should focus on Cognizant's operational approach during sourcing evaluation to ensure alignment.

Cloud-native toolchains: Cognizant employs essential DevOps and DevSecOps tools like AWS CodePipeline, Azure DevOps, GitLab, Jenkins and JIRA. These toolchains augment its staff by enabling capabilities like pipeline as code, automated issue transitions and streamlined project management. Cognizant can demonstrate comprehensive support for cloud-native development workflows through fully managed CI/CD pipelines and tooling, upon request.

Deloitte

Deloitte is a global professional services network with 460,000 employees that saw significant PCITS revenue growth of 20% in 2024. Deloitte's consulting-led approach makes it particularly suited to transformation initiatives encompassing large strategic cloud transformations as part of broader digital initiatives. It is not as suited to less ambitious or smaller-scale management and transformation projects. Deloitte did not wish to publicly disclose PCITS project or client numbers. Deloitte seeks to position itself as a trusted advisor, adopting a digital-first, cloud-native approach to delivering strategic business outcomes.

Timely delivery: Deloitte's average migration times are significantly higher than the mean for the PCITS providers in this evaluation. This may be due to Deloitte's tendency to encourage more extensive changes to application code and more significant alteration of infrastructure environments. Prospective clients with looming deadlines should question Deloitte about trade-offs that can be made to accelerate delivery.

Cloud workload optimization: Although Deloitte prefers to take a cloud-native approach to delivery, it performs a considerable amount of cloud migration using the "revise" pattern, driving application modernization, PaaS adoption and cloud infrastructure automation in pursuit of TCO-reduction outcomes. Deloitte has numerous accelerators that increase the efficiency of this work, which is augmented with GenAI capabilities.

Cloud workload transformation: Deloitte's preference for digital-first, cloud-native solutions means that a significant percentage of its PCITS business is focused on rearchitecting and rebuilding applications within the context of a strategic transformation initiative. Deloitte has mature standardized frameworks, industry-specific intellectual property and repeatable processes that enable this work. These elements are supported by significant automation and tools, including the use of GenAI to enhance productivity.

Cloud-native toolchains: Deloitte's Ascend platform is centered on the agile development cycle and the related DevOps life cycle. Its tools are flexible enough to accommodate not only software engineering teams, but also data science teams. The capabilities encompass the entirety of the life cycle in an integrated fashion, allowing clients the ability to adapt tool usage to their preferred operating model.

Knowledge sharing: Deloitte engages in co-creation and co-innovation activities with its clients. It performs knowledge-sharing activities in approximately one-fourth of its engagements. Deloitte strongly encourages its clients to adopt its organizational frameworks, including its version of a CCOE, but clients need to ensure that these frameworks are customized to fit their needs, especially when they are not pursuing a digital business transformation.

HCLTech

HCLTech is a global technology company with 220,000 employees, of which just under 100,000 are PCITS-focused. In 2024, its PCITS revenue grew slightly below average at 14%. HCLTech's delivery capabilities are balanced across the PCITS use cases, making it suited to cloud-optimized, cloud-native and efficient operations initiatives for organizations seeking to leverage technology for growth, efficiency and innovation in an evolving digital landscape. It performed nearly 5,000 PCITS projects for 4,300 PCITS clients across Microsoft Azure, AWS, Google Cloud and OCI. It adopts a customer-first mindset, working closely with clients to understand their specific challenges and delivering tailored solutions aligned to business outcomes.

Solution design: HCLTech's consultative sales and delivery teams are generally aligned with specific industries, leveraging their industry expertise to shape and inform the solutions they propose. It will co-innovate with customers, including delivery using shared-risk models reflected in the strategic cloud transformation and managed application use cases.

Timely delivery: HCLTech claims some of the fastest turnaround times for migrations, with durations ranging from as little as three days for the smallest applications to 34 days for the largest. This efficiency is achieved even though it performs relatively fewer lift-and-shift migrations compared with other providers. This underpins the rapid data center exit use case in which HCLTech scored above average in this research.

Strategic cloud transformation: HCLTech uses a high level of automation throughout migration delivery, even when applications are rebuilt or rearchitected. This is aided by a deep portfolio of industry-specific accelerators. It frequently assists clients with DevOps transformation, including SRE implementations. Clients who are not ready for immediate or accelerated automation, based on Gartner interactions, may not be the right fit for HCLTech's PCITS.

Cloud-optimized toolchains: HCLTech uses its custom-developed AI Force platform to deliver hybrid cloud operations, enterprise monitoring and service desk capabilities as part of its overall suite of platform capabilities that deliver improved decision making and compliance. AI Force incorporates GenAI augmentation throughout the IT service management life cycle. HCLTech's approach emphasizes using the same operations approach for the public cloud as for on-premises and edge infrastructure design, providing a consistent governance and compliance posture across complex hybrid cloud environments.

Knowledge sharing: HCLTech provides knowledge sharing via traditional approaches like formal training, hands-on workshops and labs, and ongoing postimplementation support. However, its offerings are relatively limited compared with the leaders in this research. Clients will need to be clear on their expectations and negotiate the delivery of knowledge-sharing activities. HCLTech is open to discussing the strategic transfer of personnel to ensure optimal alignment with client needs and project goals.

IBM

IBM is a global technology and consulting company with over 160,000 employees, of which just under 60,000 are PCITS-focused. In 2024, IBM's PCITS business grew by an above-average 18%. IBM is still evolving its PCITS offerings, featuring solid capabilities balanced across the PCITS use cases, which makes it suited to cloud-optimized and cloud-native transformations. IBM performed nearly 900 PCITS migration projects for more than 4,000 PCITS clients across AWS, Microsoft Azure, Google Cloud and OCI. It takes a consulting-led approach, targeting deep relationships and steering clients' VMware cloud modernization and product-centric value delivery, with a focus on business outcomes and hybrid multicloud.

Solution design: IBM's approach is based on a consulting-led strategy development, which helps clients recognize the benefits of modernization and transition to a product-centric, cloud-native delivery model. IBM claims the highest level of co-solutioning with clients through its IBM Garage framework, an accelerated, collaborative and iterative approach to solution development and transformation. IBM's Consulting Advantage platform serves as a central repository for assets and reusable agents harvested from client engagements utilizing automation and AI to accelerate the solutioning phase.

Timely delivery: IBM is investing in its structured methodology, reusable assistance agents, accelerators and client status dashboards, which while currently delivering average cloud migration timelines, should provide benefits in the future. Therefore, clients need to focus on the maturity of IBM's accelerators through proofs of concept (POCs) or detailed reviews.

Cloud workload transformation: IBM is focused on the adoption of modern cloud architectures, encouraging clients to transform environments to leverage cloud-native technologies. Through its Hybrid by Design and Agentic AI frameworks, GenAI-powered assets, and assistants and industry-focused approach, IBM accelerates cloud transformation across the software life cycle, achieving high levels of automation. IBM's automated workflows and factory-based approach support legacy modernization, digital product/platform engineering and data modernization, helping to enhance speed to market and cost-efficiency.

Cloud-native management: IBM delivers improved system reliability, operational efficiency and better decision making in hybrid multicloud environments through its Plastic Recovery Insight and Steering Model (PRISM) and AIOps platforms. PRISM leverages insights, automation and AI to proactively identify and resolve issues, reducing costs by providing automated, consistent and common operations. Its AIOps is an integrated platform providing automated instrumentation and AI-based insights orchestrated by intelligent automation.

Cloud-native toolchains: IBM leverages cloud-native and third-party provider tools (including acquired products OpenShift, Apptio and Terraform) and supplements these with its own consulting assets and assistants to plug gaps, provide integrations and enhance solutions. IBM's Consulting Advantage platform provides a central repository for these reusable assets and assistance agents that automate key development and industry patterns.

Infosys

Infosys is a large global services provider with over 320,000 employees, with approximately 260,000 PCITS-focused. Its PCITS business grew by an above-average 26% in 2024. In 2024, Infosys performed nearly 8,000 PCITS migration projects for more than 1,500 PCITS clients across Microsoft Azure, AWS, Google Cloud and OCI. Infosys promotes business outcomes like TCO reduction, business growth/disruption and more efficient operations built around less ambitious levels of change. Infosys is often seen as steady and dependable by clients, with capabilities more aligned to cloud-optimized transformations.

Solution design: Infosys uses deep talent and industry expertise to understand client issues and co-create optimal solutions. It broadens client perspectives and clearly expresses solutions in proposals and agreements. Its industry cloud narrative aligns with industry consortiums, providing ready-to-deploy offerings for various sectors. Infosys uses consulting-led co-creation in many deals while offering services such as cloud assessments, demonstrating its strong capability to tailor and present solutions effectively.

Cloud workload optimization: Infosys reported significant TCO reductions, exemplified by a client case study of 30% TCO reduction and 48% total PI over several years. It offers comprehensive FinOps services, including practice establishment, reporting and optimization implementation, which are available through gain share or integrated into managed services. Its cloud management platform (CMP) includes consolidated billing and supports cost optimization, augmented by automated remediation and recommendations.

Cloud-optimized management: Infosys uses the SRE approaches and cognitive automation with AIOps to aim for ZeroOps. It utilizes Infosys Cobalt accelerators for cloud management, which integrate programmatically with ITSM tools through APIs, event hooks and data extractors. Its CMP tool acts as a management portal with API access, identity integration, consolidated billing and service request management features. Dedicated squads focusing on platform tools and SRE support this capability.

Cloud-optimized toolchains: Infosys positions its cloud-agnostic assets under its Cobalt brand, bringing together third-party GenAI-powered tools with its own methodologies, scripts and accelerators and helping clients achieve cost savings through optimization and efficient operations. Its comprehensive CMP tool serves as a management portal, offers APIs, integrates IAM, consolidates billing and connects with ITSM tools.

Knowledge sharing: Infosys delivers knowledge sharing through training, mentorship and co-working to upskill client personnel. Through its Wingspan portal — a digital learning platform offering thousands of courses on AI, cloud and machine learning (ML) — it can accelerate talent transformation within clients. Knowledge transfer is embedded in projects through agile documentation, tools and client engagement in project squads for decision making and retention.

Insight

Insight is a global IT solutions provider with nearly 15,000 employees, of which 4,000 are PCITS-focused, growing its PCITS business significantly by 40% in 2024. Insight has a solid vision around which it structures its capabilities. However, its relative size and subsequent ability to invest in broader tooling and automation makes it better suited to new or stand-alone cloud-native transformations without the need to manage legacy estates. In 2024, Insight undertook 650 PCITS projects for more than 2,400 PCITS clients across Microsoft Azure, Google Cloud and AWS. Insight's client-centric approach helps build client understanding to deliver tailored solutions.

Solution design: Insight is still building out its consulting capabilities, which requires an increased level of senior client stakeholder engagement to align solutions to business objectives. It seeks to co-create blueprints before engaging accelerators and implementation mechanisms like migration factories. However, compared with its peers, governance definitions and guardrails are more basic and will require a higher level of oversight from client organizations.

Timely delivery: One of Insight's core delivery principles is "start fast, deploy for use, iterate quickly," which sets it apart from some peers in this research that traditionally take longer to build a clearer and more detailed strategy before commencement. Insight aims to accelerate self-service and efficiency designing phases with a high degree of parallel execution and continuous improvement. This supports faster delivery compared with sequential methods while aligning with business objectives, shared with its clients, to eliminate unnecessary delays.

Cloud-native management: The Insight principle, "all software platforms are defined as code with everything delivered as a service," underpins cloud-native development and operations, emphasizing automation, API-driven services, and codified infrastructure and applications. Its unified control plane for multicloud environments integrates third-party tooling to manage at scale. Its delivery framework includes standardized migration and modernization factories to scale cloud-native adoption.

Cloud workload optimization: Insight addresses cloud workload optimization in several ways, focusing on cost and operational efficiency. Its services are designed to accelerate self-service and efficiency. It aims to deliver predictable costs in its clients' hybrid cloud environments. Outcomes are more IT-outcome-focused than business-outcome-focused, which makes Insight a good fit for clients looking for technical debt reduction. In a specific case study, it reported 40% savings compared with the established baseline.

Knowledge sharing: Insight states that it leads and establishes the foundations and roadmap for client empowerment. The principles it uses to equip customers for self-support are the same used to equip its own managed services. It also applies "insight accelerators" after establishing a solution, which can be seen as packaging and sharing codified knowledge or prebuilt components.

LTIMindtree

LTIMindtree is a global technology consulting and solutions company with nearly 82,000 employees, of which just under 30,000 are PCITS-focused. LTIMindtree saw its PCITS business grow by a slightly below-average 16% in 2024. LTIMindtree's scale makes it suited to midsize organizations' strategic cloud transformation initiatives, leveraging innovative solutions and industry-focused architectural patterns. In 2024, it completed nearly 3,200 PCITS projects for more than 500 PCITS clients across Microsoft Azure, AWS, Google Cloud and OCI. It takes a collaborative customer-centric co-solution approach that is focused on business outcomes and an ability to handle challenging landscapes.

Solution design: LTIMindtree adopts a synergetic solution design approach to understand the client's expectations and establish a clear vision and tailored strategies for cloud transformation. Its approach is built around its modernization platform, which provides a knowledge fabric, actionable intelligence and a roadmap-aligned agentic framework. It leverages a low level of co-solutioning with clients, which may require clients to take greater leadership in developing the optimum solution.

Timely delivery: LTIMindtree ensures timely delivery by employing structured outcome-focused methodologies and platforms of automation, focusing on improving operational efficiency and aligning deal structures with client benefits. Its approach centers on established methodologies, agent-based automation and a factory-based approach, which supports predictable execution and delivers shorter cloud migrations. However, its scale, tooling investment and geographic coverage may make it less suited to large, complex multielement transformations.

Cloud workload transformation: LTIMindtree is better suited for cloud workload transformations. Through its cloud transformation platform, it leverages established automation, agents and methodologies like its S-curve model to establish a roadmap of optimizations, achieving excellent levels of automation. It is focused on enhancing developer productivity through a fully automated DevSecOps pipeline process, integrating multiple third-party tools that they adapt through different engineering archetypes.

Cloud-native management: Through its platform-centric ecosystem, LTIMindtree cloud-native management services are built on driving automation, optimizing costs, modernizing applications for cloud platforms, leveraging AI/GenAI, and providing flexible operational and commercial models, all supported by deeply skilled, multicloud-capable teams and an emphasis on continuous improvement and an evergreen approach.

Cloud-native toolchains: LTIMindtree's support for cloud-native toolchains involves strategically selecting and implementing modern platform tools, automating processes for efficiency, leveraging AI, and establishing standardized and repeatable factory models. Its DevOps platform provides software development life cycle (SDLC) tool connectors, simplified CI/CD pipeline creation, AI coding tools and value stream dashboards that enable DevOps at scale.

NTT DATA

NTT DATA is a global technology and business solutions provider with nearly 200,000 employees, of which just under 30,000 are PCITS-focused. In 2024, Gartner estimates that its PCITS revenue remained level or declined slightly. NTT DATA continues to adjust its enterprise focus with its PCITS services lacking the vision and capabilities of its peers in this research. This makes it more suited to existing clients or clients with less ambitious transformation ambitions. In 2024, NTT DATA performed about 600 PCITS projects for nearly 2,000 PCITS clients across AWS, Microsoft Azure, Google Cloud and OCI. It provides a full spectrum of cloud services as an enabler for businesses looking to enhance agility, innovation and sustainable growth.

Solution design: NTT DATA's utilizes an experience-driven client-centric methodology focused on strategic workload placement and playbooks derived from experience with clients. It builds out transformation roadmaps, offering comprehensive, client-focused approaches that go beyond technical implementation. It integrates strategic planning, FinOps, automation and platform standardization to deliver business outcomes.

Cloud workload transformation: NTT DATA encourages clients to transform legacy environments to better leverage cloud-native approaches. It has built industry templates and accelerators to streamline modernization, accelerate cloud adoption and enhance operational efficiency. Its tools integrate AI, automation, microservices and APIs to enable faster, secure and scalable transformation. However, it currently achieves lower levels of automation than some others in this research.

Cloud-native management: NTT DATA supports the management of cloud-native environments by providing a robust, automated and observable platform, underpinned by modern operational practices, such as DevSecOps and SRE, and integrated with AI, aiming to deliver operational efficiency and business outcomes. It structures its delivery model around pods of experienced full-stack engineers engaged in both transformation and ongoing support, fostering continuity and understanding in managing cloud-native environments.

Cloud-native toolchains: NTT DATA's approach involves prioritizing the use of readily available cloud-native tooling, supplemented with its own assets. It integrates these tools within an orchestration platform and methodologies that enable rapid, efficient and observable management of cloud environments. NTT DATA's digital delivery platform creates an AI-powered ecosystem that orchestrates, optimizes and secures IT operations at scale.

Knowledge sharing: NTT DATA's approach includes enablement and knowledge transfer as key aspects empowering client IT organizations. It provides knowledge assets (playbooks), insights and roadmaps and facilitates knowledge transfer, especially when migrating to new tech stacks. It actively engages client technical leadership and business stakeholders, fostering mutual understanding and knowledge exchange.

Persistent

Persistent is a global technology services company with 24,000 employees, of which 14,500 are PCITS-focused. The company saw its PCITS business grow by an above-average 20% in 2024. Its size makes it suited to small and midsize businesses or smaller, more focused strategic cloud transformations delivering end-to-end technology solutions to improve operational efficiency, enhance customer experiences and drive innovation. In 2024, it performed about 170 PCITS projects for more than 500 PCITS clients across AWS, Microsoft Azure, Google Cloud and OCI. It deploys the same business focus and domain knowledge of larger providers, yet is small enough to bring a more boutique experience when delivering cloud solutions.

Solution design: Persistent uses a tailored "meet the customer where they are at" approach. It builds its approach around a structured set of accelerators, automation, and innovative technologies and techniques utilizing GenAI and ML to build the optimum solution. Its PiCloud platform designs, develops and deploys cloud architectures to build customizable solutions for specific contexts.

Cloud workload transformation: The majority of Persistent's engagements are focused around midsize cloud-native transformations because it lacks the depth of investment in tooling integration required for cloud-optimized transformations. It takes a holistic approach to building a solution for clients, through its SASVA platform, providing capabilities to reverse engineer and analyze existing codebases. The platform allows Persistent to conduct detailed evaluations of existing applications — including portfolio analysis and migration planning — and to modernize outdated technology components or applications, reporting 50% time savings when compared with manual methods.

Cloud-native management: Persistent's SASVA platform approach assists in the management of the entire software development life cycle through code conversion and modernization, automated testing and data generation, and assessment planning. It claims that some SDLC phases — such as market research, product roadmapping, prototyping, backlog creation and work estimation — are 10 times faster with SASVA than traditional methods. It also orchestrates several in-house-developed agents to help developers fix defects or even make fixes without human intervention.

Cloud-native toolchains: Persistent has built its toolchains through the integration of open-source and third-party tools, providing a standardized approach. It supplemented this with a number of individual-focused solutions built around a strong end-to-end tooling vision. These complement its SASVA platform, an integrated platform that offers solutions from ideation to postdeployment operations.

Knowledge sharing: Through Persistent University, it develops training programs designed to equip business stakeholders with the requisite skills for effective platform utilization. Its knowledge sharing is integrated into its service delivery model, actively aiming to transfer practical knowledge and skills to the client's workforce to drive up successful adoption and realization of value from the implemented solutions.

Tata Consultancy Services

Tata Consultancy Services (TCS) is a large global services provider with over 600,000 employees, including 155,000 focused on PCITS. Its PCITS business grew by 17% in 2024, slightly below the average. TCS offers broad delivery capabilities across PCITS use cases, but can be more variable in its delivery. It tends to lead with less hard-driving cloud optimization and transformation approaches, which minimizes upfront costs and makes it more suited to less ambitious client transformations. In 2024, TCS performed about 1,400 PCITS migrations for more than 2,200 PCITS clients across Microsoft Azure, AWS, Google Cloud and OCI. TCS outcomes include increased operational accuracy, GenAI-accelerated technology transformation and improved sustainability.

Solution design: TCS aims to use its advisory model and transformation expertise to become a strategic partner, prioritizing customer goals such as lifetime value; digital revenue; improved experience; and earnings before interest, taxes, depreciation and amortization (EBIDTA). Its approach includes co-creation and co-solutioning; developing structured business cases; and utilizing a cloud transformation office framework for governance, design authority and tracking business value realization. This holistic strategy is reflected in numerous 2024 deals featuring design and architecture services.

Timely delivery: TCS employs an integrated quality management system with standardized guidelines for transition, migration, development, testing and operations. Regular audits and reviews monitor scope, compliance and customer satisfaction, with corrective actions if needed. It utilizes accelerators and tools for creating roadmaps, designing foundations, and enabling predictable migration and modernization.

Cloud workload transformation: TCS positions engagements as a "journey toward an AI first enterprise" and "reinvention" for clients, highlighting its bankable transformation expertise and "save and grow" model. TCS utilizes accelerators and tools such as its Cloud Migration Factory hub and MasterCraft TransformPlus for predictable migration and modernization, delivering successful client outcomes.

Cloud-optimized management: TCS delivers comprehensive managed services for process control technology (PCT) operations via platforms like TCS Cloud Exponence, including cloud operations, service reliability, security operations and FinOps. Its CMP offers self-service features such as a management portal, APIs, consolidated billing, service request management, monitoring, analytics, provisioning and expense management. It supported CMP capabilities to directly manage hyperscale IaaS/PaaS for 210 clients in 2024.

Cloud-optimized toolchains: TCS provides proprietary frameworks, accelerators, and platforms like TCS Cloud Exponence to automate cloud life cycle processes, from assessment and roadmapping to migration and operations. To reduce risks and costs, its CMP provides self-service access to capabilities — such as monitoring, analytics, provisioning, expense management and identity integration — augmenting clients' staff members for efficient management.

Tech Mahindra

Tech Mahindra is a global services provider with 150,000 employees, of which 27,000 are focused on PCITS. In 2024, its PCITS business grew by a significant 32%. Its PCITS capabilities are less mature than some others in this research, and it tends to lean on its specific industry knowledge in telecommunications and other operational-technology-dominated industries. It is therefore suited to less ambitious cloud-optimization projects for existing clients or those industry verticals. It performed nearly 400 PCITS projects across its 400 PCITS clients for AWS, Microsoft Azure, Google Cloud and OCI. It takes a customer-centric approach, combined with domain expertise and a commitment to quality and sustainability.

Solution design: Tech Mahindra's cloud strategy is based on distributed ecosystems, industry contextualization and service as software. It aims to begin with a consumption conversation, prioritizing how clients consume services and desired outcomes over resources. This top-down, outcome-driven design approach, although best in class, requires clients to ensure business outcomes guide tools and solutions, not vice versa.

Cloud workload transformation: Tech Mahindra views cloud workload transformation as a core component of enabling "phygital businesses," bridging physical with digital, particularly in the manufacturing realm. It's a prudent choice for clients seeking data and AI transformation, as demonstrated by a case study of Optus, for which it developed a unified data and analytics platform that improved customer experience and used AI-powered personalization to increase revenue.

Cloud-optimized management: Tech Mahindra views cloud-optimized management as an inherent outcome of its cloud transformation approach, which is built on SaaS, a hybrid cloud control plane, pervasive integration of AI and security, and robust tooling. It states that FinOps solutions are automatically built into large-client managed services offerings (over $5 million annually), yet pricing is not included and must be negotiated if looking for specific use cases. Clients will need to spend time co-designing cost optimization SLAs and outcome-based pricing models.

Cloud-optimized toolchains: Tech Mahindra's comprehensive integrated suite of tools and platforms facilitate management and optimization of hybrid cloud. It views those as essential enablers for its cloud strategy. Tech Mahindra uses delivery platforms, such as the New Age Delivery (NAD) and Cognex Edge Intelligence (EI) platforms, to shift its cloud management to 65% automation.

Knowledge sharing: Tech Mahindra considers knowledge sharing a crucial component for enabling its clients and ensuring successful adoption and operational effectiveness of any client's cloud transformation. It delivers comprehensive training programs and ongoing support and resources. It also leverages its parent company's best practices from assessment through an operational checklist, offering best-in-class internal lessons, particularly for the manufacturing and telco industry verticals.

Wipro

Wipro is a global technology services company with 225,000 employees, of which 145,000 are attested to be PCITS-focused. Its PCITS business grew by a below-average 9.1% in 2024. Wipro's vision for its PCITS services provides a balanced approach across the PCITS use cases, making it equally suited to cloud-optimized and cloud-native transformations. However, its capabilities can be inconsistently delivered across regions. In 2024, It performed over 1,200 PCITS projects for more than 1,000 PCITS clients across Microsoft Azure, AWS, Google Cloud and OCI. Wipro positions itself as a trusted advisor, delivering innovative solutions and helping clients achieve their strategic objectives in a rapidly changing digital landscape.

Solution design: Wipro takes an advisory-and consulting-led approach, driven by its Cloud Studio accelerator and engineering skills to deliver client-customized solutions. Its pluralistic approach looks at every layer of the technology stack to drive compliance and specific workload requirements. It leverages assets, accelerators and tooling, incorporating AI to help drive its industry and regionally aligned approach while delivering tailored solutions.

Timely delivery: Wipro has integrated its structured approach and orchestrated, automated workflows, honed through proven client experiences, into its Cloud Studio accelerator to drive faster transformation delivery. Wipro reports some of the shortest implementation timelines of providers in this research, although these may be biased by a high level of client engagements involving rapid data center exits.

Cloud workload optimization: Wipro delivers both cloud-optimized and cloud-native transformations, but is particularly suited to cloud-optimized transformations. Its Cloud Studio accelerator integrates a number of third-party tools to analyze application layers, dependencies and recommend strategies. Its methodologies focus on ongoing cloud workload optimization, including a defined FinOps framework, continuous rightsizing and performance tuning services, all contributing to achieving optimized cloud workloads.

Cloud-optimized management: Wipro focuses on utilizing its deep technical expertise to build and manage cloud-optimized environments that deliver improved performance and outcomes for clients. It also focuses on autonomous execution and dynamic task sequencing, ensuring efficient continuous cloud compliance and workflow orchestration/automation of operational processes to enable increased deployment cadence and quality.

Cloud-optimized toolchains: Wipro's cloud-optimized toolchains are designed as FullStride capabilities across the application life cycle through a marketplace of microapplications. This includes Cloud Studio observability, operations, assurance and governance capabilities delivering a continuous compliance platform that enables automation and efficiency across the cloud life cycle. Wipro demonstrates one of the most coherent toolchains in this market, which has enabled it to achieve 93% auto resolution in operations, signifying significant efficiency gains powered by AI integration.

Context

An increasing number of cloud mass migration programs are technical successes but fail to deliver the customer's desired outcomes — especially TCO reduction. While the *good* implementations are better than ever in their outcomes, delivery time frames and program costs, an ever-increasing percentage of *bad* implementations result in customer disappointment.

Customers that engage in full digital transformation programs — transforming their applications, processes, mindsets and ways of working across the business — are significantly more likely to achieve desired outcomes than those that merely move their workloads to the cloud. However, these programs are fundamentally *business* transformations and not merely *IT* transformations.

This is where the use of public cloud IT transformation services providers — MSPs — enters because it is a vital ingredient in such programs. Most organizations do not have a sufficient number of employees with the breadth and depth of cloud skills — or the transformation mindset — necessary to drive large-scale cloud migration or digital transformation programs.

Gartner has observed that the quality of the organization's cloud MSP is one of the best predictors of its cloud satisfaction one year after implementation. Approximately three-quarters of public cloud IaaS and PaaS implementations include the use of a cloud MSP.

However, MSP quality varies tremendously. Furthermore, within a given MSP, the quality of individual engagements can vary unpredictably. Three issues are of particular note:

- **Delivery team variability** — Like enterprises, MSPs struggle to recruit, train and retain sufficient employees with in-demand cloud-related skills. Therefore, members of a delivery team may be inexperienced and can vary widely in their expertise and competence. Absent a contractual agreement based on deliverables or outcomes, the client may find that, without demanding a certain level of experience and qualifications, it is saddled with an MSP delivery team that is learning as it goes. This is a waste of the client's time and money and delivers suboptimal results that bear little resemblance to the promises made during the sales process.
- **Local team variability** — In most global MSPs, individual delivery teams can propose and deliver solutions as they see fit. This variability is especially acute at the local (country) level, where the local practice may nearly entirely ignore the intellectual property and best practices developed and offered at the global (or even regional) level. Therefore, the local teams do not benefit from the hard-won lessons of experience at the global level, and effectively function as if they were part of a local MSP. Conversely, many global MSPs have grown by acquisition, and the former acquisitions may still operate in their historical fashion — which can be better or worse than the global entity.
- **Customer variability** — Customers frequently issue RFPs that specify what they want an MSP to do and how they want them to do it, rather than explaining their desired business outcomes. Customers rarely know what a best-practices implementation should look like, and therefore, they often ask for things they shouldn't. Obtaining a custom solution is also more expensive than obtaining an industrialized solution. Customers should instead ask MSPs to propose their preferred approaches, and then structure a contract that is based on outcomes.

In this research, MSPs are scored based on what they can deliver at the global level when they are at their best, as well as what they *typically* deliver. However, customers should anticipate the need to contract carefully for PCITS offerings to increase the likelihood of receiving an optimal engagement.

Market Definition

Gartner defines public cloud IT transformation services (PCITS) as services designed to deliver transformational outcomes via the utilization of cloud-native professional and managed services. It includes migration, modernization, optimization and the building of new, transformational solutions on public hyperscale cloud infrastructure and platform services. Organizations seeking to use public clouds such as Amazon Web Services (AWS), Google Cloud Platform (GCP), Microsoft Azure, Oracle Cloud Infrastructure (OCI) and similar platforms engage with providers in this market to realize the greatest transformational benefits.

PCITS transforms client applications, workloads and data to the public cloud to achieve their clients' business outcomes. It promotes use of cloud-native tools, AI/generative AI (GenAI)/data and analytics (D&A) and manages IT operations in the public cloud. It employs globally consistent cloud management, optimization and modernization to continuously manage reliability, scalability, interoperability and more.

Mandatory Features

- **Comprehensive transformation approach:** The service emphasizes digital transformation, from migration through optimization, encompassing rehost (lift and shift), revise (lift and optimize) and rebuild (lift and transform). It executes infrastructure-led activities like rehosting and portions of revision, but specializes in digital transformation services that demand substantial architecture and engineering expertise.
- **Business outcome engagement:** The engagement model prioritizes business outcomes. It initiates discussions by understanding clients' business objectives and then translating them into future-proof application, data and platform requirements rather than diving into technical specifics.
- **Cloud-native and application development expertise:** The service offers a range of application development capabilities, while emphasizing cloud-native precepts when designing application architectures and operational models. By adhering to these principles, it maximizes the benefits of a client's environment, future-proofing autoscalability, resilience, elasticity and efficient resource utilization for the client's solutions.
- **Multicloud expertise:** The service includes a beneficial and innovative use of cloud services from multiple public cloud providers, based on the same general class of comparable IaaS and/or PaaS solutions or workloads.

- **ESG:** The service addresses environmental and social sustainability and associated governance. It also focuses on the ESG impacts of the service in a client's environment.

Common Features

Tools:

- Discovery and migration
- Prebuilt development environments/industry models
- Portals and APIs
- Cloud operations
- Cloud financial management

Professional services:

- Cloud-native solution architecture design
- Holistic cloud application strategy focused on integration and optimisation, (e.g., commercial software, SaaS and underdeveloped applications)
- Cybersecurity strategic advisory
- Transformation incorporated across all phases of the cloud adoption life cycle.
- Agile approach to core client/vendor tool integration (e.g., IT service management (ITSM) integration for ticket management or DevSecOps tooling)
- Data and analytics/AI/GenAI capabilities

Managed services:

- Technical support (e.g., service desk and issue resolution, monitoring, configuration management)
- Cloud workload management, optimization and operational evolution
- Provisioning and deployment (managed continuous integration/continuous delivery [CI/CD])

- Maintain and strengthen security posture compliance and network services

Product/Service Class Definition

Many global system integrators (GSIs) have cloud transformation capabilities; however, this Critical Capabilities and its companion Magic Quadrant offer a view of providers that is more specifically focused on public cloud transformation and is business-led or application-led instead of infrastructure-led.

The market definition comprises the following key aspects:

- Providers deliver positive business impacts born from IT transformation. A "transformational IT outcome" is one that uses new technologies and paradigms to meet or improve on business objectives. For example, the outcome is transformational if building a cloud-native solution in a hyperscale cloud infrastructure and platform services (CIPS) platform results in a significantly improved or new KPI — such as revenue, margin, customer satisfaction or retention.
- The engagement between the customer and the service provider is application-led, rather than infrastructure-led. Discussions of specific technical solutions are deferred until an understanding of the business objective has been achieved. Business objectives are more effectively stated as application and data requirements, rather than technical requirements for which infrastructure and platform services should be used to achieve them.
- Solutions are built exclusively with public hyperscale CIPS and SaaS. Providers can deliver complete, transformative solutions using only public cloud resources, freeing the customer from the responsibility of building, maintaining and managing the existing environment.
- Cloud-native precepts are emphasized for application architecture and operational models. The benefits of the cloud model are maximized when cloud services are used as designed, with technical and operational choices that result in autoscalability; resiliency; and elastic, fine-grained resource consumption.
- Rehost, revise, rearchitect, rebuild and replace are generally considered the five R's of cloud transformation. Rehost and some portion of revise are considered infrastructure-led activities, while the remaining R's are the focus of application-led transformation services.

- Application development services are in scope. Providers have some degree of application development capability, ranging from the ability to take existing code and modernize it for use in the cloud to building new applications from scratch to be operated as custom-made services.
- SaaS integration and management are in scope, but as an add-on functionality, not an endpoint. Providers may optionally deliver services for managing and integrating SaaS into the customer's environment.
- Complex application integration and management are in scope. Providers may optionally deliver services for integration and management of complex enterprise applications from providers, such as SAP, Oracle and others on the public cloud.
- Managed service capabilities are in scope. Providers must offer the capability to deliver fully managed services for their clients. This includes oversight of daily operations and optimization of infrastructure operations and management on the public cloud.

Critical Capabilities Definition

Solution Design

This capability evaluates the MSP's presales and consulting capabilities, including understanding the client's desired outcomes and challenges; broadening the client's thinking; co-creating the optimum solutions; and effectively expressing solutions in proposals, statements of work (SOWs) and agreements.

This capability is measured against the following:

- **Adoption of co-creation:** The MSP's adoption of co-creation and co-solutioning in both precontract and postcontract interactions with clients.
- **Migration approach:** The MSP's drive to find the right migration and transformation approach for the client as opposed to simply adopting low initial cost "lift-and-shift" approaches.
- **Business case support:** Support provided to clients in building a structured and balanced transformational business case.
- **Industry focus:** The MSP's adoption of industry vertical-specific configuration blueprints and solution templates.
- **Discover/assess automation:** The MSP's adoption of automation, ML and AI in the discovery and assessment phases of the transformation life cycle, and its ability to maximize the effectiveness of that automation.
- **Design automation:** The MSP's adoption of automation, ML and AI in the design phase of the transformation life cycle, and its ability to maximize the effectiveness of that automation.

Timely Delivery

This capability evaluates the MSP's ability to deliver effectively, including project staffing, working relationships with clients, effective program and project management, and timely delivery of promised outcomes and expectations.

This capability is measured against the following:

- **PCITS services staff:** The availability and growth in skilled resources.

- **Resource attrition:** The evaluation of the service provider's resource health and personnel sustainability, leading to risks around loss of experience and client account understanding.
- **Business outcomes:** The adoption of contracted business outcome metrics to drive the successful delivery of PCITS deals.
- **Transformation timeliness:** The MSP's ability to successfully leverage its methodologies, artifacts and assets to ensure fast implementation and migration timelines.
- **Delivery methodology:** The clarity and maturity of the MSP's delivery methodologies to ensure the timely delivery of PCITS projects.
- **Migration automation:** The MSP's adoption of automation, ML and AI in the migration phase of the transformation life cycle, and its ability to maximize the effectiveness of that automation.

Cloud Workload Optimization

This capability evaluates the MSP's ability to apply the "revise" pattern to applications and their environments, preparing them for cloud-optimized (and where feasible, cloud-native) operations approaches.

This capability is measured against the following:

- **Database replacement:** The ability of the MSP to optimize a client's public cloud environment through the adoption of database PaaS services to enhance client transformations.
- **Serverless environments:** The ability of the MSP to optimize a client's public cloud environment through the adoption of serverless PaaS services such as Kubernetes and containers to enhance client transformations.
- **Enterprise solutions:** The MSP demonstrates the capability to support clients in the optimized deployment of enterprise applications to the public cloud.
- **IaaS/PaaS adoption:** The MSP's levels of IaaS/PaaS adoption, which demonstrates a value-based approach to cloud workload optimization.
- **Service definition:** The MSP's service definitions and market material demonstrate a clear focus, structured value messaging and associated case studies.

- **Optimization approach:** The clarity and maturity of the MSP's optimization approach and methodologies ensures the timely and value-based delivery of PCITS projects.
- **Optimization automation:** The MSP's adoption of automation, ML and AI in the optimization of the public cloud solutions, and its ability to maximize the effectiveness of that automation.

Cloud Workload Transformation

This capability evaluates the MSP's ability to apply the "rebuild" or "rearchitect" pattern to applications, preparing them for cloud-native DevOps.

This capability is measured against the following:

- **Service definition:** The MSP's service definitions and market material demonstrate a clear focus, structured value messaging and associated case studies.
- **Industry cloud templates:** The MSP demonstrates support for industry-vertical-focused solutions through its investment in industry cloud-native templates and/or accelerators.
- **Cloud-native transformation approach:** The clarity and maturity of the MSP's cloud-native transformation approach and methodologies ensures the timely and value-based delivery of PCITS projects.
- **Cloud-native capabilities:** The MSP's capabilities for building and/or running applications that take advantage of the unique characteristics of cloud environments, such as using immutable, autonomous, scalable and elastic infrastructure patterns.
- **Cloud-native transformation automation:** The MSP's adoption of automation, ML and AI in the cloud-native transformation of public cloud solutions, and its ability to maximize the effectiveness of that automation.

Cloud-Optimized Management

This capability evaluates the MSP's cloud-optimized managed services, focused on the people and process aspects of delivery.

This capability is measured against the following:

- **Legacy management:** The MSP's ability to effectively manage a client's optimized public cloud environment through the support for native autoscaling and load balancing.
- **Service definition:** The MSP's service definitions and market material demonstrate a clear focus, structured value messaging and associated case studies.
- **Platform capabilities:** The MSP provides a cloud-optimized management platform that is public-cloud-agnostic, supports automated provisioning and deployment, manages serverless environments, supports scalability, and provides ongoing observability and compliance.
- **Cloud-optimized management approach:** The clarity and maturity of the MSP's cloud-optimized management approach and methodologies ensures successful ongoing management of these solutions.
- **Cloud-optimized management automation:** The MSP's adoption of automation, ML and AI in the ongoing management of the cloud-optimized solutions, and its ability to generate maximum efficacy from that automation.

Cloud-Native Management

This capability evaluates the MSP's cloud-native DevOps capabilities, focused on the people and process aspects of delivery across the entire application life cycle, including effective collaboration with the client's teams.

This capability is measured against the following:

- **Service definition:** Do the service definitions and market material demonstrate a clear focus, structured value messaging and associated case studies.
- **Cloud-native experience:** The MSP experience of managing cloud-native solutions at scale.
- **Cloud-native developers:** The level of MSPs resources that have cloud-native application/product development skills and experiences.
- **Platform capabilities:** The MSP provides a cloud-native management platform that is public-cloud-agnostic, supports automated provisioning and deployment, and manages cloud-native environments including ongoing observability and compliance.

- **Cloud-native management approach:** The clarity and maturity of the MSP's cloud-native management approach and methodologies to ensure successful ongoing management of these solutions.
- **Cloud-native management automation:** The MSPs' adoption of automation, ML and AI in the ongoing management of the cloud-native solutions, and its ability to generate maximum efficacy from that automation.

Cloud-Optimized Toolchains

This capability evaluates the MSP's tools, platforms, automation and other capabilities necessary to support a cloud-optimized life cycle, including how such toolchains both augment MSP personnel and enable client self-service.

This capability is measured against the following:

- **CMP capabilities:** The MSPs' cloud management platform (CMP) provides a wide range of capabilities that support public cloud environments in support of cloud-optimized solutions.
- **Cloud-optimized automation:** The MSPs' adoption of automation, ML and AI in support of cloud workload optimization and the ongoing management of the cloud-optimized solutions, and its ability to generate maximum efficacy from that automation.
- **Technology stack completeness:** The MSP demonstrates a clear vision for its cloud-native toolchain across the complete cloud transformation life cycle.
- **Level of integration:** The MSP has invested in integrating and enhancing cloud-native, open-source and third-party solutions to leverage its own methodologies and artifacts to deliver increased value and enable an integrated toolchain.
- **Automation/AI/ML:** The MSP has enhanced the toolchain solutions through the adoption and integration of AI, ML, orchestration and automation into the end-to-end toolchain.
- **Innovation and improvement:** The MSP demonstrates a philosophy of continual innovation and improvement that it will use to ensure the toolchain keeps pace with advancements in future technology capabilities.

- **Capability utilization:** The MSP has successfully deployed its capabilities across multiple client accounts and is focused on the deployment of these capabilities across all new and existing client engagements.

Cloud-Native Toolchains

This capability evaluates the MSP's tools, platforms, automation and other capabilities necessary to support cloud-native DevOps throughout the life cycle, including how such toolchains both augment MSP personnel and enable client self-service.

This capability is measured against the following:

- **ITSM integration:** The MSP has successfully integrated its cloud-native tooling with its ITSM and other infrastructure platforms to support the increased cadence of change enablement for cloud-native solutions.
- **Cloud-native automation:** The MSPs' adoption of automation, ML and AI in support of cloud-native workload transformation and the ongoing management of the cloud-native solutions, and its ability to generate maximum efficacy from that automation.
- **Technology stack completeness:** The MSP demonstrates a clear vision for its cloud-optimized toolchain across the complete cloud transformation life cycle.
- **Level of integration:** The MSP has invested in integrating and enhancing cloud-native, open-source and third-party solutions to leverage its own methodologies and artifacts to deliver increased value and enable an integrated toolchain.
- **Automation/AI/ML:** The MSP has enhanced the toolchain solutions through the adoption and integration of AI, ML, orchestration and automation into the end-to-end toolchain.
- **Innovation and improvement:** The MSP demonstrates a philosophy of continual innovation and improvement that it will use to ensure the toolchain keeps pace with advancements in future technology capabilities.
- **Capability utilization:** The MSP has successfully deployed its capabilities across multiple client accounts and is focused on the deployment of these capabilities across all new and existing client engagements.

Knowledge Sharing

This capability evaluates the MSP's ability to share knowledge with the client (including training, mentorship and co-working to upskill/reskill client personnel), drive transformation and work together effectively.

This capability is measured against the following:

- **Innovation:** The MSP demonstrates a philosophy of continual innovation and improvement across the services with clear engagement, collaboration and sharing with clients to evolve the public cloud services over time.
- **Knowledge sharing:** The MSP has a structured approach to the sharing of knowledge, accelerators and artifacts across client accounts and through structure sharing methodologies with client resources during the life of the agreements.
- **Knowledge transfer:** The MSP has an open approach to knowledge transfer back to client employees or other managed service provider staff, when engaged only for public cloud transformation and not ongoing managed services.

Use Cases

Rapid Data Center Exit (Lift-and-Shift)

The client seeks to rapidly migrate a portfolio of applications, accomplished primarily through rehosting, with minimal if any follow-on managed services.

This use case is often deployed by clients who have a defined time scale to exit private data center facilities or as an early mass migration to help facilitate a rapid migration driven by commercial challenges like Broadcom's recent VMware license changes. While not strictly seen as public cloud transformation, it is included in this analysis as a common early phase use case ahead of future public cloud transformation initiatives.

Strategic TCO Reduction (Lift-and-Optimize)

The client seeks the outcome of significantly reducing the TCO of infrastructure and operations.

To accomplish this, they seek a cloud-optimized migration of a portfolio of applications, including follow-on cloud-optimized managed services, with a potential full or partial handover of operations to the client after transformation.

This use case seeks to reimagine the infrastructure environment to leverage significant automation, cloud-native management, security and services (including PaaS), thereby facilitating cloud-optimized operations without significant change to the application architecture or environment.

Strategic Cloud Transformation

The client seeks the capabilities that support a cloud-enabled digital business transformation so that it can achieve strategic business outcomes.

To accomplish this, it seeks a transformational migration, rebuilding and rearchitecting its application portfolio (and revising applications when this is not feasible), with follow-on cloud-native DevOps-at-scale services.

This use case seeks to rearchitect both the infrastructure environment and application architecture to optimally leverage the advantages of public cloud environments such as immutable, autonomous, scalable and elastic deployment patterns. By embodying these characteristics, cloud-native applications and products can fully exploit the business benefits of cloud environments — such as flexibility, scalability and resilience — while supporting the rapid innovation and development cycles demanded by many organizations' digital transformation ambitions.

Managed Application

The client seeks cloud-optimized operations or cloud-native DevOps for a single application or small group of applications.

This may entail cloud migration as a first step. Examples include scenarios such as enterprise application migration (including ERP migration), launch of a cloud-native digital application or other project-based work.

This use case focuses on capabilities involved in modifying and optimizing applications to take full advantage of public cloud environments. This transformation can vary in scope and complexity, depending on the organization's goals and the specific applications involved.

Efficient Operations

The client seeks cloud-optimized operations for one or more applications that are already in the public cloud.

This includes the possibility of needing to perform a “second phase,” “cleanup” or “redo” for previously migrated applications.

This use case focuses on experience, practices, strategies and toolchains aimed at optimizing the use of cloud resources to achieve maximum efficiency and cost-effectiveness. It targets capabilities involved in managing cloud environments and services in a way that minimizes waste, reduces costs and improves performance.

Agile Cloud-Native DevOps

In this use case, the client seeks cloud-native DevOps for one or more applications that are already in the public cloud, including any necessary transformation work to shift the culture and ways of working across all affected functions.

Agile cloud-native DevOps is an approach that combines the principles of agile development, cloud-native technologies and DevOps practices to create a highly efficient and flexible development and delivery process. Agile supports iterative development, customer collaboration and flexibility in response to change. It emphasizes delivering small, incremental improvements frequently, allowing teams to adapt quickly to feedback and changing requirements.

Cloud-native refers to building and running applications that exploit the advantages of public cloud computing, leveraging cloud services for scalability, resilience and flexibility. DevOps is a set of practices that aim to automate and integrate the processes of software development and IT operations. It focuses on continuous integration and continuous delivery (CI/CD), infrastructure as code (IaC), monitoring, and collaboration between development and operations teams to enhance speed and quality of software delivery.

Adoption of an agile cloud-native DevOps approach requires not just changes in processes and skills, but also the establishment of the underlying platforms of capabilities to support these new ways of working at scale.

Vendors Added and Dropped

Gartner reviews and adjusts its inclusion criteria for Magic Quadrants and Critical Capabilities as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant and Critical Capabilities may change over time. A vendor’s appearance in a Magic Quadrant and Critical Capabilities one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

Added

The following provider was added to this Critical Capabilities. This provider did not meet the inclusion criteria (IC) last year, but did for the current iteration:

- Insight

Dropped

The following providers were dropped from this Critical Capabilities:

- Bespin Global
- Cloud4C
- Eviden (Atos)
- Hitachi Digital Services
- Rackspace Technology
- SMX
- Virtusa

Inclusion Criteria

The inclusion criteria for this Critical Capabilities are the same as those for the companion Magic Quadrant for Public Cloud IT Transformation Services.

The inclusion criteria represent the specific attributes that analysts believe are necessary for inclusion in this research.

Must have all three validations per hyperscaler.

Amazon Web Services:

- Validated for the AWS Managed Service Provider partner program
- Validated for the DevOps Consulting Competency
- Validated for the Data & Analytics Consulting Competency

or

Google Cloud:

- Validated for the Managed Services Provider initiative
- Validated for the Application Development — Services specialization
- Validated for the Data Analytics — Services specialization

or

Microsoft Azure:

- Validated for the Azure Expert MSP certification
- Validated for the Azure: DevOps with GitHub on Microsoft Azure
- Validated for the Azure: Analytics on Microsoft Azure specialization

In addition:

Must have one of the following ML/AI certifications on a primary or secondary hyperscaler:

- Amazon Web Services: Validated for Machine Learning Consulting Competency
- Google Cloud: Validated for Machine Learning Services specialization
- Microsoft Azure: Validated for AI and Machine Learning specialization

Multicloud capability: Must have at least 20% PCITS client revenue on two or more of the following: AWS, Google Cloud, Microsoft Azure or OCI.

Must have 10% or more PCITS clients or PCITS clients revenue in at least three of the below regions:

- Asia/Pacific (including China/Japan/Australia/New Zealand)
- Europe

- Middle East and Africa
- North America
- Central and South America

Revenue must be above $300 million annually, with 25% or more PCITS revenue.

Table 1: Weighting for Critical Capabilities in Use Cases

(Enlarged table in Appendix)

Critical Capabilities	Rapid Data Center Exit (Lift-and-Shift)	Strategic TCO Reduction (Lift-and-Optimize)	Strategic Cloud Transformation	Managed Application	Efficient Operations	Agile Cloud-Native DevOps
Solution Design	15%	10%	15%	10%	10%	10%
Timely Delivery	60%	10%	5%	10%	15%	10%
Cloud Workload Optimization	5%	20%	5%	20%	10%	5%
Cloud Workload Transformation	0%	1%	20%	5%	0%	0%
Cloud-Optimized Management	0%	30%	5%	15%	35%	5%
Cloud-Native Management	0%	4%	15%	10%	0%	35%
Cloud-Optimized Toolchains	0%	10%	5%	15%	15%	5%
Cloud-Native Toolchains	0%	5%	15%	5%	5%	15%
Knowledge Sharing	20%	10%	15%	10%	10%	15%
As of 11 July 2024						

Source: Gartner (August 2024)

This methodology requires analysts to identify the critical capabilities for a class of products/services. Each capability is then weighted in terms of its relative importance for specific product/service use cases.

Each of the products/services that meet our inclusion criteria has been evaluated on the critical capabilities on a scale from 1.0 to 5.0.

Critical Capabilities Rating

Table 2: Product/Service Rating on Critical Capabilities

(Enlarged table in Appendix)

Critical Capabilities	Accenture	Brillio	Capgemini	Cognizant	Deloitte	HCLTech	IBM	Infosys	Insight	LTIMindtree	NTT DATA	Persistent	Tata Consultancy Services	Tech Mahindra	Wipro
Solution Design	4.1	3.2	3.4	3.3	3.5	3.6	3.6	3.4	3.3	3.3	3.1	3.2	3.3	3.1	3.6
Timely Delivery	4.1	3.6	3.2	2.7	3.5	3.6	3.2	3.4	3.2	3.1	2.4	3.0	3.1	2.5	3.8
Cloud Workload Optimization	4.2	2.5	3.7	2.9	3.9	3.1	3.3	3.1	3.1	3.1	2.7	2.4	3.3	3.1	4.0
Cloud Workload Transformation	4.5	3.7	3.8	3.7	4.1	4.0	4.1	3.8	3.3	3.8	2.7	2.6	3.6	2.7	4.2
Cloud-Optimized Management	4.5	2.6	3.6	3.2	3.7	3.2	3.6	3.2	2.8	3.2	2.8	3.2	3.3	2.5	3.4
Cloud-Native Management	4.4	4.2	4.2	3.6	4.4	4.2	4.2	3.8	3.8	4.1	3.0	3.8	4.0	3.2	4.1
Cloud-Optimized Toolchains	4.4	3.6	4.0	4.0	4.2	4.0	4.2	4.0	3.9	3.9	3.4	3.9	3.9	3.1	4.3
Cloud-Native Toolchains	4.3	3.9	3.9	3.6	4.1	4.1	4.0	3.8	3.9	3.9	3.4	3.7	3.8	2.7	4.1
Knowledge Sharing	4.3	3.2	3.6	3.1	3.9	3.7	4.0	3.3	2.8	3.3	2.4	2.8	3.3	2.4	3.8
As of 11 July 2024															

Source: Gartner (August 2024)

Table 3 shows the product/service scores for each use case. The scores, which are generated by multiplying the use-case weightings by the product/service ratings, summarize how well the critical capabilities are met for each use case.

Table 3: Product Score in Use Cases

(Enlarged table in Appendix)

Use Cases	Accenture	Brillio	Capgemini	Cognizant	Deloitte	HCLTech	IBM	Infosys	Insight	LTIMindtree	NTT DATA	Persistent	Tata Consultancy Services	Tech Mahindra	Wipro
Rapid Data Center Exit (Lift-and-Shift)	4.14	3.40	3.31	2.86	3.60	3.61	3.40	3.38	3.10	3.14	2.52	2.97	3.19	2.61	3.79
Strategic TCO Reduction (Lift-and-Optimize)	4.30	3.04	3.63	3.20	3.81	3.48	3.65	3.37	3.14	3.32	2.82	3.07	3.38	2.75	3.79
Strategic Cloud Transformation	4.31	3.51	3.75	3.41	3.96	3.83	3.91	3.60	3.39	3.60	2.88	3.15	3.54	2.81	3.97
Managed Application	4.29	3.23	3.70	3.29	3.89	3.61	3.73	3.48	3.28	3.43	2.86	3.12	3.47	2.84	3.91
Efficient Operations	4.31	3.07	3.59	3.22	3.78	3.51	3.66	3.40	3.14	3.33	2.84	3.16	3.37	2.69	3.77
Agile Cloud-Native DevOps	4.29	3.63	3.81	3.36	4.02	3.86	3.89	3.60	3.48	3.64	2.91	3.38	3.61	2.87	3.97
As of 11 July 2024															

Source: Gartner (August 2024)

To determine an overall score for each product/service in the use cases, multiply the ratings in Table 2 by the weightings shown in Table 1.

Acronym Key and Glossary Terms

CI/CD	continuous integration/continuous delivery
CMP	cloud management platform
CCOE	cloud center of excellence
COE	center of excellence
CSP	cloud service provider
IA	intelligent automation
IaC	infrastructure as code
IaaS	infrastructure as a service
IoT	Internet of Things
ITSM	IT service management
MSE	midsize enterprise
MSP	managed service provider
NLP	natural language processing
PaaS	platform as a service
PCITS	public cloud IT transformation services
T&M	time and materials

Evidence

The evaluation of providers' capabilities for this Critical Capabilities comes from both Gartner primary and secondary research:

- Primary research includes:
  - Briefings from participating service providers
  - Feedback from clients
  - CoE research information-gathering, including publicly available information

- Secondary research includes:
  - Client inquiries
  - Insight from other Gartner analysts who have spoken with the providers or clients of these providers about their cloud transformation products
  - Briefings delivered to Gartner outside of the Critical Capabilities process
  - Press releases and other publicly available information

[1] The 2024 Gartner End-User Buying Behavior Study: The Buying Divide

Critical Capabilities Methodology

This methodology requires analysts to identify the critical capabilities for a class of products or services. Each capability is then weighted in terms of its relative importance for specific product or service use cases. Next, products/services are rated in terms of how well they achieve each of the critical capabilities. A score that summarizes how well they meet the critical capabilities for each use case is then calculated for each product/service.

"Critical capabilities" are attributes that differentiate products/services in a class in terms of their quality and performance. Gartner recommends that users consider the set of critical capabilities as some of the most important criteria for acquisition decisions.

In defining the product/service category for evaluation, the analyst first identifies the leading uses for the products/services in this market. What needs are end-users looking to fulfill, when considering products/services in this market? Use cases should match common client deployment scenarios. These distinct client scenarios define the Use Cases.

The analyst then identifies the critical capabilities. These capabilities are generalized groups of features commonly required by this class of products/services. Each capability is assigned a level of importance in fulfilling that particular need; some sets of features are more important than others, depending on the use case being evaluated.

Each vendor's product or service is evaluated in terms of how well it delivers each capability, on a five-point scale. These ratings are displayed side-by-side for all vendors, allowing easy comparisons between the different sets of features.

Ratings and summary scores range from 1.0 to 5.0:

1 = Poor or Absent: most or all defined requirements for a capability are not achieved

2 = Fair: some requirements are not achieved

3 = Good: meets requirements

4 = Excellent: meets or exceeds some requirements

5 = Outstanding: significantly exceeds requirements

To determine an overall score for each product in the use cases, the product ratings are multiplied by the weightings to come up with the product score in use cases.

The critical capabilities Gartner has selected do not represent all capabilities for any product; therefore, may not represent those most important for a specific use situation or business objective. Clients should use a critical capabilities analysis as one of several sources of input about a product before making a product/service decision.

Recommended by the Authors

Some documents may not be available as part of your current Gartner subscription.

How Products and Services Are Evaluated in Gartner Critical Capabilities

Magic Quadrant for Public Cloud IT Transformation Services

Table 1: Weighting for Critical Capabilities in Use Cases

Critical Capabilities	*Rapid Data Center Exit (Lift-and-Shift)*	*Strategic TCO Reduction (Lift-and-Optimize)*	*Strategic Cloud Transformation*	*Managed Application*	*Efficient Operations*	*Agile Cloud-Native DevOps*
Solution Design	15%	10%	15%	10%	10%	10%
Timely Delivery	60%	10%	5%	10%	15%	10%
Cloud Workload Optimization	5%	20%	5%	20%	10%	5%
Cloud Workload Transformation	0%	1%	20%	5%	0%	0%
Cloud-Optimized Management	0%	30%	5%	15%	35%	5%
Cloud-Native Management	0%	4%	15%	10%	0%	35%
Cloud-Optimized Toolchains	0%	10%	5%	15%	15%	5%
Cloud-Native Toolchains	0%	5%	15%	5%	5%	15%
Knowledge Sharing	20%	10%	15%	10%	10%	15%

Critical Capabilities	*Rapid Data Center Exit (Lift-and-Shift)*	*Strategic TCO Reduction (Lift-and-Optimize)*	*Strategic Cloud Transformation*	*Managed Application*	*Efficient Operations*	*Agile Cloud-Native DevOps*
As of 11 July 2024						

Source: Gartner (August 2024)

Table 2: Product/Service Rating on Critical Capabilities

Critical Capabilities	*Accenture*	*Brillio*	*Capgemini*	*Cognizant*	*Deloitte*	*HCLTech*	*IBM*	*Infosys*	*Insight*	*LTIMindtree*	*NTT DATA*	*Persistent*	*Tata Consultancy Services*	*Tech Mahindra*	*Wipro*
Solution Design	4.1	3.2	3.4	3.3	3.5	3.6	3.6	3.4	3.3	3.3	3.1	3.2	3.3	3.1	3.6
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Cloud Workload Optimization	4.2	2.5	3.7	2.9	3.9	3.1	3.3	3.1	3.1	3.1	2.7	2.4	3.3	3.1	4.0
Cloud Workload Transformation	4.5	3.7	3.8	3.7	4.1	4.0	4.1	3.8	3.3	3.8	2.7	2.6	3.6	2.7	4.2

Cloud-Optimized Management	4.5	2.6	3.6	3.2	3.7	3.2	3.6	3.2	2.8	3.2	2.8	3.2	3.3	2.5	3.4
Cloud-Native Management	4.4	4.2	4.2	3.6	4.4	4.2	4.2	3.8	3.8	4.1	3.0	3.8	4.0	3.2	4.1
Cloud-Optimized Toolchains	4.4	3.6	4.0	4.0	4.2	4.0	4.2	4.0	3.9	3.9	3.4	3.9	3.9	3.1	4.3
Cloud-Native Toolchains	4.3	3.9	3.9	3.6	4.1	4.1	4.0	3.8	3.9	3.9	3.4	3.7	3.8	2.7	4.1
Knowledge Sharing	4.3	3.2	3.6	3.1	3.9	3.7	4.0	3.3	2.8	3.3	2.4	2.8	3.3	2.4	3.8
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Use Cases	*Accenture*	*Brillio*	*Capgemini*	*Cognizant*	*Deloitte*	*HCLTech*	*IBM*	*Infosys*	*Insight*	*LTIMindtree*	*NTT DATA*	*Persistent*	*Tata Consultancy Services*	*Tech Mahindra*	*Wipro*
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