iSG Provider Lens™

VMware Ecosystem

Assessment of providers empowering enterprises in
VMware modernization and transformation journeys

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VMware operates in a dynamic and competitive market and has been a leader in virtualization technologies. Several market shifts have now impacted its position:

- Growing relevance of hyperscalers such as AWS, Azure and Google Cloud has challenged its on-premises virtualization model. VMware has adapted through hybrid and multicloud solutions (for example, VMware Cloud on AWS and Tanzu for Kubernetes management).

- Rising adoption of containerization and DevOps practices and the high demand for Kubernetes management are reshaping enterprise IT.

- Mounting cyber threats requires a focus on security in virtualized and cloud environments.

- Increasingly enterprises are distributing workloads close to users and devices, causing data center-centric virtualization models to evolve to support decentralized computing.

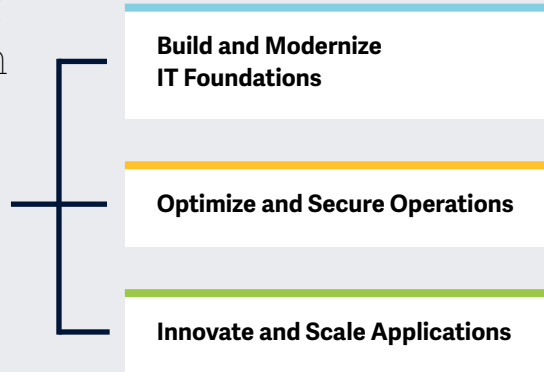VMware's partners support in offering services, covering infrastructure modernization, application development and integration, platform optimization, and governance and management. Partner capabilities are classified into three quadrants:

- **Build and Modernize IT Foundations** covers areas such as data center transformation, core virtualization and hyperconverged infrastructure (HCI), hybrid cloud adoption and cloud management, software-defined networking (SDN), and edge computing.

- **Optimize and Secure Operations** covers areas such as network security, endpoint security and threat detection, identity-based access control, automation, and cloud security.

- **Innovate and Scale Applications** covers areas such as application development/ modernization and management, AI integration, Kubernetes and DevOps, automation, and CI/CD.

ISG analyzes global provider positioning in the three quadrants, based on portfolio strength and market competitiveness. Many providers offer VMware-related services, but the study will focus on the ones leading each quadrant.

This study evaluates provider capabilities within the **VMware ecosystem** based on product and service portfolios and competitiveness.

Simplified Illustration Source: ISG 2025

Build and Modernize IT Foundations

Optimize and Secure Operations

Innovate and Scale Applications

The ISG Provider Lens™ VMware Ecosystem study offers the following to business and IT decision-makers:

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

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

Build and Modernize IT Foundations

Definition

This quadrant evaluates providers within the VMware ecosystem offering services to help organizations build and modernize their IT systems. They enable organizations to effectively leverage virtualization and HCI for hybrid cloud adoption and to accelerate their cloud migration initiatives.

These providers are proficient in helping clients improve their IT operations, including infrastructure, network and application management. Additionally, the providers have proven expertise in assisting organizations with resource utilization and improving infrastructure and cloud-related cost management and optimization.

Beyond technical capabilities, the providers assessed for this quadrant have domain expertise. This ability allows them to help organizations increasingly attain business agility, responsiveness and resilience through transparency and predictability in IT.

Eligibility Criteria

1. Adept in VMware Cloud Foundation (VCF) and HCI, including designing, deploying and managing VCF in **hybrid and multicloud environments**

2. Proficient in VMware Aria for **cloud governance, automation and workload optimization** and practice in integrating it with hyperscalers and in on-premises deployments

3. Ability to manage VMware vSphere for **workload orchestration, infrastructure automation and performance tuning**

4. Expertise in VMware vSAN **hyper-converged storage**, including optimization for scalability, availability and performance

5. Skilled in **SDN and security**, including certifications in VMware NSX for **network virtualization, microsegmentation and security policy automation with a record of** integrating NSX with **Zero Trust architectures and SD-WAN solutions**

6. Expert in **telco edge and cloud management**, successfully deploying VMware-based **5G, IoT and edge computing solutions** in telecom and corporate environments

7. Experience with VMware in **carrier-grade cloud platforms and network function virtualization (NFV)**

8. Expert in **AI and GPU virtualization**, including skills in AI and ML workloads on VMware vSphere with GPU acceleration, and has the ability to optimize VMware infrastructure for **AI-driven automation and analytics**

9. History in designing and deploying VMware-based **sovereign cloud architectures** and in integrating VMware solutions into **industry-specific clouds**

Optimize and Secure Operations

Definition

This quadrant evaluates providers offering services to help enterprises optimize and secure their multicloud runtime environments. The services cover areas including network security, endpoint security and threat detection, identity-based access control, automation, and cloud security.

These providers have the expertise to assist clients with optimizing their VMware environment for improved performance, based on workload analysis, and implementing best practices in resource allocation and management. Additionally, the providers are conversant with configuring security settings in the VMware environment, encompassing guardrails such as role-based access control, firewalls and encryption.

Beyond technical capabilities, the providers assessed for this quadrant offer training on VMware services and management tools for IT personnel and users. They also handhold clients through change management to ensure they have the know-how to handle everyday operations.

Eligibility Criteria

1. Expert in **optimizing VMware environments**, including vRealize Automation and **performance tuning across compute, storage and network layers**

2. Adept in **application and infrastructure performance optimization** services, leveraging AI-driven monitoring, auto-scaling and cost governance tools

3. Expert in **securing and automating IT operations**, with capabilities spanning **automation, operational visibility and cost efficiency**

4. Skilled in **endpoint protection and threat detection** using VMware Carbon Black

and vDefend Advanced Threat Prevention

5. Proficient in microsegmentation and network security services, including **policy-driven segmentation and NSX-based threat prevention**

6. Expert in implementing **identity-based access controls and workload protection**, enabling intrinsic security and alignment with Zero Trust architectures

7. Adept in offering support for **secure cloud and edge networking**, with proven experience in VMware SASE, SD-WAN and converged cloud networking architectures.

Innovate and Scale Applications

Definition

This quadrant evaluates providers within the VMware ecosystem offering services to help organizations modernize and optimize applications for business transformation and innovation. Provider capabilities and services in this space typically include a combination of competencies, covering infrastructure, tools, practices and strategies to support application development/modernization and management, AI integration and automation, Kubernetes, and DevOps.

These providers have the proficiency to help clients implement architectures to design applications to run as microservices for flexibility and scalability. They also provide the services and expertise for implementing continuous integration and deployment pipelines to streamline application development and ongoing updates.

Beyond technical capabilities, providers assessed for this quadrant offer services to foster collaboration between development and operations teams. This aids clients in embracing Agile practices for iterative development and feedback.

Eligibility Criteria

1. Skilled in application modernization services, including legacy **application portfolio assessment, migration strategy and refactoring** for VMware-compatible cloud environments

2. Expert in **Kubernetes and container orchestration**, including VMware Tanzu Platform, offered as a platform-as-a-service (PaaS) solution, with services spanning **container deployment, scaling and management**

3. Adept in **cloud-native application development and modernization,** including **microservices architecture, API design, and lifecycle management** using modern Dev frameworks and VMware ecosystem tools

4. Capabilities in **AI and ML solutions**, particularly with VMware Private AI Foundation with NVIDIA, supporting **scalable model training and deployment** across hybrid environments

5. Skilled in providing advanced data services, including provisioning, managing, and monitoring **databases** using VMware Data Services Manager with integration across hybrid storage and app data flows

6. Adept in enabling developer agility and DevOps maturity through **CI/CD pipeline automation, infrastructure-as-code (IaC) and developer self-service platforms** tailored for enterprise-grade operations

Quadrants by Region

As a part of this ISG Provider Lens™ quadrant study, we are introducing the following three quadrants on VMware Ecosystem 2025:

Quadrant	Global
Build and Modernize IT Foundations	✔
Optimize and Secure Operations	✔
Innovate and Scale Applications	✔

The research phase falls in the period between April and May 2025, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in September 2025.

Milestones	Beginning	End
Survey Launch	April 15, 2025	
Survey Phase	April 15, 2025	May 09, 2025
Sneak Preview	July 2025	
Press Release & Publication	September 2025	

Please refer to the **ISG Provider Lens™ 2025 research** agenda to view and download the list of other studies conducted by ISG Provider Lens™.

Access to Online Portal

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

Buyers Guide

ISG Software Research, formerly "Ventana Research," offers market insights by evaluating technology providers and products through its Buyers Guides. The findings are drawn from the research-based analysis of product and customer experience categories, ranking and rating software providers and products to help facilitate informed decision-making and selection processes for technology.

In the course of the VMware Ecosystem IPL launch, we want to take advantage of the opportunity to draw your attention to related research and insights that ISG Research will publish in 2025. For more information, refer to the Buyers Guide research schedule.

Research Production Disclaimer:

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

ISG Star of Excellence™ – Call for nominations

The Star of Excellence™ is an independent recognition of excellent service delivery based on the concept of "Voice of the Customer." The Star of Excellence™ is a program, designed by ISG, to collect client feedback about service providers' success in demonstrating the highest standards of client service excellence and customer centricity.

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

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

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

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

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

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

ISG Star of Excellence

Methodology & Team

The ISG Provider Lens 2025 – VMware Ecosystem research study analyzes the relevant software vendors/service providers in the global market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

Study Sponsor:
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The research and analysis presented in this study will include data from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. ISG recognizes the time lapse and possible market developments between research and publishing, in terms of mergers and acquisitions, and acknowledges that those changes will not reflect in the reports for this study.

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

Contacts For This Study

Study Sponsor

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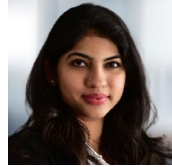Michael
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Data Analyst

Pragathi
Thimmaiya

Project Manager

iSG Provider Lens™

ISG Provider Lens Advisors Involvement Program

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

In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three consultant advisors participate as part of each study's quality and consistency review process. The consultant advisors ensure each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the consultant advisors' group and contribute at different levels depending on their availability and expertise.

The QCRT advisors:

- Help define and validate quadrants and questionnaires,

- Advise on service provider inclusion, participate in briefing calls,

- Give their perspectives on service provider ratings and review report drafts.

Invited Companies

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

Accenture	Dell Technologies	HPE (Hewlett Packard Enterprise)	OVHcloud
Arrow Electronics	Deloitte	IBM	Palo Alto Networks
Atos	DigitalOcean	Infosys	Platform9
AWS	NTT DATA	Insight Enterprises	Proact IT Group AB
Bluemantis (GreenPages Technology Solutions)	DXC Technology	Jenkins	Pure Storage
Capgemini	Dynatrace	Kyndryl	Rackspace Technology
CDW Corporation	Elastic Security	Lenovo	Rancher (SUSE)
CGI	Fortinet	Logicalis Group	Red Hat
Check Point Software	Fujitsu	Lumen	SentinelOne
CircleCI	GitHub	Microsoft Azure	ServiceNow
Cisco	GitLab	NetApp	SHI International
ClearFocus Technologies	Google Cloud	Nutanix	Softchoice Corporation
Cloud4C Services	HashiCorp	NVIDIA	SonicWall
Cognizant	HCL Technologies	Oracle	Sophos
CrowdStrike	Hitachi Vantara	Orange Business Services	Splunk

Invited Companies

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

Sungard Availability Services

TCS

Technologent

Tech Mahindra

Trend Micro

Wipro

Zscaler

ISG Provider Lens™

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

For more information about ISG Provider Lens™ research, please visit this webpage.

ISG Research™

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

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ISG

ISG (Nasdaq: III) is a global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth.

The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.

For more information, visit isg-one.com.

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MARCH, 2025

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