

# Private/Hybrid Cloud – Data Center Solutions

A research report comparing provider strengths,  
challenges and competitive differentiators



Introduction	3	Contacts for this Study	12
About the Study		Advisor Involvement	
Quadrants Research	5	Advisor Involvement - Program	
Definition	6	Description	13
Quadrants by Regions	8	Advisory Team	13
Schedule	9		
Client Feedback Nominations	10	Invited Companies	14
		About our Company & Research	15
Methodology & Team	11		

The demand for reliable private and hybrid cloud systems is transforming the software landscape. Enterprises are looking for flexibility, scalability and control to meet the growing challenges of digital transformation, data sovereignty and cost optimization. As hybrid cloud environments become the norm, organizations require software solutions enabling seamless integration, resilient operations and centralized governance across multicloud solutions.

Our ISG Provider Lens™ solutions study highlights critical markets, outlines key players driving innovation and provides a detailed schedule for participation, enabling us to seamlessly engage with our research process and maximize visibility in the market.

The urgent need for enhanced operational efficiency drives the hybrid cloud market. Enterprises demand platforms that simplify multicloud environments, reduce complexities and minimize the need for manual intervention. Cost optimization is a top priority as businesses seek tools to intelligently manage resources,

ensure workload migration and enable flexible pricing models. Regulatory compliance and security remain essential, with organizations navigating strict data sovereignty laws and addressing rising cybersecurity risks. Furthermore, resiliency and business continuity are vital in ensuring service uptime and disaster recovery, making platforms that provide disaster recovery-as-a-service (DRaaS), automation and failover capabilities indispensable.

Providers must address these needs through two critical categories of solutions:

- **Hybrid cloud management platforms (HCMP):** These platforms deliver end-to-end governance, workload orchestration and real-time monitoring, enabling seamless operations across hybrid cloud environments. They should integrate with existing IT ecosystems and leverage advanced analytics to optimize performance and reduce costs.



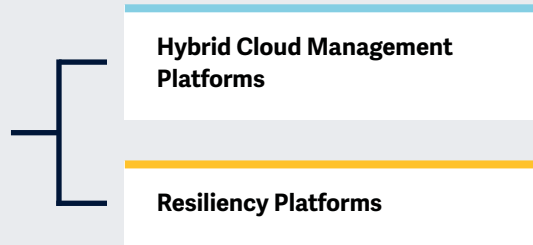
- **Resiliency platforms:** These platforms guarantee operational continuity through automated recovery and failover mechanisms, ensuring data integrity and system availability during disruption.

This study highlights the evolving role of software solutions in addressing the needs of enterprises, while the public cloud services study showcases providers and the way they implement and run these platforms on their clients' behalf.



This study focuses on ISG's perceptions of the most critical aspects of **Private/Hybrid Cloud – Data Center Solutions** in 2025.

Simplified Illustration Source: ISG 2025



**The ISG Provider Lens™ Private/ Hybrid Cloud – Data Center Solutions offers the following to businesses and IT decision-makers:**

- Transparency on strengths and weaknesses of relevant providers
- Differentiated positioning of providers by segments based on their competitive strengths and portfolio attractiveness
- Focus on the global markets.

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.



## Hybrid Cloud Management Platforms

### Definition

This quadrant assesses software vendors offering integrated management platforms for on-premises, public, private and hybrid cloud infrastructures. These platforms ensure consistency across diverse cloud environments, including containers, enabling enterprises to deploy applications in a cost-effective and automated manner. The platforms feature robust container orchestration capabilities to support modern application development.

Hybrid cloud management platforms can be delivered as-a-service or through licensing and are often the foundation of software-defined data centers (SDDC), fabric-based computing (cluster management) and serverless infrastructures. These platforms enhance compliance, security and operational standardization, making them essential for businesses optimizing cloud infrastructure management.

In addition to cloud orchestration, the platforms have advanced tools for cost visualization and optimization, offering comprehensive, efficient and secure cloud management. Also, these platforms should integrate with existing IT setups, provide a unified management interface, visualize costs, automate tasks and be Internet accessible and predict outages by using AI and ML and enable self-service.

### Eligibility Criteria

1. Provides a platform to **build and operate** managed on-premises, public, private and hybrid cloud infrastructures
2. Offers a solution that includes **cost control and dashboards** for chargeback and showback mechanisms
3. Provides a **single pane of glass view and self-service capabilities** to various stakeholders
4. Enables provisioning based on catalog services for the deployment of the technology stack, providing a **one-click deploy option** using automated workflows
5. Generates multiple reports that can be used by leadership teams with a single-pane-of-glass view
6. Provides a **secure environment** for a client's data flow and storage security
7. Offers solutions through a **licensing model** rather than as bundled services deals
8. Provides **integration of third-party tools** through APIs



## Resiliency Platforms

### Definition

This quadrant assesses independent solution vendors offering platforms or solutions that support resiliency and redundancy through backup and disaster recovery across on-premises, private, public, hybrid, edge cloud and SaaS environments. Resiliency platforms help IT teams maintain fault-tolerant systems while protecting data and operations, ensuring business continuity by quickly restoring data amid disruptions such as degraded application performance, outages or system failures. These platforms can be delivered as a service or through licensing.

Their core features include data backup and recovery, system failover, alternate site operations and emergency response training. Other essential aspects encompass business continuity and disaster recovery planning, implementation and continuous testing. Advanced capabilities include automated orchestration, AI and ML-led risk assessments,

business impact analysis and compliance management. They also address recovery times and provide training to respond to both forecasted and unforeseen events. These platforms cover the entire lifecycle of backup and recovery, minimizing risks and downtime while ensuring seamless business continuity.

### Eligibility Criteria

1. Offers a unified platform for **backup and disaster recovery** for on-premises or private, public, hybrid, edge cloud and SaaS environments
2. Offers comprehensive **monitoring tools with real-time visibility** into disaster recovery environments
3. Demonstrates reporting capabilities to **track performance metrics** and identify trends
4. Manages data and systems and offers both **manual and automated recovery** capabilities
5. Aligns **various policies for backup and retention** per organizations' **recovery point-and-time** objectives
6. Implements best practices (including solutions test and refresh) designed to **prevent any outages or downtime** and to suit changing situations
7. Offers solution that can integrate **with other infrastructure management**, resiliency and backup platforms
8. Implements **robust failover and failback procedures**



As a part of this ISG Provider Lens™ quadrant study, we are introducing the following two quadrants on Private/Hybrid Cloud – Data Center Solutions 2025:

Quadrant	Global
Hybrid Cloud Management Platforms	✓
Resiliency Platforms	✓





The research phase falls in the period between January and March 2025, during which survey, evaluation, analysis and validation will occur. The results will be presented to the media in June 2025.

<b>Milestones</b>	<b>Beginning</b>	<b>End</b>
Survey Launch	January 8, 2025	
Survey Phase	January 8, 2025	February 5, 2025
Sneak Preview	May 2025	
Press Release & Publication	June 2025	

---

The collection of client testimonials via the Star of Excellence Program requires early client referrals (no official reference needed) as CX scores have a direct influence on the provider's position in the IPL quadrant and the awards.

Please refer to the [link](#) to view/download the ISG Provider Lens™ 2025 research agenda.

#### **Access to Online Portal**

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

#### **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 Private/Hybrid Cloud – Data Center Solutions 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](mailto:star@cx.isg-one.com)



**ISG Star of Excellence**



The ISG Provider Lens 2025 – Private/Hybrid Cloud – Data Center Solutions 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:**

Heiko Henkes

**Lead Author:**

Shashank Rajmane

**Research Analyst:**

Yatharth Bharti

**Data Analysts:**

Sachitha Kamath and  
Lakshmikavya Bandaru

**Project Manager:**

Akshaya Hegde

Information Services Group Inc. is solely responsible for the content of this report. Unless otherwise cited, all content, including illustrations, research, conclusions, assertions and positions contained in this report were developed by, and are the sole property of Information Services Group Inc.

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



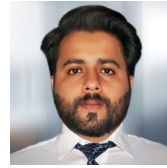
Heiko  
Henkes

Director and  
Principal Analyst



Shashank  
Rajmane

Principal Analyst  
U.S. and Global



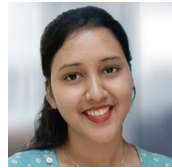
Yatharth  
Bharti

Senior Research  
Analyst



Sachitha  
Kamath

Senior Data  
Analyst



Lakshmikavya  
Bandaru

Senior Data  
Analyst



Akshaya  
Hegde

Global Project  
Manager



### ISG Provider Lens Advisors Involvement Program

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

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

## ISG Advisors to this study



**Rob  
Brindley**

**Partner**



**Anay  
Nawathe**

**Director**



## 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.**

\* Rated in previous iteration

Abiquo*	Dell Technologies*	SEP*
Acronis*	Druva*	ServiceNow*
Arcserve*	Flexera*	UnitedLayer*
Axcient*	HCLSoftware*	Unitrends*
BMC Software*	HPE/HPE (Zerto)*	Veeam*
Centilytics*	IBM*	Vembu Technologies*
Cisco*	Morpheus Data*	Veritas*
Cloud rewind*	NAKIVO*	VMware*
CloudBolt Software*	NetApp*	
CloudKeeper*	Nutanix*	
CloudSphere*	OpenText (Carbonite)/OpenText (Micro Focus)*	
Cohesity*	Redstor*	
Commvault*	Resolve Systems*	
CoreStack*	Rubrik*	
Datto*	Scalr*	



### iSG Provider Lens™

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

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

### iSG Research™

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

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

For more information about ISG Research™ subscriptions, please email [contact@isg-one.com](mailto:contact@isg-one.com), call +1.203.454.3900, or visit [research.isg-one.com](http://research.isg-one.com).

### iSG

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

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

For more information, visit [isg-one.com](http://isg-one.com).



**JANUARY, 2025**

---

**BROCHURE: PRIVATE/HYBRID CLOUD – DATA CENTER SOLUTIONS**