ISG Provider Lens™

2022

Next-Gen Private/Hybrid Cloud – Data Center Solutions & Services 2022

imagine your future®

ISG (Information Services Group) (NASDAQ: III) is a leading global technology research and advisory firm. A trusted business partner to more than 700 clients, including 75 of the top 100 enterprises in the world, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; technology strategy and operations design; change management; market intelligence and technology research and analysis. Founded in 2006, and based in Stamford, Connecticut, ISG employs more than 1,300 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.

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Definition

Data center outsourcing is the practice of sourcing the responsibility of managing end-to-end data center assets to a third-party provider. It includes orchestration provisioning; integrated monitoring; and management of computing, storage, database, middleware resources and other components of the infrastructure. The data center may be owned by the enterprise, service provider or a third-party colocation provider. Integrated monitoring and management services are usually delivered from a provider's location through an offshore/onshore/nearshore shared service center or via a dedicated delivery center model classified as remote infrastructure management (RIM) services.

A private cloud is an extension of the existing computing environment of an enterprise and leverages the investments made in virtual infrastructure and applications. Enterprises with stringent security and governance requirements, large data volumes and close integration of enterprise applications and workflows needs may prefer an on-premises or a private cloud environment characterized by hardware hosted locally at a client's facility. IT service providers can create private clouds with scalable virtual compute, networking and storage resources, running in their data centers or over a shared infrastructure, and configure them to isolate a private cloud.

A hybrid cloud combines the best of on-premises infrastructure, private and public clouds. It connects the existing on-premises infrastructure services with a private cloud, a public cloud or both. While combining services and data from a variety of cloud models, the goal is to create a unified, automated and a well-managed computing environment. One of the fundamental advantages of a hybrid cloud deployment is the high degree of control offered to the organization; hybrid clouds allow businesses to leverage the capabilities of public cloud platform providers, but without the need to offload their entire data to a third-party data center. This provides greater flexibility, while keeping the vital components within a company's firewall.

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

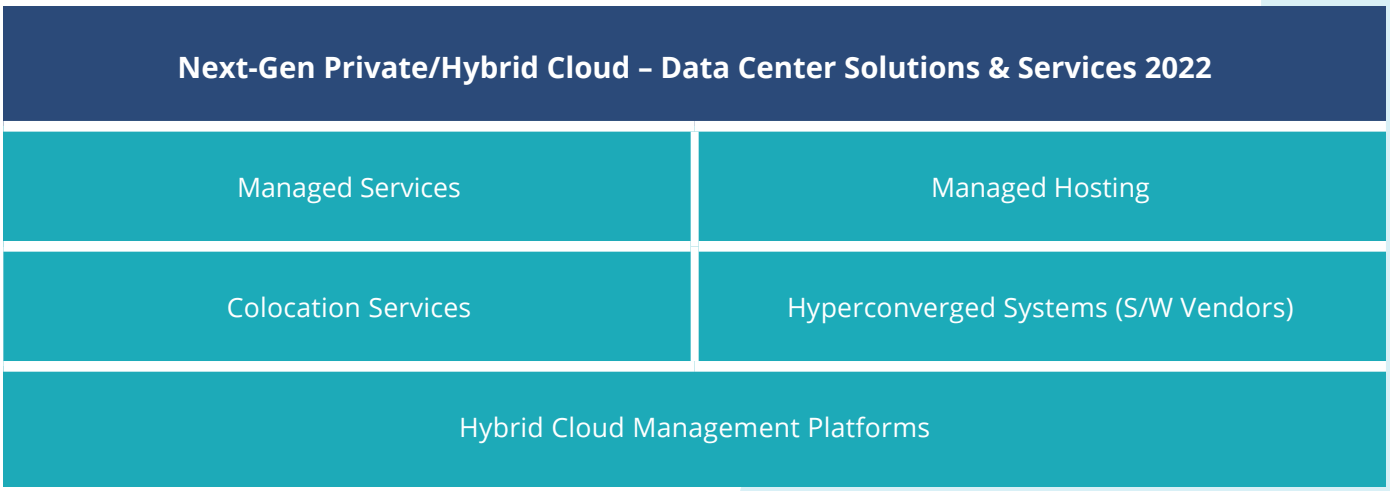
- A differentiated positioning of providers based on competitive strengths and portfolio attractiveness
- Focus on different markets, including the U.S., the U.S. public sector, Germany, Switzerland, the U.K., Nordics, Brazil, Australia, Benelux, France, and Malaysia and Singapore

ISG studies serve 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.

Quadrants Research

As a part of this ISG Provider Lens™ quadrant study, ISG includes the following five quadrants on Next-Gen Private/Hybrid Cloud — Data Center Solutions and Services:

Simplified illustration



Source: ISG 2022

Managed Services

This quadrant assesses a provider's ability to offer ongoing management services for private and hybrid clouds as well as traditional data center infrastructures and platforms that comprise physical and virtual servers, middleware, storage, databases and networking components. The infrastructure may reside at a client's data center or the service provider's facilities or even co-located in a third-party facility.

Participating companies typically offer transition services, where they guide clients to optimize their existing IT landscapes. Common projects include large-scale data center consolidation, virtualization, cloud enablement and configuration/implementation of a software-defined data center (SDDC). Transition services also include expanding existing facilities, transferring new workloads or creating new private clouds. Managed services are characterized by the transfer of responsibilities to a service provider and are governed by service level agreements (SLAs) with penalties for any deviation. At a broad level, these services include provisioning; enabling real-time and predictive analysis; and monitoring and operational management of a customer's on-premises, private and hybrid-cloud environments. These activities are aimed at maximizing the performance of workloads in the cloud, reducing costs and ensuring compliance and security. Participants should have the capability to manage traditional as well as cloud-native application release that also include continuous integration and delivery processes.

Eligibility criteria

- Ability to offer services for private and hybrid clouds, data center infrastructure (servers, middleware, storage, and databases) on their own without depending on partners
- Ability to provide services within a client's premises or remotely and preferably through its shared service centers (RIM)
- Established or emerging basic/standard relationships with one of the major hyperscalers such as AWS, Microsoft, Google and IBM
- Experience in large transition projects that include automation, consolidation, virtualization and containerization of data centers and cloud enablement
- Ability to act as an extension of the clients' IT organization and get involved in creating blueprints, architecture frameworks and management processes at the client's location
- Ability to provide for a centralized orchestration/management of hybrid IT infrastructure
- Experience in business continuity planning, particularly in managing a client's hybrid infrastructure remotely
- Appropriate certifications to ensure compliance at the local level

Managed Hosting

This quadrant assesses service providers that offer standalone enterprise-grade hosting solutions, using their own or third-party facilities and infrastructure. The providers assessed here are responsible for the day-to-day management and maintenance of data center components such as servers, storage, operating systems, and connectivity to the external network. Ideally, clients state their application and operating requirements, and the managed hosting provider takes the responsibility of provisioning the infrastructure to keep applications running with the desired performance and security.

A provider may monitor various IT assets such as legacy systems and private and public clouds via a hybrid cloud management platform. However, managing hybrid clouds has not been assessed for this quadrant. The service levels typically considered to assess managed hosting services are the various tiers of data centers, multi-layered security, service availability and network (LAN) I/O at peak time.

Eligibility criteria

- Ability to offer enterprise-grade hosting solutions using the provider's infrastructure
- Capability to offer active-active and active-passive disaster recovery and backup services
- Technical and financial capacity to upgrade its infrastructure and maintain capacity plans to ensure hosting performance in anticipation of an increase in demand
- Capability to scale and maintain dedicated servers and storage as well as shared cloud resources on the same network and management platform
- Ability to provide at least five layers of physical security in the data center

Colocation Services

This quadrant assesses providers that offer standardized data center operations as colocation services for midmarket and large enterprise clients as well as public sector organizations. The participating companies offer community access points for various hosting providers, system houses, carriers or telecommunication providers and end users. Enterprise clients that opt for colocation services expect a standardized and sophisticated data center setup, many carrier options, low latency and high bandwidth at affordable prices to deliver rich content or critical, latency-sensitive information to users within and outside major metropolitan areas.

Eligibility criteria

- Owns facilities that offer standardized data center architecture design for colocation
- Offers high-quality data network equipment, appliances and connectivity systems
- Guarantees power density to support current and future technologies
- Provides at least five layers of physical security measures on the premises
- Possesses appropriate certifications such as SSAE 16, HIPAA, ISO 14001, ISO 22301, ISO 27001, ISO 50001, EN 50600, PCI DSS, NIST, FISMA and SOC Type I and II
- Ability to securely manage and maintain all the data center equipment and technology stacks
- Amenable to SLAs related to hands-and-feet support and hardware replacement
- Ability to offer facilities with traffic exchange points in proximity to users and clouds
- Ability to offer disaster recovery and backup solutions
- Ability to leverage clean energy sources and solutions to reduce energy consumption — including zero carbon emission and green data center initiatives

Hyperconverged Systems (Software Vendors)

This quadrant assesses vendors that offer hyperconverged infrastructure (HCI) with preconfigured software and blueprints, designed to upscale or downscale server and storage clusters. An HCI can centrally manage a scalable enterprise cloud, on-premises infrastructure and private clouds built on public cloud virtual machines.

An HCI manages networks, disks, memory, central processing unit (CPU) and graphic processing unit (GPU) cores, forming clusters or processing nodes. With HCI, clients can dynamically change the configurations of each node, dedicating or reserving resources for optimal application performance, balancing storage capacity and computing power.

Eligibility criteria

- Offers a solution with cloud-like flexibility for private data centers
- Offers a software that serves as a single orchestration layer across an HCI, including public and private clouds
- Provides a system ensuring fault tolerance, thus enabling high availability
- Ability to offer storage, compute and network that are independently configurable and scalable
- Ability to provide agile professional services on its own or through partners. Professional services include support to customize implementations
- Adept at managing resiliency and reliability during an outage
- Offers a solution that includes encryption and tools to enable high levels of security and visibility

Hybrid Cloud Management Platforms

This quadrant assesses vendors of software to build and operate infrastructures, thus offering a robust integrated management platform for on-premises, public, private and hybrid clouds. This platform provides consistency across cloud environments and enables enterprises to achieve cost-effective, automated and standardized application deployments, across multi-cloud environments with robust container capabilities.

Hybrid cloud management platforms can be offered as-a-service or licensed for use and serve as the basis for an SDDC, fabric-based computing (cluster management) and serverless infrastructures, thus improving on compliance and standardization.

Eligibility criteria

- Ability to provide a platform to build and operate cloud infrastructures for managed on-premises, public, private and hybrid clouds
- Offers a solution that includes cost control and dashboards for chargeback and showback mechanisms
- Ability to provide single pane of glass and self-service capabilities to various stakeholders
- Enables provisioning based on catalog services for the deployment of the technology stack, ideally providing a one-click deploy option, using automated workflows
- Ability to generate multiple reports that can be used by the leadership team with a single-pane-of-glass view
- Capability to provide a secure environment for a client's data flow in the cloud management platform (CMP)
- Capability to buy the solution by clients through a licensing model, rather than as a bundled services deal
- Ability to provide integration of third-party tools through application programming interfaces (APIs)

Quadrants by Region

Quadrants	Global	Brazil	Germany	Nordics	Switzerland	U.K.	U.S.	U.S. Public Sector	Australia	Benelux	France	Malaysia & Singapore
Managed Services		√	√	√	√	√	√	√	√	√	√	√
Managed Hosting		√	√	√	√	√	√	√	√	√	√	√
Colocation Services		√	√	√	√	√	√	√	√	√	√	√
Hyperconverged Systems (S/W Vendors)	√											
Hybrid Cloud Management Platforms	√											

Archetype Report

In this report, we identify and classify the typical buyers of data center outsourcing services (managed and transformation services) that look for transformational capabilities. We have identified the following four major categories of buyers:

- **Traditional outsourcers:** Buyers that focus primarily on cost reduction and seek outsourcing/staff augmentation assistance for basic monitoring activities
- **Managed services:** Buyers that look for a broader suite of managed services with some elements of transformation
- **Transformational:** Buyers that have already achieved a high level of virtualization/standardization and are looking to further transform their infrastructure
- **Pioneering:** Buyers that aspire to achieve high levels of automation, orchestration and implementation of a software-defined infrastructure to boost developer productivity

Schedule

The research phase falls in the period between **January and April 2022,** during which survey, evaluation, analysis, and validation will take place. The results will be presented to the media in **June 2022.**

Milestones	Beginning	End
Launch	January 14, 2022	
Survey Phase	January 14, 2022	February 11, 2022
Sneak Preview	May 2022	
Press Release	June 2022	

Please refer to this link below to view/download the ISG Provider LensTM 2022 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!

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 program is 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. 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@isg-one.com

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.

List of companies to be invited for the survey

Are you on the list, or do you see your company as relevant provider that is missing from the list? Then feel free to contact us to ensure your active participation in the research phase.

*um (OBS)
23 Media
365 Data Centers
3stepit
3U
Abilis IT
Abiquo
Abraxas
Accenture
Acdalis Informatik Datacenter Zug
acora
ACP
Adacor
Advanced Unibyte
Advania
Agnos
AIXIT
All for One Group
alphosting
Alpine DC
Anexia
ARHS
Artmotion
Arvato Systems
Ascenty
Aspectra
Aspire Technology Solutions
Aspiresys
Asseco
AT&T
ATEA
Ativy
Atos
ATSG
Aveniq (Avectris)
Axians
Ayehu
Baden Cloud
Bancadati
Basefarm
Bechtle
Bedag Informatik
Begasoft
Bell Technologix
Birlasoft
BitHawk
BMC
Boreus
Bossers & Cnossen B.V.
BrainServe
BT
BTC
Bulk Infrastructure
CANCOM
Capgemini
CDNetworks
Cegeka
Cema
CentralServer
Centre de donnees Romand
Centron
CGI
Cisco
Cisilion
Citrix
CKW
Claranet
Cloud&Heat
CloudBolt

List of companies to be invited for the survey

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CloudSpere
Cocus AG
Codero
Coforge
Cogent
Cognizant
ColoBale
Colocation America
Colocation IX
Cologix
Colozüri.ch
Colt DCS
Columbus
Compasso UOL
Computacenter
Conapto
Concat
CONET
Connectria
Conscia
Contabo
Contegix
Controlware
Core IT Solutions
Core Technology
Coreix
Coresite
Coretek Services
Coretelligent
Corsicatech
CWCS
CyrusOne
Cyxtera
DARZ
Data Foundry
Data Hub
Data Intensity
Data11
DataBank
Datacenter Leipzig
Datacenter One
Datacenter Thurgau
Datacenter Zug
DataCore
DATAGROUP
Datasource
Datawire
Dedalus
Delaware Consulting
Dell EMC
Densify
Deutsche Telekom
Devoteam I Alegri
DigiPlex
Digital Realty
Dokom21
dunkel
DXC Technology
DYOPATH
EcoDatacenter
Econis
Ecotel
einfochips
ELCA
Elea
Embratel
Embriq AS
EMC HostCo
Ensono

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ePlus
eqipe
Equinix
euNetworks
EVEO
EveryWare
EWL Luzern
exaSys/WZH
Expedient
Fibernet
Ficolo
fifteenfourtyseven
First Colo
Flexential
Flexera
FS Data
Fujitsu
FWC
GAVS
GIA Informatik AG
Giant Swarm
GIB Solutions
GleSYS
Global Switch
GlobalConnect
Green Datacenter
Green Mountain
green.ch
GridScale
GTT
Hashroot limited
HCL
Hetzner
Hexaware
Hitachi Vantara
HostDime
hostpoint
Hostserver
Hosttech
Hostway
HPE
HTBASE
HTC (Ciber)
Huawei
Huayun Data Group
HYDRO66
HyperGrid
HYVE
i.t.Now
IBM
ICME
IDE Group
IGN
iland
Immedion
INAP
infeurope S.A
Infomaniak
Infosys
Insigmaus
InternetX
InterVision
iomart
IP Exchange(q.beyond)
Iron Mountain
IT Backbone
IT Point AG
ITENOS
ITpoint

List of companies to be invited for the survey

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Itris One

iver

iVision

IWB

JMC Software AG

Kamp

Keppel

KMD

Lake Solution

Lansol

Ldex Group

Lefdal Mine

Lenovo

Leuchter IT

Levantis

Liquid Web

Littlefish

Logicalis

LTI

Lume Cloud (ColoHouse)

Lumen

Maincubes

Maintech

Mandic

Materna

Matrix

Maxta

MEDIAM

Micro Focus

Microland

Micropole S.A.

Microsoft

Mightcare Solutions GmbH (ex Wusys)

Millgate

Mindtree

Mivitec

Moresi

Morpheus Data

Mount10

Mphasis

msg systems

MTF

myLoc

myLog

Nagarro-ES

Navisite

NetApp

Netcloud

Netcompany

Netfox

Netgain

Netic

Netrality Data Centers

Netrics

Netskin

nexellent (Tineo)

Nextios

NineInternet Solutions

Node4

Nordlo

Noris Network

Nouveau

Novatrend

NTS Workspace

NTT Data

NTT Ltd.

Nutanix

ODATA

OnApp

List of companies to be invited for the survey

Are you on the list, or do you see your company as relevant provider that is missing from the list? Then feel free to contact us to ensure your active participation in the research phase.

OneNeck IT

Oni

operational services

Opus

Orange Business Services

Ordina NV

Otava

Park Place Technologies

Persistent

Pfalzkom I Manet

PhoenixNAP

Piemont

Pivot3

plusserver

Plutex

Portlane

Presidio

Pro Logic Systems

Proact

Probrand

procloud

Profi AG

Pulsant

QTS

Rackspace Technology

Rahi Systems

ratiokontakt

Rechenzentrum Ostschweiz

Rechenzentrum Winterthur

Red Hat

Redcentric

Release 42

Rg19

RightScale (Flexera)

Safe Host

Safe Swiss Cloud

Scala

ScaleUp Technologies

Scalr

Senselan

ServerPronto Dedicated Servers

Servertown

ServiceNow

Sievers

SIEVERS GROUP

Six Degrees

Sltn It Products B.V.

Smart IT

Snow Software Embotics

Sonda

Sopra Steria

Stackit

StarWind

Steadfast

Stefanini

StorMagic

Stratoscale

Structured Communication Systems

Sungard AS

Supreme servers

SVA

Swcomms

Sweden Dedicated

Swisscolocation

Swisscom

Switch

Sword Group SE

Synoptek

Syntax

List of companies to be invited for the survey

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Systamatic

System Clinch

TCS

Tech Mahindra

Telehouse

TelemaxX

Telium

Telstra

Terralogic

ti&m

TierPoint

TietoEVRY

Timico

TIVIT

Total Computer Networks

Trivadis

T-Systems

Turnkey

UKFast

UMB

Unisys

UniSystems S.A.

UnitedLayer

Uptime IT

UST

V8 Consulting

Veber

VIRTUS

Visolit

VMware

Vodafone

Volico Data Centers

Volta

VSHN

Wipro

Witcom

Wowrack

Xelon

Xfiber

Zayo

Zensar

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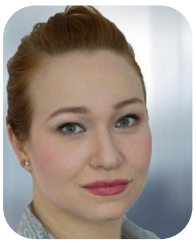
Do you need any further information?

If you have any questions, please contact us at isglens@isg-one.com.

Contacts for this study



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Do you need any further information?

If you have any questions, please contact us at isglens@isg-one.com.

ISG Provider Lens QCRT Program Description

ISG Provider LensTM offers market assessments by incorporating practitioner insights, reflecting regional focus and conducting 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 & Consistency Review Team (QCRT) that ensures each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. 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 providers inclusion, participate in briefing calls
- Give their perspectives on service provider ratings and review report drafts

The ISG Provider Lens QCRT program helps round out the research process, supporting comprehensive research-focused studies.

Quality & Consistency Review Team for this study

Bernie Hoecker
Partner

Anna Medkouri
Partner

Alexandra Classen
Partner

Rob Brindley
Director

Anay Nawathe
Principal Consultant

Do you need any further information?

If you have any questions, please contact us at isglens@isg-one.com.