



***ISG** Provider Lens™

2022

Next-Gen Private/Hybrid
Cloud – Data Center
Services & Solutions
2022 – U.S. Public Sector

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

This ISG Public Sector Provider Lens™ research study examines software and services providers that develop, enable, and deliver the scope of IT capabilities needed by public sector entities and agencies in the U.S. as they work to reduce IT and operational costs. Providers can also help public sector organizations lessen the negative impacts of changing and shrinking workforces, enable the digital capabilities requested and expected by constituencies and employees, and minimize long-term operational and organizational disruptions.

For the purposes of this study, ISG includes state and municipal government organizations, public utility, healthcare, and education entities, and similar organizations in our definition of the U.S. public sector.

Data center outsourcing is the practice of sourcing the responsibility of managing end-to-end data center assets to a third-party provider, including 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 agency or department, by a services provider, or by a third-party colocation provider. Integrated monitoring and management services are usually delivered from the provider's location through an offshore, onshore or nearshore shared service center or a dedicated delivery center model, which are classified as remote infrastructure management services (RIM).

A private cloud is an extension of the existing computing environment at an enterprise level and leverages the investments made in virtual infrastructure and applications. Enterprises with strict security and governance requirements, large data volumes and a need for tight integration with other enterprise applications and workflows may prefer on-premises or a private cloud environment. A private cloud strategy usually comprises hardware hosted locally at a client facility, or IT service providers can create private clouds with scalable virtual computing, networking, and storage resources running in their data centers or over a shared infrastructure and configure it to isolate a private cloud.

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

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 new engagements.

Quadrants Research

As part of this ISG Provider Lens™ quadrant study, ISG includes the following three quadrants on Next-Gen Private/Hybrid Cloud — Data Center Solutions and Services for U.S. Public Sector

Simplified illustration



Source: ISG 2022

Managed Services

This market covers a provider's ability to offer ongoing management services for private and hybrid clouds, as well as traditional data center infrastructure and platforms that consist of physical and virtual servers, middleware, storage, databases and networking components. Infrastructure may reside in the client's data center or the service provider facilities or collocated in a third-party facility.

Participating companies usually take over the responsibility of including transition services, guiding the client to optimize their current IT landscape. Typical projects include large-scale data center consolidation, virtualization, cloud enablement and a new configuration or implementation of a software-defined data center (SDDC). Transition services also apply while expanding the facilities, transferring new workloads or creating new private clouds. A characteristic of managed services is the transfer of responsibility to the service provider, governed by service level agreements (SLAs) and respective penalties for deviation from agreed performance goals. At a broad level, these services include provisioning, real-time and predictive analysis and monitoring and operational management of the customer's on-premises, private and hybrid-cloud environments. These are aimed at maximizing the performance of workloads in the cloud, reducing costs and ensuring compliance and security.

Participants should have management capabilities to handle traditional as well as cloud native application release management, which also involves continuous integration and delivery processes.

One of the primary differentiations between managed services providers and managed hosting providers is that managed services providers have stronger integrations practices that break up monolithic and traditional applications into individual services or microservices.

Eligibility criteria

- Ability to service private and hybrid clouds, data center infrastructure (servers, middleware, storage and databases) by themselves and not through partners
- Ability to provide services within a client's premises or remotely and preferably through its shared service centers
- Established or emerging basic and standard relationships with one of the major public cloud hyperscale providers such as AWS, Microsoft, Google or 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 a centralized orchestration / management of hybrid IT infrastructure
- Experience in transforming its business continuity planning while managing a client's hybrid infrastructure remotely during the pandemic
- Appropriate certifications to ensure compliance at 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. Participants are responsible for day-to-day management and maintenance of data center equipment such as servers, storage, operating systems and connectivity to the external network. Ideally, clients provide their applications and operating requirements and the managed hosting provider is responsible for provisioning the infrastructure to keep applications running at the desired performance and secure levels.

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 is not rated in this quadrant assessment. The primary service levels typically employed to measure managed hosting services are 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, maintaining capacity plans to ensure hosting performance in advance to demand increases
- Capability to scale and maintain dedicated servers and storage, as well as shared cloud resources, on the same network and management platform
- Provision for at least five layers of physical security in the data center

Colocation Services

This market has providers that offer standardized data center operations as colocation services for midmarket and large enterprise clients. 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 choices, low latency and high bandwidth at affordable prices to deliver rich content or critical, latency-sensitive information to users in and outside major metropolitan areas.

Eligibility criteria

- Owns the facilities that offer standardized data center architecture design for colocation
- Offers high-quality data network equipment, appliances and connectivity
- Guaranteed power density to support current and future technologies
- Provision for at least five layers of physical security measures on the premises
- Appropriate certification. Examples include SSAE 16, HIPAA, ISO 14001, ISO 22301, ISO 27001, ISO 50001, EN 50600, PCI DSS, NIST, FISMA, SOC Type I and II
- Capacity to securely manage and maintain all the data center equipment and technology stacks
- Ability to provide SLAs around hands and feet support, and hardware replacement
- The facilities offer traffic exchange points close to users and clouds
- Ability to offer Disaster Recovery and Backup solutions
- Ability to leverage clean energy sources and solutions for reduced energy consumption can be better rated. Examples include zero carbon emission and green data center initiatives

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 Lens™ 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 work identified by the 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 to produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of 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.

365 Data Centers	Equinix	Navisite
Accenture	Expedient	NTT DATA
AT&T	Flexential	NTT Ltd.
Atos	Fujitsu	OneNeck IT
BT	GAVS	Orange Business Services
Capgemini	HCL	phoenixNAP
Codero	Hexaware	QTS
Coforge	Hostway	Rackspace Technology
Cogent	IBM	Sungard AS
Cognizant	iland	TCS
Colocation America	INAP	Tech Mahindra
Cologix	Infosys	TierPoint
CoreSite	InterVision	T-Systems
Coretelligent	Iron Mountain	Unisys
CyrusOne	Liquid Web	UST
Cyxtera	LTI	Wipro
DataBank	Lumen	Zayo
Digital Realty	Microland	Zensar
DXC	Mindtree	
Ensono	Mphasis	

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Do you need any further information?

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