



2021

Next-Gen Private/Hybrid Cloud – Data Center Services & Solutions 2021

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Definition

Data center outsourcing is the practice of contracting the responsibility of managing end-to-end data center assets to a third-party provider and 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 the provider's location through an offshore/onshore/nearshore shared service center or 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 tight integration (with other enterprise applications and workflows) needs may prefer on-premises or a private cloud environment characterized by hardware hosted locally at a client facility. IT service providers can also create private clouds with scalable virtual compute, 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, private and public cloud. It connects the existing on-premises infrastructure services with a private or public cloud, or both. The goal, while combining services and data from a variety of cloud models, is to create a unified, automated and well-managed computing environment. One of the fundamental advantages of 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 the 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., Germany, Switzerland, the U.K., Nordics and Brazil

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 current vendor relationships and potential engagements.

Quadrants Research

In this ISG Provider Lens™ quadrant study, ISG includes the following four quadrants on next-gen private/hybrid cloud - data center services and solutions:



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 infrastructure and platforms that comprise physical and virtual servers, middleware, storage, databases and networking components. The infrastructure may reside in the client's data center or the service provider's facilities or even co-located in a third-party facility.

Participating companies usually take over the transition services where they guide clients to optimize their existing IT landscape. Typical 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 the facilities, transferring new workloads or creating new private clouds. Managed services are characterized by the transfer of responsibility to a service provider and governed by service level agreements (SLAs) and corresponding 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.

A primary difference between managed service providers and managed hosting providers is that the former have stronger integrations practices that involve breaking monolithic and traditional applications into individual services or microservices.

Eligibility criteria:

- Ability to offer services for private and hybrid clouds, data center infrastructure (servers, middleware, storage and databases) on their own without relying 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 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 a client's 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 business continuity planning, particularly 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. The providers assessed here are responsible for the day-to-day management and maintenance of data center equipment 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 primary service levels typically considered 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 capability 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
- 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. 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 facilities that offer standardized data center architecture design for colocation
- Offers high-quality data network equipment, appliances and connectivity
- Guarantees power density to support current and future technologies
- Provides at least five layers of physical security 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, SOC Type I and II
- Ability to securely manage and maintain all data center equipment and technology stacks
- Amenable to provide SLAs related to hands and feet support and hardware replacement
- Ability to offer facilities with traffic exchange points close to users and clouds
- Ability to offer disaster recovery and backup solutions
- Ability to leverage clean energy sources and solutions to reduce energy consumption — these include zero carbon emission and green data center initiatives

Hyperconverged Systems (SW Vendors)

This quadrant analyzes vendors that offer hyperconverged infrastructure (HCI) with preconfigured software and blueprints designed to scale (up/down) 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 network, disks, memory, CPU and GPU cores, forming clusters or processing nodes. With HCI, clients can dynamically change the configurations of each node, dedicating or reserving resources for optimum application performance, balancing storage capacity and computing power.

Eligibility criteria:

- The solution offers cloud-like flexibility for private data centers
- The software provides a single orchestration layer across an HCI, including public and private clouds
- The system ensures fault-tolerance, enabling high availability
- Storage, compute and network are independently configurable and scalable
- Ability to provide agile professional services on their own or through partners. Professional services should include support to customize implementations
- Adept at managing resiliency and reliability during an outage
- The solution includes encryption and tools to offer high level of security and visibility

Hybrid Cloud Management Platforms

This quadrant analyzes vendors of technology 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's capability.

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
- The solution 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 to deploy a technology stack; ideally providing a “one click deploy”, using automated workflows
- Capability 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 APIs

Quadrants by Region

Quadrants	Global	Brazil	Germany	Nordics	Switzerland	U.K.	U.S.
Managed Services	Overview	√	√	√	√	√	√
Managed Hosting	Overview	√	√	√	√	√	√
Colocation Services	Overview	√	√	√	√	√	√
Hyperconverged Systems	Overview	√	√	√	√	√	√
Hybrid Cloud Management Platforms	Overview	√	√	√	√	√	√

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 buyer segments:

- **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 2021**, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in **June 2021**.

Milestones	Beginning	End
Launch	January 11, 2021	
Survey phase	January 11, 2021	February 8, 2021
Sneak previews	May 2021	
Press release	July 2021	

Please refer to this [link](#) to view/download the ISG Provider Lens™ 2021 research agenda.

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.

Partial list of companies being invited for the survey

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

*um (OBS)

365 Data Centers

3stepIT

3U

Abilis IT

Abiquo

Abraxas

Accenture

Acdalis Informatik Datacenter Zug

acora

ACP

Adacor

Advanced

Advania

AIXIT

All for One Group

Alpine DC

Anexia

Anexio

Artmotion

Arvato Systems

Ascenty

Aspectra

Aspire Technology Solutions

Asseco

AT&T

ATEA

Atos

Auxis

Avectris

Axiants

Baden Cloud

Bancadati

Basefarm (OBS)

Bechtle

Bedag Informatik

Begasoft

Bell Techlogix

BitbyBit

BitHawk

BrainServe

BT

BTC

CANCOM

Capgemini

Cegeka

Cema

CentralServer

Centre de donnees Romand

Centron

CenturyLink (Lumen)	Controlware
CGI	Core Technology
Cisco	Coreix
Cisilion	Coresite
CKW	Coretek
Claranet	Coretelligent
Cloud&Heat	CorpFlex
CloudBolt	Corsicatech
Cloudreach	CWCS
CMIT Solutions	CyrusOne
Cucus AG	Cyxtera
Codero	DARZ
Coforge	Data Hub
Cogent	Data Intensity
Cognizant	Datacenter Leipzig
ColoBale	DatacenterOne
Colocation America	DATAGROUP
ColocationIX	Datasource
Cologix	Datawire
Colozüri.ch	Dedalus Prime
Colt DCS	Dell EMC
Columbus	Deutsche Telekom
Compasso	Devoteam I Alegri
Comport	DigiPlex
Computacenter	Digital Realty
Conapto	Dokom21
CONET	dunkel

DXC	Green Datacenter
Econis	Green Mountain
Ecotel	green.ch
einfochips	GridScale
Embratel	GTT
Embriq AS	Hasroot
EMC HostCo	HCL
Ensono	Hetzner
ePlus	Hexaware
Equinix	Hitachi Vantara
euNetworks	HostDime
EVEO	Hostserver
EveryWare	Hosttech
EWL Luzern	Hostway
Expedient	HPE
Fibernet	HTBASE
Ficolo	HTC (Ciber)
fifteenfourtyseven	Huawei
First Colo	Huayun Data Group
Flexential	HYDRO66
Fujitsu	HyperGrid
GAVS	HYVE
Giant Swarm	IBM
GIB Solutions	IDE Group
Glesys AB	IGN
Global Switch	iland
Grapin	Immediion

INAP (Internap)	Littlefish
INAP (SingleHop)	LocawebCorp
Infomaniak	Logicalis
Infosys	LTI
InternetX	Iume
InterVision	Maincubes
Interxion	Mandic
iomart	Materna
IP-Only	Matrix
Ironmountain	Maxta
IT Backbone	Maxtra
ITENOS	MEDIAM
Itris One	MicroFocus
iver	Microland
iVision	Microsoft
IWB	Mightcare Solutions GmbH (ex Wusys)
JMC Software AG	Millgate
Kamp	Mindtree
Keppel	Mivitec
KMD	Moresi
Lake	Morpheus Data
Lansol	Mphasis
Ldex Group	msg services
Lenovo	MTF
Leuchter IT	myLoc
Levantis	Navisite
Liquid Web	NetApp

Netcloud	Presidio
Netcompany	Proact
Netfox	Probrand
Netrality	Profi AG
nexellent	Prologic systems
nexellent (Tineo)	Pulsant
NineInternet Solutions	QSC
Node4	QTS
Nordlo	Rackspace Technology
Noris Network	Rahi Systems
Nouveau	ratiokontakt
NTS Workspace	Rechenzentrum Ostschweiz
NTT	Rechenzentrum Winterthur
NTT Data	Red Hat
NTT Global Datacenters	Redcentric
Nutanix	RightScale (Flexera)
ODATA	Safe Host
OneNeck	Scala Data Centers
Oni	ScaleUp
operational services	Scalr
Opus	Serverpronto
Orange Business Services	ServiceNow
Otava	SIEVERS GROUP
Pfalzkom Manet	Six Degrees
PhoenixNAP	SmartIT
Pivot3	Snow Software Embotics
plusserver	Sonda

Sopra Steria	Total Computer Networks
Stackit	Trivadis
StarWind	T-Systems
Steadfast	Turnkey
Stefanini	UKFast
StorMagic	UMB
Stratoscale	Unisys
Structured	UnitedLayer
Sungard AS	Uptime IT
Swcomms	UST Global
Swisscolocation	Veber
Swisscom	VIRTUS
Switch	Visolit
Syntax Systems	VMware
System Clinch	Vodafone
Systematic	Volico
TCS	Volta
Tech Mahindra	VSHN
Telehouse	Wipro
TelemaxX	Witcom
Telium	Wowrack
Telstra	Xfiber
ti&m	Zayo
TierPoint	Zensar
TietoEVRY	
Timico	
TIVIT	

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