



***ISG** Provider Lens™

2020

Next-Gen Private/Hybrid
Cloud - Data Center Services
& Solutions 2020

imagine your future®

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Definition

Data center outsourcing is the practice of outsourcing the responsibility of provisioning, monitoring and management of computing and storage resources to a third-party provider. The data center may be owned by the enterprise, service provider or a third-party colocation provider. Monitoring services are usually delivered from the provider's location and are called remote infrastructure management services (RIM).

A private cloud is an extension of the existing computing environment at an enterprise 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-premise or private cloud deployments and operations. Service providers can implement cloud technology to create private clouds with 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 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. 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.

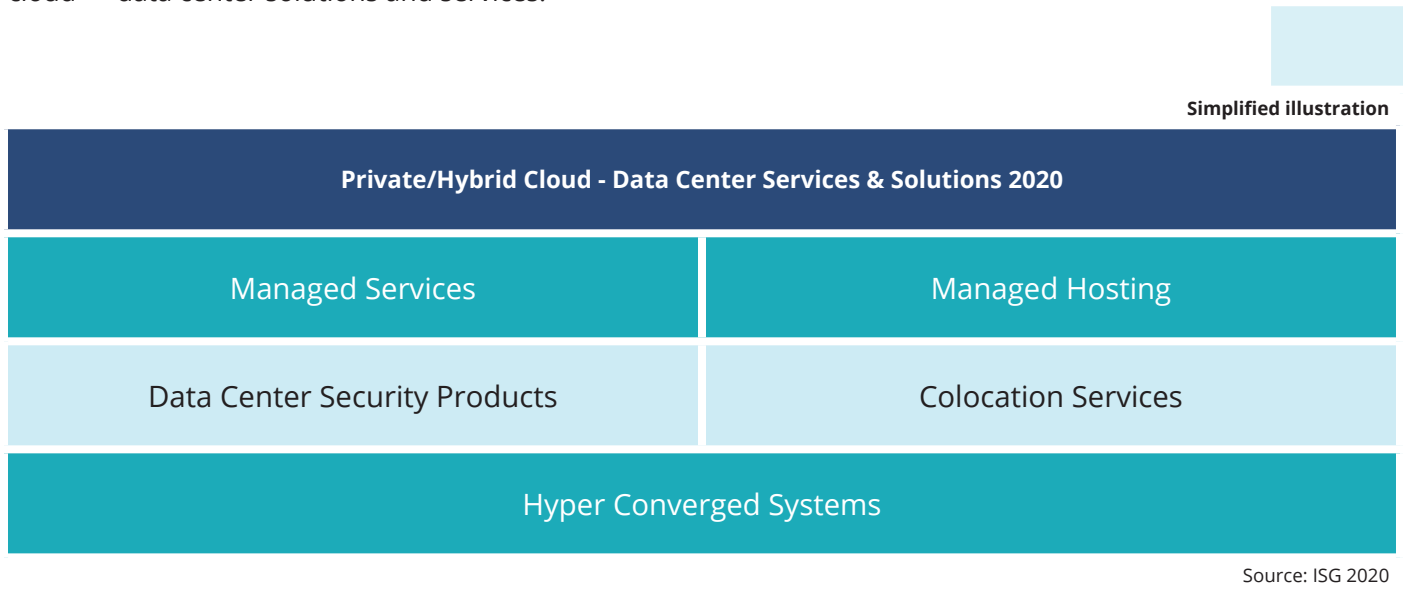
The ISG Provider Lens™ study offers IT-decision makers:

- A differentiated positioning of providers based on competitive strengths and portfolio attractiveness
- Focus on different markets, including the U.S., Germany, Switzerland, 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 their current vendor relationships and potential new engagements.

Quadrant Research

As part of this ISG Provider Lens™ quadrant study, ISG includes the following four quadrants on private/hybrid cloud — data center solutions and services:



Managed Services

This market covers the provider’s ability to provide ongoing management services for data center infrastructure and platforms that consist of servers, middleware, storage, databases and networking components. Infrastructure may be in the client’s data center or the service provider facilities or even co-located in a third-party facility. Participating companies usually take over the responsibility of including transition services. 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 private and hybrid-cloud environment. These are aimed at maximizing the performance of workloads in the cloud, reducing costs and ensuring compliance and security.

Eligibility criteria:

- Ability to service data center infrastructure (networks, 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 RIM)/shared services center
- 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 the clients’ IT organization and get involved in creating blueprints, architecture frameworks and management processes at the client’s location
- Ability to manage high memory and compute-intensive workloads and consulting on individual shoring alternatives

Managed Hosting

This quadrant assesses service providers that offer standalone* enterprise-grade hosting solutions using their 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. A provider may monitor various IT resources 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 facilities and infrastructure
- Capability to offer active-active disaster recovery and backup services
- Capacity to securely manage and maintain all the data center equipment and technology stacks
- 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

** Standalone services only – not applicable to outsourcing providers that offer managed hosting through third-party owned infrastructure, as part of a larger data center outsourcing deal*

Colocation Services

This market has providers that offer professional and standardized data center operations as colocation services. The participating companies offer community access points for various hosting providers, system houses, carriers or telecommunication providers and end users. Enterprise clients mainly opt for colocation services because they provide a standardized and sophisticated data center setup, different carrier providers 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:

- Ability to use a standardized data center architecture design for colocation field offices
- Adept at providing colocation-hosting facilities with high-quality data network equipment
- Guaranteed power density to support current and future technologies
- Provision for at least five layers of physical security measures on the premises
- Colocation site must possess appropriate certification such as SSAE 16, HIPAA, ISO 14001, ISO 22301, PCI DSS, NIST, FISMA, SOC Type I and II, from one or more auditing companies
- Ability to offer edge computing and networking
- Ability to offer interconnected fabric hub services
- Ability to optimize hybrid/multi-cloud applications by placing traffic exchange points close to users and clouds
- Ability to offer seamless integration with hyperscalers and edge data centers to support new applications for AI, Internet of Things (IoT), autonomous vehicles, big data, etc.

Hyper Converged Systems

This quadrant analyzes vendors that provide hyper converged systems that are closely aligned or preconfigured hardware and software appliances, are blueprints designed to scale up or down and can centrally manage a scalable cloud infrastructure. These systems consist of network, storage and compute resources that are equipped with management software for orchestration purposes and are often the first step to build a private or hybrid cloud and be cloud ready. Hyper converged infrastructure makes data center resources readily available as cloud services.

Eligibility Criteria:

- Software to provide a single orchestration layer across hyper converged infrastructure (HCI) components
- System management software to aid in orchestration as well as disaster recovery operations
- Storage, compute and network to be independently configurable and scalable
- Ability to provide an agile professional service along with customizable implementations
- Adept at managing resiliency and reliability during an outage
- Ability to offer cloud-like flexibility in on-premises data centers
- Ability to switch data/applications between on-premises servers and the public cloud
- Ability to offer self-encrypting drives and tools that provide high levels of security and visibility

Data Center Security Products

The cloud/data center security category comprises solutions that counter IT infrastructure attacks or threats, irrespective of whether they are installed in the cloud (private, public, hybrid or multi-cloud) or on-premise. This market is focused on cloud services offered by independent software vendors. The solutions are built for continuous compliance monitoring and reporting and provide a centralized dashboard for maximum visibility of threats and anomalies. Cloud and data center security solutions are fundamental to DevSecOps and shorter go-to-market cycles without compromising on quality and compliance.

Eligibility Criteria:

- Ability to provide software solutions as a shield against hacker attacks and to identify anomalies in context of several services/tools for Incident response management, application security management, encryption and key management, and virtualization/container security management
- Ability to offer cloud, DevSecOps monitoring, visibility, and management capabilities that seamlessly enable hybrid implementations
- Solution to provide firewall, intrusion detection, virtual private network, vulnerability scanning and anti-viral services
- Capability to offer pro-active threat intelligence, advanced detection and analysis capabilities
- Security orchestration and automation technologies to provide efficient incident response workflow
- Advanced detection methods and analytics techniques, including response capabilities, threat intelligence (mobility, IoT and big data), etc.

Quadrants by Region

Quadrants	Global	U.S.	Germany	CH	U.K.	Nordics	Brazil
Managed Services - Private & Hybrid Cloud Solutions	Overview	✓	✓	✓	✓	✓	✓
Managed Hosting - Private & Hybrid Cloud Solutions	Overview	✓	✓	✓	✓	✓	✓
Data Center Security Products	Overview	✓	✓	✓	✓	✓	✓
Colocation Services	Overview	✓	✓	✓	✓	✓	✓
Hyper Converged Systems	Overview	✓	✓	✓	✓	✓	✓

Archetype Report

In this report, we identify and classify the typical buyers of data center outsourcing services (managed and transformation services) which nowadays look for transformational capabilities. We have identified five major segments of buyers as follows:

- **Traditional Outsourcers** – Buyers that focus primarily on cost reduction and seek outsourcing/staff augmentation assistance for basic monitoring activities
- **Managed Services** – Buyers looking 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 transform their infrastructure further
- **Pioneering** – Buyers that aspire to achieve high levels of automation, orchestration and implementation of a software-defined infrastructure for boosting developer productivity

Schedule

The research phase falls in the period between **January and April 2020**, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in **June 2020**.

Milestones	Beginning	End
Launch	January 17, 2020	
Survey Phase	January 17, 2020	February 14, 2020
Sneak Preview	May 13, 2020	
Press Release	June 2020	

Please refer to [this link](#) to view/download the ISG Provider Lens™ 2020 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 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.

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Do you need any further information?

If you have any questions, please do not hesitate to contact us at isglens@isg-one.com.

Partial list of companies invited for the survey

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

A2Hosting	Check Point	envia TEL
Accenture	Ciber (HTC Global Solutions)	Equinix
ACP	Cisco	e-shelter
Adacor	Claranet	EVEO
AltusHost	Cloudscene	FireEye
Anexia	Codero	First Colo
Arvato Systems	Cognizant	Flexential
Ascenty	Colt DCS	Fortinet
ATEA	Coresite	F Secure
Atos	CorpFlex	Fujitsu
Axians	CyrusOne	GAVS
Barracuda Networks	DARZ	Global Switch
BaseFarm	Databank	Globalconnect
Bechtle	Datacenter One	GTT (Interoute)
Binero Solutions	DATAGROUP	HCL
BT	Dedalus Prime	Hetzner
BTC	Deutsche Telekom (TDG)	HostDime
CA	Digital Realty	Hostinger
Cegeka	Dimension Data (NTT)	Hostserver
CANCOM	Dunkel	HPE
Capgemini	DXC	HTBASE
CDNetworks	Ecotel	Huawei
CentralServer	Embratel	Hydro66Hydro66
Centron	EMC HostCo	Hyve
CenturyLink	Ensono	IBM

Infosys	NTT Communication	TelemaxX
Interxion	Nutanix	Telium
Iron Mountain	Odata	Tierpoint
ISH Tecnologia	Orange	TietoEVRY
ITENOS	Palo Alto Networks	TIVIT
Juniper Networks	Pfalzkom I Manet	TRIANZ
KMO	Pivot3	Trend Micro
Lenovo	PlusServer	Trustwave
LEW Telnet	Portlane	T-Systems
Locaweb Corp Cluster2Go	QSC	Unisys
Logicalis	Rackspace	UOL Diveo
LogRhythm	Rapid7	VMWare
LTI	ratiokontakt	Wipro
Majesco	Rejiers Embriq	Zensar
Mandic	ScaleUp	
Maxta	Secureworks	
McAfee	SingleHop	
MicroFocus	Sonda IT	
Microland	Splunk	
Mindtree	Stratoscale	
Mphasis	Sungard AS	
myLoc	Supreme servers	
Navisite	Symantec	
NetApp	Syntax Systems (FIT)	
NIIT	TCS	
noris network	Tech Mahindra	
NTT	Telehouse	