

Private/Hybrid Cloud – Data Center Services

Managed Hosting

A research report comparing provider strengths,
challenges and competitive differentiators

Customized report courtesy of:



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Nordics' robust network and data centers are underlying reasons for its competitive digital edge

As part of its ISG Provider Lens™ Private/Hybrid Cloud — Data Center Services study, ISG examined more than 100 providers of hybrid IT and colocation services in the Nordics and identified the most important service providers and trends affecting the managed services and colocation market in the region.

Market activity across the Nordics is driven by Denmark, Sweden, Finland and Norway, ranking 1, 3, 7 and 12 on IMD's Digital Competitiveness Ranking. A significant part of the success of these countries had to do with their business-friendly environment, strong public policy such as investment into R&D and a highly skilled workforce. The countries have a robust IT infrastructure, characterized by high-speed broadband internet penetration.

Cybersecurity and data sovereignty are placed high on the Nordic nation's list of priorities. Large enterprises across the region continue to advocate for a cloud environment that complies with local data privacy and secrecy regulations. Nordic companies and public institutions have suffered from cyber intrusions and attacks, particularly from Chinese entities since 2021. Incidents of ransomware attacks have increased since the Russia-Ukraine war. The ongoing Russia-Ukraine war has not only had an impact on security but also upon inflation, mostly brought about by a spike in energy costs.

According to Eurostat, electricity prices for non-household consumers rose by approximately 40 percent during the first half of 2022 compared with 2021. The electricity price rise has been uneven among the main Nordic countries, with Finland experiencing a significantly lower price rise of approximately 20 percent compared with Sweden, Norway and Denmark; which experienced price rises of approximately 60 percent, 75 percent and 100 percent, respectively. Yet, the electricity prices

Nordics' competitive energy strategy helps local enterprises keep their **energy costs** at bay.



per kWh in these countries continue to remain lower than the average across the European Union (EU), with enterprises in Finland having to pay the least at approximately €0.75 per kWh. Therefore, while the Nordic enterprises have been affected by the hike in energy price rise, it is still lesser than the average EU hike in prices.

The Russia-Ukraine war's effect on the data center outsourcing market will be felt in energy costs and wage increases because of inflation that employees will need to contend with. The spike in operating expenditure has made profit margins significantly slimmer, with many data center operators passing the rise in operating expenditure to their customers. This could prompt a realignment of contracts between the enterprises and their service providers.

The data center outsourcing industry across the Nordics continues to hold strong despite the fallout from the war, as many enterprises favor the strong data privacy laws and the collective stability of the countries in the Nordics and the operators' investments into sustainability initiatives. To mitigate the rise in costs, enterprises are adopting technologies from niche companies than incorporating

elaborate transformations. Well-established service providers operating across the Nordics are on the back foot. Given that enterprises across the Nordics operate cloud environments that are highly sophisticated and often operate across multicloud environments, they will still rely on those service providers that are established in this space and have the backing of competencies from key hyperscalers.

Service providers are adopting capabilities that will automate several IT operations, which will help blunt the high cost of labor. ISG believes that the surge in operational costs is therefore momentary and that the operational cost will continue to fall moving forward.

The following are key trends that will impact the private/hybrid cloud data center outsourcing market in the Nordics.

- **Acquisition of new capabilities:** The effort to build a holistic end-to-end platform service that holistically mitigates the migration to the cloud continues unabated among large service providers. Many large providers, like Accenture, continue to acquire smaller cloud transformation

specialists and implement their capabilities into their cloud transformation platforms. The challenge with a multitude of such acquisitions lies in ensuring that there will be no duplication in services and that overall customer experience would continue to be seamless and reliable. Another method would be working with a network of specialists and outsourcing tasks based upon the partner's specialty. TCS' COIN ecosystem is an example of such a partnership, where it provides the cloud transformation service to its customers while leveraging emerging technology such as blockchain from its startup community into the implementation process.

- **Automating an entire value chain of operations:** Technologies such AIOps and autonomous IT operations will continue to experience traction among service providers as they try to offset costs brought about by the rise in employee compensation and inflation. Along with infrastructure as code (IaC), service providers will help provision the end users' cloud infrastructure quicker while automatically remediating anomalies

and conducting root cause analysis. Service providers that are active in the region have either partnered with ISVs to leverage their automation capabilities or have built their own automation capabilities from scratch. The power of automation will continue to play a pivotal role across many markets, including this one, and can level the playing field between a large, established service provider and a smaller, more regional one.

- **Microservices, edge computing and the multicloud environment:** With the proliferation of industry-specific IoT technologies and 5G across Nordics, there will be more demand for edge computing infrastructure that is distributed and closer to the end user and applications, which are easy to deploy and work independently. Microservices and container management services will experience traction as enterprises look on developing edge compute infrastructure and applications that are quick and agile to deploy. There is significant heterogeneity across the cloud infrastructure from the edge to the data center code. Service providers with



software-defined anything (SDx) expertise will have an upper hand over those without since this expertise and the right automation capabilities would improve cloud orchestration and avoid vendor lock-ins, which might arise when operating in a hybrid, multicloud environment.


- **Environmental, social and governance (ESG) initiatives:** Sustainability is at the core of managed cloud services delivered to customers. Although the spike in energy costs and general inflation has impacted the service providers deploying further measures to stem emissions, they continue to have unwavering commitment in meeting environment compliance regulations set out by the local government and their customers. Many regional service providers tap into renewable energy to meet their scope 1 emission norms. In addition, many colocation companies supply waste hot water to local residential communities as well as to companies from diverse industrial backgrounds, actively participating in the circular economy.

- **Focus on FinOps to continue:** The demand for FinOps grew considerably during the pandemic as the enterprises operating in vast, hybrid and multicloud environments were looking to further optimize their cloud spend to weather the financial distress they found themselves in. The Russia-Ukraine war has again brought FinOps to the fore as service providers grapple with higher operating costs.

Although the impact of the COVID-19 pandemic and the international unrest caused by the war between Russia and Ukraine are causing economic difficulties, the IT market in the Nordics continues to show brisk growth.

Service providers leverage FinOps and implement automation across the value chain of cloud operations to alleviate operations cost brought by geopolitics.




 Provider Positioning

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	Managed Services for Large Accounts	Managed Services for Midmarket	Managed Hosting	Colocation Services
3stepIT	Not In	Market Challenger	Not In	Not In
Accenture	Leader	Not In	Not In	Not In
Advania	Product Challenger	Product Challenger	Product Challenger	Not In
Anexia	Not In	Not In	Contender	Not In
Asseco	Contender	Contender	Not In	Not In
ATEA	Leader	Leader	Leader	Not In
AtlasEdge	Not In	Not In	Not In	Contender
Atos	Product Challenger	Not In	Not In	Not In
Bulk infrastructure	Not In	Not In	Not In	Leader
Capgemini	Leader	Not In	Not In	Not In
CGI	Leader	Leader	Leader	Not In




 Provider Positioning

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	Managed Services for Large Accounts	Managed Services for Midmarket	Managed Hosting	Colocation Services
Coforge	Not In	Contender	Not In	Not In
Cognizant	Product Challenger	Not In	Not In	Not In
Conapto	Not In	Not In	Not In	Product Challenger
Conscia	Not In	Product Challenger	Not In	Not In
Digital Realty	Not In	Not In	Not In	Leader
DXC Technology	Rising Star ★	Not In	Rising Star ★	Not In
EcoDataCenter	Not In	Not In	Not In	Leader
Embriq	Contender	Not In	Contender	Not In
Equinix	Not In	Not In	Not In	Leader
Fujitsu	Leader	Not In	Leader	Not In
GleSys	Not In	Not In	Product Challenger	Contender



 Provider Positioning


	Managed Services for Large Accounts	Managed Services for Midmarket	Managed Hosting	Colocation Services
Green Mountain	Not In	Not In	Not In	Leader
HCLTech	Leader	Not In	Not In	Not In
ICME	Not In	Not In	Contender	Not In
Infosys	Product Challenger	Not In	Product Challenger	Not In
Iver	Not In	Product Challenger	Product Challenger	Not In
Kyndryl	Leader	Not In	Leader	Not In
Lefdal Mine	Not In	Not In	Not In	Product Challenger
LTIMindtree	Product Challenger	Leader	Not In	Not In
Lumen	Not In	Not In	Product Challenger	Product Challenger
Mediam	Not In	Not In	Not In	Contender



 Provider Positioning

	Managed Services for Large Accounts	Managed Services for Midmarket	Managed Hosting	Colocation Services
Netcompany	Contender	Contender	Product Challenger	Not In
Netic	Not In	Contender	Not In	Not In
Nordlo	Not In	Contender	Contender	Not In
Northern	Not In	Not In	Not In	Product Challenger
Orange Business	Leader	Leader	Leader	Leader
Proact	Not In	Contender	Not In	Not In
Rg19	Not In	Contender	Not In	Not In
Sopra Steria	Product Challenger	Product Challenger	Leader	Not In
Stack Infrastructure	Not In	Not In	Not In	Leader
Sweden Dedicated	Not In	Not In	Not In	Contender



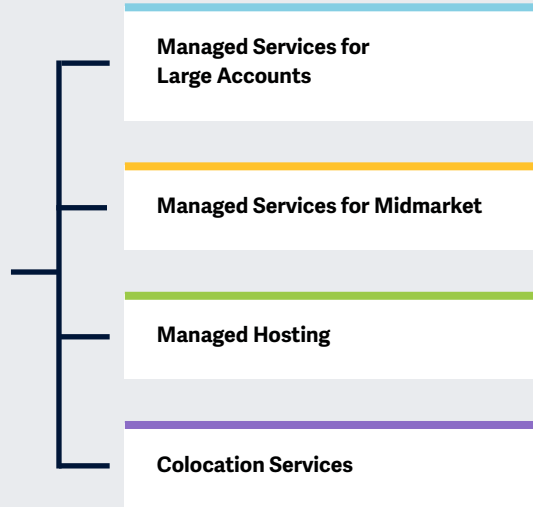
 Provider Positioning

	Managed Services for Large Accounts	Managed Services for Midmarket	Managed Hosting	Colocation Services
Systematic	Product Challenger	Product Challenger	Not In	Not In
TCS	Leader	Not In	Not In	Not In
Tech Mahindra	Product Challenger	Leader	Not In	Not In
Telia	Not In	Not In	Market Challenger	Contender
Tietoenvy	Leader	Leader	Leader	Not In
T-Systems	Product Challenger	Leader	Leader	Not In
Verne Global (Ficolo)	Not In	Not In	Not In	Leader
Vodafone	Not In	Not In	Contender	Not In
Wipro	Leader	Not In	Not In	Not In
Xfiber	Not In	Not In	Not In	Contender



This study focuses on what ISG perceives as most critical in 2023 for **private/hybrid cloud and data center outsourcing**.

Simplified Illustration; Source: ISG 2023



Definition

This study assesses service providers of data center outsourcing, including the providers of managed hosting, colocation facilities and managed services. Typical participants use automation tools on highly secure data centers, providing security, operations management and client dashboards.

Data center outsourcing is the practice of transferring the responsibility of managing data center assets to a third-party provider. It includes orchestration; provisioning; integrated monitoring; and managing infrastructure components including computing, storage, database, middleware and others. The data center may be owned by the enterprise client, service provider or a third-party colocation provider. Integrated monitoring and operations can be delivered from a provider's shared service center located offshore, onshore, nearshore or via a dedicated delivery center such as a remote infrastructure management (RIM) model.

A private cloud is an extension of a client's computing environment that 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, and may choose to host in their facility. As businesses are becoming software and data driven, they need an infrastructure base that can adapt to the changing market conditions, be managed based on a hybrid model, and be always accessible. Currently, most data center outsourcing engagements have elements of private/hybrid cloud and intuitive cloud management cognitive platform enablement.

A hybrid cloud connects the existing on-premises infrastructure services with a private cloud, a public cloud, or many multicloud arrangements. An enterprise can also leverage colocation and hosting providers, and not necessarily own a data center, to have a hybrid cloud setup. Globally, there is a massive surge in demand for a multicloud environment from the enterprise community as enterprises adopt hybrid and multicloud strategies to migrate and



manage their workloads with improved agility, reduced operating costs and high application performance and availability.

There has been a rapid increase in the use of proprietary platforms and tools by service providers and enterprises for automating cloud operations, thereby increasing the adoption of AI and machine learning (ML) technologies. One of the fundamental advantages of a hybrid cloud deployment is the high degree of control offered to the organization; hybrid clouds allow enterprises to leverage the capabilities of public cloud platforms without the need to offload their entire data to a third-party data center. Although still evolving, edge computing is another technology that enterprises of all sizes are adopting for various existing and new use cases, such as software-defined solutions, IoT processing, hybrid cloud connectivity, firewall and network security, branch and micro data centers, internet-enabled devices and asset tracking. Edge is also being used to address the latency challenges in the present, highly distributed environments by removing network barriers and bringing processing to the edge.

ISG reports consistent demand for infrastructure services as enterprises are becoming more vigilant toward spending on large and complex cloud implementations. The demand for managed services, especially infrastructure and workloads management services, also is growing slowly. According to the ISG 1Q 2023 ISG Index™ figures, the global market grew by one percent in combined market ACV to reach its current value of \$24.1 billion for the first three months. Managed services ACV increased by one percent year-over-year and reached \$9.8 billion, while the XaaS ACV decreased by 13 percent to reach \$14.3 billion. Also, IaaS spending witnessed a declining growth of 16 percent to reach \$10.4 billion, while the SaaS market declined by 4 percent to reach \$3.9 billion during the same period.



Scope of the Report

In this ISG Provider Lens™ quadrant report, ISG covers the following four quadrants for services/solutions: Managed Services for Large Accounts, Managed Services for Midmarket, Managed Hosting and Colocation Services.

This ISG Provider Lens™ study offers IT decision makers with the following:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments (quadrants)
- Focus on regional market

Our study serves as the basis for important decision making in terms of positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing vendor relationships and potential engagements.

Provider Classifications

The provider position reflects the suitability of IT providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions IT providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between \$20 million and \$999 million with central headquarters in the respective country, usually privately owned.

- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above \$1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product Challenger, Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens™ quadrant may include service providers that ISG believes have strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

- **Number of providers in each quadrant:** ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).





Provider Classifications: Quadrant Key

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/ services and a follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not in means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.





Managed Hosting

Managed Hosting

Who Should Read This Section

This report is relevant to enterprises across all industries in the Nordics for evaluating managed hosting providers.

In this quadrant, ISG defines the current market positioning of managed hosting providers in the Nordics and how they address enterprises' key challenges.

Service providers have been drawn to the Nordics because of the region's access to cost-effective renewable energy sources. Many enterprises are now prioritizing sustainability, and hosting data centers in the Nordics can significantly reduce Scope 3 emissions. Furthermore, the Nordics boasts reliable connectivity with other regions and a stable environment, making it an increasingly popular location for data center services.

Managed hosting is a viable solution for enterprises looking to avoid the burdens of operating a private data center while maintaining control over the underlying systems supporting their hosted applications.

By leveraging a managed hosting provider's investment in modern technologies and updated traditional infrastructure, enterprises can benefit from reduced on-premises infrastructure needs. Managed hosting providers offer consumption-based hosting services, including bare metal options, support for various operating systems and databases, compliance certifications and connectivity to multicloud environments. Managed hosting providers can also deliver services close to an enterprise's core operations, which is essential for latency-sensitive applications.



IT and infrastructure leaders should read this report to analyze providers' tool modernization and hosting capabilities and the impact of hosting space advancements on hybrid cloud strategies.



Software development and technology leaders should read this report to understand providers' offerings and their impact on ongoing software development and systems, including applications under development.

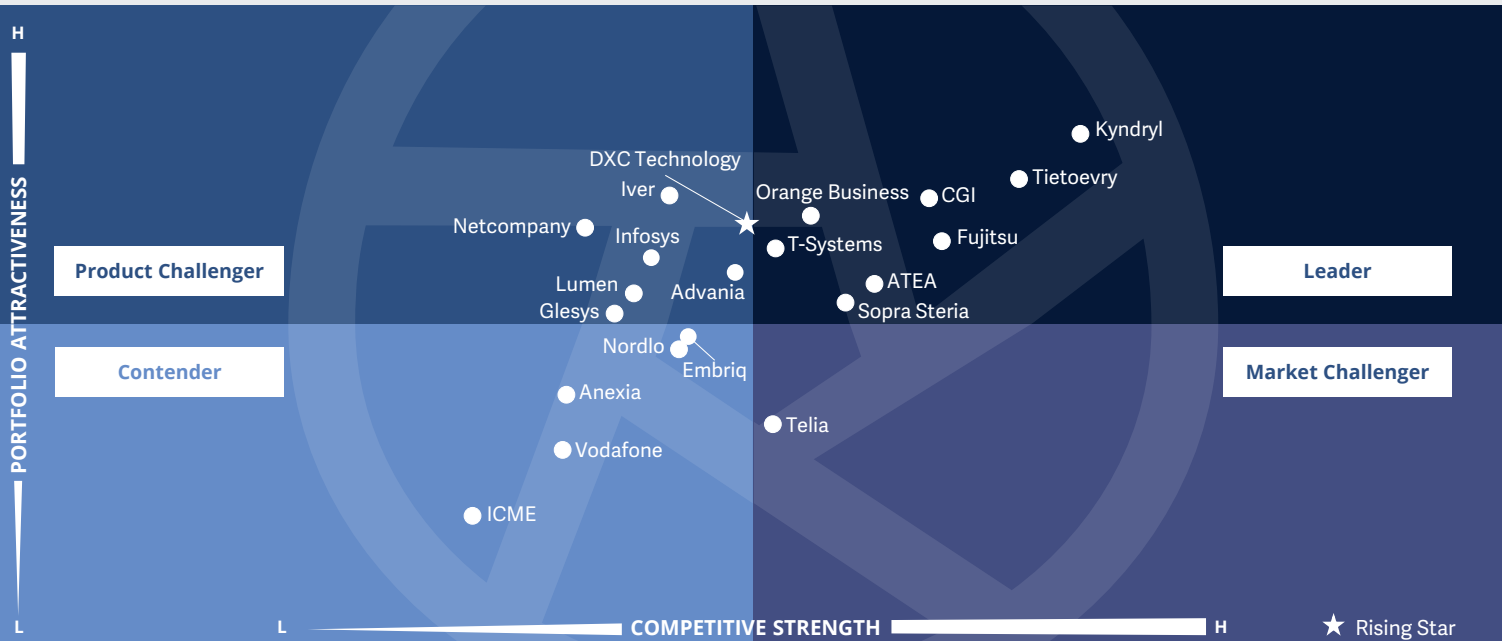


Sourcing, procurement and vendor management professionals should read this report to better understand the current landscape and partner ecosystem of managed hosting providers in the Nordics.



Private/Hybrid Cloud – Data Center Services
Managed Hosting

Nordics 2023



Nordic enterprises need **scalable hosting** solutions with the stringent **data security** and **privacy** of a private cloud. Services providers leverage their ISV and hyperscaler partnerships to build an **agile cloud** environment, which can also be used for **HPC**.

Rohan Thomas



Managed Hosting

Definition

This quadrant assesses service providers that offer standalone enterprise-grade hosting solutions using their own or third-party facilities and infrastructure to midmarket and large enterprise clients. The providers assessed here are responsible for the regular 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, the ones offering hybrid cloud management tools or platforms have not been evaluated for this quadrant. The service levels typically considered to assess managed hosting services are the various tiers of data centers, multilayered security, service availability and network (LAN) I/O at peak time.

Eligibility Criteria

1. Ability to offer **enterprise-grade hosting** solutions using the provider's infrastructure
2. Capability to offer active-active and active-passive **disaster recovery and backup services**
3. **Technical and financial capacity** to upgrade the infrastructure and maintain capacity plans to ensure hosting performance in advance if there is an increase in demand
4. **Capability to scale and maintain dedicated servers** and storage and shared cloud resources on the same network and management platform
5. Ability to provide at least **five layers of data center security**



Managed Hosting

Observations

Compared with other regions, the data center outsourcing industry in the Nordics is highly evolved. Large and mid-sized enterprises are challenged to run their infrastructure across a multivendor cloud environment. They prefer a hosting environment that gives them the scalability of a public cloud environment while retaining data privacy and security of the private cloud.

To help their end users address these issues, leading service providers in the Nordics have developed a robust suite of tools that include AIOps and IaC, along with a repository of automation blueprints. These offerings reduce the provisioning time for hosting while also maintaining high SLAs. SDN capabilities further accelerate deployment while improving orchestration across different cloud environments.

Most service providers maintain strong partnerships with ISVs to implement containers and virtualization into their clients' cloud hosting environment. CoEs built in partnership

with key specialists, like VMware, assist the end user in building on its unique use case and enhance the cloud transformation experience.

Many service providers leverage these inherent capabilities and partner with hardware specialists such as NVIDIA and Dell to spin up high-performance computing (HPC) environments. These are done by large enterprises mostly for product development.

Establishing disaster recovery, although difficult to implement, is essential for data recovery purposes. Disaster recovery as a service (DRaaS) will help with its implementation.

From the 90 companies assessed for this study, 21 have qualified for this quadrant with eight being Leaders and one a Rising Star.

Atea

Atea's data centers have a minimum of five layers of physical security and guarantee an uptime of 99.95 percent. Its DRaaS enables its end users to efficiently implement scalable disaster recovery solutions custom to their business requirements.

CGI

CGI's regional footprint is part of an extensive network of data centers worldwide. Its automation capabilities reduce provisioning time while guaranteeing a high uptime. CGI offers versatile disaster recovery services with low up-front implementation cost.

Fujitsu's

Fujitsu's Uvance platform implements automation across the company's hosting environment while reducing carbon footprint. It has helped reduce its power usage effectiveness (PUE) to 1.56. All Fujitsu data centers are powered by renewable energy.

Kyndryl

Kyndryl uses IBM hardware for its hosting solutions. The hardware cuts migration time by a significant margin and also powers use cases that require HPC. Kyndryl's Nordic presence is a part of its extensive network of global data centers.



Orange Business has a robust portfolio of SDx solutions, which optimizes workloads across different cloud environments. It leverages its global network infrastructure to support mission-critical applications at the edge, requiring low latency.

Sopra Steria

Sopra Steria has a significant presence in Norway. The company collaborates with Orange Business and OVHcloud to develop the sovereign cloud. Its AIOps and RPA capabilities simplify IT operations and enhance its customers' visibility of its hosted data centers.



Managed Hosting

tietoevry

TietoEVRY has an extensive footprint of 13 data centers in the Nordics. These data centers comply with local government laws. TietoEVRY is also actively collaborating with VMware to develop the sovereign cloud. On average, TietoEVRY reduces provisioning time by 40 percent.

T-Systems

T-Systems provides memory-centric computing capabilities and bare metal as a service for customers that are migrating to SAP HANA. It is also leveraging its partnerships with NVIDIA to implement GPUs in its services for enhancing its processing abilities for HPC.

DXC Technology

DXC Technology (Rising Star) is consolidating its data center to reduce energy consumption and space. It uses DevOps and IaC to reduce operations cost further. It provides managed resiliency services, infrastructure recovery services and backup as a service.





“Orange Business’ SDx capabilities are leveraged extensively for orchestration across multicloud environments. Its edge computing services support low-latency and mission-critical applications.”

Rohan Thomas

Orange Business

Overview

Orange Business is headquartered in Paris, France and operates in 65 countries. It has more than 29,100 employees across over 100 global offices. In FY22 the company generated €7.9 billion in revenue, with IT Services as its largest segment. In July 2018 Orange Business acquired Basefarm, improving Orange Business’ managed IT services portfolio and penetration into the Nordics. By September 2022, Basefarm was fully integrated into the Orange Business brand. The entity specializes in digitally transforming multinational large and mid-sized enterprises with cloud, smart mobility and cybersecurity.

Strengths

Extensive data center footprint: Orange Business has a network of more than 70 data centers worldwide. Across the Nordics, it has four Tier 3 data centers: three in Norway and one in Sweden. The high density of data centers in the region caters to the localization required by the enterprises here. The company partners with key hyperscalers, namely AWS, Azure and Google Cloud, and has built on its automation capabilities to accelerate cloud deployments.

Increased adoption of automation: Orange Business has a robust portfolio of SDx solutions. The company is aggressively investing in developing its automation and AIOps capabilities. These investments have had a significant impact on sustainability goals and the amount of time required for

data center provisioning. The company has leveraged its automation capabilities to reduce provisioning time by 85 percent.

Edge computing services: Its strong global network infrastructure supports Orange Business edge services. This ensures the availability of low-latency requirements of up to 5 ms for most of its customer base. Its innovation labs also support edge computing services. The low latency of Orange Business’ networks supports a variety of use cases, including 5G, IoT and the digital workspace.

Caution

Orange Business’ comprehensive SDx portfolio aids in automating its network operations. However, it should continue investing in AI, ML and AIOps technologies because it lags behind what its competitors offer. This would include developing its IP and patents.





Appendix

The ISG Provider Lens™ 2023 – Private/Hybrid Cloud – Data Center Services report analyzes the relevant software vendors/service providers in the Nordics market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research™ methodology.

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The research and analysis presented in this report includes research from the ISG Provider Lens™ program, ongoing ISG Research™ programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of April 2023, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

All revenue references are in U.S. dollars (\$US) unless noted.

The study was divided into the following steps:

1. Definition of Private/Hybrid Cloud – Data Centre Services market
2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & use cases
4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)
5. Use of Star of Excellence CX-Data
6. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
7. Use of the following key evaluation criteria:
 - * Strategy & vision
 - * Tech Innovation
 - * Brand awareness and presence in the market
 - * Sales and partner landscape
 - * Breadth and depth of portfolio of services offered
 - * CX and Recommendation



Author & Editor Biographies

Author



Rohan Thomas
Senior Lead Analyst

Rohan Thomas has nearly a decade's worth of knowledge expertise in the realms of ICT, which include telecommunications, data centers, and networks and application performance management. At ISG, Rohan is the lead analyst for ISG Provider Lens™, leading research activities and benchmarking exercises pertaining to the regional adoption of digital infrastructure such as private/hybrid cloud.

He has a Bachelor's degree in Mechanical Engineering from Visveswaraya Technological University and a Master's degree in Computer Aided Design and Manufacturing from Vellore Institute of Technology.

Enterprise Context and Overview Analyst



Meenakshi Srivastava
Senior Research Analyst

Meenakshi Srivastava is a Senior Research Analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on the Private Hybrid Cloud Data Center. She creates content for Provider Lens™ studies and supports lead analysts in the research process for multiple regions. She has an experience of 3 years in IT industry and 2.5 years in market research industry. She is also responsible for authoring the enterprise context and global summary reports for her respective study.

Prior to her role in ISG, she has worked on various signature research projects which involved both qualitative and quantitative analysis as well as content creation and contextualization for other market research firm. She has an expertise of working on both primary and secondary research projects and is also associated with other custom and ad-hoc research projects.





IPL Product Owner

Jan Erik Aase
Partner and Global Head – ISG Provider Lens™

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor.

Now as a research director, principal analyst and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.



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](#).

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REPORT: PRIVATE/HYBRID CLOUD – DATA CENTER SERVICES