iSG Provider Lens™

Private/Hybrid Cloud – Data Center Services

Managed Services — Large Accounts

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:
Computacenter

QUADRANT REPORT | JUNE 2024 | U.K.

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Report Author: Meenakshi Srivastava

Enterprises leverage hybrid cloud solutions to expedite innovation and adapt to economic unpredictability

The U.K.'s data centre industry is experiencing a surge in demand, primarily driven by advancements in AI and rapid technological innovations. These advancements necessitate upgrades to existing facilities to handle the increased processing requirements. As a result, companies are expected to ramp up their spending on hyperscale data centres by an estimated 20 percent, signalling a substantial investment trend in the sector.

Given its status as a global financial hub, London remains a focal point for investment in the data centre industry. However, regions like Manchester, Slough and Birmingham are also emerging as key locations for data centre investments. These regions' attraction lies in their strategic positioning and burgeoning digital ecosystems, which make them conducive for data centre infrastructure development.

Regulatory landscape and cybersecurity initiatives: Despite the uncertainties stemming from Brexit, the UK's regulatory landscape concerning data protection remains robust. Adequacy decisions for the EU General Data Protection Regulation (GDPR) until June 2025 assure uninterrupted data flows between the UK and EU member states, offering regulatory clarity for businesses operating across borders. In addition, cybersecurity has garnered significant attention from the UK government, with increased funding allocated to the National Cyber Security Program. This initiative aims to bolster the country's digital resilience and safeguard against cyber threats. Efforts to foster collaboration within the startup community to address critical cybersecurity challenges underscore the government's commitment to enhancing cybersecurity measures.

Strategic partnerships and automation initiatives: In response to evolving market dynamics, large service providers in the UK are pursuing strategic acquisitions to enhance their capabilities and streamline cloud migration processes. With the acquisition of smaller cloud transformation specialists, these providers

Providers increasingly adopt **FinOps** practices to optimize **costs** while maintaining **sustainability** goals.

aim to integrate their expertise into existing platforms, thereby enhancing their service offerings and providing end-to-end solutions to clients. Furthermore, automation technologies such as AIOps and autonomous IT operations are being increasingly adopted to optimize operational efficiency and mitigate the impact of rising costs associated with inflation and labour expenses.

Focus on edge computing and environmental, social and governance (ESG) initiatives:
The proliferation of Internet of Things (IoT) devices and the rollout of 5G networks across the UK have fuelled the demand for edge computing infrastructure. This infrastructure is essential for processing data closer to the point of origin, enabling real-time insights and reducing latency. Additionally, ESG initiatives have gained prominence within the data centre industry, with service providers implementing measures to reduce carbon emissions and meet stringent environmental compliance standards. These initiatives reflect a growing commitment to sustainability and responsible business practices.

Financial optimization amid economic challenges: Despite economic uncertainties caused by the COVID-19 pandemic and geopolitical tensions, the UK's IT market continues to exhibit resilience and growth. The demand for FinOps has surged as enterprises seek to optimize cloud expenditure amid financial constraints. The ongoing Russia-Ukraine crisis has further underscored the importance of efficient financial management strategies, prompting service providers to explore innovative approaches to cost optimization and resource allocation. Amid these challenges, the UK's IT market remains dynamic and poised for continued expansion, driven by technological innovation and strategic investments in infrastructure.

According to the ISG 1Q1 2024 ISG Index™, Europe's demand for IT and business services in the first quarter increased for the first time in a year, powered by growth in the banking, financial services and insurance (BFSI) sector. Managed services ACV in the first quarter rose 3 percent, to $3.9 billion. There were 277 managed services contracts signed in the

quarter, down 8 percent from the prior year but up 9.5 percent sequentially from the fourth quarter. Among those contracts were two mega deals (ACV of US $100 million or more). The volume of smaller deals (under $30 million) was down 10 percent year on year as economic uncertainty weighed on discretionary spending. With companies still focusing on cost reduction, the ACV of restructured contracts climbed 12 percent. The region's largest market, the UK, generated $1.2 billion of managed services ACV, its fifth consecutive quarter with ACV of more than $1 billion, although it was down 4 percent versus the prior year.

Rising energy costs, inflation and geopolitical instability have added complexity to financial management and resource allocation for service providers in the UK. Service providers are required to implement strategies to optimize energy usage, enhance efficiency and explore alternative energy sources.

Provider Positioning

	Managed Services — Large Accounts	Managed Services — Midmarket	Managed Hosting	Colocation Services
Accenture / Accenture (Navisite)	Leader	Not In	Market Challenger	Not In
Acora	Not In	Contender	Not In	Not In
ANS Group	Not In	Not In	Not In	Contender
Ark Data Centres	Not In	Not In	Not In	Contender
AtlasEdge	Not In	Not In	Not In	Contender
Atos	Leader	Contender	Product Challenger	Not In
Axians	Contender	Contender	Not In	Not In
BT	Product Challenger	Market Challenger	Market Challenger	Product Challenger
Capgemini	Leader	Not In	Not In	Not In
CGI	Market Challenger	Not In	Not In	Not In

Provider Positioning

Provider Positioning

	Managed Services — Large Accounts	Managed Services — Midmarket	Managed Hosting	Colocation Services
Claranet	Product Challenger	Leader	Leader	Not In
Coforge	Not In	Contender	Not In	Not In
Cognizant	Product Challenger	Not In	Not In	Not In
Colt (Lumen) / Colt DCS	Not In	Not In	Product Challenger	Product Challenger
Computacenter	Leader	Not In	Not In	Not In
Coreix	Not In	Not In	Not In	Contender
Custodian Data Centres	Not In	Not In	Not In	Contender
CWCS	Not In	Not In	Contender	Not In
CyrusOne	Not In	Not In	Not In	Product Challenger
Datum	Not In	Not In	Not In	Contender

Provider Positioning

	Managed Services — Large Accounts	Managed Services — Midmarket	Managed Hosting	Colocation Services
Digital Realty	Not In	Not In	Not In	Leader
DXC Technology	Leader	Not In	Leader	Not In
Ensono	Market Challenger	Leader	Leader	Not In
Equinix	Not In	Not In	Not In	Leader
Evoque (Cyxtera)	Not In	Not In	Not In	Product Challenger
Fujitsu	Leader	Leader	Leader	Not In
Global Switch	Not In	Not In	Not In	Leader
GTT	Not In	Contender	Contender	Not In
HCLTech	Leader	Not In	Not In	Not In
Hexaware	Rising Star ★	Leader	Not In	Not In

Provider Positioning

	Managed Services — Large Accounts	Managed Services — Midmarket	Managed Hosting	Colocation Services
HYVE	Not In	Contender	Contender	Not In
Infosys	Leader	Not In	Not In	Not In
Kao Data	Not In	Not In	Not In	Market Challenger
Kyndryl	Leader	Not In	Leader	Not In
LDeX Group	Not In	Not In	Not In	Contender
Logicalis	Product Challenger	Contender	Contender	Not In
LTIMindtree	Product Challenger	Leader	Not In	Not In
Microland	Contender	Product Challenger	Not In	Not In
Mphasis	Contender	Product Challenger	Not In	Not In
NTT DATA	Product Challenger	Product Challenger	Product Challenger	Not In

Provider Positioning

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	Managed Services — Large Accounts	Managed Services — Midmarket	Managed Hosting	Colocation Services
NTT GDC / NTT Global Data Centers	Not In	Not In	Not In	Leader
plusserver	Not In	Not In	Product Challenger	Not In
Pulsant	Not In	Not In	Leader	Product Challenger
Rackspace Technology	Not In	Leader	Leader	Product Challenger
Redcentric	Not In	Not In	Product Challenger	Leader
Sopra Steria	Product Challenger	Product Challenger	Product Challenger	Not In
TCS	Leader	Not In	Not In	Not In
Tech Mahindra	Product Challenger	Rising Star ★	Not In	Not In
Telefonica Tech	Not In	Leader	Contender	Not In
Telehouse	Not In	Not In	Not In	Leader

Provider Positioning

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	Managed Services — Large Accounts	Managed Services — Midmarket	Managed Hosting	Colocation Services
T-Systems	Not In	Leader	Leader	Not In
Unisys	Contender	Leader	Product Challenger	Not In
UST	Not In	Product Challenger	Contender	Not In
VIRTUS	Not In	Not In	Not In	Market Challenger
Vodafone	Contender	Market Challenger	Not In	Not In
Wipro	Leader	Not In	Not In	Not In
Zensar Technologies	Product Challenger	Product Challenger	Not In	Not In

This study focuses on what ISG perceives as the most critical aspects of **private/hybrid cloud and data center** outsourcing services in 2024.

Simplified Illustration Source: ISG 2024

- Managed Services — Large Accounts
- Managed Services — Midmarket
- Managed Hosting
- Colocation Services
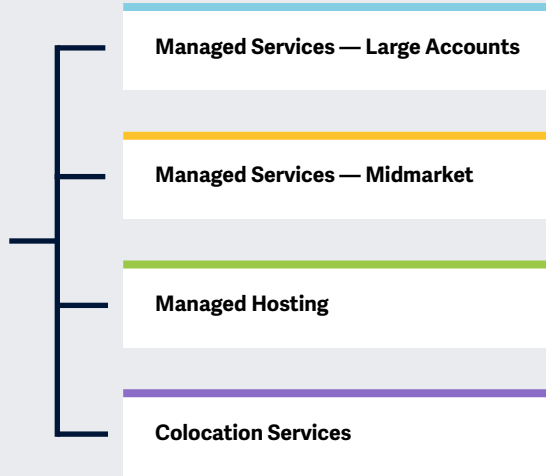
Definition

This study assesses global and regional providers offering data centre outsourcing, including the service providers of managed hosting, colocation facilities and managed services.

Data centre outsourcing is the practice of transferring the responsibility of managing data centre assets to a third-party provider. It encompasses orchestration, provisioning, integrated monitoring, and managing infrastructure components, including computing, storage, database and middleware. The data centre may be owned by the enterprise client, service provider or a third-party colocation provider. A private cloud is an extension of a client's computing environment that leverages investments in virtual infrastructure and applications. A hybrid cloud connects the existing on-premises infrastructure services with a private cloud, a public cloud or multicloud arrangements. An enterprise may also leverage colocation and hosting providers, and not necessarily own a data centre, to have a hybrid cloud setup.

Enterprises with stringent security and governance requirements, large data volumes and close integration of enterprise applications and workflow needs may prefer an on-premises or a private cloud environment and choose to host in their own facility. Enterprises are also increasingly opting for hybrid cloud setups as they offer a high degree of control and leverage the capabilities of public cloud platforms without the need to offload all their data to a third-party data centre. ISG has also observed enterprises demanding the implementation of ESG initiatives by infrastructure services providers. The rapid increase in digital transformation engagements is accompanied by a rise in energy demands, contributing to climate changes, while government regulations are mandating a faster transition to carbon neutrality.

Scope of the Report

This ISG Provider Lens™ quadrant report covers the following five (spell out the number of quadrants; do not use a digit) quadrants for services/solutions: Managed Services — Large Accounts, Managed Services — Midmarket, Managed Hosting and Colocation Services

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

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

Our study serves as the basis for important decision-making by covering providers' 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 providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the service requirements from enterprise customers differ and the spectrum of providers operating in the local market is sufficiently wide, a further differentiation of the 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 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 & Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens™ quadrant may include a service provider(s) which ISG believes has 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 (exceptionsare 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.

★ **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.

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.

Managed Services — Large Accounts

Who Should Read This Section

This report is relevant to large enterprises across all industries in the UK for evaluating private/hybrid cloud data centre managed service providers.

In this quadrant, ISG defines the current market positioning of managed service providers for large accounts in the UK and how they address the key challenges large enterprises face with their hybrid cloud model.

Cloud adoption has recently been on the uptake among large enterprises in the UK, driven by a combination of economic benefits, environmental considerations, infrastructure modernization efforts, and the need for global expansion and collaboration. However, enterprises in the UK are now looking beyond public cloud providers and seeking cloud computing services from private and hybrid cloud providers who can offer robust security and ensure compliance with relevant regulations. This trend is also a result of the UK's robust regulatory standards, which prioritize data protection. Private and hybrid

clouds offer more security and flexibility than the public cloud, ensuring enterprises' mission-critical workloads are up and safe.

Advancements in AI, ML and other rapid technological innovations add to the growing demand for cloud services in the UK. Enterprises also seek providers who can offer GenAI services and cloud customization via FinOps to achieve operational and financial efficiencies. Service providers are upgrading their existing infrastructures to support the increasing processing requirements of these modern technologies. Clients leverage these modern infrastructures to boost operational efficiencies through automation, self-healing and analytics. Enterprise spending is expected to continue, which also signals substantial growth in providers' investments.

IT and infrastructure leaders should read this report to analyze managed service providers' modernization and service capabilities and the market advancements that impact hybrid cloud strategies.

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

Software development and technology leaders should read this report to understand providers' positioning, offerings and their impact on the ongoing infrastructure transformation initiatives.
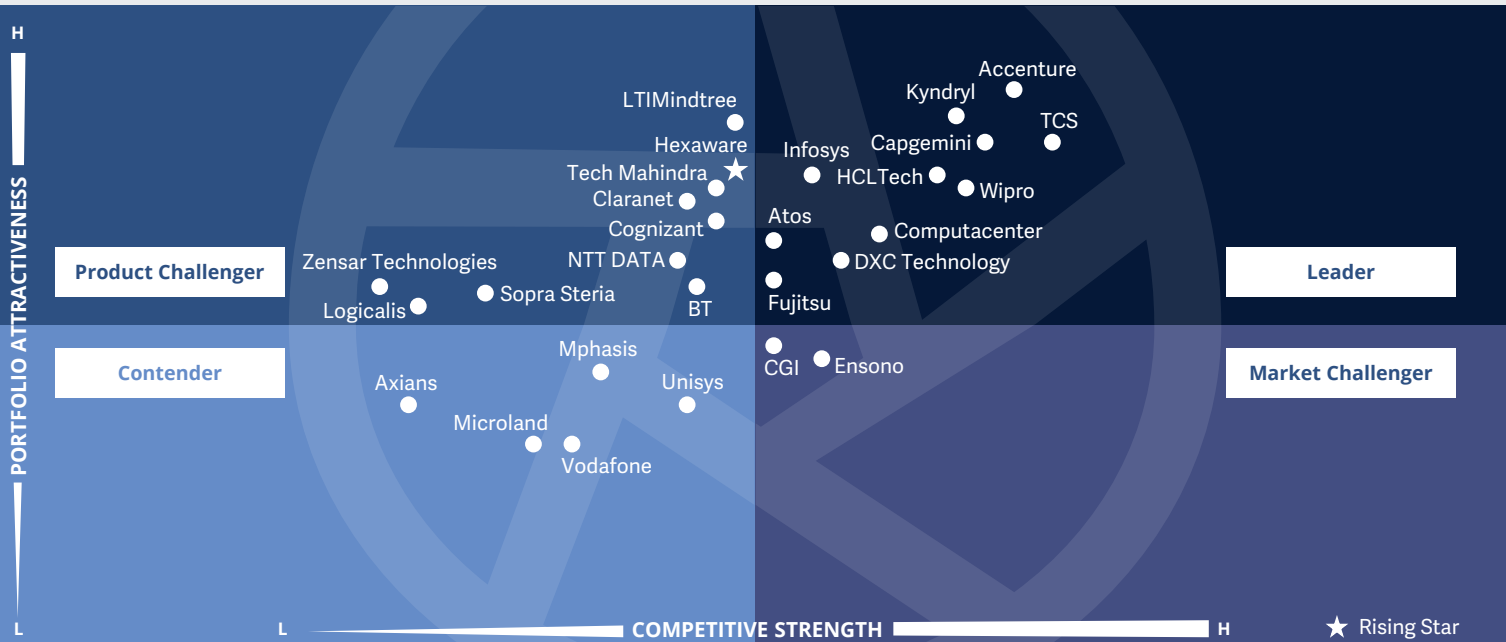
ISG Provider Lens™

Private/Hybrid Cloud – Data Center Services
Managed Services — Large Accounts

U.K. 2024

PORTFOLIO ATTRACTIVENESS

H

Product Challenger

Contender

Leader

Market Challenger

LTIMindtree
Hexaware
Tech Mahindra ★
Claranet
Cognizant
Zensar Technologies
NTT DATA
Logicalis
Sopra Steria
BT
Mphasis
Axians
Unisys
Microland
Vodafone

Infosys
HCLTech
Atos
DXC Technology
Fujitsu
CGI
Ensono

Accenture
Kyndryl
Capgemini
TCS
Wipro
Computacenter

L

L COMPETITIVE STRENGTH H

★ Rising Star

In the UK's managed services, the integration of **cloud computing**, **AI** and **cybersecurity** has revolutionized operations, offering enterprises sophisticated tools and solutions to enhance their IT infrastructures.

Meenakshi Srivastava

Managed Services — Large Accounts

Definition

This quadrant assesses a provider's ability to offer ongoing management services for private and hybrid clouds and traditional data centre infrastructures and platforms to midmarket and large enterprise clients. These services include managing physical and virtual servers, middleware, storage, databases and networking components across various environments, including client data centres, multicloud settings, provider facilities or third-party colocation centres.

Such providers typically offer transition services, guiding clients to optimize their existing IT landscapes. Common projects include large-scale data centre consolidation, virtualization, cloud enablement and configuration, and implementation of a software-defined data centre (SDDC). These services may also include expanding existing facilities, migrating workloads or creating new private/hybrid clouds.

Managed services involve transferring responsibilities to a service provider and are governed by SLAs with penalties for non-compliance. Key services include provisioning, real-time and predictive analysis, and monitoring and managing operations of a customer's on-premises, private and hybrid cloud environments. These activities aim to maximize workload performance on the cloud, reducing costs and ensuring compliance and security. Providers are expected to adeptly manage both traditional and cloud-native application releases, encompassing continuous integration and delivery processes. They must also leverage advanced AI and ML capabilities to automate operational activities, predict outages and offer actionable insights.

Eligibility Criteria

1. Offer **services for private and hybrid clouds and data centre infrastructure** (servers, middleware, storage and databases) **on their own** without depending on partners

2. Provide services within a client's premises or remotely and preferably through its **shared service centres** (under the remote infrastructure management (RIM) model)

3. Demonstrate experience in **large transition** projects that include **automation**, **consolidation**, **virtualization** and **containerization** of data centres and cloud enablement

4. Act as an **extension of clients' IT organization** and get involved in creating blueprints, architecture frameworks and management processes at the client's location

5. Provide services for a **centralized orchestration**/management of hybrid IT infrastructure

6. Showcase **appropriate certifications** to ensure security and compliance at the local level

Observations

In the UK, service providers are adept at meeting the intricate needs of large accounts, especially those with international operations requiring diverse compliance measures. These clients often seek comprehensive hybrid cloud solutions, robust disaster recovery (DR) strategies and advanced cybersecurity measures to ensure data residency compliance across multiple jurisdictions.

Leading service providers in this quadrant exhibit expertise in automation, possess strong vendor partnerships and boast ample resources to support global operations effectively. They specialize in delivering turnkey cloud transformation solutions, bolstered by enhanced cybersecurity capabilities and tailored advisory services, catering to industry-specific requirements.

Mainframe solutions offered by some service providers confer an additional advantage, particularly as enterprises navigate the transition from legacy data centres to cloud environments. Efforts to consolidate data centre infrastructure aim to mitigate energy costs while supporting sustainability goals through decarbonization programs and ESG monitoring.

Despite challenges posed by inflation and rising energy costs, UK service providers are committed to meeting the evolving needs of their enterprise clientele. Renegotiation of contracts and increased automation, leveraging technologies like AIOps, containerization and SDN, aim to optimize operations and reduce costs per unit, ensuring continued competitiveness in the market.

From the 56 companies assessed for this study, 28 qualified for this quadrant, with 11 being Leaders and 1 Rising Star.

accenture

Accenture's recent acquisition of Navisite will enhance and expand United Kingdom and Ireland's (UKI's) infrastructure managed services capabilities by incorporating approximately 100 practitioners.

AtoS

The **Atos** Bridge solutions specialize in integrating and orchestrating services to ensure the continuity of critical applications and business processes for customers.

Capgemini

Capgemini prioritizes enhancing automation and standardization capabilities across its portfolio to deliver a uniform experience and drive cost efficiency.

Computacenter

Computacenter has a significant business managing its customers' networks, data centres, applications and cloud instances. Security is an inherent feature across all these services, embedded in its design standards, implementation processes and day-to-day management.

DXC TECHNOLOGY

DXC Technology's DXC Platform X offers its customers best-in-class solutions tailored to their evolving technology requirements, enabling them to stay future-ready and deliver desired business outcomes.

Fujitsu

Fujitsu offers a managed service for cloud-native infrastructure, overseeing both public and private cloud platforms along with their respective workloads. This encompasses traditional mutable IaaS as well as cloud-native immutable PaaS and database infrastructure.

HCLTech

HCLTech offers extensive cloud-native capabilities along with a robust suite of automation tools developed in-house. These tools enhance its managed cloud services by optimizing workloads and streamlining cloud migration processes.

Infosys employs advanced AI solutions across its operations, setting them apart from competitors and delivering exceptional outcomes through its offering Infosys Topaz.

kyndryl

Since becoming independent in November 2021, **Kyndryl** has formed 28 strategic partnerships with major hyperscalers such as AWS, Google and Microsoft, which is playing a pivotal role in driving innovation and delivering exceptional customer results.

Sustained demand for services in the cloud and cost optimization domains has resulted in substantial deal wins and a promising pipeline for **TCS**. Cloud migration, transformation and Gen AI present significant long-term opportunities.

Wipro's acquisitions have strengthened its expertise, with 5,000 domain consultants in BFSI and energy and utilities sectors and 1,000 cybersecurity specialists. Acquisition/divestiture playbooks and diagnostic frameworks for assessment are widely utilized across various verticals.

HEXAWARE

Hexaware (Rising Star) is broadening its presence in the UK with a new facility in Birmingham. This expansion follows the establishment of a pilot facility in the city earlier this year, with the aim of providing on-site support to multiple customers.

Computacenter

"Computacenter ensures its managed services continuously harness the power of new tools like AI and adopt market-leading technologies to accelerate service delivery and deliver seamless experiences across the UK."

Meenakshi Srivastava

Overview

Computacenter is headquartered in Hatfield, U.K. It has more than 20,000 employees across over 70 offices in 23 countries. In FY23 the company generated £6.9 billion in revenue, with Technology Sourcing as its largest segment. With approximately 12,000 managed services employees and over 12,000 technical certifications, Computacenter offers private and hybrid cloud solutions to large accounts in the UK. Computacenter provides private/hybrid cloud and data centre services from its 11 offices in the UK. It serves diverse industries, including manufacturing, financial services, consumer products, retail, energy and utilities and more.

Strengths

Enhanced security measures: Computacenter manages networks, data centres, applications and cloud instances with embedded security measures aligned with CIS level 1 standards. Its services include patch management, vulnerability management and additional security services like key and secrets management. Its professional services team supports in-contract changes and provides strategic advisory services, including security assessments and network security offerings.

Strategic vendor partnerships and accreditations: Computacenter maintains top-tier partnerships with leading private cloud vendors like VMware, Red Hat and Dell, alongside a diverse portfolio of partners including Nutanix and Splunk. With over 200 vendor accreditations and numerous partner awards, Computacenter delivers best-of-breed hybrid- and multicloud solutions, leveraging long-term partnerships and strategic alignments to drive high-value technology solutions for customers.

Service innovation and acceleration: Computacenter possesses proactive service portfolio management. It has significant investments in leading technologies and frameworks like the Pragmatic Institute™ framework for real-world insights and actionable best practices and Triple A Approach℠ for continuous service improvement through a combination of analytics, automation and AI.

Caution

A significant portion of Computacenter's services are offered under white-label solutions. Enhancing its AIOps capabilities will be crucial for maintaining competitiveness. Additionally, it is developing a repository of automation blueprints, which could enhance the efficiency of cloud migration and transformation processes.

Star of Excellence

A program, designed by ISG, to collect client feedback about providers' success in demonstrating the highest standards of client service excellence and customer centricity.

In the ISG Star of Excellence™ research on enterprise customer experience (CX), clients have given feedback about their experience with service providers for their **Private/Hybrid Cloud – Data Center Services**.

Based on the direct feedback of enterprise clients, below are the key highlights:

Client Business Role

▲ **Most satisfied**
Human Resources

▼ **Least satisfied**
Shared Services Operations

Region

▲ **Most satisfied**
Australia/New Zealand

▼ **Least satisfied**
Africa

Industry

▲ **Most satisfied**
Public sector

▼ **Least satisfied**
Healthcare

Industry Average CX Score

77.7

▲ Highest CX: 96.8
▼ Lowest CX: 60.6

CX Score: 100 most satisfied, 0 least satisfied
Total responses (N) = 467

Most Important CX Pillar

Execution and Delivery

Service Delivery Models	Avg % of Work Done
Onsite	56.0%
Nearshore	20.8%
Offshore	23.2%

Appendix

Methodology & Team

The ISG Provider Lens 2024 – Private/Hybrid Cloud – Data Center Services study analyses the relevant software vendors/service providers in the U.K. market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

Study Sponsor:
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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 May 2024 , 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 Center 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

Meenakshi Srivastava
Lead Analyst

Meenakshi Srivastava has nearly eight years of expertise and knowledge in IT infrastructure and analysis and insight generation. At ISG, Meenakshi is a lead analyst for ISG Provider Lens™, leading research activities and benchmarking exercises on the regional adoption of digital infrastructure such as private and hybrid cloud. She holds a bachelor's degree from Mumbai University in electronics engineering and an MBA degree in marketing from the Indian Institute of Management, Jammu (IIM Jammu).

Enterprise Context and Overview Analyst

Arpita Choudhury
Senior research Analyst

Arpita is a Senior Research Analyst at ISG. She is responsible for supporting and co-authoring Provider Lens™ studies on on Public Cloud and Private Hybrid Cloud Data Center Solutions and Services. Arpita supports the Lead Analysts in the research process on multiple regions and authors the global summary report, and focal points. She also collaborates with the Lead Analysts in the process of rating the providers and in building insights around the market trends and drivers.

Arpita comes with an experience of over 4.5 years in research. She has led and supported ad-hoc research requests in investment banking, healthcare, energy, and information and communication technology. During this period, she has also spent a significant time enabling technology sales in pre-sales research teams. Arpita is skilled in insights generation, market sizing and forecasting, storyboarding, design thinking, financial analysis, go-to-market strategies, competitive intelligence, and benchmarking. Her areas of interest broadly are- technology, finance, and business strategy.

Author & Editor Biographies

Study Sponsor

Heiko Henkes
Managing Director, ISG Provider Lens™

Heiko Henkes serves as Director and Principal Analyst at ISG, overseeing the Global ISG Provider Lens™ (IPL) Program for all IT Outsourcing (ITO) studies alongside his pivotal role in the global IPL division as a strategic program manager and thought leader for IPL lead analysts.

Henkes heads Star of Excellence, ISG's global customer experience initiative, steering program design and its integration with IPL and ISG's sourcing practice. His expertise lies in guiding companies through IT-based business model transformations, leveraging his deep understanding of continuous transformation,

IT competencies, sustainable business strategies and change management in a cloud-AI-driven business landscape. Henkes is known for his contributions as a keynote speaker on digital innovation, sharing insights on using technology for business growth and transformation.

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.

ISG Research™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

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