ISG Provider Lens™

Private/Hybrid Cloud – Data Center Services

Managed Hosting

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

TATA COMMUNICATIONS

QUADRANT REPORT | JUNE 2024 | APAC

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Report Author: Phil Hassey

Client requirements for hybrid cloud continue to evolve, and providers must respect these dynamics

Despite what was first perceived with the advent of the public cloud, a one-size-fits-all infrastructure deployment model does not exist. A range of models suit enterprises' business, legal and cultural requirements across geography. As a result, the hybrid cloud model has come to the fore and will sustain this position in the foreseeable future. A combination of on-premise, public and private data centre deployment virtually works for all. There is no definitive right or wrong approach to the cloud model rather, the effectiveness of any strategy is determined by what works for the enterprise itself.

Each organisation has different concerns about various factors such as cost, success measurement, security, data privacy, performance management and interoperability.

Several region-specific factors compound these issues within the Asia Pacific (APAC) region. Costs may vary widely by region; within countries, skills can be either lacking, too expensive or otherwise unavailable. Networking capabilities and geopolitical constraints are also significant factors in determining the most appropriate IT infrastructure delivery model. This perspective also varies significantly at the regional and local levels. In a country, local providers can shine and provide robust in-market capabilities. However, from a broader regional perspective, providers must have a broad geographic presence to succeed in APAC. They cannot claim to run a regional data centre capacity from a single location like Singapore or Sydney. A provider must be present in Australia, ASEAN (most likely Singapore), India and North Asia. Even within countries like Australia or India, it must ensure a presence in multiple locations, with a robust redundancy plan in geographically larger markets. This required market breadth does disqualify some providers, such as local telecommunication providers, from enjoying a leadership position. If they wish

Ongoing localised investment is essential for success in the market.

to have a regional presence, they must be more aggressive in engaging in partnerships and building a regional scale.

At the regional level, several factors drive the evolution of data centres. These factors include the following:

GenAI: GenAI has become a topic of discussion in the majority of the technology sector, and the data centre ecosystem is just one part of the demand shift. Leveraging data centres to optimise GenAI, AI and ML is critical to providing these solutions to address scale, sustainability and time requirements. Data centres must keep pace with the evolution of the technology for these use cases.

Skills remain a significant issue: Unemployment is relatively low in most regional markets. Technology, particularly in high-demand areas, continues to be a substantial issue with intense upside pressure on wages and a shift towards automation. While several providers have headline job losses, significant skill rebalancing is ongoing, partly fuelled by the shift towards hybrid clouds. Automation is one of many measures to overcome this skills gap. The education system needs an overhaul across skill categories, not just in terms of technology but also data centres.

Data centre in a box: Modular data centres are being increasingly deployed to offer scale and immediacy of service delivery from a location perspective. While they may not always expand from a delivery or cost perspective, they provide strong business cases in particular industries with unique requirements. This model is effective in various environments in APAC that are remote or unserved by traditional data centre delivery.

Sustainability initiatives: Sustainability is a priority for regional organisations. However, this aspect looks different across the countries in the region. As a result, it is difficult to draw consistent conclusions about the most appropriate strategy to attain sustainability. Nevertheless, as it is essential, the model that provides the most sustainable business and environmental ecosystem will be preferred. Enterprises must know that they can objectively measure the costs and benefits.

Security: Security is a misunderstood but critical business requirement. Some private data centres provide greater control over security implementations and capabilities with internally developed protocols. Security for the private cloud can be as compromised, if not more, than the public cloud. Hence, enterprises investing in security in the private cloud must be incredibly vigilant. Meanwhile, opting for the hybrid cloud model does not justify overlooking security or outsourcing security functions. It must be proactively managed and remain an enterprise priority, regardless of the cloud and deployed data centre management model.

Cost savings: Along with security, the cost savings derived from public versus private cloud can be objective and will depend intensely on the individual client requirements and business case. Some private cloud data centres can offer cost savings for consistent and predictable service delivery.

Touch and feel the data centre: Public data centres can be hands-off in every way. It may be impossible to know where data is stored or enable someone to access the data centre. While many organisations understand and embrace this, others deem having the data centre on-site and on premise as an essential business requirement. The risk factor also varies considerably when the data centre is in another country. Therefore, the rapid data centre build-out in markets such as Thailand and Indonesia is significant for hybrid and public cloud delivery models.

Compliance requirements: Compliance is an essential driver for private data centre investments, particularly in highly regulated industries. It dictates the need for greater assurance in these data centres. However, the need for compliance presents challenges for private data centres and can demand heavy investments. Addressing and managing this capability warrants attention from the C-suite, which should be appropriately communicated at this level.

Legacy systems create unique economics: Many enterprises rely on legacy systems for financial, skills access and cultural reasons. While some may not have the skills to migrate

to the cloud, or their resources may be skewed, others, especially those untouched by the significant competitive pressures from digital transformation, have not found the impetus and compelling business case to make the shift.

The APAC region is central to global growth as a driver and enabler. As a result, constant growth and innovation in the hybrid cloud and data centre ecosystem are essential.

Provider Positioning

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	Managed Services	Managed Hosting	Colocation Services
AC3	Product Challenger	Not In	Not In
Accenture	Leader	Not In	Not In
Atos	Contender	Contender	Not In
AVM Cloud	Not In	Contender	Not In
Capgemini	Leader	Not In	Not In
CDC Data Centres	Not In	Not In	Product Challenger
Colt DCS	Not In	Not In	Contender
Datacom	Contender	Not In	Not In
Deloitte	Product Challenger	Not In	Not In
Digital Realty	Not In	Not In	Leader

Provider Positioning

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	Managed Services	Managed Hosting	Colocation Services
DXC Technology	Product Challenger	Product Challenger	Not In
Equinix	Not In	Not In	Leader
Evoque (Cyxtera)	Not In	Not In	Contender
FastComet	Not In	Contender	Not In
Fujitsu	Leader	Leader	Leader
Global Switch	Not In	Not In	Leader
HCLTech	Leader	Not In	Not In
HYVE	Not In	Product Challenger	Not In
Infosys	Leader	Not In	Not In
Kyndryl	Leader	Leader	Product Challenger

Provider Positioning

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	Managed Services	Managed Hosting	Colocation Services
Macquarie Telecom	Not In	Market Challenger	Contender
Maxis	Contender	Contender	Not In
NEXTDC	Not In	Not In	Leader
NTT DATA	Leader	Leader	Not In
NTT GDC / NTT Global Data Centers	Not In	Not In	Leader
Orange Business	Not In	Not In	Product Challenger
Orro	Not In	Contender	Not In
Persistent Systems	Contender	Not In	Not In
Rackspace Technology	Product Challenger	Leader	Rising Star ★
Singtel	Market Challenger	Leader	Product Challenger

Provider Positioning

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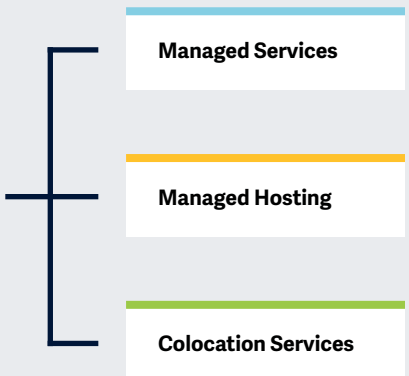
	Managed Services	Managed Hosting	Colocation Services
StarHub	Not In	Product Challenger	Not In
SYS IT	Contender	Not In	Not In
Tata Communications	Not In	Leader	Product Challenger
TCS	Leader	Not In	Not In
Tech Mahindra	Market Challenger	Not In	Not In
Telekom Malaysia	Not In	Contender	Contender
Telstra	Leader	Leader	Leader
Unisys	Contender	Contender	Not In
Verizon	Not In	Not In	Product Challenger
Wipro	Leader	Not In	Not In

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



Simplified Illustration Source: ISG 2024

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 three quadrants for services: Managed Services, 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 APAC market

Note: APAC includes ANZ, *ASEAN and India and excludes China, Hong Kong, Japan, South Korea and Taiwan.

(*ASEAN - Indonesia, Malaysia, The Philippines, Singapore, Thailand and Vietnam).

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 provider 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.

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

Who Should Read This Section

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

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

Managed hosting reduces enterprises' burden of operating a private data centre by providing some control over the underlying systems that underpin the hosted applications. Enterprises in APAC seek managed hosting service providers that offer comprehensive support for various operating systems, databases and applications. Additionally, providers should be able to offer reliable uptime, secure data storage and high-performance network connectivity to ensure the availability and accessibility of their customers' applications.

Enterprises in the APAC region expect providers to enhance their hybrid cloud support and develop advanced mainframe solutions, showcasing their commitment to staying at the forefront of technological advancements.

Additionally, providers focus on updating their physical and virtual security protocols and gaining industry certifications such as ISO, Health Insurance Portability and Accountability Act (HIPAA), Federal Risk and Authorization Management Program (FedRAMP) and National Institute of Standards and Technology (NIST).

Enterprises across industry verticals are seeking investment in enhancing security measures and automated managed backup and recovery services that incorporate high-end computing and AI technologies. Managed hosting providers are building up their capabilities to migrate workloads between different hosting environments, such as on-premises, cloud or hybrid, to support enterprises.

IT and infrastructure leaders should read this report to analyse providers' tool modernisation 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' positioning, offerings and the impact on the ongoing infrastructure transformation initiatives.

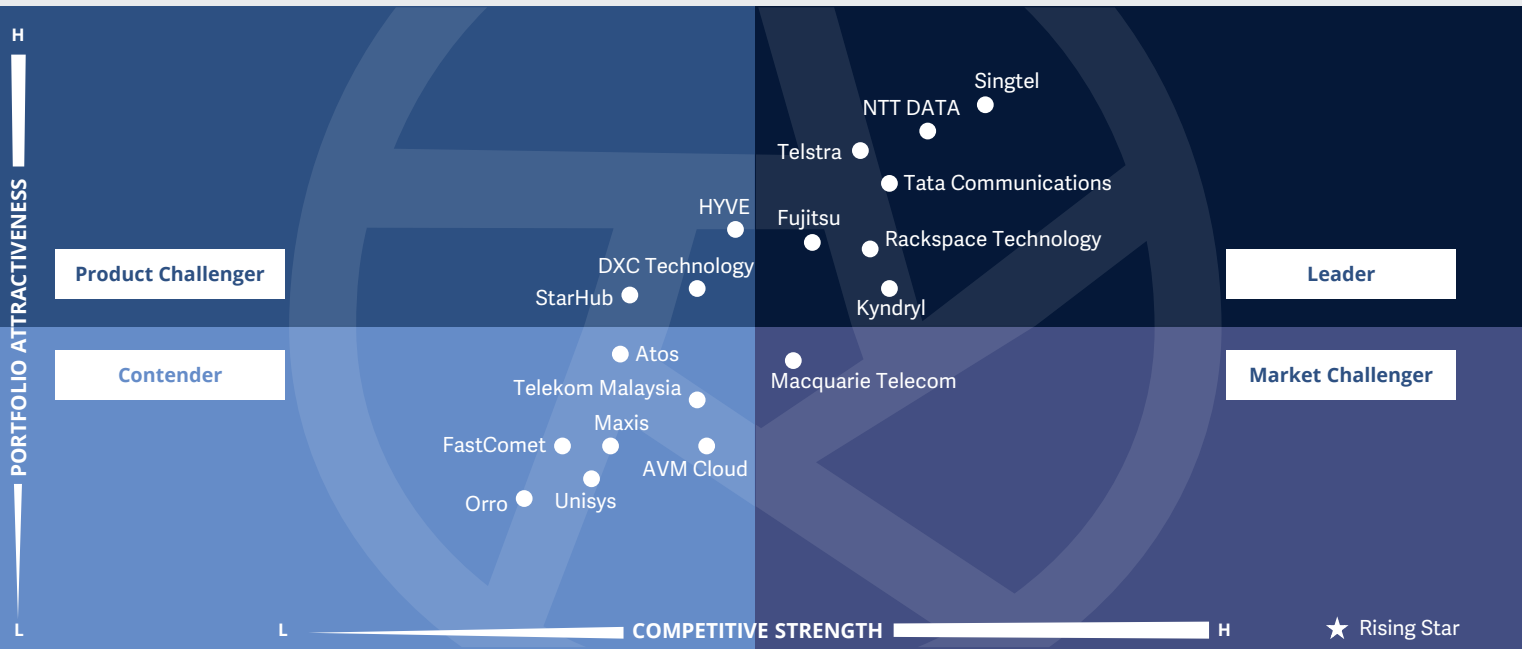
Sourcing, procurement and vendor management professionals should read this report to better understand APAC's current landscape and partner ecosystem of managed hosting providers.

ISG Provider Lens™

Source: ISG RESEARCH

Private/Hybrid Cloud – Data Center Services Managed Hosting

APAC 2024



This quadrant assesses service providers offering **standalone enterprise-grade hosting** solutions using owned or third-party facilities and infrastructure. **Providers are responsible for the day-to-day management and maintenance** of equipment.

Phil Hassey

Definition

This quadrant assesses service providers that offer standalone enterprise-grade hosting solutions using their own or third-party facilities to midmarket and large enterprise clients. The providers assessed here are responsible for regularly managing and maintaining data centre 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 on the responsibility of provisioning the infrastructure to keep applications running effectively, with optimal performance and security.

The assessment includes providers monitoring IT assets, such as legacy systems and private and public clouds, through hybrid cloud management platforms. However, this evaluation does not include providers solely offering hybrid cloud management tools or platforms. Key service levels considered in this benchmark are data centre tiers, multilayered security, service availability and network (LAN) I/O performance during peak times. The assessment focuses on providers that deliver a comprehensive managed hosting service, ensuring high performance, security and reliability for enterprise clients. Enterprises also expect managed hosting providers to offer automated backup and recovery services that use advanced techniques and hosting applications near the workload to get ultra-low latency capabilities.

Eligibility Criteria

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

Observations

The managed hosting market has exhibited satisfactory growth through 2023 and in the first four months of 2024. Hosting providers have maintained their investments and compete based on capabilities rather than capacity in several local markets. We have identified substantial investment expanding to additional countries in the region, such as New Zealand, Indonesia and Thailand, as well as increased investment in existing established data centre markets such as Australia and India.

Hosting providers have made significant strides in their managed services, revamping their data centre facilities with cutting-edge technologies and expanding their service offerings to unprecedented levels. These providers have upgraded their equipment in response to the industry's demand for exceptional, high-compute capabilities. They have also enhanced their hybrid cloud support and developed advanced mainframe solutions, showcasing their commitment to staying at the forefront of technological advancements. Hosting providers have also updated their physical and virtual security protocols and received industry certifications such as ISO, HIPAA, FedRAMP, NIST and GDPR. These providers have improved customer service with 24/7 support systems and better resolution techniques.

While managed hosting may be overlooked in the local market, it plays a crucial role. Selected providers must offer managed hosting to provide a comprehensive suite of services across the cloud management spectrum. The key to maintaining leadership and meeting client expectations lies in forging strong partnerships with key ecosystem providers. This collaborative approach is essential for the industry's continued success.

From the 40 companies assessed for this study, 18 qualified for this quadrant, with seven being Leaders.

Fujitsu

Fujitsu has been a long-term provider of managed hosting solutions for organisations across APAC. Its scale is increasing further in emerging markets.

kyndryl

Kyndryl can draw on its strong legacy of service delivery for clients across APAC for managed hosting and broader data centre solutions.

NTT DATA

NTT DATA is a global provider with proven methodology and experience to transform clients' workloads to a managed service, colocation or hosting environment.

rackspace technology

Rackspace Technology is a leader in providing infrastructure solutions for regional clients. It focuses on service excellence and satisfaction and leverages its strong hyperscaler relationships.

Singtel

Singtel is growing in its role as a provider of regional solutions from its Singapore hub. The central location of Singapore provides compelling access to skills.

TATA COMMUNICATIONS

Tata Communications benefits from its strong capabilities in the key Indian market, which it effectively leverages throughout the region.

Telstra

Telstra has a crucial network environment and invests in managed service solutions that meet customers' requirements in the Australian market and, more broadly, in Asia.

Leader

"Tata Communications is an ideal provider for clients seeking to expand or retract their capabilities within or beyond India in the global market."

Phil Hassey

Tata Communications

Overview

Tata Communications is headquartered in Mumbai, India. It has more than 13,600 employees across 22 offices in 15 countries. In FY23 the company generated $2.2 billion in revenue, with Data and Managed Services (DMS) as its largest segment. It is India's largest enterprise data services provider, with 21 offices globally, including Australia, Malaysia, Singapore and Sri Lanka. The business provides connected solutions, infrastructure and experiences to clients across the region and globally.

Strengths

Bespoke and hybrid cloud solutions: Tata Communications enables clients to maximise the value of their cloud investments by providing an enterprise-class and predictable infrastructure environment. Its services are further supported by its robust global network infrastructure, high levels of embedded security and ease of management with a focus on ease of use.

Industry-based cloud: Tata Communications has developed industry-specific clouds for government and financial services. Although these offerings are primarily for the Indian market, they can be scaled across the region. The government cloud focuses strongly on PaaS and IaaS, allowing it to provide solutions from Mumbai and Delhi for the government while ensuring client data sovereignty.

Proprietary offerings: Tata Communications' approach to the cloud includes its proprietary cloud offering IZO™ Cloud. IZO™ Cloud provides clients with various options for cloud and infrastructure procurement. The suite includes IZO™ Cloud for Enterprise, IZO™ Cloud Storage, IZO™ Cloud for SAP HANA and Oracle, and managed public cloud services. Beyond core infrastructure, the IZO™ Cloud also offers a range of flexible, performance-focused and scalable solutions.

Caution

Tata Communications has achieved success operating as an India-based firm. However, there is an opportunity for the company to enhance its regional visibility, especially for clients outside India.

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.

Source: ISG Star of Excellence™ research program, Insights till June 2024

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

▲ 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 analyzes the relevant software vendors/service providers in the APAC 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 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

Phil Hassey
Lead Analyst

Phil has an enviable reputation for understanding, assessing and communicating insight into the increasingly diverse and complex technology sector as it attempts to tightly integrate to business requirements. He is constantly "tilting the world view" with unique but grounded perspectives for clients.

He has worked for some of the largest, and smallest enterprises in the world to help them understand the role of the intersection of technology and business. At the same time, he has also worked with technology and business providers to help ensure they place the customer requirements at the centre of their business.

He has undertaken research and strategy projects on every continent, and for every possible application of technology and business.

Enterprise Context and Overview Analyst

Manoj M
Research Analyst

Manoj is a research analyst at ISG and supports ISG Provider Lens™ studies on Private/Hybrid Cloud – Data Center Services, Mainframes and Public Cloud Data Center Solution and Services. He also supports the lead analysts of multiple regions in the research process. Prior to this role, he supported the ROI process in sales intelligence platform and was an individual contributor in handling research requirements for advanced technologies in different sectors.

He has considerable expertise in predicting the automation impact by considering certain parameters such as productivity, efficiency and time reduction. During his tenure, he has supported research authors and authored Enterprise Context and Global Summary reports with market trends and insights.

Study Sponsor

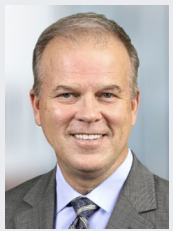
Heiko Henkes

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.

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Founded in 2006, and based in Stamford, Conn., ISG employs 1,600 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.

For more information, visit isg-one.com.

ISG Provider Lens™

JUNE, 2024

REPORT: PRIVATE/HYBRID CLOUD – DATA CENTER SERVICES