ISG Provider Lens™

Private/Hybrid Cloud – Data Center Services

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

unisys

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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

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	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

	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

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	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

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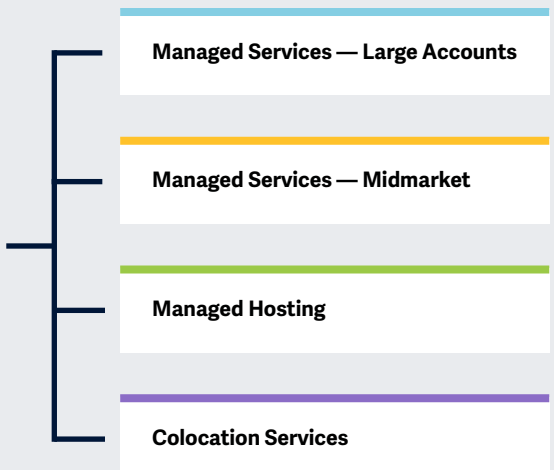
	Managed Services — Large Accounts	Managed Services — Midmarket	Managed Hosting	Colocation Services
T-Systems	Not In	Leader	Leader	Not In
Unisys	Contender	Leader	Product Challenger	Not In
UST	Not In	Product Challenger	Contender	Not In
VIRTUS	Not In	Not In	Not In	Market Challenger
Vodafone	Contender	Market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

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.

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 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.

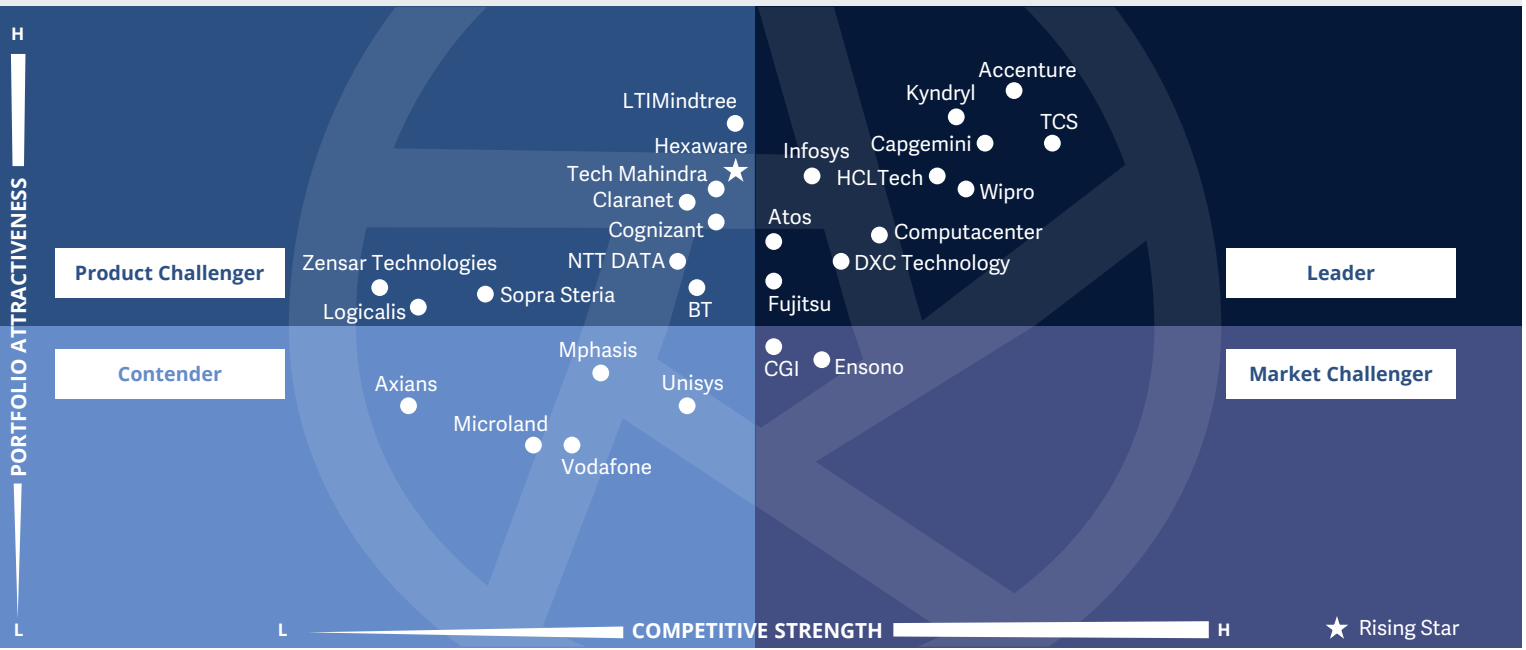
Software development and technology leaders should read this report to understand providers' positioning, offerings and their impact on the ongoing infrastructure transformation initiatives.

ISG Provider Lens™

Source: ISG RESEARCH

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

U.K. 2024



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

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

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.

TCS TATA CONSULTANCY SERVICES

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

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.

Managed Services — Midmarket

Who Should Read This Section

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

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

UK midmarket enterprises are gradually using cloud environments to digitize their businesses, enabling them to offer always-on services. Generally, such businesses prioritize cost savings, secure storage facilities and sustainability when transitioning from their legacy systems to the cloud. Because the public cloud comes with its own set of difficulties, such as managing operational costs, availability and security, the private and hybrid cloud providers emerge as partners of choice for such enterprises. The enterprises that migrated to the public cloud for its benefits are moving back to the private or hybrid cloud, seeking more autonomy, privacy and security.

Private and hybrid cloud managed service providers can offer enterprises localized infrastructure, relieving them of the responsibility of managing data centres while keeping them in control of their data. The service providers add value by offering disaster recovery solutions and access to several modern computing techniques like serverless architecture, database as a service and DevOps practices. Enterprises benefit from reduced deployment costs and providers' cloud optimization expertise.

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

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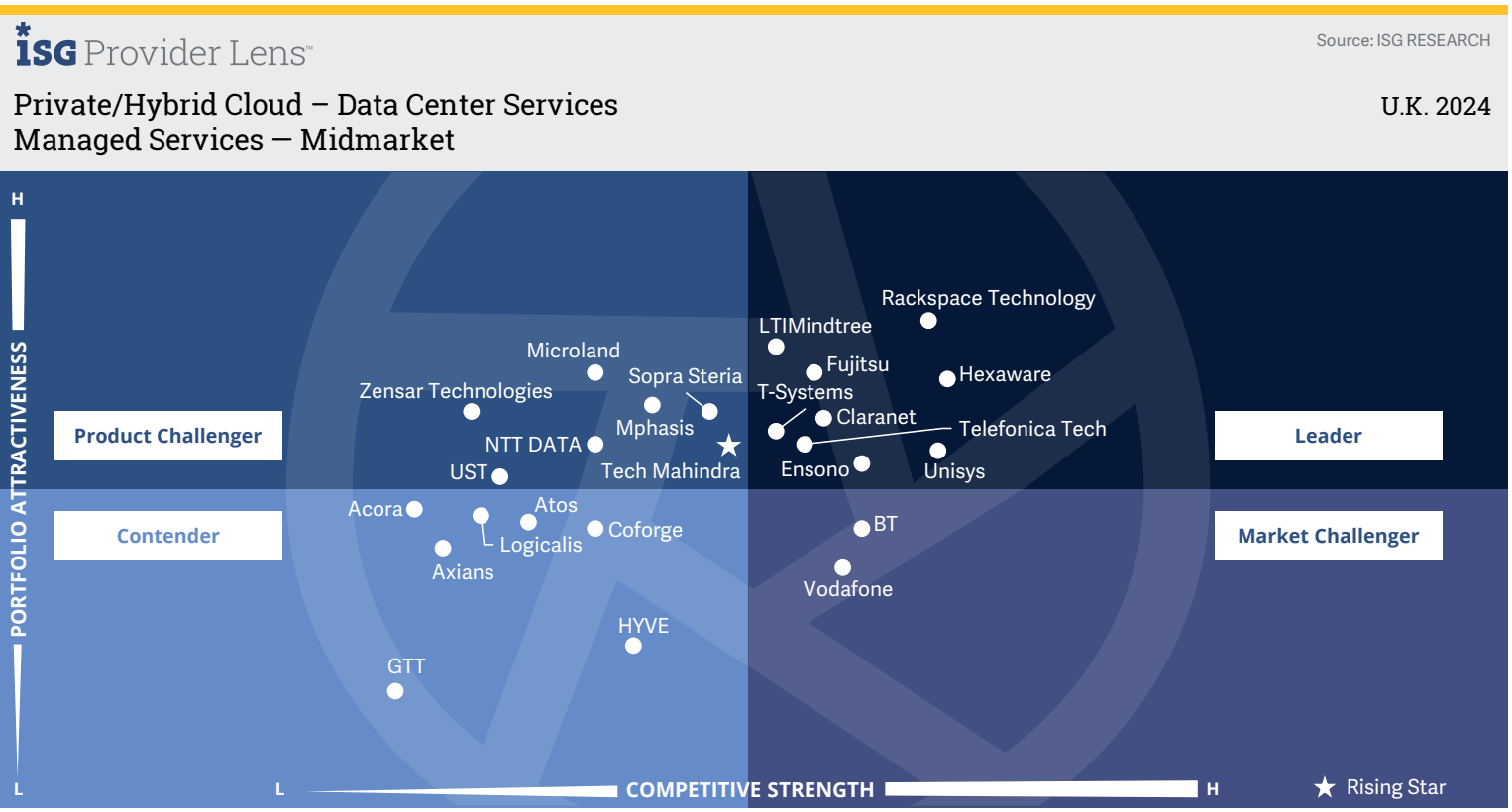

Midmarket enterprises consider **cost savings**, **cybersecurity** measures and **sustainable** solutions amid economic uncertainty while transitioning to the cloud. Embracing sustainability practices is crucial for meeting **environmental goals** and efficiency.

Meenakshi Srivastava

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

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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, midmarket companies face unique challenges, particularly concerning energy costs and inflation fluctuations. Some are shifting back from public to private or hybrid cloud environments due to difficulties in managing operational costs, availability and security. These organizations seek solutions that address migration challenges and optimize their workloads, requiring advanced capabilities such as AIOps, container services and SDN for automation and workload orchestration across diverse cloud environments.

Leading service providers have established partnerships with key ISVs and hyperscalers to enhance cloud efficiency through virtualization and automation. Additionally, midsize businesses are increasingly focused on ESG principles, which influence their choice of service providers with expertise in automation, edge solutions, and flexible SLAs.

Service providers play a crucial role in assisting midmarket enterprises in developing hybrid cloud strategies, offering reduced deployment costs, disaster recovery solutions and access to modern computing technologies like serverless architecture, database as a service and DevOps practices. In addition, midsize service providers are expanding their offerings to include application modernization, cost optimization and legacy infrastructure management, catering to diverse industry needs and fostering client retention and growth.

From the 56 companies assessed for this study, 25 qualified for this quadrant, with 9 being Leaders and 1 Rising Star.

claranet

Claranet collaborates with Ansible, VMware and Terraform to construct and deploy standard and customer-specific virtualized private cloud environments. Its FinOps services optimize cloud spending and offer recommendations for efficient cloud management.

ensono

Ensono's platform incorporates AIOps tooling and container services, while offerings like ExperThink™ facilitate the migration of legacy languages to modern cloud environments. The company further expands its platform with new products like Flex Cloud and Advisor.

Fujitsu

The FinOps services offered by **Fujitsu** Cloud Managed Services serve as an extension tailored to assist customers with cloud financial management and reduce cloud wastage through data-driven cloud spending decisions.

HEXAWARE

Hexaware's approach to edge computing emphasizes tailored solutions for private/hybrid cloud data centres, prioritizing agility, scalability and security to integrate edge computing capabilities into client infrastructure seamlessly.

LTIMindtree

LTIMindtree offers Infinity and Canvas, its AI- and ML-powered integrated platforms, designed for streamlined decision-making. These cognitive multicloud platforms feature cutting-edge engineering tools and processes, ensuring excellence across the entire cloud lifecycle.

rackspace technology.

Rackspace Technology offers adaptable SDDC capabilities, reducing latency and notably enhancing security. Through its Elastic Engineering, the company houses a collection of automation assets and bots that elevate the effectiveness of customers' cloud transformation strategies.

Telefónica Tech

Telefónica Tech UK and Ireland launched a set of enterprise cybersecurity solutions to address evolving threats, introducing advanced monitoring and detection technologies as integral components of the suite.

T-Systems

T-Systems is advancing the sustainability agenda through digital solutions: sustainable IT operations and efficient platforms tailored to customers' workloads. Collaborating with partners, the company embraces a comprehensive approach to sustainability.

Unisys

Unisys employs industry best practices for secure data management, offering clients comprehensive security services and products for identification, protection, detection, response and recovery.

Tech Mahindra

Tech Mahindra's (Rising Star) Cloud BlazeTech — iCOPS excels in cloud-native development, hybrid cloud infrastructure and site reliability engineering (SRE) automation, supporting DevOps, API, cloud integration and service migration and modernization.

Leader

"Unisys assists clients in highly regulated sectors in achieving successful transformation and operations by aligning with industry standards. This is rooted in its extensive history of integrating security and compliance into its solutions."

Meenakshi Srivastava

Unisys

Overview

Unisys is headquartered in Pennsylvania, U.S. It has more than 16,200 employees across 57 offices in 27 countries. In FY23, the company generated $2.0 billion in revenue, with Enterprise Computing Solutions as its largest segment. Unisys helps organizations integrate and manage their hybrid cloud environments, including cloud migration, optimization and cloud-native capabilities. It is focused on providing vertical-aligned cloud solutions to its existing and prospective clients in the government and public services, BFSI, healthcare or pharmaceuticals, manufacturing and travel and transportation in the midmarket and large account markets.

Strengths

Expert-led FinOps: Unisys uses FinOps-certified experts to analyse monthly spending, detect anomalies and find cost-saving opportunities. These capabilities help clients avoid cloud inefficiencies and automate recommendations for downsizing or terminating underutilised resources.

Streamlined hybrid cloud transformation: Unisys delivers end-to-end services for hybrid cloud transition and transformation, including assessment, migration, implementation, application modernization and infrastructure management services. Its agile deployment approach, supported by AI-enabled and auto-discovery tools and phased transitions, ensures rapid and iterative transformation aligned with client objectives, governance and compliance.

Cybersecurity capabilities: Unisys offers a comprehensive range of cybersecurity services encompassing advisory, consulting, compliance, governance and vulnerability monitoring and scanning. These capabilities are continuously enhanced through strategic partnerships and alliances, exemplified by collaborations such as the Unisys Cyber Recovery Service developed in conjunction with Dell.

Advanced automation and AI: Through its Automation Hub Center of Excellence (CoE), Unisys collaborates with clients across various business sectors to ensure the utmost quality in automation services. Employing vFunction for comprehensive modernization initiatives, Unisys has curated a repository of landing zones tailored for hybrid cloud deployments.

Caution

A considerable portion of Unisys' revenue is derived from the US market. To enhance its presence in the UK, Unisys should establish partnerships with local suppliers, develop a portfolio of UK-specific use cases and prioritize recruiting local talent.

Managed Hosting

Who Should Read This Section

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

In this quadrant report, ISG defines the current market positioning of managed hosting providers in the UK and how they address the key challenges large enterprises face.

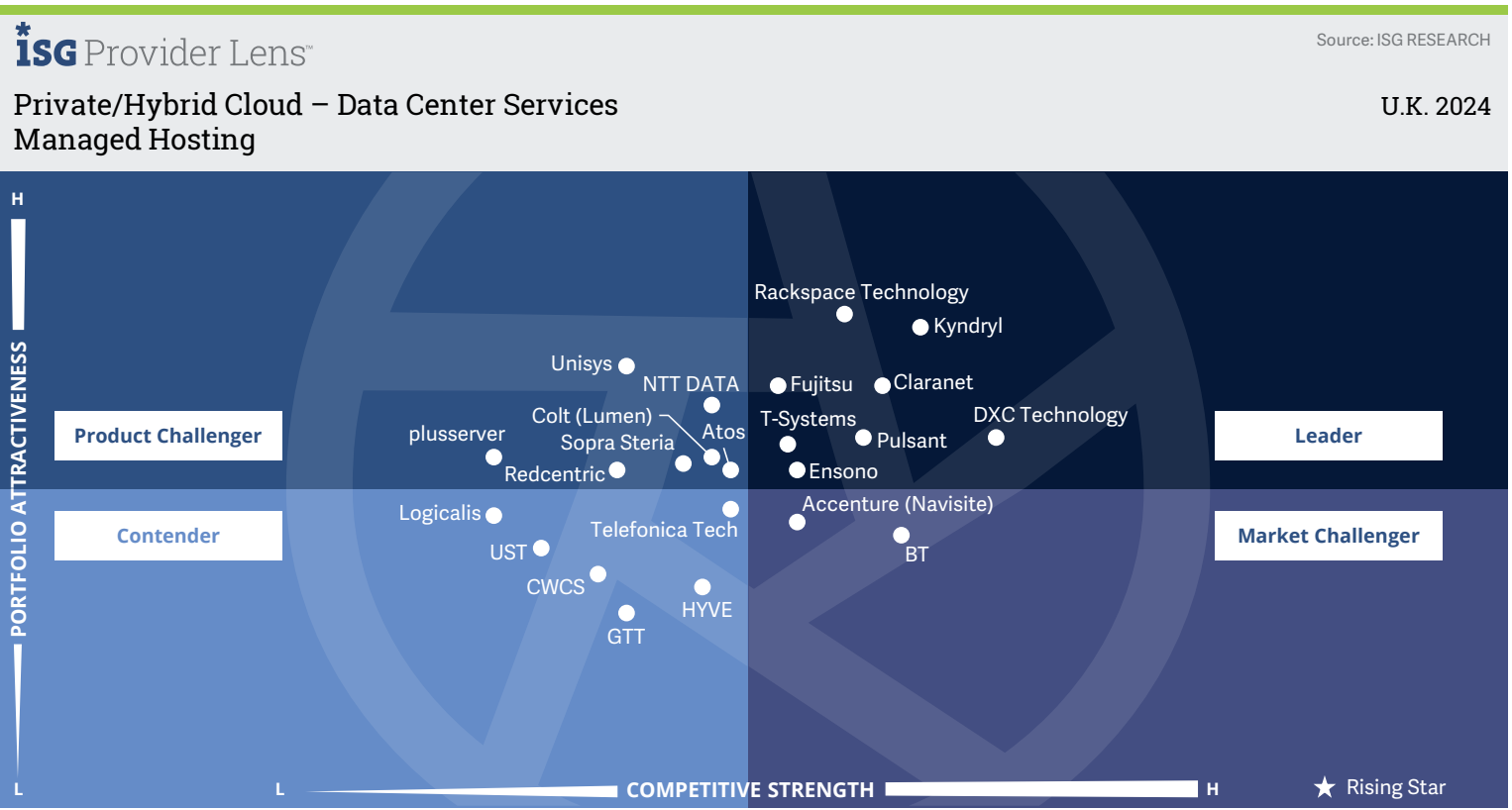
Enterprises in the UK are gradually shifting their focus from on-premises environments to outsourced services such as managed hosting for data storage and business continuity purposes. Managed hosting reduces enterprises' burden of operating a private data centre while offering them some control over the hosted data. Enterprises leverage this flexibility in addition to other hosting services, such as multi-cloud connectivity, low-latency network connectivity, bare metal services, platform-agnostic operating systems and database support.

Large enterprises look for providers who can offer reliable uptime, secure data storage and high-performance network connectivity, while midsize enterprises seek comprehensive technical support, including 24/7 monitoring, rapid incident response and proactive maintenance to ensure maximum uptime and availability. Managed hosting providers address these demands by transitioning from enterprise AI to GenAI, improving operational efficiency, increasing security and easily predicting downtimes. The providers focus on leveraging strategic partnerships with various technology vendors and data centre providers to offer services such as networking-as-service and bare metal-as-service.

IT and infrastructure leaders should read this report to better analyse providers' tool modernisation and hosting capabilities and the impact of hosting space advancement on hybrid cloud strategies.

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 UK.

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



Hosting providers in the UK are leveraging **AI** and **ML** to streamline data centre operations, while offering comprehensive managed services, including **disaster recovery as a service (DRaaS)**, to address challenges such as fluctuating **energy costs** and **sustainability** requirements.

Meenakshi Srivastava

Managed Hosting

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

Enterprises in the UK grapple with the challenges posed by fluctuating energy costs, necessitating innovative solutions from service providers. Leading hosting providers integrate AI and ML into their operations to address these challenges. These technologies significantly reduce provisioning time for data centres, helping to mitigate the impact of energy cost surges.

Furthermore, these providers offer a comprehensive suite of managed services to optimize workloads across hybrid cloud environments. Among these services, DRaaS is gaining prominence as an efficient and scalable solution for disaster recovery implementation. In addition to these advancements, service providers are forming strategic partnerships to enhance their offerings. By collaborating with leading chipset manufacturers, they can build and extend high-performance compute capabilities to customers, particularly for research and product development purposes. This strategic approach enables service providers to deliver enterprise-grade cloud solutions that combine the scalability of public clouds with the data security and privacy of private clouds.

Across various industry verticals, there is a growing emphasis on improving security protocols and implementing automated managed backup and recovery services. These services leverage cutting-edge computing and AI technologies to enhance security and streamline data management processes. As a result, businesses are increasingly opting for low-latency services offered by hosting providers, favouring them over traditional on-premises infrastructure solutions.

From the 56 companies assessed for this study, 23 qualified for this quadrant, with 8 being Leaders.

claranet

Claranet operates an extensive hosting infrastructure throughout the UK, utilizing partnerships with Ansible, VMware and Terraform to deploy flexible and customized cloud environments. Additionally, its GreenOps services offer valuable insights to clients, aiding them in reducing carbon emissions.

DXC TECHNOLOGY

DXC Technology manages a network of data centres globally to ensure that client localization needs are met. This extensive infrastructure includes mainframe MIPS, network interfaces and storage capacity, supporting its commitment to delivering competitive solutions.

ensono

Ensono broadened its advisory and consulting portfolio through the acquisitions of ExperSolve, specializing in mainframe modernization, and AndPlus, focusing on cloud-native and data engineering.

Fujitsu

Fujitsu's managed hosting services are provided from Tier 3 standard data centres, ensuring enterprise-class levels of resilience and recovery. Clients have the flexibility to customize resilience levels and recovery windows.

kyndryl

With a widespread network of data centres, **Kyndryl** offers a robust infrastructure. Leveraging advanced AI capabilities and strategic partnerships with hyperscale providers, Kyndryl delivers an agile environment tailored to host critical applications for end users.

Pulsant

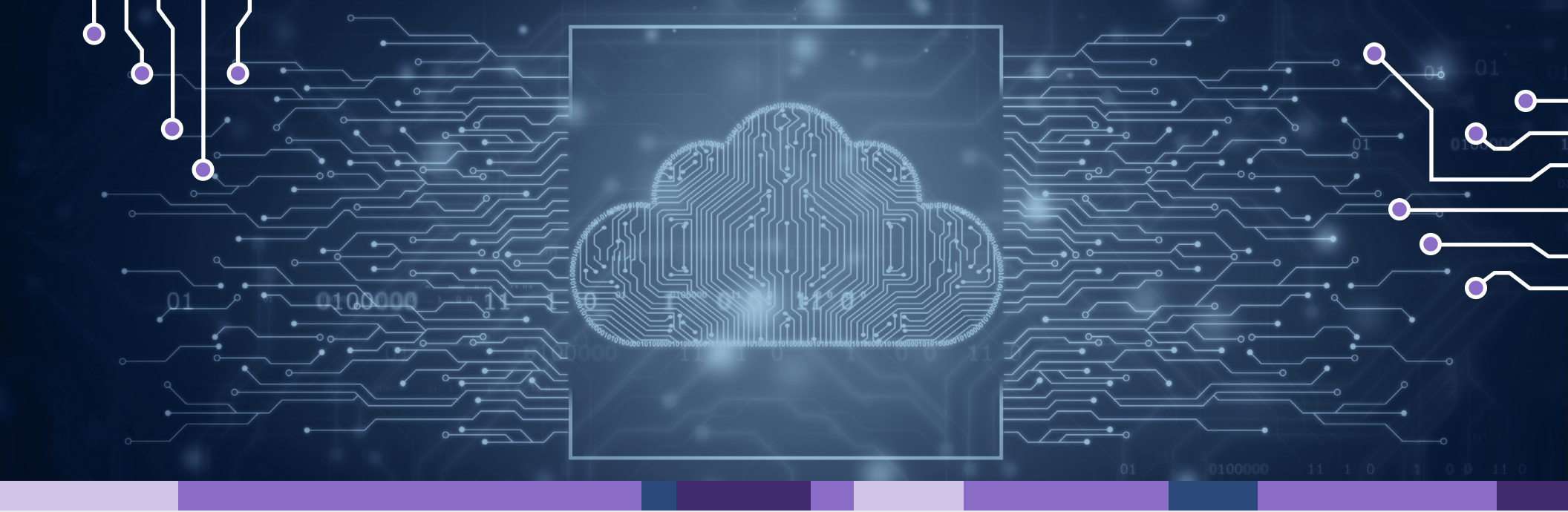
Pulsant has introduced Pulsant Cloud, a self-service hybrid cloud platform available across three locations. Pulsant Cloud integrates seamlessly with the Pulsant network, spanning 12 regional data centres with a 100GB connection.

rackspace technology.

Rackspace Technology's Rackspace Fabric offers a wide array of reusable assets, automation, and UI elements that enhance customer experiences with cloud-like functionalities. This intellectual property enables Rackspace to automate business operations and scale effectively.

T-Systems

T-Systems has robust partnerships within the private and hybrid cloud sectors. It has jointly invested in establishing a centre of excellence to aid customers in navigating their digital transformation endeavours with VMware.



Colocation Services

Who Should Read This Section

This quadrant is relevant to enterprises of all sizes in the UK for evaluating colocation service providers.

In this quadrant report, ISG defines the current market positioning of colocation service providers in the UK and how they address the key challenges faced by enterprises in the region.

Enterprises lease space in colocation facilities to store their servers, storage devices and networking equipment and utilize the provider's power, cooling, bandwidth and security infrastructure to manage their hardware. The providers offer diverse connectivity options with various carriers and telecommunication providers, low-latency networks, high bandwidth for content delivery, security, scalability and service flexibility.

In addition to offering autonomy to enterprises to manage their own infrastructure, colocation allows them to upscale or downscale the deployment as per business requirements.

Colocation providers also offer green data centres powered by renewable energy sources, reducing the client's carbon footprint.

Enterprises in the UK are looking to boost their colocation trajectory to reduce operating expenditures while balancing quality and affordability, including professional support, remote hands, applications monitoring and maintenance. They seek a standardized and sophisticated data centre setup that offers several ISP carrier options, low-latency connectivity and high bandwidth at affordable prices.

IT and infrastructure leaders should read this report to analyse the capabilities of colocation providers and the market advancements that impact the management and operation of key workloads.

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

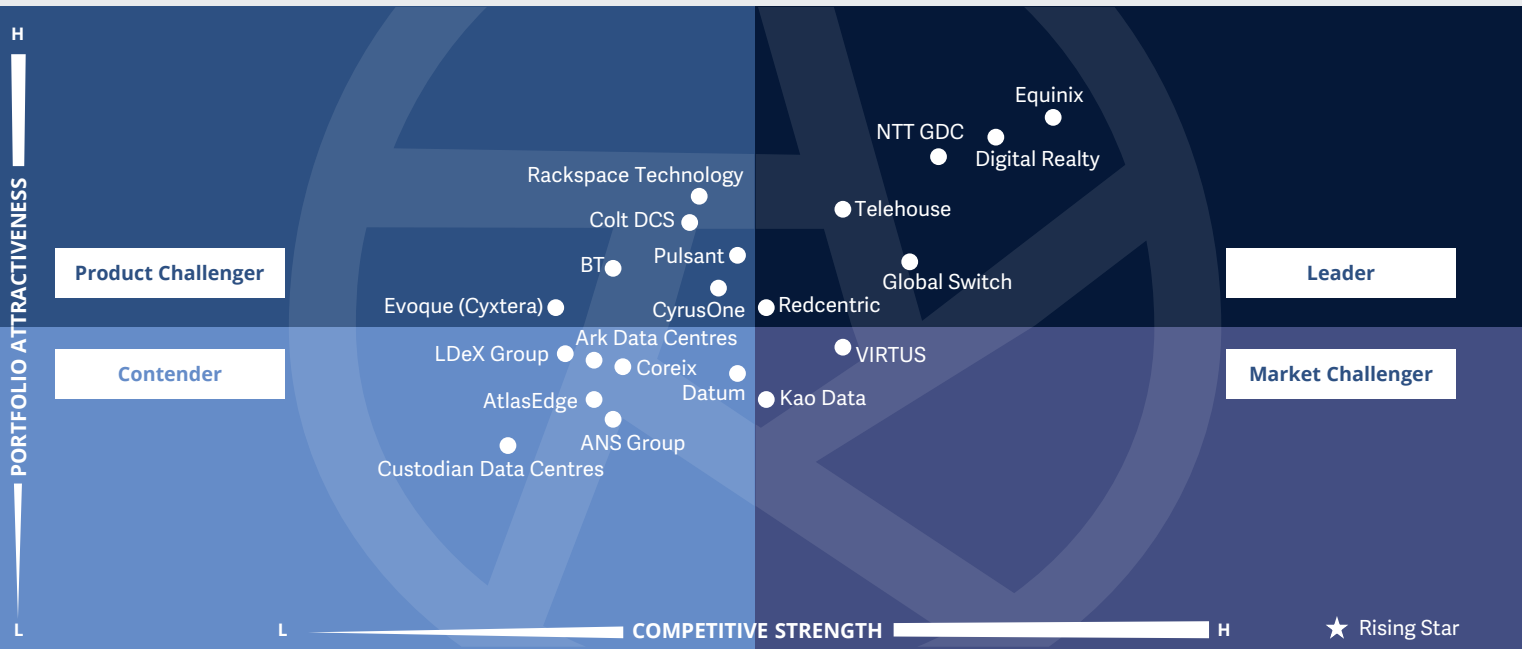
Software development and technology leaders should read this report to understand providers' positioning, offerings and their impact on the ongoing development at an enterprise level.

ISG Provider Lens™

Source: ISG RESEARCH

Private/Hybrid Cloud – Data Center Services
Colocation Services

U.K. 2024



Amid ongoing **expansion** and **consolidation**, the UK's colocation services market extends into Tier 2 cities, leveraging **owned fibre infrastructure** for a competitive edge and implementing efficient technologies to meet **ESG** commitments.

Meenakshi Srivastava

Definition

This quadrant assesses colocation providers offering standardized data centre operations for midmarket and large enterprise clients, focusing on renting space for servers and computing hardware in a third-party infrastructure space. Providers offer building, cooling, power and security services, while clients manage their hardware. Key offerings include high-quality data centre setups and onboarding services, diverse connectivity with various carriers and telecommunication providers, low latency, high bandwidth for content delivery, scalability and flexibility in services. Security and compliance are paramount, ensuring data and infrastructure protection. These centres also serve as community access points, fostering collaboration among hosting providers, system houses and end users.

Enterprise clients procure colocation services to reduce operating expenditures while balancing quality and affordability, including professional support, remote hands, monitoring and maintenance. They expect a standardized and sophisticated data centre setup, several carrier options, low latency and high bandwidth at affordable prices to deliver rich content or critical, latency-sensitive information to users within and outside major metropolitan areas. Colocation providers offer a secure, high-performance environment for critical IT infrastructure by leveraging next-generation AI and ML technologies that are adaptable to changing business needs.

Eligibility Criteria

1. Own facilities that offer **standardized data centre** architecture design for colocation
2. Offer **secure** and high-quality **network** equipment, appliances and connectivity systems
3. Guarantee **power density** to support current and future technologies
4. Provide at least **five layers** of **data centre security**
5. Possess **appropriate certifications** such as SSAE 16, HIPAA, ISO 14001, ISO 22301, ISO 27001, ISO 50001, EN 50600, PCI DSS, NIST2, FISMA and SOC Type 1 and 2
6. Amenable to SLAs related to **hands-and-feet support** and hardware replacement
7. Offer **facilities with traffic exchange points** in proximity to users and hyperscalers
8. Offer **disaster recovery and backup solutions**
9. Leverage **clean energy sources** and solutions to **reduce energy consumption**, including zero carbon emission and **green data centre** initiatives

Observations

The colocation services market in the UK is undergoing a significant transformation characterized by both expansion and consolidation. Established providers such as Global Switch, Equinix and Telehouse are expanding their data centre footprints in London, while others like Pulsant and Datum are strategically eyeing opportunities in Manchester, a city gaining prominence as an alternative location to London. This trend indicates a growing demand for data centre services outside of the capital, driven by factors such as the high energy costs, power struggles and high population density in London.

Furthermore, the market is witnessing notable mergers and acquisitions, with Redcentric's acquisition of 4D Data Centers and Sungard's UK facilities, along with Colt's acquisition of Lumen's EMEA business, GleSys by Cube IM and Cyxtera by Evoque. These moves reflect the dynamic nature of the industry as providers seek to enhance their capabilities and market reach.

UK data centres are positioning themselves as connectivity hubs, offering access to advanced communication infrastructure such as fibre, dark fibre, internet exchange points (IXPs) and subsea cables. This infrastructure enables providers to offer low-latency connectivity for both local and international communications, catering to the increasing demand for high speed.

Moreover, sustainability and energy efficiency have become key priorities for data centre operators in the UK. Providers are investing in energy-efficient technologies and practices, including energy-efficient cooling systems, virtualization and advanced power management systems, to reduce their environmental impact and achieve carbon-neutrality goals.

From the 56 companies assessed for this study, 21 qualified for this quadrant, with 6 being Leaders.

Digital Realty

Digital Realty's strategic carrier-neutral facilities (CNFs) worldwide will host BT's transformative Global Fabric network-as-a-service (NaaS), enabling customers to unlock the full value of their data and facilitate secure and compliant access across their businesses.

Equinix

Situated in strategic locales neighbouring one of the world's key financial centres, **Equinix's** London data centres enjoy superior connectivity. It houses Equinix Internet Exchange® (IX), alongside the London Internet Exchange (LINX) and London Network Access Point (LONAP).

Global Switch

Global Switch's London facility offers superior resilience and scale, powered by the UK's largest private high-voltage network. With direct access to the national grid's 132kV network, the campus ensures robust infrastructure, advanced cooling and 24/7 security.

NTT GDC

NTT GDC's strategic investment in East London notably bolsters the digital transformation journey of clients in industries like media, technology and financial services, fostering their growth and innovation.

Redcentric

Redcentric ensures seamless connectivity across its UK network, collaborating with multiple tier 1 carriers for high speed, and resilient access to public cloud services. Clients prefer Redcentric for secure, well-connected colocation solutions meeting the highest standards.

Telehouse

Telehouse ensures the highest levels of security at its London data centres, featuring constant surveillance by trained personnel, electronic access management, proximity access control systems and CCTV.

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 **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

▲ 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

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.

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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

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.

Study Sponsor

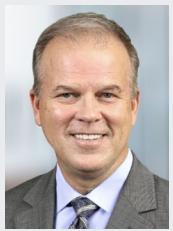
Heiko Henkes

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™

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ISG

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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