

Private/Hybrid Cloud – Data Center Services

Managed Hosting — Midmarket

A research report comparing provider strengths,
challenges and competitive differentiators

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The growing demand for outsourced IT infrastructure solutions continues to drive the expansion of managed services and colocation services

Published on an ongoing basis, ISG Index™ has already indicated in recent issues that the market for infrastructure outsourcing is still growing, but unit costs are continuing to fall. By automating services, suppliers can offset the high labor cost and the increasing cost of living. Although prices for long-term IT service contracts continue to fall, overall expenditure is rising due to increased consumption. In Switzerland, the projected inflation rate for 2024 may prompt suppliers to negotiate contract realignment to find joint solutions to offset rising costs and strengthen future collaboration. Long-term IT service contracts can be further optimized through close cooperation between suppliers and customers to take increased consumption into account

and develop efficient solutions despite falling prices. The aim is to react flexibly to changing market conditions and remain competitive in the long term through automation and the realignment of contracts.

ISG also predicts that competition between providers of hybrid IT and colocation services in Switzerland will intensify as companies increasingly seek flexible and secure solutions. The rising demand for cloud services and data center capacities will pressurize providers to develop innovative offerings and continuously improve their service quality.

It is noticeable that providers are increasingly emphasizing the importance of standardizing infrastructures to offer better services at a lower price. Standardization offers various advantages — it enables providers to automate the operation of infrastructures and reduce the need for manual intervention, leading to significant cost savings and improved efficiency.

A standardized infrastructure makes it easier for providers to scale operations quickly and replicate the standardized components at

Multicloud strategies
rely on both
**polycloud and
hybrid cloud** and
are thus becoming
increasingly complex.



different locations and with various customers. Furthermore, standardization increases the reliability and consistency of the infrastructure, which can increase customer satisfaction and reduce the risk of downtime and service interruptions. By standardizing infrastructure services through infrastructure as code (IaC) and software-defined infrastructure, providers can achieve greater efficiency, scalability and reliability, ultimately benefiting providers and enterprise customers.

Trends in managed services: In many cases, hybrid infrastructure management tools must be compatible with VMware and ServiceNow products to integrate machine learning into automation. Modern service platforms will use incident analytics to look for potential root causes to provide more contextual information to service teams and automate incident resolution, thus reducing mean time to detect (MTTD) and mean time to repair (MTTR). Service providers will continue to automate their processes to improve service quality and save costs. For medium-sized customers, this would mean simplifying infrastructure management and reducing operational risk.

Large customers, on the other hand, want to minimize service interruptions to improve service quality. Large service providers use automated systems to increase performance and reduce administrative costs. Data analytics provides customers with insights and knowledge regarding consolidation and rightsizing so that they can make informed decisions. Infrastructure as Code (IaC) allows customers to fully control the deployment of new services and DevOps environments. Modern managed service platforms have IaC and DevOps automation options on-premises as well as in colocation and managed hosting environments.

Modernization of IT infrastructure: Many Swiss companies have been using their IT systems for many years or even decades, and these systems have reached the end of their lifespan. These systems can no longer keep up with the demands of modern applications and business processes and are more vulnerable to security threats and other risks. Modernization requires a significant investment of time, money and resources, which many companies see as a major challenge. Service providers offer

a thorough analysis of existing infrastructure, identify vulnerabilities and inefficiencies, and create a plan for how these systems can be updated or replaced. Although the benefits may not be immediately apparent, and there may be risks such as business disruption during the migration process, modernization is a crucial step for many companies to remain competitive and meet the demands of the digital age. While it may be challenging, the potential savings are significant, particularly through improved operational efficiency and increased business results.

Hybrid cloud trends: Companies have recognized that legacy applications often do not run smoothly in a public cloud environment. This is why they often choose to operate in colocation data centers or migrate to a managed hosting model. Service providers can now manage colocation, hosting and cloud through a single AIOps platform to provide customers with a unified experience across all infrastructures. On the other hand, local data centers are often not as well connected as colocation and hosting data centers, making a move inevitable.

Evolution from hybrid cloud to polycloud: In 2024, cloud providers such as AWS, Microsoft Azure and Google Cloud will continue to expand their services. Companies will carefully decide where to place their workloads. With the polycloud strategy, applications will have access to the optimal services for their specific use case, be it an industry-specific cloud solution, a specialized database or an AI and ML service. Companies are integrating their on-premises and private cloud infrastructures into their roadmaps as they realize that not all workloads belong in the public cloud, mainly due to cost, performance and regulatory aspects.

Cost optimization in the cloud is paramount: Companies are increasingly focusing on cost reduction and efficiency in 2024 due to the possibility of an impending economic downturn. With the rapid growth in public cloud usage over the last two years, cloud spending has significant cost-saving potential. IT, Finance and FinOps teams are visualizing their TCO across their hybrid cloud footprint (on-premises, private and public clouds) to identify optimization opportunities and monetization potential in cloud migrations. Having achieved



fundamental cost savings through simple FinOps in recent years, organizations are now looking to redesign their applications to leverage cost-effective, cloud-native technologies such as serverless to further optimize their cloud spend.

Increasing success for small and medium-sized providers: It is noticeable that several large global system integrators are losing customers to these smaller providers. The main reasons for this are manifold. A few of them are listed below:

Costs: Small and medium-sized providers can offer more competitive prices due to lower overheads. They are also more agile and can adapt quickly to changing market conditions.

Innovation: Due to their agility and innovative strength, small and medium-sized providers can react more quickly to new technologies and trends. Some of them even offer more advanced solutions.

Personal service: Small and medium-sized providers attach great importance to personal support, customer orientation and flexibility. This allows them to tailor their services to the

individual needs of their customers, in contrast to the standardized offerings of large providers.


Ongoing shortage of skilled workers drives M&A activity: Companies are acquiring capacity and skills to increase their revenues. In 2023, the trend of increasingly smaller companies in the managed services sector being acquired by larger companies continued unabated. ISG predicts further mergers and acquisitions in the coming years.

Strong demand for colocation services: In Switzerland, commercial enterprises, banks and insurance companies, healthcare sectors and public administrations are increasingly relying on the services of colocation providers and moving their infrastructure to their data centers. There are many reasons for this, including improved operational security, adherence to compliance requirements and the rapid provision of secure connectivity worldwide. In addition to housing, some colocation providers offer state-of-the-art IT infrastructure systems that can be easily added and provide a basis for a hybrid cloud. Sustainability is an important issue.

Data centers are required to achieve the goal of climate neutrality by 2030. Green technologies, energy recovery systems, use of green energy, monitoring and optimization will become mandatory — a requirement that many customer-owned data centers will find challenging to meet.


The providers hold targeted discussions with companies to create added value for their business. They help modernize and manage the infrastructure instead of focusing solely on day-to-day operational management. In addition, providers help organizations create a roadmap to improve performance and reduce workload costs.



 Provider Positioning


	Managed Services — Large Accounts	Managed Services — Midmarket	Managed Hosting — Large Accounts	Managed Hosting — Midmarket	Colocation Services
Abraxas	Not In	Not In	Market Challenger	Not In	Not In
Accenture	Leader	Not In	Not In	Not In	Not In
ACP	Not In	Contender	Not In	Not In	Not In
All for One Group	Not In	Product Challenger	Not In	Not In	Not In
AlpHosting	Not In	Not In	Contender	Not In	Not In
Anexia	Not In	Not In	Not In	Market Challenger	Not In
Aspectra	Not In	Not In	Not In	Contender	Not In
AtlasEdge	Not In	Not In	Not In	Not In	Product Challenger
Atos	Leader	Not In	Leader	Not In	Not In
Aveniq	Not In	Leader	Leader	Not In	Not In



 Provider Positioning


	Managed Services — Large Accounts	Managed Services — Midmarket	Managed Hosting — Large Accounts	Managed Hosting — Midmarket	Colocation Services
Axians	Not In	Leader	Not In	Not In	Not In
Bancadati	Not In	Not In	Not In	Not In	Contender
Bechtle	Not In	Leader	Not In	Leader	Not In
Bedag Informatik	Not In	Not In	Contender	Not In	Not In
BitHawk	Leader	Not In	Not In	Not In	Not In
BrainServe	Not In	Not In	Not In	Not In	Product Challenger
BT	Contender	Not In	Contender	Not In	Not In
CANCOM	Not In	Rising Star ★	Not In	Not In	Not In
Cappgemini	Leader	Not In	Not In	Not In	Not In
CGI	Contender	Not In	Not In	Not In	Not In



 Provider Positioning


	Managed Services — Large Accounts	Managed Services — Midmarket	Managed Hosting — Large Accounts	Managed Hosting — Midmarket	Colocation Services
CKW	Not In	Not In	Not In	Contender	Contender
Cognizant	Product Challenger	Not In	Not In	Not In	Not In
ColoBâle	Not In	Not In	Not In	Not In	Contender
Controlware	Not In	Contender	Not In	Not In	Not In
CONVOTIS	Not In	Leader	Not In	Leader	Contender
Data11	Not In	Not In	Not In	Not In	Contender
Datasource	Not In	Not In	Not In	Not In	Contender
Devoteam	Contender	Market Challenger	Not In	Not In	Not In
Digital Realty	Not In	Not In	Not In	Not In	Leader
DXC Technology	Product Challenger	Not In	Not In	Not In	Not In



 Provider Positioning


	Managed Services — Large Accounts	Managed Services — Midmarket	Managed Hosting — Large Accounts	Managed Hosting — Midmarket	Colocation Services
Econis	Not In	Contender	Product Challenger	Not In	Not In
ELCA/EveryWare	Not In	Leader	Not In	Leader	Product Challenger
eqipe	Not In	Not In	Not In	Contender	Not In
Equinix	Not In	Not In	Not In	Not In	Leader
exaSys	Not In	Not In	Not In	Not In	Market Challenger
Fujitsu	Contender	Not In	Product Challenger	Not In	Not In
Green	Not In	Leader	Not In	Product Challenger	Leader
HCLTech	Rising Star ★	Not In	Not In	Not In	Not In
Hexaware	Contender	Not In	Not In	Not In	Not In
Hosttech	Not In	Not In	Not In	Contender	Product Challenger



 Provider Positioning


	Managed Services — Large Accounts	Managed Services — Midmarket	Managed Hosting — Large Accounts	Managed Hosting — Midmarket	Colocation Services
Infomaniak	Not In	Not In	Product Challenger	Not In	Product Challenger
ITpoint Systems	Not In	Contender	Not In	Product Challenger	Not In
ITRIS One	Not In	Not In	Not In	Market Challenger	Not In
IWB	Not In	Not In	Not In	Not In	Product Challenger
Kyndryl	Leader	Not In	Leader	Not In	Not In
LAKE Solutions	Not In	Contender	Not In	Not In	Not In
Leuchter IT	Not In	Not In	Not In	Market Challenger	Not In
MTF	Not In	Leader	Not In	Leader	Not In
Netcloud	Not In	Leader	Not In	Not In	Not In
Netskin	Not In	Not In	Not In	Contender	Not In



 Provider Positioning


	Managed Services — Large Accounts	Managed Services — Midmarket	Managed Hosting — Large Accounts	Managed Hosting — Midmarket	Colocation Services
nexellent	Not In	Not In	Contender	Not In	Not In
Nine Internet Solutions	Not In	Not In	Not In	Product Challenger	Not In
nLighten	Not In	Not In	Not In	Not In	Product Challenger
NorthC Datacenters	Not In	Not In	Not In	Not In	Product Challenger
Novatrend	Not In	Not In	Contender	Not In	Not In
NTS Workspace	Not In	Not In	Not In	Not In	Leader
NTT DATA	Product Challenger	Not In	Product Challenger	Not In	Not In
NTT GDC	Not In	Not In	Not In	Not In	Leader
Orange Business	Contender	Not In	Contender	Not In	Not In
ProCloud	Not In	Not In	Not In	Product Challenger	Not In



 Provider Positioning

	Managed Services — Large Accounts	Managed Services — Midmarket	Managed Hosting — Large Accounts	Managed Hosting — Midmarket	Colocation Services
Rackspace Technology	Product Challenger	Not In	Rising Star ★	Not In	Not In
Safe Swiss Cloud	Not In	Not In	Not In	Product Challenger	Not In
ServerTown	Not In	Not In	Not In	Contender	Not In
SmartIT Services	Not In	Not In	Not In	Contender	Not In
Sopra Steria	Contender	Not In	Contender	Not In	Not In
STACK Infrastructure	Not In	Not In	Not In	Not In	Leader
Swisscom	Leader	Leader	Leader	Leader	Leader
TCS	Leader	Not In	Not In	Not In	Not In
ti&m	Leader	Not In	Leader	Not In	Not In
T-Systems	Product Challenger	Not In	Leader	Not In	Not In



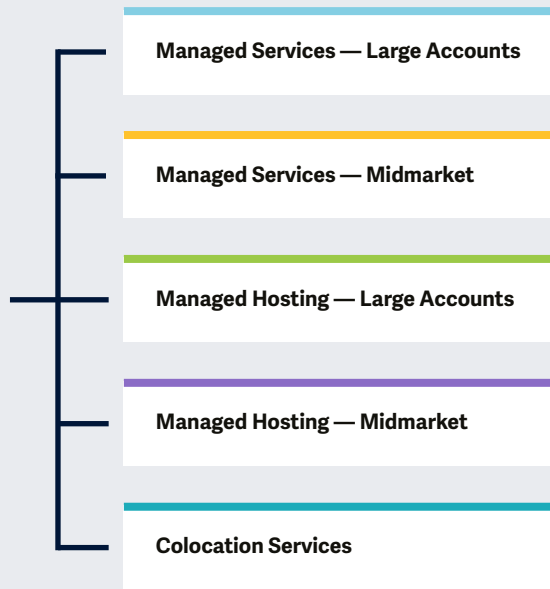
 Provider Positioning

	Managed Services — Large Accounts	Managed Services — Midmarket	Managed Hosting — Large Accounts	Managed Hosting — Midmarket	Colocation Services
UMB	Leader	Not In	Not In	Not In	Not In
Unisys	Contender	Not In	Not In	Not In	Not In
UnitedLayer	Not In	Not In	Not In	Not In	Contender
Vantage Data Centers	Not In	Not In	Not In	Not In	Product Challenger
VSHN	Contender	Product Challenger	Not In	Not In	Not In
Wipro	Leader	Not In	Not In	Not In	Not In
Xelon	Not In	Not In	Not In	Contender	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 center outsourcing, including the service providers of managed hosting, colocation facilities and managed services.

Data center outsourcing is the practice of transferring the responsibility of managing data center assets to a third-party provider. It encompasses orchestration, provisioning, integrated monitoring, and managing infrastructure components, including computing, storage, database and middleware. The data center 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 center, 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 center. 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

The ISG Provider Lens™ Private/Hybrid Cloud – Data Center Services offers the following to businesses and IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers.
- A differentiated positioning of providers by segments on their competitive strengths and portfolio attractiveness.
- Focus on different markets, including the APAC**, Brazil, France, Germany, Nordics, Netherlands, Switzerland, U.K. and U.S.

ISG Provider Lens™ studies serve as an important decision-making tool for positioning service providers, growing key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their current vendor relationships and potential engagements.

**APAC (ANZ, *ASEAN, India – ex China, Hong Kong, Japan, Korea, Taiwan)

*ASEAN = Indonesia, Malaysia, Philippines, Singapore, Thailand and Vietnam

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 (exceptions are possible).





Provider Classifications: Quadrant Key

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

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.

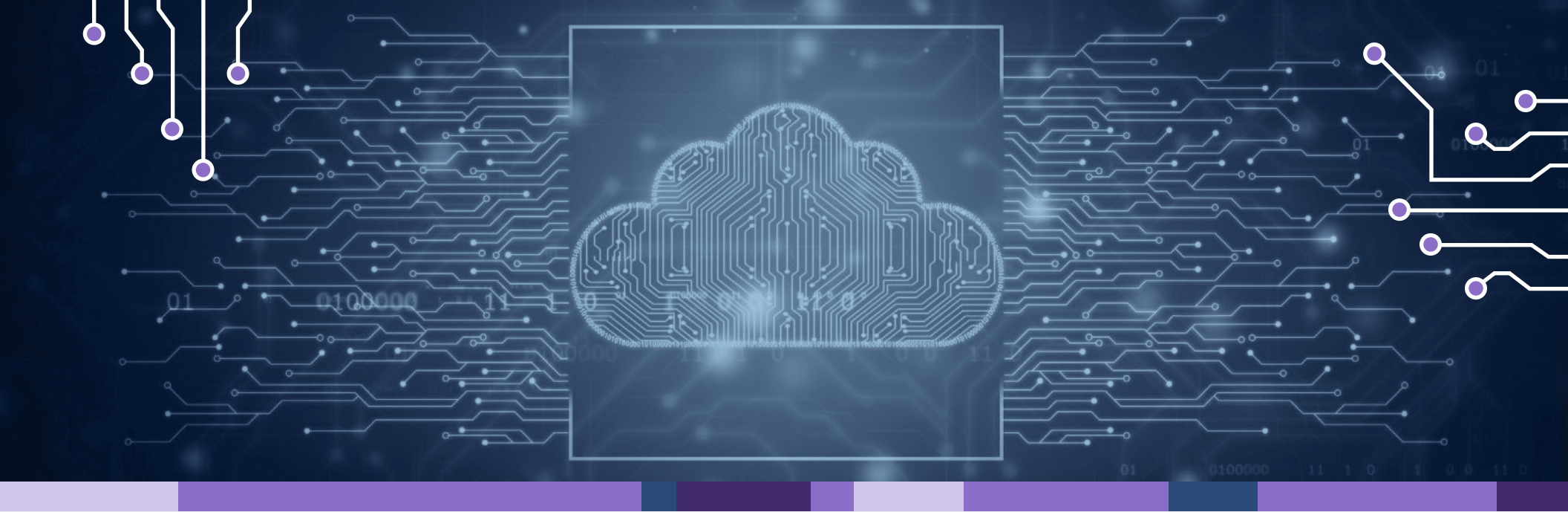
Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength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

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 — Midmarket

Who Should Read This Section

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

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

With managed hosting in place, enterprises are relieved of operating and maintaining their data centers while still having control over their hosted data. Enterprises can leverage modern technologies and updated traditional infrastructure offered by providers, reducing their on-premises infrastructure needs. In addition, they can benefit from the consumption-based offerings of service providers, such as bare metal options, multi-operating systems and multi-database support, compliance certifications, connectivity to multicloud environments and low-latency connectivity between data centers.

The market for managed hosting among midmarket enterprises in Switzerland has experienced steady growth in recent years. Hosting providers have made significant investments in expanding their service portfolios and advancing their data centers to offer new options. Observations in Switzerland indicate that the managed hosting business is significant despite low profit margins. Some smaller service providers have been acquired by larger ones. However, service providers ensure that hosting stable, non-dynamic workloads can lower customers' operating costs compared to using public clouds.



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



IT and infrastructure leaders should read this report to better analyze tool modernization and providers' hosting capabilities along with hosting space advancement's impact on private/hybrid cloud strategies.

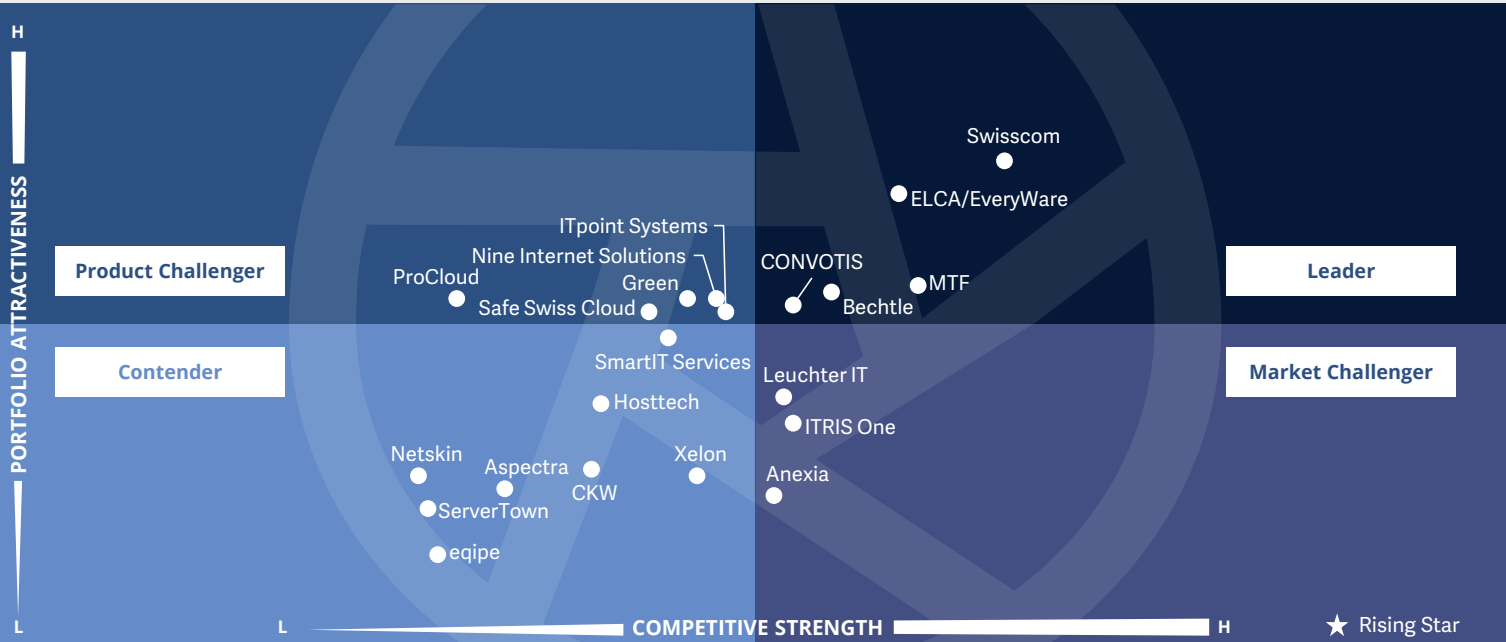


Software development and technology leaders can gain an understanding of providers' offerings and their impact on ongoing software development and systems, including applications under development.



Private/Hybrid Cloud – Data Center Services
Managed Hosting – Midmarket

Switzerland 2024



This quadrant evaluates providers of **standalone hosting solutions using their own or third-party facilities and infrastructure**. Providers are responsible for the day-to-day management and maintenance of data center equipment such as servers, storage media, operating systems and networks.

Ulrich Meister



Managed Hosting – Midmarket

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 center components such as servers, storage, operating systems and connectivity to the external network. Ideally, clients state their application and operating requirements, and the managed hosting provider takes 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 center 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 center security



Managed Hosting – Midmarket

Observations

The market for managed hosting has seen continuous growth in recent years. Hosting providers have made significant investments in expanding their service offerings and developing their data centers to offer their customers new options. Their portfolio has been adapted to customer needs to provide high-performance functions.

Support for hybrid clouds has also been improved, and state-of-the-art mainframe solutions have been developed. Providers have updated their security measures, both physical and virtual. They have also optimized their customer service with a 24/7 support system and further developed their solution technologies. Hyperconverged systems have proven to be crucial for improving the performance of APIs, enabling automated provisioning and self-service capabilities.

Observations in Switzerland show that the managed hosting business is significant despite a low-profit margin. Some providers have resold their hosting services to large companies.

ISG also notes that many organizations are using hosting services in conjunction with public cloud infrastructure to reduce costs. Providers of managed hosting services argue that by hosting stable and non-scalable workloads, their customers can reduce their operating costs without switching to a broad, standardized range of public cloud services.

This study examined 77 providers; 21 of them qualified for this quadrant, including five as Leaders.



Bechtle is experiencing steady growth in Switzerland and is valued by customers of all sizes, especially Swiss SMEs, due to its numerous data storage locations.



CONVOTIS has significantly expanded its portfolio and created improved market access by merging with JMC.

ELCA/EveryWare

ELCA/EveryWare has once again been recognized as a Leader in managed hosting. Its broad portfolio of services is reflected in a continuously growing customer base and trust.

MTF

MTF is a respected provider of system houses from Switzerland, specializing in the provision of comprehensive cloud solutions for SMEs.



Swisscom is undoubtedly a leader in the field of managed hosting, serving both medium-sized and large companies from its eight Tier 4 data centers and offering tailor-made cloud solutions with certified infrastructure experts.



CONVOTIS



“CONVOTIS distinguishes itself with top-notch cloud expertise and always keeps an eye on technological developments that are important for SMEs for its customers.”

Ulrich Meister

Overview

Headquartered in Düsseldorf, Germany, CONVOTIS employs more than 1,000 people in 23 offices in nine countries. In FY23 the company generated revenue of €140 million, with the Services division representing the largest segment. The company’s range of services includes hybrid infrastructure management, data and AI services and cybersecurity. With the acquisition of JMC in 2023, CONVOTIS has completed a significant expansion step.

Strengths

End-to-end managed hosting and security services: CONVOTIS guarantees high overall availability for the entire system, from application operation in the data center to site networking and data transmission in the on-site network. The company maintains partnerships with major hardware and software providers and can therefore offer customized hybrid and multicloud models. A broad portfolio of managed security services ensures that the IT security requirements of medium-sized companies are met. Similar to the tariff models for cloud computing, CONVOTIS has designed its security solutions as a demand-based service in the “as a service” model.


Broad managed hosting offering:

CONVOTIS takes over the provision and operation of customer infrastructure on-site or via its own Colo Zug data center and various colocation providers such as CKW, NTT Global (eShelter), Interxion and Equinix. For private, public and multicloud infrastructures, we offer operational takeover and responsibility as well as transition management based on leading cloud platforms (Microsoft Azure, IBM Cloud, container platforms).

Caution

CONVOTIS has built up enormous momentum with the merger with JMC. Now, it is a matter of fulfilling the high expectations of customers that go hand in hand with this.





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.



Appendix

The ISG Provider Lens 2024 - Private/Hybrid Cloud – Data Center Services research study analyzes the relevant software vendors/service providers in the Switzerland 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

Ulrich Meister
Lead Analyst

Ulrich is significantly involved in the ISG Provider Lens™ quadrant studies involved. He mainly writes about digital technology, IT services and cloud technology. His research agenda includes the assessment of the impact the digital transformation that Analysis of market dynamics, the

Positioning of providers on the market, the writing of POVs, the Observation of the software market and the identification of opportunities for Company.



Author

Wolfgang Heinhaus
Lead Analyst

Wolfgang Heinhaus has over 25 years Experience in IT infrastructure and was in a leading position in a global food companies active. He has more than 8 years Extensive research experience in the areas of colocation services, IT infrastructure, IT security and cloud Computing.

He has conducted several IPL studies for the German and Swiss markets and also advises customers on these topics.



Author & Editor Biographies

Author



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 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.



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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.

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