

# Private/Hybrid Cloud – Data Center Services

Managed Services — Midmarket

A research report comparing provider strengths,  
challenges and competitive differentiators

<b>Executive Summary</b>	03
<b>Provider Positioning</b>	06
<b>Introduction</b>	
Definition	14
Scope of Report	15
Provider Classifications	16
<b>Appendix</b>	
Methodology & Team	27
Author & Editor Biographies	28
About Our Company & Research	31
<b>Star of Excellence</b>	24
Customer Experience (CX) Insights	25

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<b>Managed Services — Midmarket</b>	17 – 23
Who Should Read This Section	18
Quadrant	19
Definition & Eligibility Criteria	20
Observations	21
Provider Profile	23

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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



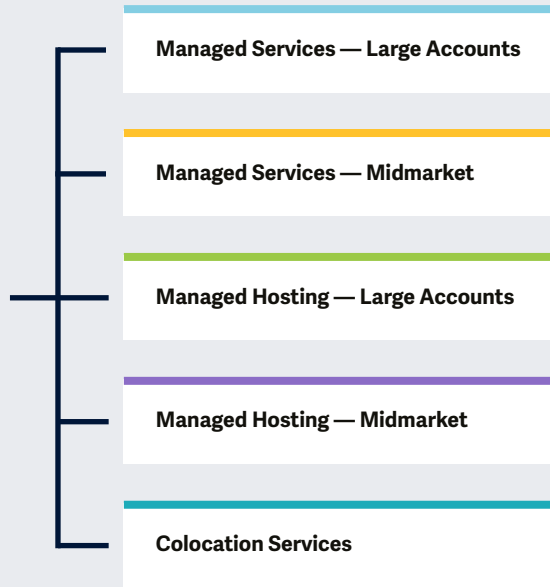
 Provider Positioning

	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.

**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 — Midmarket

### Who Should Read This Section

This report is relevant to midsize enterprises across all industries in Switzerland for evaluating private/hybrid cloud and data center MSPs.

In this quadrant, ISG defines MSPs' current market positioning in Switzerland and how they address midsize enterprises' key challenges with their private/hybrid cloud models. These providers are adept at managing enterprise clients' data center infrastructure, enabling them to focus on other tasks.

Midsize enterprises in Switzerland have been swift in adopting cloud services and are keen on working with service providers that offer end-to-end management of their cloud environments. These businesses are investing in cloud services to reduce their operations costs and benefit from providers' expertise. They are increasingly looking for customized solutions that enable them to meet their complex requirements optimally.

Midsize enterprises in Switzerland seek service providers that can automate their processes, simplify infrastructure management and reduce operational risks, thereby improving service quality and saving costs. These enterprises also look for integrated solutions through private/hybrid cloud deployments, focusing on edge solutions. Integrating AI and ML technologies for process automation is becoming increasingly important, leading to cost savings and process improvements.

Service providers are offering superior control to enterprises for the deployment of new services and DevOps environments by providing infrastructure as code (IaC). Modern managed service platforms have IaC and DevOps automation options, both on-premises and in colocation and cloud environments.



**IT and infrastructure leaders** should read this report to analyze MSPs' modernization and service capabilities and market advancements impacting private/hybrid cloud strategies.



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

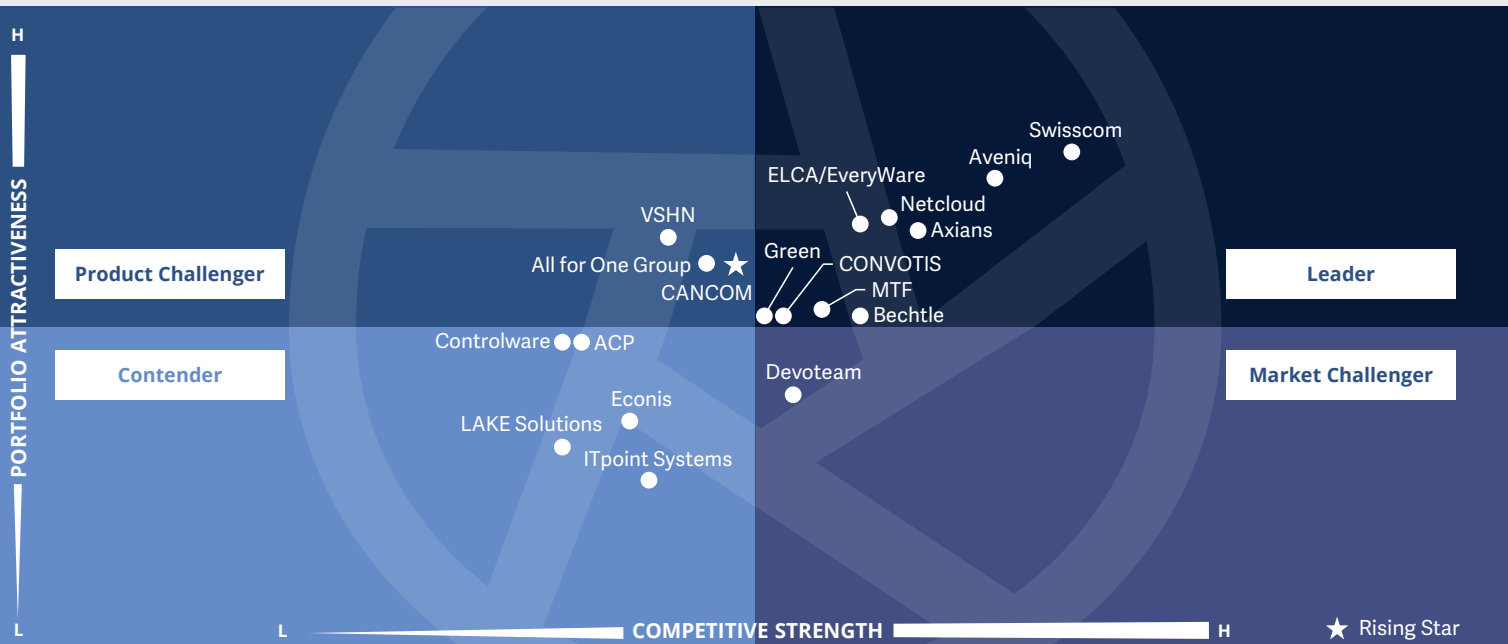


**Sourcing, procurement and vendor management professionals** should read this report to better understand the current landscape and partner ecosystem of MSPs in Switzerland.



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

Switzerland 2024



This quadrant evaluates providers of **managed services for private and hybrid clouds** as well as **traditional data center infrastructure**. They mostly offer transition services and help optimize existing IT landscapes.

*Ulrich Meister*



## Managed Services – Midmarket

### Definition

This quadrant assesses a provider's ability to offer ongoing management services for private and hybrid clouds and traditional data center 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 centers, multicloud settings, provider facilities or third-party colocation centers.

Such providers typically offer transition services, guiding clients to optimize their existing IT landscapes. Common projects include large-scale data center consolidation, virtualization, cloud enablement and configuration, and implementation of a software-defined data center (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 center 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 centers** (under the remote infrastructure management (RIM) model)
3. Demonstrate experience in **large transition** projects that include automation, **consolidation, virtualization** and **containerization** of data centers 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



## Managed Services – Midmarket

### Observations

Switzerland is one of the leading nations in the European market for managed hybrid cloud services. This results from openness to cloud technologies, focus on improving customer experience, strong revenue growth and increasing number of service contracts in the Swiss market compared to the entire European region. Companies are looking for integrated solutions through hybrid cloud deployment with a focus on edge solutions. Integrating AI and ML technologies for process automation is becoming increasingly important, leading to cost savings and process improvements. Medium-sized companies also increasingly require service providers with extensive management capabilities as well as automated orchestration, industry-specific platforms and solutions based on site reliability engineering (SRE). Here, medium-sized providers in Switzerland are reacting faster than their larger competitors.

A growing trend in the Swiss market is the use of multicloud approaches to ensure redundancy and minimize downtime. Close

collaboration between service providers and customers is required to ensure seamless integration of different cloud platforms. This allows companies to react more flexibly to changing market conditions, strengthen their competitiveness and protect their data and applications.

SME customers are looking to simplify infrastructure management and minimize operational risk by working with SME providers on an equal footing. This development shows that SMEs are increasingly looking for customized solutions that optimally meet their complex requirements. SME providers play an important role here, as they can respond more flexibly to individual needs and offer more personalized support. Discussions about managed hybrid cloud solutions are becoming increasingly important, as collaboration with various hyperscalers and the integration of legacy applications is becoming a complex challenge for many companies.

This study examined 77 providers, 18 of which qualified for this quadrant, including nine Leaders and one Rising Star.

### AVENIQ

**Aveniq** presents an extremely interesting offer that is specially designed for SAP and Microsoft solutions and can be flexibly adapted to customers' needs.

### axians

**Axians** is a professional in infrastructure modernization and offers many solutions. The company has shown its capabilities with many successful projects.



**Bechtle** has been a successful provider of services and solution integration for a long time. The company sets high standards with a wide range of products and services and satisfied customers.

### CONVOTIS empower IT

**CONVOTIS**, through the merger with JMC, has significantly expanded its portfolio and gained financial stability.

### ELCA/EveryWare

**ELCA/EveryWare** understands its customers' challenges in hybrid and multicloud projects. The company works closely with major cloud providers to develop top-notch cloud scenarios for its customers.

### Green

**Green** has become the industry leader through continuous portfolio development.

### MTF

**MTF** is a frontrunner in managed private cloud solutions and is very familiar with the requirements of IT services.

### Netcloud

**Netcloud** inspires numerous customers from various industries with its comprehensive range of services.



## Managed Services – Midmarket



**Swisscom** remains one of the top providers of managed service solutions for SMEs and actively contributes to shaping market demand.

### **CANCOM**

**CANCOM** has become a Rising Star with its outstanding portfolio, especially in the area of hybrid and multicloud management.





“CONVOTIS presents itself as a popular IT provider for medium-sized companies that is constantly developing and expanding.”

*Ulrich Meister*

# CONVOTIS

## Overview

Headquartered in Düsseldorf, Germany, CONVOTIS employs more than 1,000 people in 23 branches 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

### Customized IT infrastructures:

CONVOTIS creates customized, advanced and automated IT systems and, in addition to operation, offers transformation implementation, target architecture creation and industry-specific expertise in the technology fields of Edge and IoT. Due to the enterprise cloud approach, elements of the conventional infrastructure can continue to be operated, and innovative cloud services can be integrated.

### Hybrid cloud consulting expertise:

CONVOTIS offers not only independent economic feasibility studies and detailed cloud readiness assessments, but also fundamental service mapping, well thought-out investment planning and innovative

cloud procurement approaches based on various infrastructures. Customers from the SME sector receive a versatile operations stack that is open to various providers.


### Seamless security per Swiss regulations:

As the operator of its own infrastructures and data centers in Switzerland, CONVOTIS guarantees compliance with the strictest requirements for data security and data protection in accordance with Swiss legal regulations and standards. TÜV and ISO certifications are carried out on an ongoing basis.

## Caution

CONVOTIS is regarded as an outstanding technology specialist in relation to infrastructures of all kinds. Using the existing customer potential to build up industry-specific expertise and application skills beyond the pure cloud offering is advisable.






# 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

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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.



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**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.



### \*ISG Provider Lens™

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For more information about ISG Provider Lens™ research, please visit this [webpage](#).

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### \*ISG

ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 900 clients, including more than 75 of the world's top 100 enterprises, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including AI and automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis.

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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**JUNE, 2024**

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**REPORT: PRIVATE/HYBRID CLOUD – DATA CENTER SERVICES**