

# Private/Hybrid Cloud – Data Center Services

A research report comparing provider strengths,  
challenges and competitive differentiators

Customized report courtesy of:



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### Enterprises are rethinking their priorities and changing from a cloud-first to right-cloud mindset

The accelerated migration to cloud peaked in 2022, giving room for more mature cloud planning and adoption throughout 2023. The public cloud continues to grow in both clientele and revenue. However, enterprises are rethinking their hybrid cloud architectures to move workloads to a more efficient platform rather than moving everything to one place.

The new approach considers the pros and cons of private and public clouds, taking into consideration licensing expenses, modernization costs and regulations around healthcare data, privacy, confidentiality and data sovereignty. The decision is no longer restricted to choosing platform A or B but rather depends on determining the best combination for managed hosting, shared and dedicated infrastructure, private cloud and two to four public cloud providers.

The new hybrid cloud architecture should facilitate workload migration across data centers by using high-capacity network links offering low latency, thereby enabling the distribution of applications across different data centers while considering regulations and operational costs.

Many service providers offer a Certifié Hébergeur de Données de Santé (HDS) certification and can advise clients on where to store patients' data in compliance with regulations. This year, ISG observed more providers adhering to the standards defined by the Commission Nationale de l'informatique et des libertés (CNIL), an independent French administrative regulatory body focused on ensuring adherence to data privacy law in collecting, storing and using personal data. However, compliance with data sovereignty is more complex, and few data center providers can offer SecNumCloud certifications issued by the French National Agency for Information Systems Security (ANSSI, as the acronym is known in French).

Providers can help clients in finding the right **balance** between **private** and **public** clouds.



Companies not classified as operators of vital importance (OVI) or operators of essential services (OES) show fewer concerns with data sovereignty. However, while OVE refers to defense and national security, the OVI includes many enterprises in the food, healthcare, water, telecom and broadcasting, space and research, manufacturing, energy, transportation and financial service industries and the public sector. Several large enterprises in France fall under the OVI category, necessitating every service provider operating in France to understand the implications of data sovereignty regulations and devise a compliant hybrid cloud architecture that uses advanced services available only in the public cloud, such as generative AI (GenAI). Finding the right balance of cost, compliance and technological innovation is crucial. Clients cannot ignore GenAI, data lakes, AI analytics and ML when designing new business solutions.

The financial services sector also faces new challenges. Similar to regulations in some non-EU countries, the Resilience Act (DORA) published in 2023 is assumed to take effect in January 2025 within the EU.

After DORA, financial institutions must follow rules for protection, detection, containment, recovery and repair capabilities against IT-related incidents. For service providers, this is an opportunity to develop solutions for logging, backup and restoration on certified data centers that comply with HDC and SecNumCloud.

After considering all the complexities involving regulations and the opportunities around GenAI and ML, service providers can design hybrid cloud platforms to operate accordingly. However, most legacy applications are not ready to run on hybrid clouds. Companies need to decompose applications, integrate APIs to distribute applications and segregate privacy data from data that do not fall under regulations. ISG surveyed IT leaders to find out how they modernize applications to migrate onto cloud platforms. The survey confirms a market change from a simple lift-and-shift approach to rethinking priorities to rearchitect applications while adopting private or public cloud platforms.

Providers in the **Managed Services — Large Accounts** quadrant know the implications of HDS, SecNumCloud and DORA. These providers can guide clients through the design of compliant hybrid clouds and related IT governance to ensure data is stored in the right place. Clients should check providers' certifications per their industry requirements. As complexity increases with regulations, leading providers use AIOps and FinOps platforms to automate provisioning and check configurations against clients' policies and regulations. Providers also offer FinOps as a service that comprises IT policy configuration, regulatory controls, sustainability monitoring, security auditing, reporting and approval controls. These advanced FinOps platforms provide clients with the means to demonstrate compliance, including for carbon footprint, environment, social and governance (ESG) requirements, data location, data access and audit reporting.

In the **Managed Services — Midmarket** quadrant, the survey finds that midmarket enterprises do not feel the push toward data sovereignty. Clients' decisions are based on

cost and performance, enabling multicloud adoption and more freely designed hybrid infrastructures. The providers in this quadrant offer self-service catalogs with full automation and FinOps to control costs and consolidate multicloud billing. Providers can help clients optimize cost and performance.

The **Manage Hosting** quadrant shows a growing number of providers using self-service automation, offering a cloud-like experience. Most service platforms use VMware or Red Hat OpenStack as the base for virtualization and self-service provisioning. A typical managed hosting provider operates in colocation data centers, offering high-speed connectivity to AWS, Microsoft Azure and the public internet. Clients selecting a managed hosting provider should ensure that facilities have the required certifications, and that data backup resides in a separate data center within France to stay compliant. Several providers offer that choice.

In the **Colocation Services** quadrant, ISG observes that providers are accelerating investments in building and expanding data center capacity. The weather in France allows providers to commit to lower power usage




effectiveness (PUE) by reducing the use of air conditioning and replacing it with fresh air for most of the year. However, the market struggles to develop clean energy sources for power facilities. Solar and wind farms require open space, which is not widely available. Compounding this, ISG noted rising demand for infrastructure capable of hosting GenAI, which uses high-end servers, high power density, CPU and GPU water cooling. It is uncertain how colocation providers will resolve this complex equation: increase power density, offer more data center space, reduce PUE and develop clean energy supply.

Cloud computing and GenAI demand drive the expansion of the colocation market. Most cloud regions offered by all hyperscalers operate in colocation data centers. For cloud providers, it is mandatory to distribute the regions in segregated data centers belonging to different providers to eliminate the risk of failure and ensure business continuity. All trends suggest that demand for more data center space will continue for several years to accommodate the cloud and many AI-related services currently under development.


Cloud computing demand and growing interest in GenAI are driving more investments in data center expansion and establishing new facilities to host large-scale AI processing capacity. Vendors are investing in developing energy-efficient CPU and GPU technologies, while colocation and hosting providers are focusing their investments on clean energy and decarbonization initiatives.



 Provider Positioning


	Managed Services — Large Accounts	Managed Services — Midmarket	Managed Hosting	Colocation Services
3DS OUTSCALE	Not In	Not In	Product Challenger	Not In
Accenture	Leader	Not In	Not In	Not In
AtlasEdge	Not In	Not In	Not In	Contender
Atos	Leader	Not In	Leader	Not In
Axians	Not In	Contender	Not In	Not In
BSO	Not In	Contender	Contender	Contender
Capgemini	Leader	Not In	Not In	Not In
CGI	Product Challenger	Not In	Not In	Not In
CHEOPS TECHNOLOGY	Not In	Contender	Leader	Not In
Claranet	Product Challenger	Leader	Product Challenger	Not In
Cloud Temple	Not In	Leader	Leader	Not In



 Provider Positioning

	Managed Services — Large Accounts	Managed Services — Midmarket	Managed Hosting	Colocation Services
Coforge	Not In	Contender	Not In	Not In
Cogent	Not In	Not In	Not In	Leader
Cognizant	Product Challenger	Not In	Not In	Not In
Colt DCS	Not In	Not In	Not In	Product Challenger
Constellation	Not In	Rising Star ★	Contender	Contender
DATA4	Not In	Not In	Not In	Leader
DC2SCALE	Not In	Not In	Not In	Contender
Devoteam	Contender	Not In	Not In	Not In
Digital Realty	Not In	Not In	Not In	Leader
DXC Technology	Leader	Not In	Product Challenger	Not In




 Provider Positioning

	Managed Services — Large Accounts	Managed Services — Midmarket	Managed Hosting	Colocation Services
Ecritel	Not In	Product Challenger	Leader	Not In
Equinix	Not In	Not In	Not In	Leader
Etix Everywhere	Not In	Not In	Not In	Rising Star ★
Fujitsu	Not In	Product Challenger	Product Challenger	Not In
Global Switch	Not In	Not In	Not In	Contender
GTT	Not In	Contender	Contender	Not In
HCLTech	Rising Star ★	Not In	Not In	Not In
Infosys	Product Challenger	Not In	Not In	Not In
IONOS	Not In	Not In	Contender	Not In
Koesio	Not In	Product Challenger	Product Challenger	Not In






 Provider Positioning

	Managed Services — Large Accounts	Managed Services — Midmarket	Managed Hosting	Colocation Services
Kyndryl	Leader	Not In	Leader	Not In
LTIMindtree	Not In	Product Challenger	Not In	Not In
Neurones	Contender	Not In	Not In	Not In
NTT DATA	Contender	Not In	Product Challenger	Not In
Orange Business	Leader	Leader	Leader	Leader
OVHcloud	Not In	Not In	Leader	Not In
Penta Infra	Not In	Not In	Not In	Contender
S3NS	Not In	Not In	Contender	Not In
ScaleSquad	Not In	Leader	Not In	Not In
Scaleway	Not In	Not In	Leader	Not In



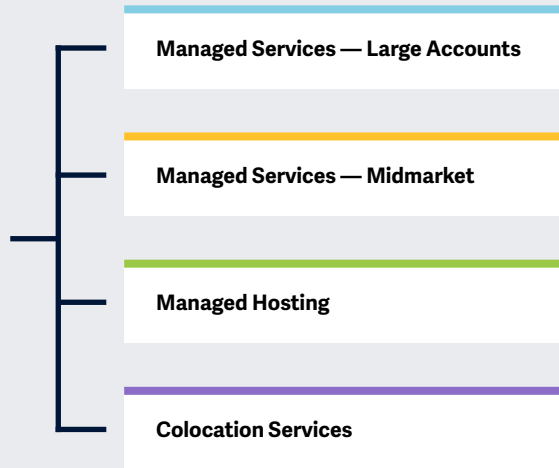
 Provider Positioning

	Managed Services — Large Accounts	Managed Services — Midmarket	Managed Hosting	Colocation Services
SCC	Not In	Leader	Not In	Not In
Sigma	Not In	Product Challenger	Not In	Not In
Sopra Steria	Product Challenger	Leader	Leader	Not In
TCS	Product Challenger	Not In	Not In	Not In
Telehouse	Not In	Not In	Not In	Product Challenger
T-Systems	Product Challenger	Not In	Product Challenger	Not In
Unisys	Contender	Not In	Product Challenger	Not In
UnitedLayer	Not In	Not In	Contender	Not In
Wipro	Leader	Not In	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 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

This ISG Provider Lens™ quadrant report covers the following four quadrants for services: 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 an important decision-making basis for positioning, 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.

### 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 Services — Large Accounts

### Who Should Read This Section

This report is relevant to large enterprises across all industries in France for evaluating hybrid cloud managed service providers.

In this quadrant, ISG defines the current market positioning of managed service providers in France and how they address the key challenges large enterprises face with their hybrid cloud models. These providers are adept at managing data center infrastructure for their enterprise clients, enabling them to focus on other tasks.

In France, large enterprises are increasingly adopting hybrid and multicloud environments to enhance their IT operations' flexibility, scalability and efficiency. These enterprises prefer providers offering a secure cloud environment for their sensitive data, opting for a private cloud alongside a public cloud to support international expansion, seasonal scaling and innovation.

Large-scale enterprises are evaluating managed service providers that offer industry-specific offerings and have strong capabilities in application management and orchestration. There is also a growing emphasis on integrating AI and ML technologies to automate operations, leading to cost savings and process optimization. Service providers focus on implementing a business-value-driven approach to help enterprises effectively assess workload migration and optimize the cost spent on IT infrastructure.

In France, managed service providers should adhere to the European Union's data sovereignty regulations and meet client demands. As regulations become more complex, leading providers are adopting AIOps and FinOps platforms to automate provisioning and ensure that configurations comply with clients' policies and regulations.



**IT and infrastructure leaders** should read this report to analyze the modernization and service capabilities of managed service providers and market advancements impacting hybrid cloud strategies.



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

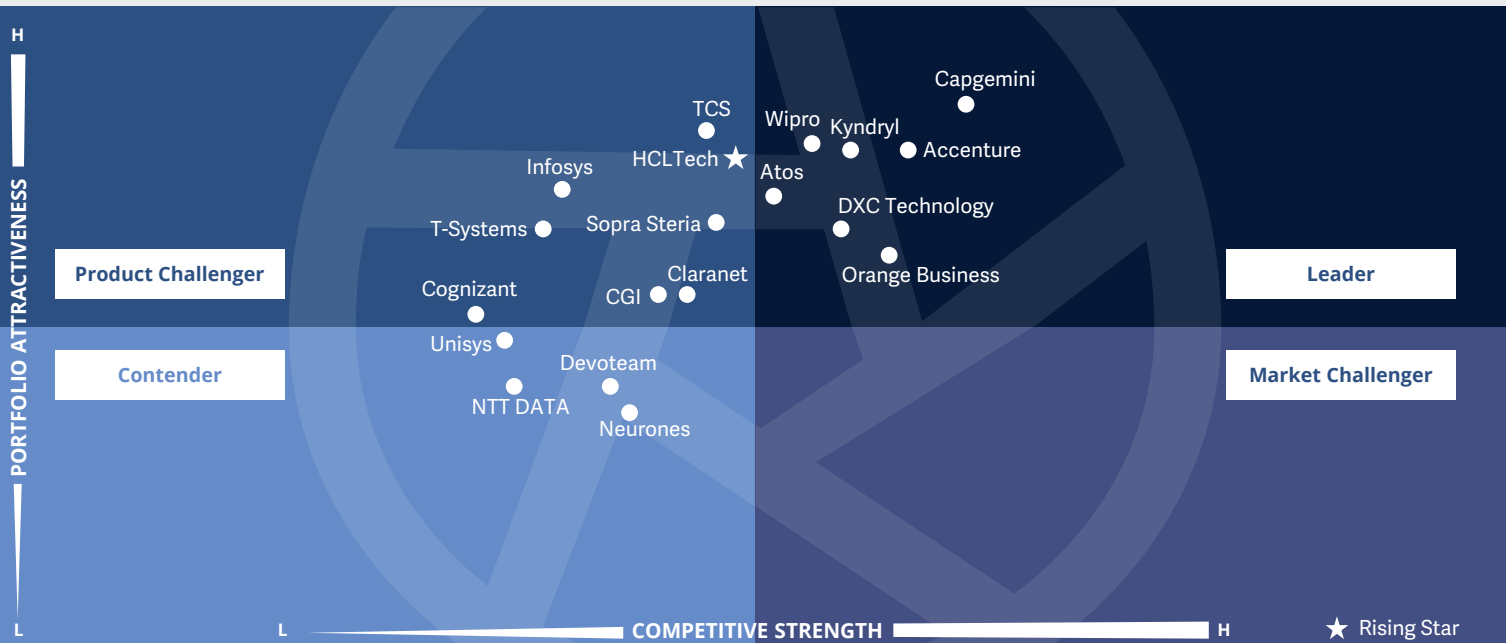


**Sourcing, procurement and vendor management professionals** should read this report to understand the current landscape and partner ecosystem of managed service providers in France.



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

France 2024



This quadrant evaluates service providers that **operate and manage hybrid cloud** infrastructures for large accounts, offering an automated service platform with AI, self-service, self-heal and **financial and compliance** controls.

*Pedro L. Bicudo Maschio*





## Managed Services – Large Accounts

### Definition

This quadrant assesses a provider's ability to offer ongoing management services for private and hybrid clouds and traditional data 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 – Large Accounts

### Observations

Service providers in this quadrant offer large-scale organizations to support enterprise clients. Typical large enterprises in France operate across Europe and many have global operations, requiring providers that can support continental-size infrastructures.

Providers use advanced AIOps to automate the entire infrastructure, thereby reducing labor costs and minimizing human errors. New and expanded FinOps platforms include more than cost management, they address governance requirements. Advanced FinOps platforms offer service approval workflows, enabling clients to track and trace who is consuming which services in private and public clouds. These platforms also record IT policies, such as service tagging, authorization levels and security configurations to enable workflows. When a user gets approval, services are automatically provisioned with the appropriate configuration. If configurations do not match the established IT policies, provisioning fails, generating incident alerts. The development and customization of commercial products

are essential investments demanded by these sophisticated service platforms. Each service provider operates a unique solution.

From the 50 companies assessed for this study, 19 qualified for this quadrant, with seven being Leaders and one Rising Star.

### **accenture**

**Accenture** has enhanced its infrastructure management capabilities and invested in acquisitions to expand its portfolio. The company uses a robust partner ecosystem to provide clients with state-of-the-art technology.

### **Atos**

**Atos'** managed services cover legacy and modern technologies, ranging from mainframe operations to public cloud monitoring and observability. The company has loyal clients and seasoned experts to support enterprises in the public and private sectors.

### **Capgemini**

**Capgemini** is one of the largest service providers globally and in France. It offers service platform integration to manage various aspects, from networking and data centers to application performance and user support with GenAI and full-service automation.

### **DXC TECHNOLOGY**

**DXC Technology** capitalizes on a global service platform, using automation to manage data centers, hosting and public clouds. It is part of a robust partner network, providing support for most technology platforms.

### **kyndryl**

**Kyndryl** supports diverse technologies, including IBM Z, IBM i, RISC and x86 platforms. It uses Kyndryl Bridge, an advanced AIOps and FinOps platform, providing clients with robust services, security and compliance.

### **Business**

**Orange Business** supports clients in all French regions, offering data center services, cybersecurity, public cloud services, private cloud and managed hosting. It focuses on providing end-to-end services and helping clients modernize their operations.



**Wipro** leverages a global service organization with advanced AIOps and FinOps. It offers global expertise in onshore, nearshore and offshore capacity. The company has a sizeable organization in France, with experience in navigating regulations and compliance.

### **HCLTech**

**HCLTech** (Rising Star) has been experiencing growth in France, offering differentiated services using GenAI and analytics, in addition to AIOps and FinOps tools. The company is committed to establishing a strong presence in the French market.





“Orange Business offers a robust infrastructure with leading-edge AI automation to rapidly transform clients’ infrastructures and deliver significant benefits to large clients with its partner network.”

*Pedro L. Bicudo Maschio*

# Orange Business

## Overview

Orange Business is headquartered in Paris, France. It has more than 30,000 employees across over 100 offices in 65 countries. In FY23, the company generated €7.9 billion in revenue, with IT Services as its largest segment.

Orange Business serves more than 3,000 large enterprises with over 2,600 experts in cloud and managed services. The company provides a robust portfolio of cloud infrastructure services, including digital and integration services, managed services and network infrastructure-related platforms.

Orange Business operates more than 70 data centers on five continents and has 2,500 cloud experts to support large enterprise clients.

## Strengths

**Comprehensive offering:** Orange Business offers a comprehensive infrastructure portfolio with a focus on trust and sovereignty. It is offered through the Cloud Avenue platform, which optimizes operating models to deliver better efficiency, mutualization and scalability. The offering is also bundled with FinOps services for multicloud and hybrid cloud, cloud networking, managed big data and edge computing.

**Hyperscaler partnerships:** Orange Business has been strengthening its partnerships with major hyperscalers and achieved a 20 percent increase in certified cloud professionals. In 2024, it launched Move2Bleu services to offer Azure services in a French data center and it is aiming to obtain SecNumCloud 3.2

qualification from ANSSI. The company also intensifies regional partnerships to boost the cloud services market share in Europe.

**Advanced automation:** Orange Business bolsters its automation capabilities with a focus on data and AI to deliver best-in-class services. It also focuses on cybersecurity by offering CyberArk and Tufin for end-to-end configuration of firewalls in infrastructures. The company has several GenAI initiatives, including a knowledge management chatbot with large language models (LLMs), an automatic configuration checker and incident correlation.

## Caution

Orange Business is a generalist cloud integrator. It has its vertical expertise catering to healthcare and smart industry. However, the company should focus on developing industry-specific solutions for diverse verticals to gain more cloud engagements.





# Managed Services — Midmarket

### Who Should Read This Section

This report is relevant to midsize enterprises across all industries in France for evaluating hybrid cloud managed service providers.

In this quadrant, ISG defines the current market positioning of managed service providers in France and how they address midsize enterprises' key challenges in using hybrid cloud models. These providers are adept at managing data center infrastructure for enterprise clients, enabling them to focus on other tasks.

Many midsize enterprises in France are prioritizing the optimization of their cloud expenses by using an integrated platform solution. Enterprises are aiming to manage their hybrid cloud costs effectively by choosing an optimal combination of public and private cloud resources to meet their performance, availability and security needs.

Enterprises in France are increasingly partnering with service providers that can facilitate modernization using open-source technologies, improve infrastructure automation and increase the efficiency of hybrid cloud systems. They expect service providers to offer self-service catalogs with full automation and FinOps to control costs and consolidate multicloud billing.

Managed service providers in France are assisting enterprises in exploring hybrid cloud architectures to eliminate technology obsolescence and implementing advanced cloud services with AIOps tools. They should also ensure that the data stored complies with the GDPR and other relevant laws pertaining to France.



**IT and infrastructure leaders** should read this report to analyze managed service providers' modernization, service capabilities and market advancements impacting hybrid cloud strategies.



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

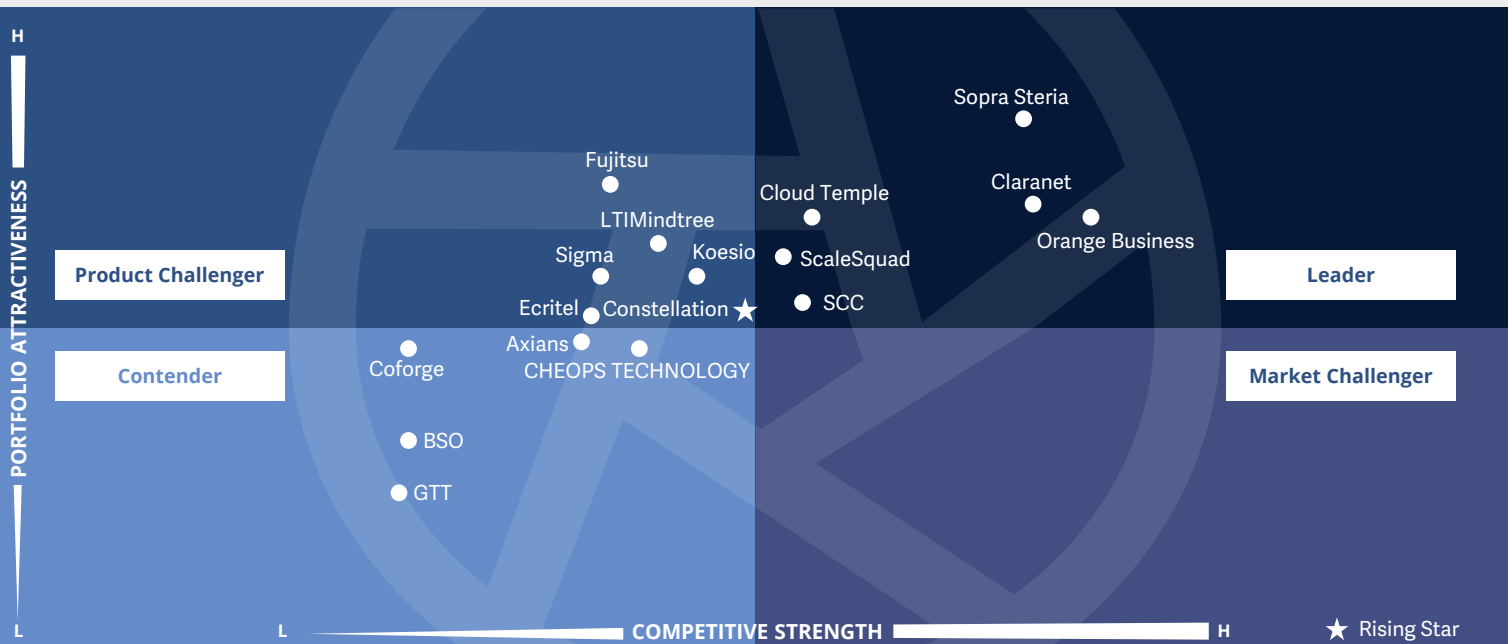


**Sourcing, procurement and vendor management professionals** should read this report to understand the current landscape and partner ecosystem of managed service providers in France.



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

France 2024



This quadrant assesses service providers that **deploy and manage** hybrid clouds for **midmarket clients**. Services offered include workload performance optimization for reducing costs and ensuring compliance and security.

*Pedro L. Bicudo Maschio*



## 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



### Observations

Providers that offer managed services for the midmarket dedicate time and resources to understand each customer's needs and deploy custom services. They also help clients explore hybrid cloud architectures to eliminate technology obsolescence and implement advanced cloud services. These providers design compliant services, helping clients segregate private data from general data to determine the suitable storage technology and location. They also use AIOps and FinOps tools, integrating open source and commercial software to offer affordable services with automation and data analytics.

From the 50 companies assessed for this study, 17 qualified for this quadrant, with six being Leaders and one Rising Star.

### claranet

**Claranet** has long been a leader in this market. It offers hosting and managed services, providing clients with end-to-end services, including consulting, cybersecurity and operations.

#### Cloud Temple

**Cloud Temple** has a custom OpenShift platform developed with Red Hat support. It automates client's operations and offers certified services, with maximum attention to security and compliance.



#### Business

**Orange Business** capitalizes on a large organization, offering midmarket clients a robust infrastructure with an automated self-service platform. It has a comprehensive portfolio to offer complete outsourcing solutions.

### ScaleSquad

**ScaleSquad** is a nimble provider, offering a strong automation platform and hybrid cloud portfolio. It helps clients elevate their IT governance practices and improve overall performance.

#### SCC

**SCC** offers full-scope managed services, covering hybrid cloud and compliance. It works with partners to operate sovereign clouds and can help clients improve service performance.

### Sopra Steria

**Sopra Steria** has a large organization that covers all French regions. It uses a robust service platform and can modernize clients' applications to increase cloud benefits, security and compliance.

### Constellation

**Constellation** (Rising Star) has an innovative approach to modernization by merging sustainability into a consistent hybrid cloud solution. It helps clients deliver green IT services and comply with regulations.







“Orange Business offers leading-edge solutions, enabling midmarket enterprises’ access to best-in-class technology and services, including networking, private and public clouds.”

*Pedro L. Bicudo Maschio*

# Orange Business

## Overview

Orange Business is headquartered in Paris, France. It has more than 30,000 employees across over 100 offices in 65 countries. In FY23, the company generated €7.9 billion in revenue, with IT Services as its largest segment. Orange Business serves more than 35,000 midmarket clients with over 2,600 experts in cloud and managed services. It operates eight data centers in France, including two that are Green IT certified.

The company’s managed services include hybrid infrastructure management, data and AI services, cybersecurity and software-defined networking. Hybrid cloud includes Orange’s data centers and partner hyperscalers AWS, Azure and Google Cloud.

## Strengths

**Customer centricity:** Orange Business builds client trust by offering a comprehensive sovereignty solution with Cloud Avenue, its private cloud platform, and highly automated managed services integrating private and public clouds. The company emphasizes optimization and quality to improve service efficiency and customer satisfaction.

### **Agility to modern clients’ infrastructures:**

Orange Business operates highly efficient data centers, using best-in-class technology. In 2024, it enhanced its cybersecurity services and launched Move2Bleu, with frameworks and tools to move clients’ workloads from the public cloud to the sovereign cloud. Bleu started operations the same year, offering IaaS, PaaS and collaboration with Microsoft technology, ensuring data location in France.

## **Accelerated innovation:**

Orange Business offers cutting-edge connectivity, enabling clients to use software-defined data centers and networking. It uses GenAI to enhance its AIOps and FinOps platforms. Novel GenAI use cases include facilitating easier access to its knowledge database, improving incident correlation and enhancing accuracy in cloud configuration checking.

## **Caution**

Orange Business offers a rich service catalog and uses comprehensive automation. Enterprises requiring custom services should include professional services to transform their IT processes and integrate with Orange Business’ framework.





# Managed Hosting

## Managed Hosting

### Who Should Read This Section

This quadrant is relevant to enterprises across all industries in France for evaluating managed hosting providers.

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

Enterprises in France are looking for best-in-breed hosting services that prioritize self-service, automation, security and compliance.

There is a growing focus on hosting platforms using VMware or Red Hat OpenStack technologies to deliver a cloud-like experience. These platforms are bundled with self-service provisioning and service dashboards that allow clients to monitor consumption, oversee performance and make necessary adjustments.

Enterprises are seeking providers that offer advanced service platforms with software-defined data center functionality across diverse locations. They expect these providers to equip clients with tools to ensure high availability and multiregion backup and restore for business workloads. Providers should also focus more

on leveraging AI-infused technologies and maximizing the use of end-to-end services, from advisory and migration to operations and optimization.

Service providers should adhere to data sovereignty regulations and design a hybrid cloud architecture that complies with Cloud Infrastructure Services Providers in Europe (CISPE), Certifié Hébergeur de Données de Santé (HDS) and SecNumCloud. There is an increased emphasis on sustainability and green energy initiatives to assist enterprises in achieving their goal of zero-carbon facilities throughout France.



**IT and infrastructure leaders** should read this report to analyze providers' tool modernization, hosting capabilities and the impact of hosting space advancements on hybrid cloud strategies.



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

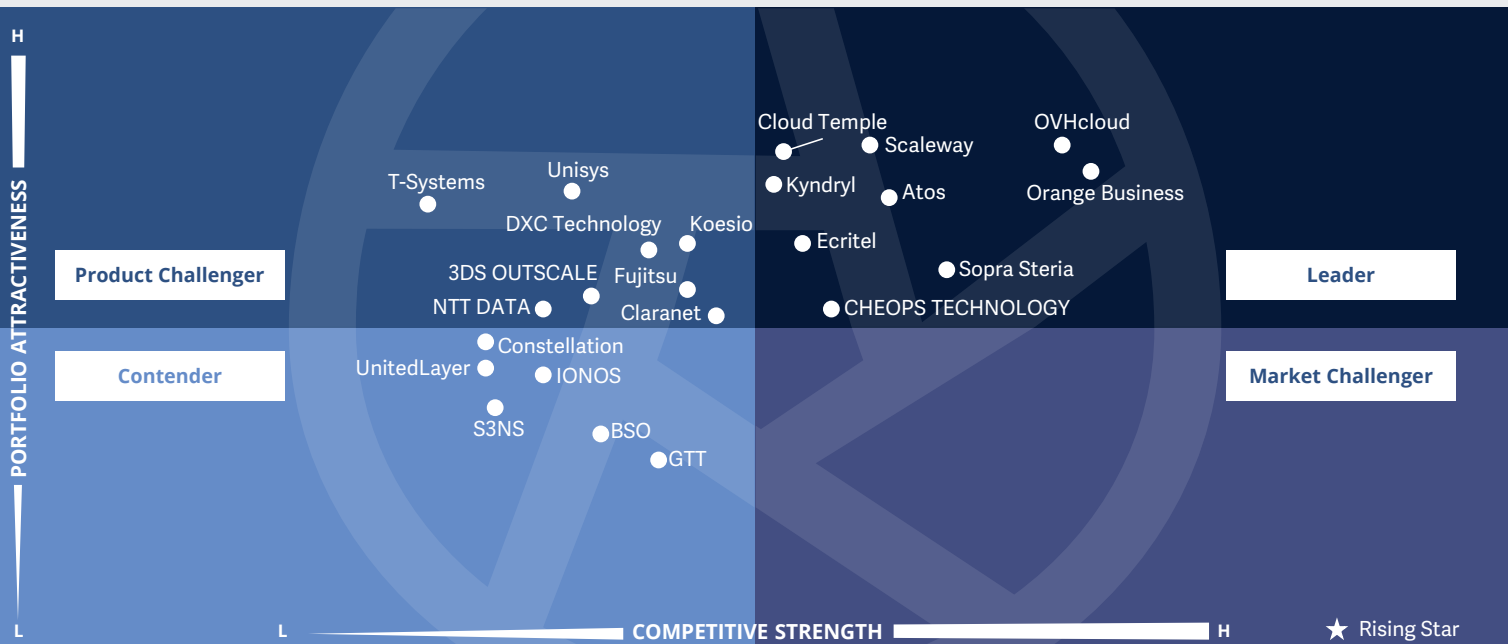


**Sourcing, procurement and vendor management professionals** should read this report to understand the current landscape and partner ecosystem of managed hosting providers in France.



Private/Hybrid Cloud – Data Center Services  
Managed Hosting

France 2024



This quadrant assesses providers of **managed hosting** services, encompassing hardware and software configured to host applications securely, **scalable computing** resources and **connectivity** to public cloud and other data centers.

*Pedro L. Bicudo Maschio*



## 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 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

### Observations

Managed hosting is in high demand in France, offering clients an alternative to public clouds. Data privacy and data sovereignty requirements drive clients to choose managed hosting. Clients not facing compliance challenges can operate in the public cloud but might opt for managed hosting to lower operating costs, especially when running legacy applications and databases that use licensed software. In general terms, the public cloud is more efficient for workloads that require fast scaling and those that use various cloud services, such as serverless computing, data lakes, analytics and AI solutions.

Most hosting platforms use VMware or Red Hat OpenStack technologies to deliver a cloud-like experience, with self-service provisioning and service dashboards for overseeing consumption, monitoring and applying corrections when necessary. Advanced service platforms offer software-defined data center (SDDC) functionality across diverse data center locations, providing the tools for high availability and multiregion backup and restore.

From the 50 companies assessed for this study, 23 qualified for this quadrant, with nine being Leaders.

### Atos

**Atos** has a flexible hosting platform supporting enterprises and public sector clients. This platform supports several technologies, including high performance computing, mainframes, RISC and x86 platforms.

### CHEOPS TECHNOLOGY

**CHEOPS TECHNOLOGY** offers an HDS-certified private cloud with various options, including Intel and IBM Power Systems. It has three data centers and operations in 13 locations in France.

### Cloud Temple

**Cloud Temple** operates two Tier III data centers with SecNumCloud and HDS certifications and connectivity to public cloud providers. It offers bare metal as a service, container management and multicloud application deployment.

### Ecritel

**Ecritel** operates 12 data centers, including four with HDS certification. The company specializes in e-commerce and healthcare, offering hosting, colocation and managed services.

### Kyndryl

**Kyndryl** supports most computing technologies, with differentiated services for IBM mainframes, IBM i and x86 platforms. Clients can also access Kyndryl Bridge, a fully automated self-service platform.

### orange Business

**Orange Business** offers a public sovereign cloud (Orange Flexible Engine) and a private cloud (Orange Cloud Avenue). The company provides scale, security, compliance and reliability.

### OVHcloud

**OVHcloud** offers preconfigured appliances and bare metal servers in 24 data centers in France. It offers anti-DDoS protection and SecNumCloud and HDS certifications.

### Scaleway

**Scaleway** offers advanced self-service private cloud, bare metal, containers and serverless architectures in nine renewable energy-powered data centers in Europe.

### Sopra Steria

**Sopra Steria** offers hosting in Tier III data centers, supporting most database types and operating systems. It is an ANSSI-certified PDIS with top vendor partnerships and cyber security services.





“Orange Business offers end-to-end services comprising hosting, cybersecurity, networking and full compliance with strict French regulations.”

*Pedro L. Bicudo Maschio*

# Orange Business

## Overview

Orange Business is headquartered in Paris, France. It has more than 30,000 employees across over 100 offices in 65 countries. In FY23, the company generated €7.9 billion in revenue. Orange Business operates more than 70 data centers on five continents, including two Green IT-certified data centers in France.

It offers two hosting options. Orange Flexible Engine is a sovereign public cloud available worldwide from three Availability Zones (AZs) in France (Paris) and three AZs in the Netherlands (Amsterdam). Orange Cloud Avenue is a private cloud based on VMware technology.

## Strengths

**Robust and compliant infrastructure:** Cloud Avenue is operated and managed by Orange Business experts in data centers located in France, compliant with data sovereignty regulations. The company's value-added services include consulting, security, technical assistance and cost optimization with FinOps tools. Cloud Avenue complies with GDPR and is ISO 27001, ISO 20017 and ISO 27018 certified, making it a highly secure platform. The platform is undergoing the qualification process for the ANSSI SecNumCloud version 3.2 in 2024.

**High connectivity:** Orange Business' data centers enable easy connectivity. Its private network connects with hyperscalers, facilitating hybrid cloud configuration and secure operations. Orange Business

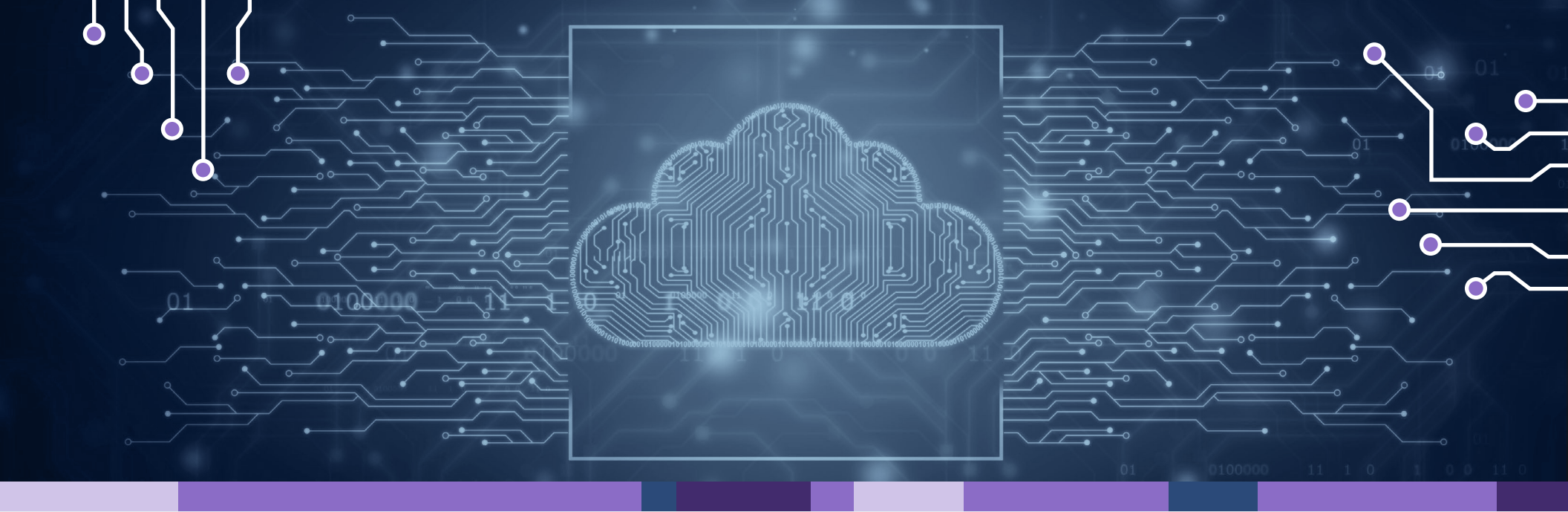
supports clients in designing and operating multicloud, including AWS, Azure, Google Cloud and Orange Flexible Engine. In 2024, it launched Move2Bleu, which enables clients to use Bleu's sovereign cloud based on Azure technology.

**Backward compatibility:** Orange Business uses VMware technology, providing a flexible and rich platform to support clients' applications and enable seamless operations across on-premises VMware installations and public cloud VMware environments. Its management dashboard enables clients to operate in private or shared environments, with self-service capabilities and multicloud support.

## Caution

Orange Business offers scalable platforms based on standardized services. It has expertise in healthcare, including HDS certification and smart industries. Clients seeking industry specialization should check certifications and references accordingly.





# Colocation Services



### Who Should Read This Section

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

In this quadrant, ISG defines the current market positioning of colocation service providers in France and how they address enterprises' critical challenges in the region.

ISG observes a growing demand for colocation facilities in France. These facilities allow enterprises to enhance their industry-specific operations by providing tailored upscaling and downscaling services while retaining control. However, colocation providers face challenges in developing cost-effective clean energy sources to provide competitive data center options in Europe, especially for the largest and oldest data centers in urban areas.

Enterprises are seeking colocation providers that offer IT resilience and edge computing capabilities, along with disaster recovery and backup solutions, which are crucial for modern business operations. There is also a rising demand for infrastructure capable of hosting

generative AI (GenAI), which uses high-end servers that demand high power density and CPU and graphics processor unit (GPU) water cooling.

Colocation providers in France are showcasing their leadership and innovation in the data center industry by adopting renewable energy sources to achieve zero-carbon facilities. This commitment is reflected in achieving the lowest power usage efficiency (PUE) scores, contributing significantly to both national and global energy transition efforts. Moreover, there is an increasing focus on strategic collaborations with hyperscalers and growing investments in sustainability initiatives and renewable energy power sources.



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

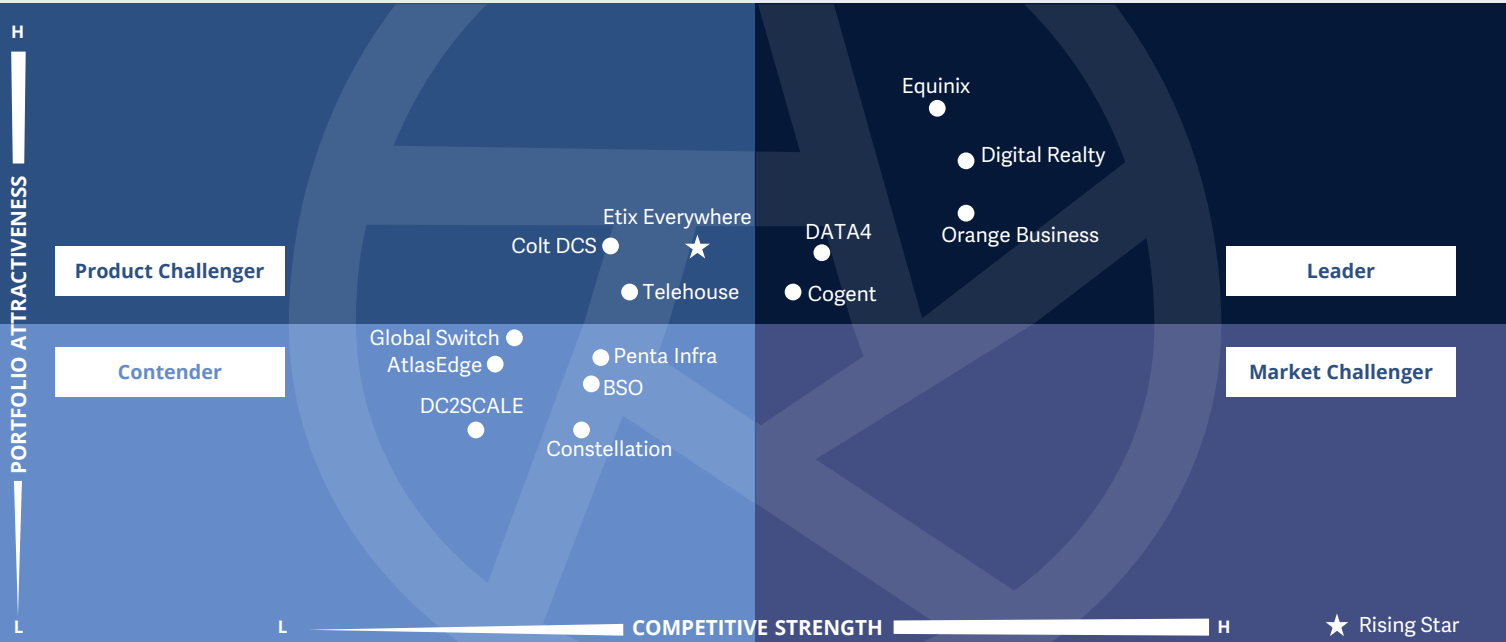


**Software development and technology leaders** should read this report to understand colocation providers' positioning, offerings and their impact on the ongoing infrastructure transformation initiatives.



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





This quadrant evaluates the providers of data center space in **colocation facilities** that offer secure access control, **redundant energy sources**, fire suppression systems, air cooling, **cloud connectivity** and security certificates.

*Pedro L. Bicudo Maschio*



## Colocation Services

### Definition

This quadrant assesses colocation providers offering standardized data center 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 center 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 centers 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 center 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 center** 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 center 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 center** initiatives



## Colocation Services

### Observations

The colocation market is expanding. The growing demand for cloud services continued in 2023 and into 2024 and further accelerated with the demand for GenAI infrastructure. Hyperscalers are heavy users of colocation data centers in Europe. Meanwhile, data sovereignty and other regulations drive demand for managed hosting, which also uses colocation facilities. ISG anticipates that the demand for more colocation facilities will continue for the next five to 10 years.

Colocation providers face infrastructure challenges in creating cost-effective clean energy sources to offer competitive data center alternatives in Europe, particularly for the largest and oldest data centers in urban locations. Clean energy and zero-carbon facilities are prevalent outside Europe. France's data centers have the advantage of favorable weather conditions, reducing the necessity for heating and cooling compared to North America and Northern Europe. Several

colocation data centers in France employ free cooling technology for improved energy efficiency, offering the lowest PUE in Europe. However, GenAI demands high power-density data centers and produces a lot more heat than regular servers running business applications. Providing clean energy to GenAI will increase the challenges for colocation providers. From the 50 companies assessed for this study, 14 qualified for this quadrant, with five being Leaders and one Rising Star.

### Cogent

**Cogent** operates 15 data centers in France. The company manages more than 54 data centers globally, offering high-speed internet and advanced networking services. It also offers bare metal as a service.

### DATA4

**DATA4** offers scalable and sustainable data center campuses with renewable energy, top-tier security certifications and 15 data centers in Paris. Additional services include high-performance computing (HPC) server storage as a service and an advanced customer portal.

### Digital Realty

**Digital Realty** operates 13 data centers in France. The company is one of the largest global colocation providers by number of data centers and floor space.

### Equinix

**Equinix** operates nine data centers in France. The company focuses on interconnection, software-defined tools and virtual appliances. In 2024, it announced investments to build wind farms in France.

### Business

**Orange Business** offers secure and reliable colocation in eight data centers in France. It offers security and 24/7 support, with advanced consulting services to help clients improve their compliance with French regulations.

### Etix Everywhere

**Etix Everywhere** (Rising Star) operates 12 data centers in France. It acquired facilities from Databank, backed by investment funds. It plans to acquire more facilities to create a network and provide interconnected edge data centers across Europe.





“Orange Business has a complete portfolio, including consulting and guidance to support clients’ growth. Enterprises can start small with colocation and expand to include security, networking, hosting and private and public cloud services.”

*Pedro L. Bicudo Maschio*

# Orange Business

## Overview

Orange Business is headquartered in Paris, France. It has more than 30,000 employees across over 100 offices in 65 countries. In FY23, the company generated €7.9 billion in revenue, with IT Services as its largest segment.

Orange Business has operated data centers for nearly 20 years. The company operates more than 70 data centers across five continents. In France, clients can use eight data centers, including two green IT-certified facilities in Normandy and Val de Loire. The company offers colocation racks, private rooms and colocation halls.

## Strengths

**Security and compliance:** Orange Business focuses on developing better standards for cybersecurity, privacy and sovereignty. Its data centers follow top design and construction standards. It offers a secure, certified, reliable and scalable environment to host clients’ data center assets in strict compliance with French regulations.


**Sustainability focus:** Orange Business takes care of every detail to provide clients with compliant and sustainable services. It uses eco-designed data centers where weather conditions are favorable to reduce air-cooling demand by using filtered outside air to cool computer racks. The company is on track to achieve net zero carbon goals by 2040.

**End-to-end service offering:** Orange Business provides a comprehensive IT outsourcing service stack. Colocation transition services include project management, coordination and support for third-party suppliers, relocation and supervision of equipment delivery, inventory management, labeling and installation. The company’s portfolio also includes professional services, operations, monitoring, networking, hosting, virtual desktops, cybersecurity and managed services.

## Caution

Orange Business focuses on providing colocation to midmarket and large enterprises, with less focus on the public sector. However, its facilities are not intended to host large scale data centers and hyperscalers, which would conflict with its hosting and public cloud offerings.





# 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 France 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 & Editor Biographies

Author



**Pedro L. Bicudo Maschio,**  
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Distinguished analyst and author, Pedro Maschio brings extensive experience in the research of the SEMEA (Southern Europe Middle East and Africa) and the Americas service markets. With more than 30 years of experience in sourcing, he has developed vendor assessments plus contract restructuring, services scope and IT benchmarking programs for diverse vertical markets in the Americas and APAC.

Before joining ISG, Pedro was a partner of TGT Consult and managing vice president at Gartner Inc., responsible for the consulting business in APAC and Latin America.

Enterprise Context and Overview Analyst



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**Research Analyst**

Manoj is a research analyst at ISG and supports ISG Provider Lens™ studies on Private/Hybrid Cloud – Data Center Services, Mainframes and Public Cloud Data Center Solution and Services. He also supports the lead analysts of multiple regions in the research process. Prior to this role, he supported the ROI process in sales intelligence platform and was an individual contributor in handling research requirements for advanced technologies in different sectors. He has considerable expertise in predicting the automation impact by considering certain parameters such as productivity, efficiency and time reduction.

During his tenure, he has supported research authors and authored Enterprise Context and Global Summary reports with market trends and insights.



## Author & Editor Biographies



*Study Sponsor*

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**Director and ISG Provider Lens™**

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

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

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



*IPL Product Owner*

**Jan Erik Aase**  
**Partner and Global Head – ISG Provider Lens™**

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor.

Now as a research director, principal analyst and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.



### iSG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

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

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### 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.

For more information, visit [isg-one.com](https://isg-one.com).



**JUNE, 2024**

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