

Private/Hybrid Cloud – Data Center Services

Managed Services for Large Accounts

A research report comparing provider strengths,
challenges and competitive differentiators

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Service providers have to alleviate operational costs due to a surge in energy expenditure

As part of its ISG Provider Lens™ Next-Gen Private/Hybrid Cloud - Data Centre Services and Solutions 2023 study, ISG examined more than 100 providers of hybrid IT and colocation services in the United Kingdom and identified the most important service providers and trends affecting the managed services and colocation market in the region.

Brexit continues to have major implications on the British economy since its finalisation in 2020. While trade agreements continue to be negotiated with countries, the UK has lost its broad market access with other EU member states, hurting its digital competitive edge. In fact, according to the IMD Digital Competitiveness Ranking, the UK slipped two positions from its 2021 ranking to 16 out of the 63 countries considered for the study.

Since 2019, many companies across industry spectra have relocated businesses to other EU member states, anticipating the loss of market access they would suffer due to Brexit. Most businesses remaining in the UK have expressed challenges in complying with the new trade rules between the UK and the rest of the EU. The Brexit phenomenon continues to affect staff relocation, with onshore hubs experiencing a pause in growth and Dublin becoming the most favoured destination for nearshore expansion.

London is an important global financial hub, and the UK has an established IT infrastructure characterised by high-speed broadband internet penetration. As a result, despite Brexit, many companies choose to co-locate close to London's financial trading houses to reduce latency, per the UK's Financial Conduct Authority (FCA). This makes London an important colocation hub and an interconnection exchange because companies who co-locate their infrastructure to other countries also prefer network access to London.

AIOps, IaC and SDx gain traction as users automate cloud ops to mitigate expenditure.



Although the UK is no longer a part of the common EU market, the EU approved adequacy decisions for EU GDPR until June 2025. This allows for a continuous data flow between EU member states and the UK without disruption due to Brexit.

Cybersecurity is an important investment area for the UK government to boost its digital economy. While the funding for its National Cyber Security Program continues to increase, the UK is also encouraging the startup community in the region to be proactive in solving critical cybersecurity issues. The necessity to solve the cybersecurity issues has increased multifold, especially since the beginning of the Russia-Ukraine conflict, which is also significantly impacting energy inflation. Except for Northern Ireland, the electricity prices across the UK surged from around €23 per kWh in January 2021 to over €60 per kWh by July 2022. The soaring prices have accelerated data centre consolidation across the UK and caused some of its data centres to be nearshored to Dublin. The energy price rise also has resulted

in expensive operation costs and driven service providers to contend with higher wages owing to the inflation that employees face.

Service providers in the UK are struggling to offer services at the same price as before Brexit. This has led many service providers to renegotiate their contracts with end users and pass some of the extra costs incurred to them. Consequently, many enterprises in the region are increasingly navigating away from well-established service providers toward smaller cloud specialists for their cloud transformation requirements. But as the well-established service providers have made significant investments in acquiring competencies from key hyperscalers so they would likely remain an indispensable part of the enterprises' hybrid and multicloud migration and optimisation.

Service providers are adopting capabilities that will automate several IT operations to reduce labour costs. ISG believes that the surge in operational expenses is, therefore, transient and will recede soon.

The following are the key trends impacting the UK's private/hybrid cloud data centre outsourcing market. Several of these are macrotrends that are also evident outside the UK.

Acquisition of new capabilities: Large service providers aim to develop comprehensive end-to-end platform services to facilitate cloud migration effectively. They are achieving this by acquiring smaller cloud transformation specialists and integrating their capabilities into the existing cloud transformation platforms. However, ensuring that these acquisitions do not result in redundant services and that the overall customer experience remains seamless and reliable is a challenge. Alternatively, some providers are partnering with a network of specialists and outsourcing tasks based on their partners' areas of expertise. TCS' COIN ecosystem is a prime example of such an approach, where cloud transformation services are provided to customers while leveraging emerging technologies like blockchain from the TCS startup community during implementation.

Implementing enhanced automation

capabilities: Service providers are increasingly adopting technologies such as AIOps and autonomous IT operations to balance the costs associated with inflation and higher employee compensation. By incorporating infrastructure as code (IaC), these providers can facilitate faster provisioning of cloud infrastructure for end users, identify and resolve anomalies automatically and perform root cause analysis. The service providers in the UK have either formed partnerships with independent software vendors (ISVs) to leverage their automation capabilities or have developed capabilities in-house. Automation can serve as a powerful equaliser, levelling the playing field between large, established service providers and smaller, regional ones. It will continue to be a significant force across various markets, including the UK.

Edge computing and cloud orchestration:

As IoT and 5G technologies become prevalent across the UK, the demand for edge computing infrastructure will increase. This infrastructure needs to be distributed and located closer to end users with applications that can be



easily deployed and operated independently. Microservices and container management services will become popular as enterprises strive to develop agile and quick-to-deploy edge computing infrastructure and applications. Service providers with SDx (software-defined anything) expertise and multivendor cloud infrastructure from the edge to the data centre will have an added advantage. The expertise and automation capabilities can also improve cloud orchestration and avoid vendor lock-ins in a multicloud environment.

Environmental, social and governance (ESG)

initiatives: Sustainability is at the core of cloud services delivery to customers. Inflation and the spike in energy costs have significantly impacted service providers, resulting in them deploying additional measures to stem their emissions. It has also led to the service providers adopting an unwavering commitment to meet the environmental compliance regulations of the local government and those embraced by their customers.


Focus on FinOps to continue: The demand for FinOps grew considerably during the COVID-19 pandemic as enterprises operating in vast,

hybrid and multicloud environments aimed to optimise their cloud expenditure and weather their financial distress. The Russia-Ukraine crisis also brought FinOps to the forefront as service providers grappled with higher operating costs.

Although the impact of the COVID-19 pandemic and the international unrest caused by the war between Russia and Ukraine are causing economic difficulties, the IT market in the UK continues to show brisk growth.


UK enterprises want transformation solutions that reduce operational expenditure while improving their sustainability and compliance with UK regulations. Service providers constantly innovate to address their customer requirements while rolling out industry- and use-case-specific solutions.



 Provider Positioning


	Managed Services for Large Accounts	Managed Services for Mid Market	Managed Hosting for Large Accounts	Managed Hosting for Mid Market	Colocation Services
3stepIT	Not In	Contender	Contender	Not In	Not In
Accenture	Leader	Not In	Not In	Not In	Not In
Acora	Not In	Product Challenger	Not In	Not In	Not In
Atos	Leader	Not In	Leader	Not In	Not In
Atos (Cloudreach)	Not In	Contender	Not In	Not In	Not In
Axians	Contender	Not In	Not In	Not In	Not In
Axians (Nouveau)	Not In	Contender	Not In	Not In	Not In
BT	Product Challenger	Market Challenger	Market Challenger	Market Challenger	Leader
Capgemini	Leader	Not In	Not In	Not In	Not In
CGI	Market Challenger	Not In	Not In	Not In	Not In
Claranet	Product Challenger	Leader	Rising Star ★	Leader	Not In



 Provider Positioning


	Managed Services for Large Accounts	Managed Services for Mid Market	Managed Hosting for Large Accounts	Managed Hosting for Mid Market	Colocation Services
Codero	Not In	Not In	Contender	Not In	Not In
Coforge	Not In	Contender	Not In	Not In	Not In
Cognizant	Product Challenger	Not In	Not In	Not In	Not In
Colt DCS	Not In	Not In	Not In	Not In	Contender
Computacenter	Leader	Not In	Not In	Not In	Not In
Coreix	Not In	Not In	Not In	Not In	Product Challenger
CWCS	Not In	Not In	Not In	Contender	Not In
CyrusOne	Not In	Not In	Not In	Not In	Contender
Cyxtera	Not In	Not In	Not In	Not In	Product Challenger
Datum	Not In	Not In	Not In	Not In	Market Challenger
Digital Realty	Not In	Not In	Not In	Not In	Leader



 Provider Positioning

	Managed Services for Large Accounts	Managed Services for Mid Market	Managed Hosting for Large Accounts	Managed Hosting for Mid Market	Colocation Services
DXC Technology	Leader	Not In	Leader	Not In	Not In
Ensono	Market Challenger	Leader	Leader	Product Challenger	Not In
Equinix	Not In	Not In	Not In	Not In	Leader
Fujitsu	Leader	Leader	Not In	Leader	Not In
Global Switch	Not In	Not In	Not In	Not In	Leader
GTT	Not In	Contender	Not In	Contender	Contender
HCLTech	Leader	Not In	Not In	Not In	Not In
Hexaware	Product Challenger	Leader	Not In	Not In	Not In
HYVE	Not In	Contender	Not In	Contender	Product Challenger
Infosys	Leader	Not In	Not In	Not In	Not In
Kyndryl	Leader	Not In	Leader	Not In	Not In



 Provider Positioning

	Managed Services for Large Accounts	Managed Services for Mid Market	Managed Hosting for Large Accounts	Managed Hosting for Mid Market	Colocation Services
LDEx Group	Not In	Not In	Not In	Not In	Contender
Logicalis	Product Challenger	Contender	Not In	Product Challenger	Not In
LTIMindtree	Product Challenger	Product Challenger	Not In	Not In	Not In
Lumen	Not In	Not In	Leader	Not In	Product Challenger
Microland	Contender	Product Challenger	Not In	Not In	Not In
Mphasis	Contender	Product Challenger	Not In	Not In	Not In
Navisite	Not In	Not In	Not In	Market Challenger	Not In
NTT DATA	Product Challenger	Product Challenger	Product Challenger	Not In	Not In
NTT GDC	Not In	Not In	Not In	Not In	Leader
PlusServer	Not In	Not In	Not In	Product Challenger	Not In
Pulsant	Not In	Not In	Product Challenger	Leader	Product Challenger




Provider Positioning

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	Managed Services for Large Accounts	Managed Services for Mid Market	Managed Hosting for Large Accounts	Managed Hosting for Mid Market	Colocation Services
Rackspace Technology	Not In	Leader	Leader	Leader	Leader
Redcentric	Not In	Not In	Product Challenger	Product Challenger	Contender
Sopra Steria	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Not In
Sungard	Not In	Not In	Contender	Contender	Not In
TCS	Leader	Not In	Not In	Not In	Not In
Tech Mahindra	Rising Star ★	Product Challenger	Not In	Not In	Not In
Telefónica Tech	Not In	Leader	Product Challenger	Leader	Not In
Telehouse	Not In	Not In	Not In	Not In	Leader
TierPoint	Not In	Not In	Contender	Not In	Not In
T-Systems	Not In	Leader	Product Challenger	Leader	Not In
UKFast	Not In	Not In	Not In	Not In	Contender



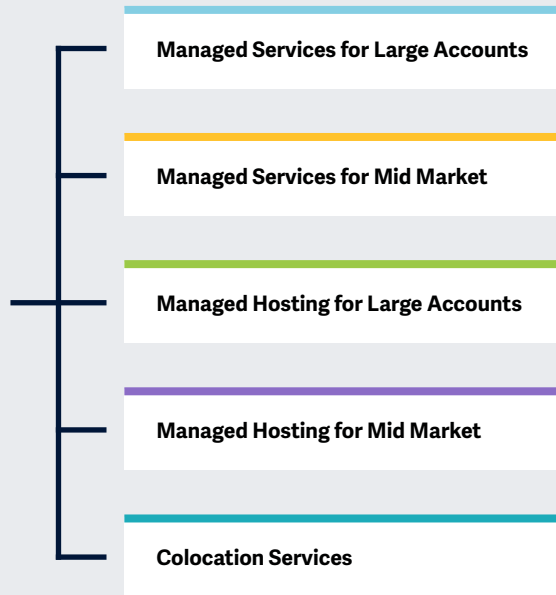
 Provider Positioning

	Managed Services for Large Accounts	Managed Services for Mid Market	Managed Hosting for Large Accounts	Managed Hosting for Mid Market	Colocation Services
Unisys	Contender	Leader	Product Challenger	Product Challenger	Not In
UST	Not In	Product Challenger	Not In	Contender	Not In
Verne Global (Volta)	Not In	Not In	Not In	Not In	Contender
VIRTUS	Not In	Not In	Not In	Not In	Market Challenger
Vodafone	Contender	Market Challenger	Not In	Not In	Not In
Wipro	Leader	Not In	Not In	Not In	Not In
Zensar Technologies	Product Challenger	Product Challenger	Not In	Not In	Not In



This study focuses on what ISG perceives as most critical in 2023 for **Private/Hybrid Cloud and Data Centre Outsourcing**.

Simplified Illustration; Source: ISG 2023



Definition

This study assesses service providers of data centre outsourcing, including the providers of managed hosting, colocation facilities and managed services. Typical participants use automation tools in highly secure data centres, providing security, operations management and client dashboards.

Data centre outsourcing is the practice of transferring the responsibility of managing data centre assets to a third-party provider. It includes orchestration; provisioning; integrated monitoring; and managing infrastructure components, including computing, storage, database, middleware and others. The data centre may be owned by the enterprise client, service provider or a third-party colocation provider. Integrated monitoring and operations can be delivered from a provider's shared service centre located offshore, onshore, nearshore or via a dedicated delivery centre such as a remote infrastructure management (RIM) model.

A private cloud is an extension of a client's computing environment that leverages the investments made in virtual infrastructure and

applications. Enterprises with stringent security and governance requirements, large data volumes and close integration of enterprise applications and workflows needs may prefer an on-premises or a private cloud environment and may choose to host in their facility. As businesses are becoming software and data-driven, they need an infrastructure base that can adapt to the changing market conditions, be managed based on a hybrid model, and be always accessible. Currently, most data centre outsourcing engagements have elements of private/hybrid cloud and intuitive cloud management cognitive platform enablement.

A hybrid cloud connects existing on-premises infrastructure services with private, public or multi-cloud arrangements. An enterprise can also leverage colocation and hosting providers, not necessarily own a data centre, to have a hybrid cloud setup. Globally, there is a massive surge in demand for a multi-cloud environment from the enterprise community as enterprises adopt hybrid and multi-cloud strategies to migrate and manage their workloads with improved agility, reduced operating costs and high application performance and availability.



There has been a rapid increase in the use of proprietary platforms and tools by service providers and enterprises for automating cloud operations, thereby increasing the adoption of AI and machine learning (ML) technologies. One of the fundamental advantages of a hybrid cloud deployment is the high degree of control offered to the organisation; hybrid clouds allow enterprises to leverage the capabilities of public cloud platforms without the need to offload their entire data to a third-party data centre. Although still evolving, edge computing is another technology enterprises of all sizes are adopting for various existing and new use cases, such as software-defined solutions, IoT processing, hybrid cloud connectivity, firewall and network security, branch and micro data centres, internet-enabled devices and asset tracking. Edge is also being used to address the latency challenges in the present, highly distributed environments by removing network barriers and bringing processing to the edge.

ISG reports consistent demand for infrastructure services as enterprises are becoming more vigilant toward spending on large and complex cloud implementations.

The demand for managed services, especially infrastructure and workloads management services, also is growing slowly. According to the ISG 1Q 2023 ISG Index™ figures, the global market grew by 1 percent in combined market ACV to reach its current value of \$24.1 billion for the first three months. Managed services ACV increased by 1 percent year-over-year and reached \$9.8 billion, while the XaaS ACV decreased by 13 percent to \$14.3 billion. IaaS spending declined by 16 percent to reach \$10.4 billion, while the SaaS market declined by 4 percent to reach \$3.9 billion during the same period.



Scope of the Report

In this ISG Provider Lens™ quadrant report, ISG covers the following four quadrants for services/solutions: Managed Services for Large Accounts, Managed Services for Midmarket, Managed Hosting, and Colocation Services

This ISG Provider Lens™ study offers IT decision-makers with the following:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments (quadrants)
- Focus on the regional market

Our study serves as the basis for important decision-making in terms of positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing vendor relationships and potential engagements.

Provider Classifications

The provider position reflects the suitability of IT providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT 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 IT 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 Challenger, Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens™ quadrant may include service providers that ISG believes have 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 for Large Accounts

Who Should Read This Section

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

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

The UK has traditionally been favoured by non-European service providers seeking to extend their reach into other EU countries. However, the situation changed with Brexit when the UK ceased its obligations as an EU member and lost access to the EU single market, significantly impacting enterprises

in the region. Post Brexit and the COVID-19 pandemic, UK enterprises have begun to identify the optimal cloud adoption investment strategies. Hybrid cloud-managed service providers can provide localised infrastructure and a comprehensive understanding of the operating environment, thereby relieving enterprises of the responsibility of data centre operations. Furthermore, they can ensure data privacy and regulatory compliance by offering sovereign cloud services, which are the primary concerns for enterprises.

Managed service providers in the UK are improvising on their automation and AI capabilities, enabling large enterprises to monitor infrastructure, predict failures and reduce maintenance costs. They can also utilise high-speed networks to minimise latency and ensure seamless connectivity between data centres.



IT and infrastructure leaders should read this report to analyse managed service providers' modernisation and service capabilities and the market advancements impacting 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.

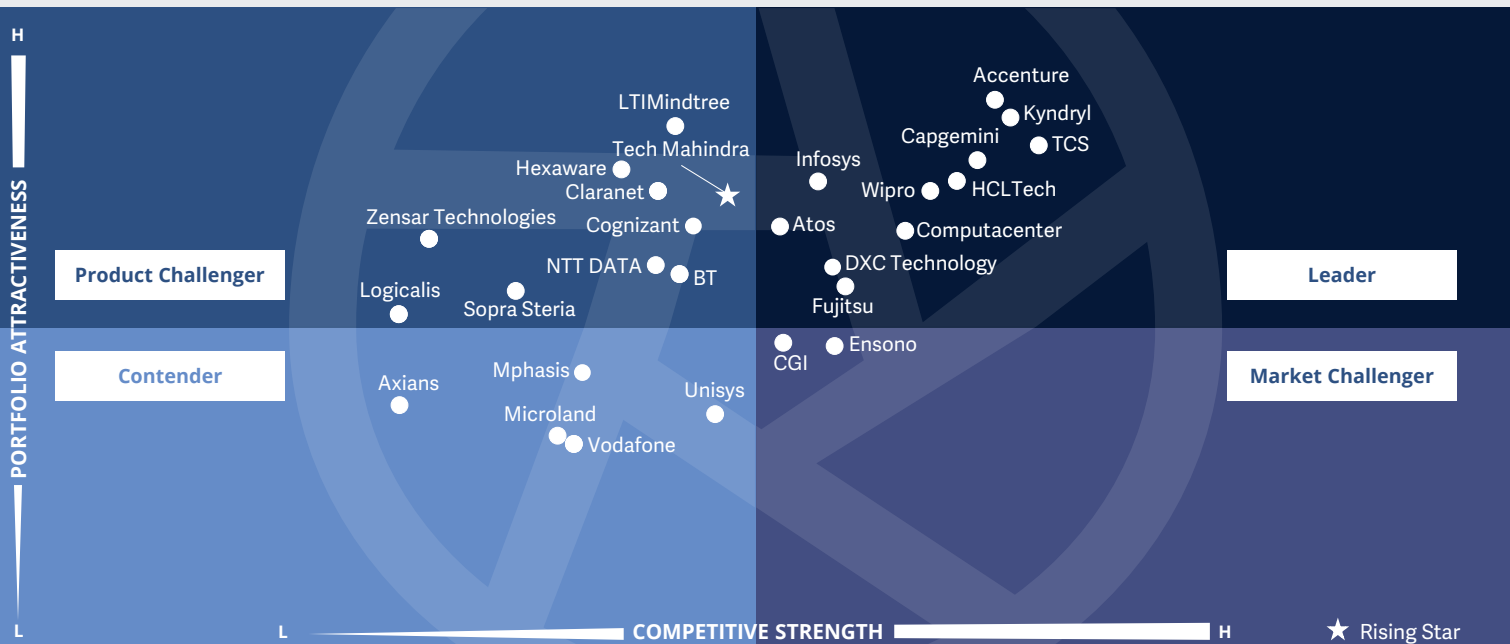


Sourcing, procurement and vendor management professionals should read this report to better understand the current landscape and partner ecosystem of managed service providers in the UK.



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

U.K. 2023



Leading service providers in the UK have set up **dedicated cloud practices**. These provide customers with **niche technologies** that are **industry-** and **use-case-specific**, increasing the return on their overall investment in **cloud transformation**.

Rohan Thomas



Managed Services for Large Accounts

Definition

This quadrant assesses a provider's ability to offer ongoing management services for private and hybrid clouds and traditional data centre infrastructures and platforms to midmarket and large enterprise clients. The infrastructures and platforms comprise physical and virtual servers, middleware, storage, databases and networking components. The infrastructure may reside at a client's data centre, in a multi-cloud environment, in the service provider's facilities or even be co-located in a third-party facility.

Such providers typically offer transition services, guiding clients to optimise their existing IT landscapes. Common projects include large-scale data centre consolidation, virtualisation, cloud enablement and configuration and implementation of a software-defined data centre (SDDC). Transition services can also include expanding existing facilities, transferring new workloads or creating new private/hybrid clouds.

Managed services are characterised by the transfer of responsibilities to a service provider and are governed by service level agreements (SLAs) with penalties for any deviation. At a broad level, these services include provisioning; enabling real-time and predictive analysis; and monitoring and managing operations of a customer's on-premises, private and hybrid cloud environments. These activities are aimed at maximising workload performance in the cloud, reducing costs and ensuring compliance and security. Providers should have the capability to manage traditional and cloud-native application releases, including continuous integration and delivery processes.

Eligibility Criteria

1. Ability to offer **services for private and hybrid clouds and data centre infrastructure** (servers, middleware, storage and databases) **on their own** without depending on partners
2. Ability to provide services within a client's premises or remotely and preferably through its **shared service centres** (RIM)
3. Demonstrate experience in **large transition** projects that include **automation, consolidation, virtualisation and containerisation** of data centres and cloud enablement
4. Ability to act as an **extension of clients' IT organisation** and get involved in creating blueprints, architecture frameworks and management processes at the client's location
5. Ability to provide services for a **centralised orchestration/**management of hybrid IT infrastructure
6. Showcase **appropriate certifications** to ensure security and compliance at the local level



Managed Services for Large Accounts

Observations

Service providers in the UK are challenged with meeting the requirements of their large enterprise customers despite inflation and a rise in energy costs. Many service providers have had to renegotiate contracts and pass additional operations on to their customers. They are also enhancing their managed cloud services portfolio suite with enhanced AIOps, container technology and SDN capabilities to automate critical processes and orchestration inside the private and hybrid environment. As a result of the automation, ISG predicts a fall in the cost per unit.

Since 2020, the service providers' community has undergone significant changes in its organisational strength, such as large service providers enhancing their capabilities via acquisitions and reinforcing their partner ecosystem. Comparatively, other providers are undergoing restructuring to become leaner and more focused on delivering managed services to customers. Either way, many of the UK's leading managed cloud service

providers have dedicated cloud practices with capabilities built from the ground up or leveraged from other prominent ISVs.

The dedicated cloud practices provide turnkey cloud transformation solutions, enhanced cybersecurity capabilities and industry-specific consulting and advisory services. Service providers with mainframe solutions will have an added advantage as enterprises continue to have a significant footprint in legacy data centres and migrate to the cloud. Service providers are also consolidating their data centre infrastructure to mitigate energy expenditure.

From the 70 companies assessed for this study, 28 have qualified for this quadrant with 11 being Leaders and one Rising Star

accenture

Accenture cloud continuum provides end-to-end services for application, data, infrastructure and security modernisation across the private and hybrid cloud environments. Products like SynOps, myConcerto and myWizard have helped modernise cloud orchestration.

Atos

Atos has fully integrated the capabilities of Cloudreach, significantly improving Atos' OneCloud platform. Atos also collaborates with Dell to edge capabilities for its customers. The solution is well-suited for 5G and IoT use cases.

Capgemini

Capgemini has a significant presence in the UK. The ENSCONCE Edge Compute platform enables rapid multi-access edge computing (MEC) services deployment. Many blue-chip companies have used its AIOps and hyper-automation abilities for cloud transformation.

Computacenter

Computacenter offers comprehensive design assistance that covers the implementation and management of SD-WAN, helping the end user to link public and private cloud environments seamlessly. Its Digital Trust Team has developed a robust portfolio of security solutions.

DXC Technology

DXC Technology provides cloud migration and modernisation, managed container services, DevSecOps and advisory services. It continues to consolidate its data centres to save on power and space. It has co-created IoT solutions via its partnerships with hyperscalers.

Fujitsu

Fujitsu's solutions are designed to ensure reliable service delivery in remote areas with limited network connectivity. The company's migration factory in the UK has improved the levels of automation during cloud transformation from 50 to 75 percent.

HCLTech

HCLTech provides extensive cloud-native capabilities and has a comprehensive suite of automation tools built from the ground up. These tools complement its managed cloud services by optimising workloads and reducing the time required for cloud migration.



Managed Services for Large Accounts



Infosys' engineering services are used for cloud transformation. Its zero-disruption modernisation provides customers in legacy data centres with a seamless transition to the cloud environment. Cyber security capabilities support Infosys' services.

Kyndryl

Kyndryl has inherited an extensive partner ecosystem of ISVs and hyperscalers from its parent company IBM. Its end-to-end cloud services include multiple landing zones, SRE optimisation, and FinOps, enabling seamless deployment across multicloud environments.



TCS products like ignio and Cognix enjoy significant traction among enterprises. TCS has a diverse ecosystem of ISVs and hyperscalers partners. It maintains an ecosystem of start-up specialists, helping the end user increase cloud innovation.



Wipro's SDN capabilities augment its cognitive automation abilities to improve the integration of microservices on the cloud. Its edge computing reference architectures and accelerators reduce time to market while increasing operational efficiency significantly.



Tech Mahindra solutions, like the managed Platform for Adaptive Cloud (mPAC), help its customers reduce their TCO while optimising workload migration to the cloud. It offers a host of accelerators and frameworks which improve cloud orchestration.





“Computacenter leverages its extensive partner ecosystem to improve the cybersecurity of its end users’ cloud environment. The company’s consulting and advisory team helps implement SDN to enhance cloud orchestration.”

Rohan Thomas

Computacenter

Overview

Computacenter is headquartered in Hatfield, UK and operates in 16 countries. It has more than 20,000 employees across over 70 global offices. In FY21 the company generated GBP 6.7 billion in revenue, with Technology Sourcing as its largest segment. Technology sourcing represents 77.2 percent of the company revenue, followed by Managed Services and professional services at 17.5 percent and 5.3 percent, respectively. Computacenter’s revenue in the UK is 27.4 percent of its total, making it an important focus region. The Apps, Cloud & Data Centre technology area represents 25 percent of Computacenter’s revenue.

Strengths

SD capabilities: Computacenter offers comprehensive design assistance that covers the technical implementation and management of SD-WAN networks from start to finish. With a range of SD-WAN services constantly improved with the latest automation capabilities, Computacenter can seamlessly link public and private cloud environments.

Robust cybersecurity: Computacenter’s Digital Trust Team has developed a robust portfolio of security solutions for its private/hybrid cloud offerings. It consists of IaaS Security, Microsoft 365 Security Operations, Secure Network Access, Secure Cloud and Domain Name System (DNS) and Internet Protocol (IP) Address Management. Computacenter has six

network operation centres (NOCs), with one in the UK. The NOCs oversee the management and connectivity of the data centres and complement Computacenter’s cybersecurity capabilities.

Partnerships and alliances: Computacenter maintains deep partnerships with key hyperscalers and ISVs, including RedHat, Dell, Cisco, HP, IBM, Lenovo, VMware and Nutanix. The company leverages its partnerships to integrate tooling unique to clients’ production environments and co-create turnkey solutions. Two platforms engineered through this co-creation were the Hyperscale Configuration and Automation Platform (HCAP) and Smart Hub, the latter being an asset management platform.

Caution

Many of Computacenter’s services are white-labelled solutions. The company can improve its AIOps capabilities to remain at par with its competitors. It is also building a repository of automation blueprints which could potentially improve cloud migration and transformation.





Appendix

The ISG Provider Lens™ 2023 - Private/Hybrid Cloud – Data Centre Services report analyses the relevant software vendors/service providers in the U.K. market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research™ methodology.

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The research and analysis presented in this report includes research from the ISG Provider Lens™ program, ongoing ISG Research™ programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of April 2023, 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 Centre 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



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Rohan Thomas
Senior Lead Analyst

Rohan Thomas has nearly a decade's worth of knowledge expertise in the realms of ICT, which include telecommunications, data centers, and networks and application performance management. At ISG, Rohan is the lead analyst for ISG Provider Lens™, leading research activities and benchmarking exercises pertaining to the regional adoption of digital infrastructure such as private/hybrid cloud.

He has a Bachelor's degree in Mechanical Engineering from Visveswaraya Technological University and a Master's degree in Computer Aided Design and Manufacturing from Vellore Institute of Technology.

Enterprise Context and Overview Analyst



Meenakshi Srivastava
Senior Research Analyst

Meenakshi Srivastava is a Senior Research Analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on the Private Hybrid Cloud Data Center. She creates content for Provider Lens™ studies and supports lead analysts in the research process for multiple regions. She has an experience of 3 years in IT industry and 2.5 years in market research industry. She is also responsible for authoring the enterprise context and global summary reports for her respective study.

Prior to her role in ISG, she has worked on various signature research projects which involved both qualitative and quantitative analysis as well as content creation and contextualization for other market research firm. She has an expertise of working on both primary and secondary research projects and is also associated with other custom and ad-hoc research projects.





IPL Product Owner

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

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

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



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

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Founded in 2006, and based in Stamford, Conn., iSG employs more than 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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REPORT: PRIVATE/HYBRID CLOUD – DATA CENTER SERVICES