iSG Provider Lens™

Private/Hybrid Cloud – Data Center Solutions

A research report comparing provider strengths, challenges and competitive differentiators

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Introduction

Building on ISG's comprehensive study of global and regional service providers of data center outsourcing, this research assessment delves into the specific area of private and hybrid cloud software solutions. While the service provider study encompasses a broad spectrum of services, including managed hosting, colocation facilities and managed services, this research study narrows its focus to evaluate software vendors specializing in private and hybrid cloud solutions. The study aims to provide a detailed analysis of technology and software vendors that excel in offering private and hybrid cloud solutions. It will assess their ability to adapt to changing market conditions, manage infrastructure in a hybrid cloud model and ensure constant accessibility.

Hybrid cloud environments have become an integral part of a client's existing IT infrastructure. They are increasingly preferred for their ability to host large data volumes and closely integrate with enterprise operations, either on-premises or in a private cloud setting.

Due to the rapidly increasing demand for AI and the associated data training, there is expected to be an even stronger focus on sophisticated data management in the future.

The study will explore how vendors incorporate intuitive cloud management and cognitive platforms, and resiliency platforms as key components in today's data-driven business landscape. We aim to provide valuable insights into the evolving dynamics of the private and hybrid cloud vendor offering landscape that would potentially aid enterprises in making informed decisions for their unique infrastructure needs.

This study focuses on what ISG perceives as the most critical aspects of **Private/Hybrid Cloud and Data Center Outsourcing Solutions** in 2024.
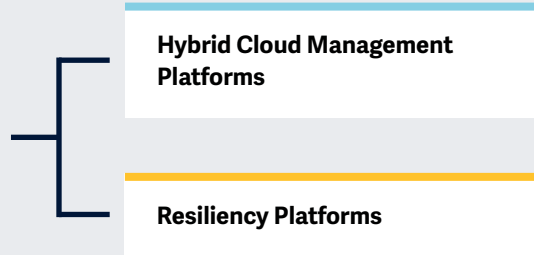
Simplified Illustration Source: ISG 2024

Hybrid Cloud Management Platforms

Resiliency Platforms

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

- Transparency on the strengths and weaknesses of relevant vendors
- A differentiated positioning of providers by segments on their competitive strengths and portfolio attractiveness

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

Hybrid Cloud Management Platforms

Definition

This quadrant assesses software vendors providing a robust integrated management platform to build and manage on-premises, public, private and hybrid cloud infrastructures. These platforms ensure consistency across cloud environments and enable enterprises to deploy applications in a cost-effective, automated and standardized manner across multiple cloud environments, including robust container capabilities.

Hybrid cloud management platforms can be offered as a service or through licensing. They can be leveraged to form the foundation for software-defined data centers (SDDC), fabric-based computing (cluster management) and serverless infrastructures. They play a crucial role in enhancing compliance and standardization, making them essential for businesses looking to optimize their cloud infrastructure management. These platforms are assessed for their ability to provide comprehensive, efficient and secure cloud management solutions.

Overall, a cloud management platform should integrate with existing IT setup, visualize costs, automate manual tasks, be accessible through the internet, support hybrid multicloud environments, predict outages by leveraging AI and ML technologies, and offer self-service capabilities while keeping all assets secure.

Eligibility Criteria

1. Ability to provide a platform to **build and operate** managed on-premises, public, private and hybrid cloud infrastructures

2. Offers a solution that includes **cost control and dashboards** for chargeback and showback mechanisms

3. Provides a **single pane of glass and self-service capabilities** to various stakeholders

4. Enables provisioning based on catalog services for the deployment of the technology stack, providing a **one-click deploy option** using automated workflows

5. Ability to generate multiple reports that can be used by the leadership team with a single-pane-of-glass view

6. Ability to provide a **secure environment** for a client's data flow in the cloud management platform (CMP)

7. Ability to offer the solution through a **licensing model** rather than as a bundled services deal

8. Ability to provide **integration of third-party tools** through APIs

Resiliency Platforms

Definition

This quadrant assesses independent solution vendors offering platforms or solutions for a resiliency and redundancy strategy with backup and disaster recovery within on-premise, private, public and hybrid cloud environments. Resiliency platforms in IT enable infrastructure teams to concentrate on creating and maintaining robustness in data and systems. These platforms are vital for ensuring business continuity, as they swiftly restore data and operations amid disruptions to regular business functions. Such disturbances may include subpar application performance at the primary deployment site, service interruptions, or any form of system slowdown or downtime. The solutions are available in two delivery models to cater to diverse organizational needs. The models include the conventional software distribution and the more contemporary SaaS model.

The resiliency platforms offer features such as data backup and recovery, system failover, alternate site operations, emergency response, communication and training on recovery procedures. Other key features include business continuity and disaster recovery strategy, planning, implementation and continuous testing. Some optional elements of a robust disaster recovery solution include automation and orchestration of processes, risk assessment, business impact analytics, reporting, ensuring compliance, and recovery time and training for forecasted and unforecasted events. These vendors cover the entire lifecycle of backup and recovery.

Eligibility Criteria

1. Offers a unified platform for **backup and disaster recovery** for on-premises or on private, public, hybrid, edge cloud and SaaS environments

2. Offers comprehensive **monitoring tools with real-time visibility** into disaster recovery environments

3. Demonstrates reporting capabilities to **track performance metrics** and identify trends

4. Ability to manage data and systems and offer both **manual and automated recovery** capabilities

5. Ability to align **various policies for backup and retention** per the organization's **recovery point-and-time** objectives

6. Ability to implement best practices (including solutions test and refresh) designed to **prevent any outages or downtime** and to suit changing situations

7. Offers solution that can integrate **with other infrastructure management**, resiliency and backup platforms

8. **Ability to implement robust failover and failback procedures**

Quadrants by Region

As part of this ISG Provider Lens™ quadrant study, we are introducing the following two quadrants on Private/Hybrid Cloud — Data Center Solutions 2024:

Quadrant	Global
Hybrid Cloud Management Platforms	✔
Resiliency Platforms	✔

The research phase falls in the period between January and March 2024, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in June 2024.

Milestones	Beginning	End
Survey Launch	January 10, 2024	
Survey Phase	January 10, 2024	February 9, 2024
Sneak Previews	May 2024	
Press Release & Publication	June 2024	

Collecting client testimonials via the Star of Excellence™ Program requires early client referrals (no official reference needed), as CX scores directly influence the provider's position in the IPL quadrant and the awards.

Please refer to the link to view/download the ISG Provider Lens™ 2024 research agenda.

Access to Online Portal

You can view/download the questionnaire from here using the credentials you have already created or refer to instructions provided in the invitation email to generate a new password. We look forward to your participation!

Research Production Disclaimer:

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing the work identified by clients. This data is collected as part of the ISG FutureSource™ process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of the information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.

ISG Star of Excellence™ – Call for nominations

The Star of Excellence™ is an independent recognition of excellent service delivery based on the concept of "Voice of the Customer." The Star of Excellence™ is a program, designed by ISG, to collect client feedback about service providers' success in demonstrating the highest standards of client service excellence and customer centricity.

The global survey is all about services that are associated with IPL studies. In consequence, all ISG Analysts will be continuously provided with information on the customer experience of all relevant service providers. This information comes on top of existing first-hand advisor feedback that IPL leverages in context of its practitioner-led consulting approach.

Providers are invited to nominate their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

It is our vision that the Star of Excellence™ will be recognized as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments.

To ensure your selected clients complete the feedback for your nominated engagement please use the Client nomination section on the Star of Excellence™ website.

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply.

Here is the email address:
ISG.star@isg-one.com

ISG Star of Excellence

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ISG Provider Lens Advisors Involvement Program

ISG Provider Lens offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context.

In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three advisors participate as part of each study's quality and consistency review team (QCRT). The QCRT ensures each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the QCRT group and contribute at different levels depending on their availability and expertise.

The QCRT advisors:

- Help define and validate quadrants and questionnaires,

- Advise on service provider inclusion, participate in briefing calls,

- Give their perspectives on service provider ratings and review report drafts.

ISG Advisors to this study

Bernie Hoecker

Partner, Enterprise Cloud Transformation Lead

Anay Nawathe

Director

Rob Brindley

Partner

Invited Companies

If your company is listed on this page or you feel your company should be listed, please contact ISG to ensure we have the correct contact person(s) to actively participate in this research.

Abiquo	Datto	Redstor
Acronis	Dell	Resolve
Arcserve UDP Cloud Direct	Densify	Rubrik Security Cloud
Appranix	Druva	Scalr
Axcient	Expedient	SEP Sesam
BMC	Flexera	ServiceNow
Carbonite	HCLTech	Snow Software Embotics
Centilytics	HPE	Unitrends
Cisco	IBM	Veeam
CloudBolt	Micro Focus	Vembu Technologies
CloudSphere	Morpheus Data	Veritas
Cohesity	NAKIVO	VMware (by Broadcom)
Commvault	NetApp	Zerto (HPE)
Contour Data Solutions	Nutanix Cloud Manager	
CoreStack	OnApp	

About Our Company & Research

ISG Provider Lens™

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

For more information about ISG Provider Lens™ research, please visit this webpage.

ISG Research™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

ISG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: Public Sector.

For more information about ISG Research™ subscriptions, please email contact@isg-one.com, call +1.203.454.3900, or visit research.isg-one.com.

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 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 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.

For more information, visit isg-one.com.

ISG Provider Lens™

REPORT: PRIVATE/HYBRID CLOUD — DATA CENTER SOLUTIONS