ISG Provider Lens™

Next-Gen Private/Hybrid Cloud - Data Center Services & Solutions

Managed Hosting for MidMarket

Nordics 2020

Quadrant Report

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

basefarm

July 2020

About this Report

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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 2020 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.

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ISG Provider Lens™

ISG Provider Lens™

ISG Provider Lens™ delivers leading-edge and actionable research studies, reports and consulting services focused on technology and service providers' strengths and weaknesses and how they are positioned relative to their peers in the market. These reports provide influential insights accessed by our large pool of advisors who are actively advising outsourcing deals as well as large numbers of ISG enterprise clients who are potential outsourcers.

For more information about our studies, please email ISGLens@isg-one.com, call +49 (0) 561-50697537, or visit ISG Provider Lens™ under ISG Provider Lens™.

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EXECUTIVE SUMMARY

In the next two to three years a substantial number of IT outsourcing deals are anticipated in the Nordics, with majority of the companies in the region planning to outsource. The Nordics market for outsourcing and insourcing represents an interesting trend; while there is continuous outsourcing growth, companies are also focusing on insourcing engagement. Sweden has shown the highest IT outsourcing rate among countries in the Nordics (it is followed by Denmark, Finland, Norway and Iceland). Scalability and cost reduction are the key drivers along with focus on cloud adoption. With hundreds of IT service provider briefings in the region, ISG believes that the reason of more outsourcing is to bring down the cost and focus on digital adoption.

According to the latest 1Q20 ISG Index™ The annual value of outsourcing deals in the Europe, Middle East and Africa (EMEA) region rose almost 4 percent in the first quarter of 2020, but would have grown at a higher rate had the impact of COVID-19 not hit the market in March. In the first quarter, managed services ACV was up 6 percent year on year, to €2.7 billion (£2.3 billion), fueled by strong demand for information technology outsourcing (ITO), up 23 percent, to €2.4 billion (£2.1 billion). Strength in the DACH and Benelux regions countered a sluggish ACV performance in the Nordics and in the U.K., which continues to grapple with Brexit anxiety.

The majority of the organizations are using artificial intelligence (AI) for IT operational excellence. Also, the companies are exploring the option to spend and leverage IT service provider’s AI and automation platforms. Hybrid IT and multi-cloud represent the new normal in the region from the IT workload deployment perspective. It is anticipated that more than 50 percent companies would migrate their applications to the multi-cloud model.

This report considers the present scenario in IT managed service insourcing and outsourcing, hyperconverged infrastructure, datacenter security products, colocation, and managed hosting services in the Nordics. It gives a detailed overview of several market growth enablers, restrictions, and trends. The report profiles and examines the leading IT service provider operations in the market.

Nordics IT outsourcing market: With the advent of complex advanced technologies. companies are no longer able to handle all aspects of transformation on their own. Therefore, the chief experience officers (CXOs) in the Nordics are increasingly showing an interest in collaborations/alliances, making this one of this year's top strategies for growth. The majority of companies in the Nordics, and across industries, believe that they will continue to outsource IT and invest in cloud services, or perhaps more than they do today. Some of the reasons why companies outsource all or part of their IT or cloud service management are cost savings, the need to focus on core business and access to innovation. According to the survey, the most common reason is that companies want to scale their operations effectively based on needs.

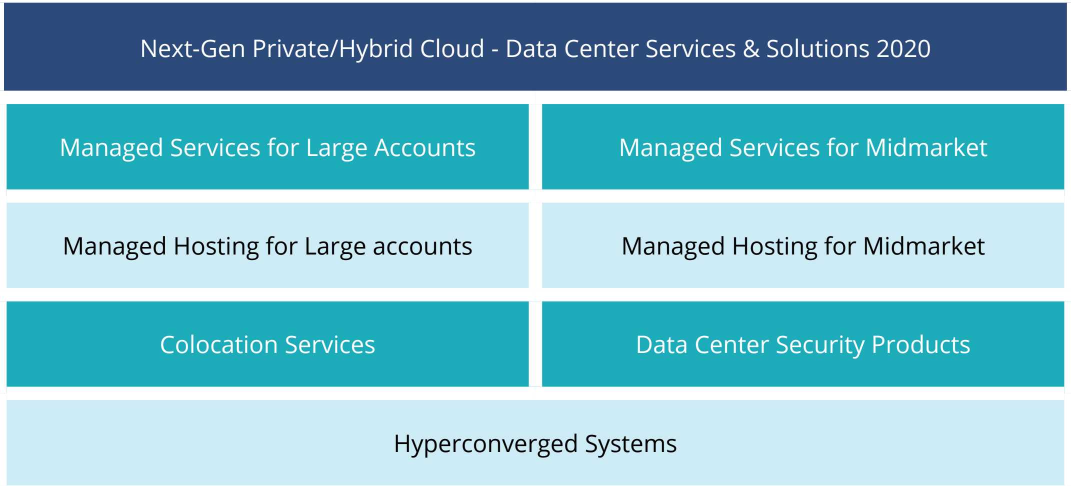
Hyperscalers driving the growth of colocation services growth in the Nordics: Colocation services in the Nordics are expected to comply with regulations and certifications. Adhering to regulations ensures high reliability, scalability, and flexibility in data center operations along with efficiency and resilience. The importance of physical security systems is growing among service providers in the Nordics. In the future, the data center market is likely to witness the increased use of robot monitoring systems with sensors and video surveillance. At the same time, Tier I and Tier II facilities are expected to see a decline, but the Tier III facilities are likely to grow. Denmark and Norway have five and six facilities, respectively, that are certified by the Uptime Institute. Many operators are expected to move to Tier IV facilities based on growth in rack power density and critical applications. Nordic countries are witnessing increased hyperscale investments from Google, Facebook, Microsoft and AWS.

Managed hosting services: The demand for managed hosting services is anticipated to grow in the next two to three years with various vendors providing advanced controlled scalability solutions to enterprises. Since enterprises are expanding business globally, the need for space and utilities has increased significantly. Hosting service providers associated with cloud providers and hardware vendors have been offering exclusive services to their clients. These data centers are highly flexible with governed solutions ranging from simple data warehousing to data analytics. These solutions allow easily managed hosting by reducing expenses, which is expected to have a positive effect on the global managed hosting services market.

Hyperconverged Infrastructure (HCI): The adoption of HCI in the region is low compared with the DACH and Benelux regions as digital transformation is slower. ISG has learned that enterprises want to reduce their costs related to power, space and cooling are, thereby, exploring and moving to HCI platforms. Enterprises that have evolved over the decades with complex data center IT landscapes are now seeking to consolidate their infrastructure with scale and agile capabilities. HCI is playing a critical role in such scenarios. The major players operating in this market have witnessed high growth in demand for HCI, especially due to ongoing data center modernization projects or other initiatives in the data center industry worldwide.

Introduction

Simplified illustration



Source: ISG 2020

Definition

A private cloud is an extension of an isolated IT or cloud system landscape, consisting of a company's existing computer environment and leveraging the investments already made in virtual infrastructure and applications. It is essential that the cloud infrastructure consists of either a physical or logical separation between systems on which no other customers are served. Companies with stringent security and governance requirements that need to handle large volumes of data and ensure tight integration with other business applications and workflows may prefer an enterprise cloud or a private cloud. Service providers or managed service providers can use cloud technologies to create private clouds with virtual machines or containers, network and storage resources running in their data centers or shared infrastructure, but in a suitably configured, isolated environment.

Definition (cont.)

A hybrid cloud combines the best of on-premises infrastructure at the customer/user site, a hosted cloud in a service provider's data center, and a public cloud from a hyperscaler. It connects the existing on-site infrastructure services with a private or public cloud or both. The aim is to combine services and data from different cloud models to create a uniform, automated and well-managed computing cloud infrastructure environment. Hybrid clouds enable companies to leverage the capabilities of public cloud platform providers without having to outsource all their data to a third-party data center or a shared infrastructure environment. This gives them greater flexibility in sourcing workloads, while allowing them to continue to operate key components within their own firewall or private cloud.

Data center outsourcing is the practice of transferring the responsibility of provisioning, monitoring and management of computing and storage resources to a third-party provider. The data center may be owned by the enterprise, service provider or a third-party colocation provider. Monitoring services are usually delivered from the provider’s location and are called remote infrastructure management (RIM) services.

Data center outsourcing is the practice of outsourcing the responsibility of provisioning, monitoring, and managing computing and storage resources to a third-party provider. The data center may be owned by the enterprise, service provider or a third-party colocation provider. Monitoring services are usually delivered from the provider’s location and are called remote infrastructure management (RIM) services.

Definition (cont.)

Scope of the Report

The ISG Provider Lens™ study offers IT-decision makers:

- Transparency on the strengths and weaknesses of relevant providers;
- A differentiated positioning of providers by segments;
- Focus on markets, including the U.S., Germany, Switzerland, U.K., Nordics and Brazil.

This 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 new engagements.

Typical outsourcing activities include level 1, 2, and 3 technical support, server monitoring, application performance monitoring, storage and database administration, hosting, colocation, disaster recovery testing and execution, defining or setting up the architecture, standards and policies, and transformation projects such as virtualization, consolidation and cloud-enablement services.

For standalone services such as colocation and managed hosting, the level of services and support varies from those in a fully managed data center outsourcing contract. For example, a colocation provider will provide the facilities and infrastructure to host equipment and some basic support services. However, all other aspects of infrastructure management are the responsibility of the client, which may independently handle it or outsource it to a managed service provider.

ISG studies are intended to anticipate the investigation efforts and buying decisions of typical enterprise clients. While contemplating a significant strategy transformation, making purchase-versus-rent decisions for infrastructure, implementing agile practices, or incorporating automation into their environments, enterprise clients will benefit from a study that examines an entire ecosystem for a certain service line.

Definition (cont.)

The studies are comprised of multiple quadrants covering the spectrum of services that an enterprise client requires, as illustrated below:

The quadrant descriptions are as follows:

- **Managed Services for Large Accounts:** This quadrant assesses a service company's ability to provide ongoing management services for data center infrastructure for large businesses. The enterprises are subject to strict regulations that add to complexities. They typically have more than 5,000 employees and revenues of more than $1 billion.
- **Managed Services for Midmarket:** This quadrant assesses a service company's ability to provide ongoing management services for data center infrastructure for medium-sized business. The enterprise client typically has less than 5,000 employees or generates less than $1 billion in revenue.
- **Managed Hosting for Large accounts:** This quadrant ranks service providers that offer enterprise-grade hosting solutions and use their facilities and infrastructure. They take responsibility for the day-to-day management and maintenance of data center assets such as servers, storage and operating systems.
- **Managed Hosting for Midmarket:** This quadrant assesses a service company's ability to provide ongoing management hosting services for data center infrastructure for medium-sized business. The enterprise client typically has less than 5,000 employees or generates less than $1 billion in revenue.
- **Colocation Services:** This quadrant assesses service providers that offer professional and standardized data center operations as colocation services. These providers typically supply network connectivity, access point for various hosting providers, system houses, independent software vendors (ISVs), and carriers or telecommunication providers.
- **Data Center Security Products:** This market ranks software and appliances that are designed to protect the IT infrastructure, regardless of whether they are installed in a public or private cloud. It assesses the capabilities of ISVs.
- **Hyperconverged Systems:** This quadrant analyzes the systems built around preconfigured hardware and software appliances. The systems comprise network, storage and compute resources that are equipped with management software for orchestration purposes and are often the first step to build a private or hybrid cloud.

Provider Classifications

The ISG Provider Lens™ quadrants were created using an evaluation matrix containing four segments, where the providers are positioned accordingly.

Leader

The “leaders” among the vendors/ providers have a highly attractive product and service offering and a very strong market and competitive position; they fulfill all requirements for successful market cultivation. They can be regarded as opinion leaders, providing strategic impulses to the market. They also ensure innovative strength and stability.

Product Challenger

The “product challengers” offer a product and service portfolio that provides an above-average coverage of corporate requirements, but are not able to provide the same resources and strengths as the leaders regarding the individual market cultivation categories. Often, this is due to the respective vendor’s size or their weak footprint within the respective target segment.

Market Challenger

“Market challengers” are also very competitive, but there is still significant portfolio potential and they clearly lag behind the “leaders.” Often, the market challengers are established vendors that are somewhat slow to address new trends, due to their size and company structure, and have therefore still some potential to optimize their portfolio and increase their attractiveness.

Contender

“Contenders” are still lacking mature products and services or sufficient depth and breadth of their offering, while also showing some strengths and improvement potentials in their market cultivation efforts. These vendors are often generalists or niche players.

Provider Classifications (cont.)

Each ISG Provider Lens™ quadrant may include a service provider(s) who ISG believes has a strong potential to move into the leader's quadrant.

Rising Star

Rising stars are mostly product challengers with high future potential. When receiving the "rising stars" award, such companies have a promising portfolio, including the required roadmap and an adequate focus on key market trends and customer requirements. Also, the "rising stars" has an excellent management and understanding of the local market. This award is only given to vendors or service providers that have made extreme progress towards their goals within the last 12 months and are on a good way to reach the leader quadrant within the next 12-24 months, due to their above-average impact and innovative strength.

Not In

This service provider or vendor was not included in this quadrant as ISG could not obtain enough information to position them. This omission does not imply that the service provider or vendor does not provide this service.

Next-Gen Private/Hybrid Cloud - Data Center Services & Solutions 2020 - Quadrant Provider Listing 1 of 5

	Managed Services for Large Accounts	Managed Services for Midmarket	Managed Hosting for Large Accounts	Managed Hosting for Midmarket	Colocation Services	Data Center Security Products	Hyperconverged Systems
Accenture	Leader	Not In	Not In	Not In	Not In	Not In	Not In
Advania	Product Challenger	Product Challenger	Rising Star	Market Challenger	Not In	Not In	Not In
Asseco	Contender	Market Challenger	Not In	Not In	Not In	Not In	Not In
ATEA	Market Challenger	Leader	Leader	Leader	Not In	Not In	Not In
Atos	Product Challenger	Not In	Not In	Not In	Not In	Not In	Not In
Barracuda Networks	Not In	Not In	Not In	Not In	Not In	Product Challenger	Not In
Basefarm (OBS)	Leader	Leader	Leader	Leader	Leader	Not In	Not In
Broadcom/Symantec	Not In	Not In	Not In	Not In	Not In	Leader	Not In
Capgemini	Leader	Not In	Leader	Not In	Not In	Not In	Not In
CenturyLink	Not In	Not In	Not In	Not In	Product Challenger	Not In	Not In
Check Point	Not In	Not In	Not In	Not In	Not In	Leader	Not In
Cisco	Not In	Not In	Not In	Not In	Not In	Leader	Leader
Cognizant	Product Challenger	Not In	Not In	Not In	Not In	Not In	Not In
Columbus	Not In	Product Challenger	Not In	Not In	Not In	Not In	Not In

Next-Gen Private/Hybrid Cloud - Data Center Services & Solutions 2020 - Quadrant Provider Listing 2 of 5

	Managed Services for Large Accounts	Managed Services for Midmarket	Managed Hosting for Large Accounts	Managed Hosting for Midmarket	Colocation Services	Data Center Security Products	Hyperconverged Systems
Conapto	Not In	Not In	Not In	Not In	Product Challenger	Not In	Not In
Dell EMC	Not In	Not In	Not In	Not In	Not In	Not In	Leader
DigiPlex	Not In	Not In	Not In	Not In	Leader	Not In	Not In
Digital Realty	Not In	Not In	Not In	Not In	Rising Star	Not In	Not In
DXC	Leader	Not In	Leader	Not In	Not In	Not In	Not In
Embriq AS	Contender	Not In	Not In	Product Challenger	Not In	Not In	Not In
Equinix	Not In	Not In	Not In	Not In	Leader	Not In	Not In
Ficolo	Not In	Not In	Not In	Not In	Leader	Not In	Not In
FireEye	Not In	Not In	Not In	Not In	Not In	Product Challenger	Not In
Fortinet	Not In	Not In	Not In	Not In	Not In	Product Challenger	Not In
Fujitsu	Leader	Not In	Leader	Not In	Not In	Not In	Market Challenger
GlobalConnect	Not In	Not In	Not In	Not In	Market Challenger	Not In	Not In
HCL	Leader	Not In	Not In	Not In	Not In	Not In	Not In
HPE	Not In	Not In	Not In	Not In	Not In	Not In	Leader

ISG Provider Lens™

Next-Gen Private/Hybrid Cloud - Data Center Services & Solutions 2020 - Quadrant Provider Listing 3 of 5

	Managed Services for Large Accounts	Managed Services for Midmarket	Managed Hosting for Large Accounts	Managed Hosting for Midmarket	Colocation Services	Data Center Security Products	Hyperconverged Systems
HTBASE	Not In	Not In	Not In	Not In	Not In	Not In	Contender
Huawei	Not In	Not In	Not In	Not In	Not In	Not In	Product Challenger
HYDRO66	Not In	Not In	Not In	Not In	Rising Star	Not In	Not In
IBM	Leader	Not In	Leader	Not In	Not In	Leader	Not In
Infosys	Product Challenger	Not In	Not In	Not In	Not In	Not In	Not In
Interxion	Not In	Not In	Not In	Not In	Leader	Not In	Not In
iver	Not In	Rising Star	Not In	Rising Star	Not In	Not In	Not In
Juniper Networks	Not In	Not In	Not In	Not In	Not In	Leader	Not In
Kaspersky	Not In	Not In	Not In	Not In	Not In	Market Challenger	Not In
KMD	Market Challenger	Leader	Rising Star	Not In	Not In	Not In	Not In
Lenovo	Not In	Not In	Not In	Not In	Not In	Not In	Contender
LTI	Rising Star	Leader	Not In	Not In	Not In	Not In	Not In
McAfee	Not In	Not In	Not In	Not In	Not In	Market Challenger	Not In
MEDIAM	Not In	Not In	Not In	Not In	Contender	Not In	Not In

Next-Gen Private/Hybrid Cloud - Data Center Services & Solutions 2020 - Quadrant Provider Listing 4 of 5

	Managed Services for Large Accounts	Managed Services for Midmarket	Managed Hosting for Large Accounts	Managed Hosting for Midmarket	Colocation Services	Data Center Security Products	Hyperconverged Systems
Micro Focus	Not In	Not In	Not In	Not In	Not In	Contender	Not In
Microsoft	Not In	Not In	Not In	Not In	Not In	Not In	Product Challenger
NetApp	Not In	Not In	Not In	Not In	Not In	Not In	Contender
Netcompany	Contender	Product Challenger	Product Challenger	Product Challenger	Not In	Not In	Not In
Nordlo	Not In	Leader	Not In	Not In	Not In	Not In	Not In
Nutanix	Not In	Not In	Not In	Not In	Not In	Not In	Leader
Palo Alto Networks	Not In	Not In	Not In	Not In	Not In	Leader	Not In
Pivot3	Not In	Not In	Not In	Not In	Not In	Not In	Product Challenger
Proact	Not In	Market Challenger	Not In	Not In	Not In	Not In	Not In
Rapid7	Not In	Not In	Not In	Not In	Not In	Contender	Not In
Red Hat	Not In	Not In	Not In	Not In	Not In	Not In	Market Challenger
SonicWall	Not In	Not In	Not In	Not In	Not In	Contender	Not In
Systematic	Product Challenger	Product Challenger	Not In	Not In	Not In	Not In	Not In
TCS	Leader	Not In	Not In	Not In	Not In	Not In	Not In

Next-Gen Private/Hybrid Cloud - Data Center Services & Solutions 2020 - Quadrant Provider Listing 5 of 5

	Managed Services for Large Accounts	Managed Services for Midmarket	Managed Hosting for Large Accounts	Managed Hosting for Midmarket	Colocation Services	Data Center Security Products	Hyperconverged Systems
Tech Mahindra	Product Challenger	Not In	Not In	Not In	Not In	Not In	Not In
TietoEVRY	Leader	Leader	Leader	Leader	Not In	Not In	Not In
Trend Micro	Not In	Not In	Not In	Not In	Not In	Leader	Not In
T-Systems	Rising Star	Leader	Product Challenger	Leader	Not In	Not In	Not In
UnitedLayer	Not In	Not In	Contender	Not In	Not In	Not In	Not In
Visolit	Not In	Contender	Not In	Not In	Not In	Not In	Not In
VMware	Not In	Not In	Not In	Not In	Not In	Not In	Leader
Vodafone	Not In	Not In	Not In	Contender	Not In	Not In	Not In
Wipro	Leader	Not In	Not In	Not In	Not In	Not In	Not In
Xfiber	Not In	Not In	Not In	Not In	Contender	Not In	Not In

Next-Gen Private/Hybrid Cloud - Data Center Services & Solutions Quadrants

ENTERPRISE CONTEXT

This report is relevant to mid-sized enterprises in the Nordics that are evaluating managed hosting providers.

In this quadrant report, ISG lays out the current market positioning of managed hosting providers in the Nordics and how they interact with key enterprise challenges in the region. Foremost among those challenges is the integration of hosted computing resources into an enterprise's overall hybrid cloud strategy. To be successful in the current digital business environment, enterprises must take a unified approach to their technical infrastructure across public and private clouds.

Colocation is especially useful to enterprises in the Nordics because they can get access to datacenters that are closer to their operations. This geographic proximity is important for applications that require low latency to be successful. In addition, using local datacenters can help enterprises comply with data protection and data residency requirements.

Using managed hosting can help enterprises by alleviating the burden of operating a private datacenter, while still allowing some control over the underlying hardware and systems that underpin the applications hosted there. Enterprises will get the benefit of managed hosting providers' investment in systems and processes that make operations more efficient and automated.

As enterprises reduce their focus on on-premises infrastructure, managed hosting providers can be a boon. Some applications cannot move to the public cloud, so offloading the management of their infrastructure can help enterprises free up technical resources to focus on more pressing business problems. This is especially true for mainframe applications, which are difficult to migrate and often critical to an enterprise's operations.

IT leaders should read this report to better understand the relative strengths and weaknesses of managed hosting providers, as well as how those providers' approaches to the market can impact enterprise hybrid cloud strategies. In particular, these leaders should understand how using a managed hosting provider will impact their management and operation of key workloads.

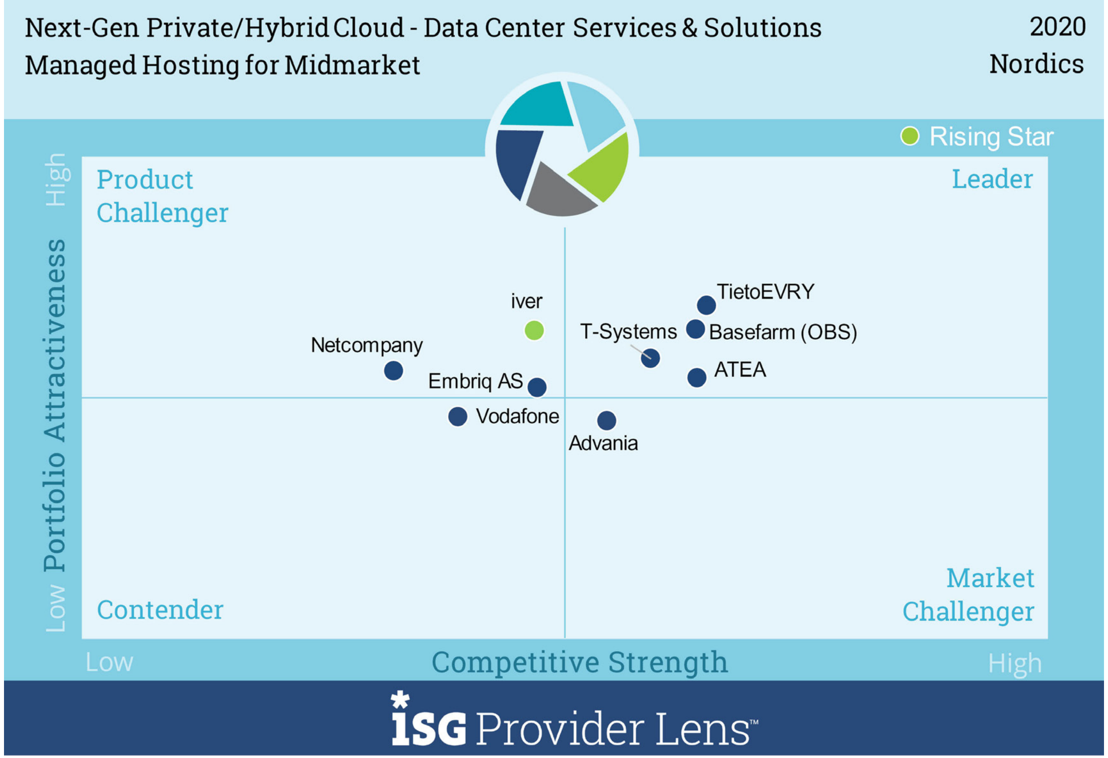
Software development and technology leaders should read this report to understand the positioning of managed hosting providers and gain a better understanding of how those providers' offerings can impact the ongoing development of software products within an enterprise. Even if all of the applications hosted with a managed hosting provider are not under active development, it is likely that new projects will have to integrate with some of these systems.

Sourcing, procurement and vendor management professionals should read this report to develop a better understanding of the current landscape of managed hosting providers in the Nordics.

MANAGED HOSTING FOR MIDMARKET

Definition

This quadrant includes service providers that offer standalone* enterprise-grade hosting solutions using their facilities and infrastructure. Participants are responsible for day-to-day management and maintenance of data center equipment such as servers, storage, operating systems and connectivity to the external network. A provider may monitor various IT resources such as legacy systems and private and public cloud via a hybrid cloud management platform. However, managing hybrid clouds is not rated in this quadrant assessment. The primary service levels typically employed to measure managed hosting services are various tiers of data centers, multi-layered security, service availability and network (local area network (LAN)) input/output (I/O) at peak time.



Source: ISG Research 2020

MANAGED HOSTING FOR MIDMARKET

Eligibility Criteria

- Ability to offer enterprise-grade hosting solutions using the provider's facilities and infrastructure.
- Ability to offer active-active disaster recovery and backup services.
- Ability to securely manage and maintain all the data center equipment and technology stacks.
- Ability to scale and maintain dedicated servers and storage, as well as shared cloud resources, on the same network and management platform.
- Ability to provide at least five layers of physical security in the data center.

* Standalone services only – not applicable to outsourcing providers that offer managed hosting through third-party owned infrastructure, as part of a larger data center outsourcing deal.

Observations

With the increasing use of data to make business decisions, companies today have an array of hosting options, including managed hosting. Hosting and cloud infrastructure services are converging as businesses incorporate IaaS into hybrid IT deployment approaches. Hybrid IaaS/hosting services are more flexible and optimization-oriented to address strategic issues of IT and business transformation. These services can also serve as a tactical approach for specific projects such as distributed enterprise applications. Managed hosting explores end users' evolution from standalone hosting and IaaS to hybrid IT environments and analyzes market trends related to multi-cloud deployment. Also, the companies tracks developments in the service provider landscape, including partnerships between traditional hosting providers and the hyperscale IaaS giants. Both global and Nordics-based companies have been investing in building a large carbon neutral data center for managed hosting services in the region.

MANAGED HOSTING FOR MIDMARKET

Observations (cont.)

- **TietoEvry** operates more than 15 data centers for managed hosting services and majority of these are in Finland and Sweden.
- **Basefarm's (Orange business Service)** automation capabilities help to reduce provisioning time by average 80 percent.
- **Atea** provides hardware and software for storing and managing information, as well as tools for virtualization, automation, security and for operating a data center environment.
- **T-Systems** provides products with pre-configured services, reducing efforts for customers.
- **Iver** has multiple data centers, along with depth and breadth in its managed hosting services portfolio in the Nordics.

BASEFARM (OBS)

Overview

Basefarm (acquired by Orange Business Services) is an emerging leader in Europe offering managed hosting and hybrid-IT services to enterprises and mid-sized organizations. The company is a key enabler for integrating major competencies of digital transformation (big data, cloud computing and information security) into one service offering. Its delivery model covers everything "from idea to cable," where it offers strategic advisory, consulting and hybrid cloud operations under one management and on any cloud. Basefarm has a pool of practitioners and advisors that serve its large client base across the Nordics. It has a strong client base in Europe, overall. The company is uniquely positioned, especially with the support of its parent company, Orange Business Services.

Strengths

Managed hosting service in high demand: Basefarm delivers managed hosting services to businesses and organizations in response to the high demand steered by availability, security, developments and quality. The organization has large number of customers in the Nordics.

Managed hosting solution for hybrid IT: Basefarm provides strategic advice, architecture, and implementation, together with the management and operation of solutions, on several different cloud platforms.

Business critical application: The organization has deep expertise in mission critical application management and managed applications through hyper-care support for databases, web servers and content management systems as needed by financial institutions.

Caution

Basefarm does not promote managed hosting services on a larger scale; there is low awareness about Basefarm's managed hosting services and the customers it serves.

Basefarm has headroom to market its overall managed hosting services in the Nordics to gain market share.

2020 ISG Provider Lens™ Leader

Basefarm's managed hosting services help reduce the IT expenditure of companies from the CAPEX and OPEX front. The organization is tapping into large enterprise clients across verticals in the Nordics.

Methodology

METHODOLOGY

The research study " Next-Gen Private/Hybrid Cloud - Data Center Services & Solutions 2020" analyzes the relevant software vendors/service providers in the Nordics market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

The study was divided into the following steps:

1. Definition of Next-Gen Private/Hybrid Cloud - Data Center Services & Solutions
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. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
6. Use of the following key evaluation criteria:
   - Strategy & vision
   - Innovation
   - Brand awareness and presence in the market
   - Sales and partner landscape
   - Breadth and depth of portfolio of services offered
   - Technology advancements

Authors and Editors

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Lead Analyst

At ISG, Manoj Chandra Jha is primarily responsible for research projects and working on the ISG Provider Lens™ (IPL) program. He actively contributes in gathering service provider intelligence through both primary and secondary research. He is responsible for writing thought leadership reports and papers on briefings provided by the service providers. In addition to these, Manoj also writes blogs on trending topics, specifically on cutting-edge technology. Manoj has executed several client requests for research and consulting assignments across industries, predominantly in the IT, manufacturing and insurance. He has handled client communication for the team, managing the client right from on-boarding to understanding their custom research requests to scheduling briefing calls. Along with this, he has been closely involved with the quadrant studies around cloud services and data center outsourcing market.

Blair Hanley Frank, Enterprise Context and Global Overview Analyst

Principal Analyst

Blair serves as an ISG enterprise analyst covering topics including artificial intelligence, cloud computing and Agile/DevOps transformation. This year, he is providing enterprise context for ISG Provider Lens reports on the service provider ecosystems around Private/Hybrid Cloud, Public Cloud, Microsoft, SAP and Next-Gen ADM. He provides enterprise IT decision makers with market-leading advice on key technology trends through research notes and personal consultation. Since joining ISG in 2018, Blair has provided clients with insights about how their strategy fits with emerging technology trends that are shaping markets worldwide, and how new technologies can help them drive better business value.

Authors and Editors

Jan Erik Aase, Editor

Director

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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