Magic Quadrant for Data Center Outsourcing and Hybrid Infrastructure Managed Services, Europe

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Gartner analyzes the execution and strategic vision of 20 leading DCO/HIMS providers and their cloud service offerings, worth more than $21 billion in annual revenue in Europe. Sourcing and vendor management leaders can use this analysis to select the best provider for their strategic initiatives.

Market Definition/Description

This Magic Quadrant evaluates 20 leading service providers' ability to deliver data center managed services (DCMSs) across Europe. DCMSs are composed of the following (see their definitions below):

- Data center outsourcing (DCO)
- Hybrid infrastructure managed services (HIMSs)
- Private cloud managed services
- Mainframe managed services
- ERP hosting managed services
- Data center transformation services
- Cloud migration services
- Infrastructure utility services (IUS)
- Remote infrastructure management (RIM)
- Edge DCMSs

This complex set of data center capabilities and services is increasingly based on managed virtual private cloud services plus hyperscale public cloud services. It is managed via a mix of RIM services leveraging traditional tools, cloud management platforms (CMPs) and intelligent automation. As in previous years, this Magic Quadrant excludes simple, dedicated web hosting and colocation services, public cloud-only services, and providers that entirely subcontract their services.

Future growth in DCMSs will come from the increasing demand of customers wishing to reduce their own data center footprints, while increasingly leveraging hyperscale and large providers' economies of scale, extensive capabilities, and intelligent automation effects. Business growth will be increased for providers that can:

- Provide all digital infrastructure components (hybrid IT management services, private and public cloud, Internet of Things [IoT] and edge computing).
- Quickly deliver the required digital infrastructure transformation activities (cloud migration, data center transformation and consolidation, and data center and workload optimization).

As such, these providers must be successful in supporting not only this industrialization (Mode 1) wave, but also the rapid innovation and DevOps requirements of their successful digital customers (Mode 2).