

The Forrester Wave™: Hosted Private Cloud Services In North America, Q2 2020

The 11 Providers That Matter Most And How They Stack Up

by Bill Martorelli
June 24, 2020

Why Read This Report

In our 32-criterion evaluation of hosted private cloud providers, we identified the 11 most significant ones — Atos, CenturyLink, Flexential, NTT DATA, Otava, OVHcloud, Rackspace Technology, Sungard Availability Services, Tata Consultancy Services (TCS), TierPoint, and Virtustream — and researched, analyzed, and scored them. This report shows how each provider measures up and helps infrastructure and operations (I&O) professionals select the right one for their needs.

Key Takeaways

Rackspace Technology And Virtustream Lead The Pack

Forrester's research uncovered a market in which Rackspace Technology and Virtustream are Leaders; NTT DATA, OVHcloud, Otava, CenturyLink, Tata Consultancy Services, and Atos are Strong Performers; and Flexential, TierPoint, and Sungard Availability Services are Contenders.

Breadth Of Infrastructure Options And Customer Experience Are Key Differentiators

Suppliers of hosted private cloud solutions that embrace the hybrid future, offer new innovations in service delivery, and provide significant infrastructure options lead the pack. These Leaders can articulate this vision while providing strong customer support.

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June 24, 2020

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Related Research Documents

- [Adoption Profile: Hosted Private Cloud In North America, Q2 2019](#)
- [Now Tech: Hosted Private Cloud, Q1 2020](#)
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The Hosted Private Cloud Evolves With The Needs Of Customers

Hosted private cloud retains its position in the hearts and minds of I&O professionals because it sits between the public and private cloud alternatives while offering at least some of the benefits of both. Often, I&O pros are drawn to its greater flexibility and higher level of perceived control. Customers also embrace hosted private cloud because of its stronger suitability for regulatory compliance and greater degree of control compared with public cloud.

Hosted private cloud customers should look for providers that:

- › **Offer a breadth of infrastructure options, with an eye toward future innovations.** A range of “T-shirt” presized infrastructure alternatives, support for custom configurations, and broad storage options is typical of hosted private cloud Leaders, Strong Performers, and Contenders alike. As public cloud hyperscalers embrace hybrid cloud solutions, such as Amazon Web Services (AWS) Outposts, Google Cloud Platform (GCP) Anthos, or Microsoft Azure Stack, hosted private cloud suppliers will be obliged to stop resisting and embrace these innovations. Leading suppliers are showing the way.
- › **Deliver strong SLAs, contractual protections, and regulatory compliance.** With their sensitivity to issues of control, typical public cloud service-level agreements (SLAs) and contracts just won't do for hosted private cloud enthusiasts. Instead, leading suppliers offer robust SLA and contractual protections while offering significant breadth of capability in addressing customers' regulatory requirements.
- › **Provide a positive experience, from initial onboarding to ongoing operations.** Simply offering high availability targets isn't enough — leading hosted private cloud suppliers also provide positive initial and ongoing customer experience and have sufficient investments in providing superior customer support.

Evaluation Summary

The Forrester Wave™ evaluation highlights Leaders, Strong Performers, Contenders, and Challengers. It's an assessment of the top vendors in the market and doesn't represent the entire vendor landscape. You'll find more information about this market in [“Now Tech: Hosted Private Cloud, Q1 2020.”](#)

We intend this evaluation to be a starting point only and encourage clients to view product evaluations and adapt criteria weightings using the Excel-based vendor comparison tool (see Figure 1 and see Figure 2). Click the link at the beginning of this report on Forrester.com to download the tool.

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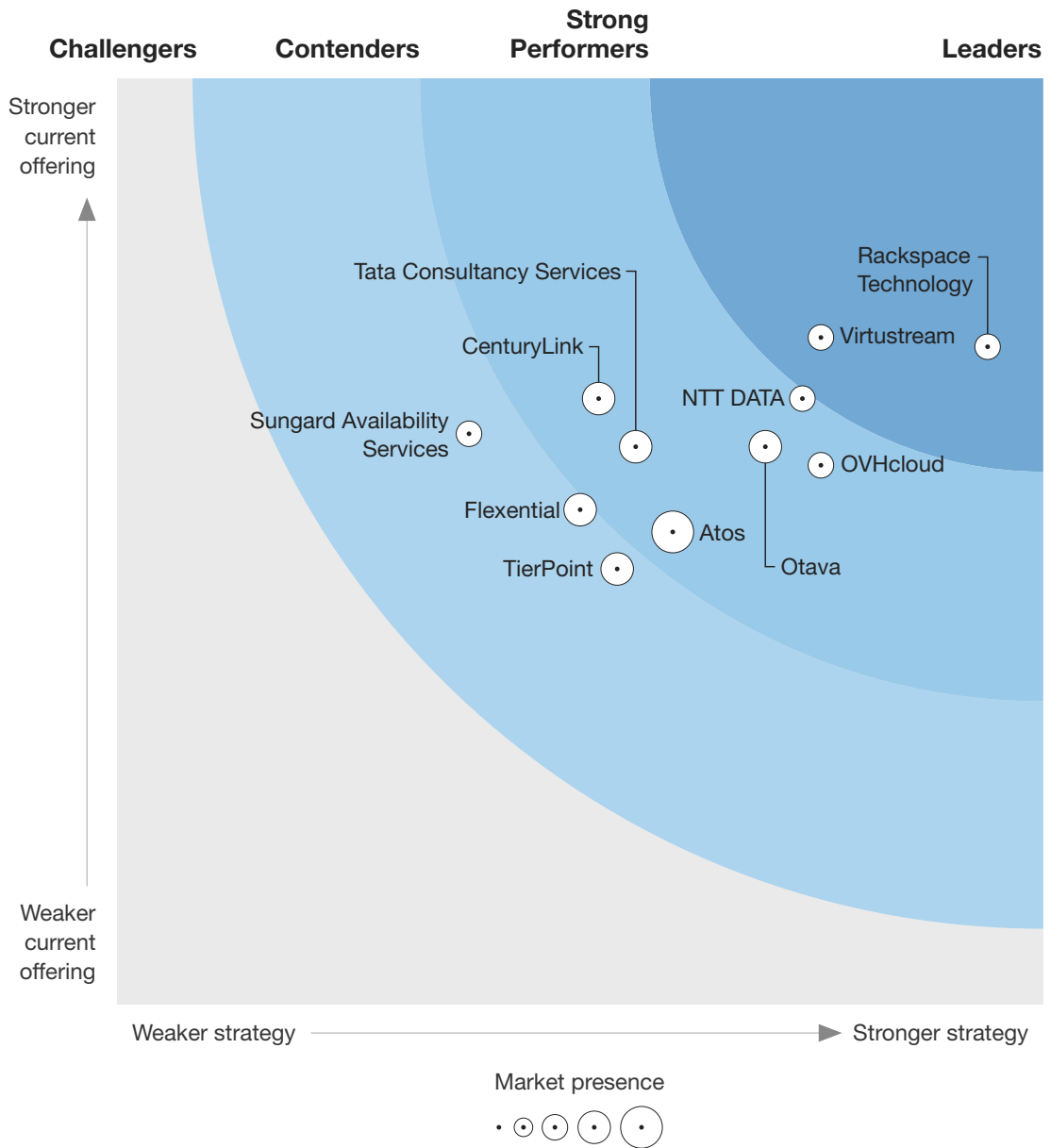
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FIGURE 1 Forrester Wave™: Hosted Private Cloud Services In North America, Q2 2020

THE FORRESTER WAVE™

Hosted Private Cloud Services In North America

Q2 2020



The Forrester Wave™: Hosted Private Cloud Services In North America, Q2 2020

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FIGURE 2 Forrester Wave™: Hosted Private Cloud Services In North America Scorecard, Q2 2020

| | Forrester's weighting | Atos | CenturyLink | Flexential | NTT DATA | Otava | OVIcloud | Rackspace Technology |
|--|-----------------------|------|-------------|------------|----------|-------|----------|----------------------|
| Current offering | 50% | 2.55 | 3.27 | 2.67 | 3.27 | 3.01 | 2.91 | 3.55 |
| Self-service portal and user interface | 5% | 1.00 | 3.00 | 1.00 | 3.00 | 1.00 | 1.00 | 3.00 |
| Permissions, roles, and image library | 5% | 3.00 | 3.00 | 1.00 | 3.00 | 5.00 | 5.00 | 5.00 |
| Integration capabilities | 5% | 3.00 | 3.00 | 3.00 | 5.00 | 1.00 | 3.00 | 5.00 |
| Compute infrastructure | 10% | 2.00 | 3.00 | 3.00 | 4.00 | 2.00 | 2.00 | 3.00 |
| Network options | 10% | 3.00 | 5.00 | 3.00 | 3.00 | 3.00 | 3.00 | 3.00 |
| Security capabilities | 5% | 3.00 | 3.00 | 3.00 | 3.00 | 3.00 | 3.00 | 5.00 |
| Storage options | 5% | 3.00 | 5.00 | 5.00 | 1.00 | 5.00 | 5.00 | 3.00 |
| Automation capabilities | 5% | 3.00 | 1.00 | 1.00 | 3.00 | 3.00 | 1.00 | 5.00 |
| Data center locations | 5% | 3.00 | 5.00 | 3.00 | 1.00 | 3.00 | 1.00 | 3.00 |
| Certifications | 5% | 3.00 | 3.00 | 3.00 | 3.00 | 3.00 | 3.00 | 5.00 |
| Service-level agreements (SLAs) | 10% | 3.00 | 3.00 | 3.00 | 3.00 | 3.00 | 3.00 | 3.00 |
| Contract agreements | 10% | 1.00 | 3.00 | 3.00 | 3.00 | 5.00 | 3.00 | 3.00 |
| Services and customer experience | 10% | 1.80 | 2.40 | 3.00 | 5.00 | 2.80 | 3.40 | 3.80 |
| Price scenarios | 5% | 3.00 | 3.00 | 1.00 | 3.00 | 3.00 | 5.00 | 1.00 |
| Complementary advisory services | 5% | 4.34 | 3.66 | 2.32 | 4.32 | 1.66 | 2.34 | 4.32 |

All scores are based on a scale of 0 (weak) to 5 (strong).

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FIGURE 2 Forrester Wave™: Hosted Private Cloud Services In North America Scorecard, Q2 2020 (Cont.)

| | Forrester's weighting | Atos | CenturyLink | Flexential | NTT DATA | Otava | OVIcloud | Rackspace Technology |
|--|-----------------------|------|-------------|------------|----------|-------|----------|----------------------|
| Strategy | 50% | 3.00 | 2.60 | 2.50 | 3.70 | 3.50 | 3.80 | 4.70 |
| Vision for the future of HPC and cloud | 20% | 3.00 | 3.00 | 1.00 | 5.00 | 5.00 | 5.00 | 5.00 |
| Execution roadmap | 20% | 3.00 | 3.00 | 3.00 | 3.00 | 3.00 | 5.00 | 5.00 |
| Market approach | 10% | 3.00 | 1.00 | 1.00 | 3.00 | 3.00 | 5.00 | 5.00 |
| Innovation roadmap | 15% | 1.00 | 3.00 | 5.00 | 3.00 | 5.00 | 3.00 | 5.00 |
| Planned enhancements | 15% | 5.00 | 3.00 | 3.00 | 5.00 | 3.00 | 3.00 | 3.00 |
| Partner ecosystem | 10% | 3.00 | 3.00 | 3.00 | 3.00 | 1.00 | 1.00 | 5.00 |
| Commercial model | 10% | 3.00 | 1.00 | 1.00 | 3.00 | 3.00 | 3.00 | 5.00 |
| Market presence | 0% | 4.04 | 3.40 | 3.32 | 2.20 | 3.12 | 2.20 | 3.00 |
| Customer numbers | 40% | 5.00 | 3.00 | 5.00 | 3.00 | 5.00 | 3.00 | 3.00 |
| Sales force | 20% | 5.00 | 5.00 | 3.00 | 3.00 | 2.00 | 3.00 | 3.00 |
| Revenue | 40% | 2.60 | 3.00 | 1.80 | 1.00 | 1.80 | 1.00 | 3.00 |

All scores are based on a scale of 0 (weak) to 5 (strong).

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FIGURE 2 Forrester Wave™: Hosted Private Cloud Services In North America Scorecard, Q2 2020 (Cont.)

| Current offering | Forrester's weighting | Sungard Availability Services | Tata Consultancy Services | TierPoint | Virtustream |
|--|------------------------------|--------------------------------------|----------------------------------|------------------|--------------------|
| Self-service portal and user interface | 5% | 1.00 | 3.00 | 3.00 | 5.00 |
| Permissions, roles, and image library | 5% | 3.00 | 3.00 | 3.00 | 3.00 |
| Integration capabilities | 5% | 3.00 | 3.00 | 1.00 | 3.00 |
| Compute infrastructure | 10% | 4.00 | 4.00 | 3.00 | 3.00 |
| Network options | 10% | 2.00 | 2.00 | 3.00 | 3.00 |
| Security capabilities | 5% | 3.00 | 5.00 | 1.00 | 5.00 |
| Storage options | 5% | 3.00 | 3.00 | 3.00 | 3.00 |
| Automation capabilities | 5% | 3.00 | 3.00 | 1.00 | 1.00 |
| Data center locations | 5% | 1.00 | 3.00 | 5.00 | 1.00 |
| Certifications | 5% | 3.00 | 3.00 | 1.00 | 3.00 |
| Service-level agreements (SLAs) | 10% | 5.00 | 3.00 | 1.00 | 5.00 |
| Contract agreements | 10% | 5.00 | 3.00 | 1.00 | 5.00 |
| Services and customer experience | 10% | 1.80 | 2.40 | 3.80 | 5.00 |
| Price scenarios | 5% | 3.00 | 1.00 | 3.00 | 3.00 |
| Complementary advisory services | 5% | 3.00 | 4.34 | 2.32 | 3.00 |

All scores are based on a scale of 0 (weak) to 5 (strong).

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FIGURE 2 Forrester Wave™: Hosted Private Cloud Services In North America Scorecard, Q2 2020 (Cont.)

| | Forrester's weighting | Sungard Availability Services | Tata Consultancy Services | TierPoint | Virtustream |
|--|-----------------------|-------------------------------|---------------------------|-----------|-------------|
| Strategy | 50% | 1.90 | 2.80 | 2.70 | 3.80 |
| Vision for the future of HPC and cloud | 20% | 3.00 | 3.00 | 3.00 | 3.00 |
| Execution roadmap | 20% | 1.00 | 1.00 | 3.00 | 3.00 |
| Market approach | 10% | 3.00 | 3.00 | 3.00 | 3.00 |
| Innovation roadmap | 15% | 1.00 | 3.00 | 1.00 | 5.00 |
| Planned enhancements | 15% | 3.00 | 3.00 | 3.00 | 5.00 |
| Partner ecosystem | 10% | 1.00 | 3.00 | 3.00 | 5.00 |
| Commercial model | 10% | 1.00 | 5.00 | 3.00 | 3.00 |
| Market presence | 0% | 3.00 | 3.08 | 3.32 | 3.00 |
| Customer numbers | 40% | 3.00 | 1.00 | 5.00 | 3.00 |
| Sales force | 20% | 3.00 | 5.00 | 3.00 | 3.00 |
| Revenue | 40% | 3.00 | 4.20 | 1.80 | 3.00 |

All scores are based on a scale of 0 (weak) to 5 (strong).

Vendor Offerings

Forrester included 11 vendors in this assessment: Atos, CenturyLink, Flexential, NTT DATA, Otava, OVHcloud, Rackspace Technology, Sungard Availability Services, Tata Consultancy Services, TierPoint, and Virtustream (see Figure 3).

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FIGURE 3 Evaluated Vendors And Product Information

| Vendor | Product evaluated | Product version evaluated |
|-------------------------------|---|---|
| Atos | Atos' Orchestrated Hybrid Cloud Portfolio | N/A |
| CenturyLink | CenturyLink Private Cloud Product Family: CenturyLink Private Cloud on VMware Cloud Foundation | VMware Cloud Foundation 3.5 & VMware Director 9.7 |
| Flexential | Flexential Hosted Private Cloud | N/A |
| NTT DATA | NTT DATA Dedicated Cloud | N/A |
| Otava | Otava Private Cloud Services | N/A |
| OVHcloud | SDDC Hosted Private Cloud and Baremetal Private Cloud | 6.7 |
| Rackspace Technology | Rackspace Private Cloud | N/A |
| Sungard Availability Services | Sungard Hosted Private Cloud Services | N/A |
| Tata Consultancy Services | TCS Enterprise Cloud Platform | N/A |
| TierPoint | TierPoint Hosted Private Cloud | N/A |
| Virtustream | Virtustream Enterprise Cloud | N/A |

Vendor Profiles

Our analysis uncovered the following strengths and weaknesses of individual vendors.

Leaders

› **Rackspace Technology offers platform breadth and a strong reputation for support.**

Rackspace Technology currently offers multiple hosted private cloud solutions based on Azure Stack, Hyper-V, OpenStack, Red Hat, VMware, VMware vSphere, and bare metal under its single brand umbrella. As an early proponent of OpenStack, Rackspace Technology still supports it for its dedicated followers, but future investments will favor Azure Stack and VMware-based solutions. Once a direct competitor to hyperscalers, it now pursues coexistence through an expanding range of management and migration services. Despite its small and medium-size business (SMB) heritage, Rackspace Technology has shown success in penetrating larger enterprise accounts with its influential “fanatical support” philosophy and significant record for innovation.

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Rackspace Technology earns appreciation from customer references for its support capabilities, but the same references say the firm's pricing model could be clearer. Paradoxically, the company's embrace of Service Blocks represents perhaps the most important packaging innovation in managed services in recent years. Although awareness of its applications management offerings isn't as high, the company has expanded its applications services significantly, most recently with its acquisition of Onica, RelationEdge, and Tricore.¹ With its strong data center presence, Rackspace Technology is a solid choice for both enterprise and SMB customers in North America for hosted private cloud services.

- › **Virtustream doubles down on mission critical applications with Epic.** Virtustream has never wavered from its ambition to be the cloud partner of choice for mission-critical workloads. The firm has clearly succeeded in supporting enterprise resource planning (ERP) with SAP, which still represents the majority of its revenues, and is now doubling down on healthcare with its embrace of Epic, a solution from Epic Systems. Virtustream's strongest market is in North America; it embraces technologies from its fellow member of the Dell/EMC family, VMware. Virtustream's xStreamCare Services are well received.

The Enterprise Cloud solution features a highly intuitive portal interface and strong self-service potential. Client references report generally positive experiences with Virtustream. Relative to its peers, Virtustream serves an audience from the largest tier of enterprises and service providers, with which the firm has extensive partnership arrangements. Virtustream is learning as it goes with its new Epic solution, but customer references are pleased with the firm's progress. Virtustream is a good fit for customers looking to host their most challenging mission-critical packaged applications — especially Epic and SAP — on private, rather than public, cloud platforms.

Strong Performers

- › **NTT DATA pursues transformation with its hosted private cloud offering.** NTT DATA inherited Dedicated Cloud when it acquired Dell Services in 2016 but has since become more active in cloud services across the board.² The company approaches hosted private cloud primarily as an engine for data center transformation. NTT DATA competes mostly with other broad services players rather than pure plays from this market. It offers VMware (including NSX, vCenter, and Vsan), Microsoft Azure Stack variants, and Microsoft Hyper-V, with the capability of deployment in the customer's data center. The Nucleus cloud management platform, at the heart of NTT DATA's Intelligent Automation Framework, has helped expand the company's automation capabilities.

With the help of the larger NTT Group, NTT DATA has streamlined its corporate structure to avoid redundancy in cloud offerings between itself and other entities, including clarity with the new NTT Ltd., for the former Dimension Data and NTT Communications offerings. NTT DATA is also pursuing a host of vertical industry-specific solutions. Client references give it high marks for partnership and overall capability, but some concerns remain about competitive pricing. North American data center locations are limited in number, and storage remains undifferentiated, despite an all-flash

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capability. Nevertheless, NTT DATA can provide attractive options for customers seeking hybrid cloud solutions in its core industries, including manufacturing, healthcare, government, and financial services.

- › **OVHcloud transitions from its vCloud Air acquisition toward a unified offering.** OVHcloud, a French cloud pure play, started in the hybrid cloud market 10 years ago with a VMware-centric solution. OVHcloud entered the North American hosted private cloud market by virtue of its acquisition of VMware's vCloud Air data center business, finalized in May 2017.³ Since then, OVHcloud has been transferring these customers out of their previous data center locations into OVHcloud facilities and creating consistency between offerings. Some of this effort includes leveraging unique features that include water-cooled server infrastructure assembled by the firm itself. The company also has a public cloud solution based on OpenStack and supports bare metal that can be used with or without hypervisors. OVHcloud is particularly strong in cloud infrastructure, giving a wide range of options. OVHcloud is also pursuing expansion into Asia.

OVHcloud enjoys a significantly stronger position in the European market, where it targets large enterprise clients and serves large and unique cloud infrastructure demands from high-tech industries. OVHcloud's virtual storage network offering is a draw with these customers. OVHcloud's customers in North America are primarily midsize entities. Its reference customers detect some inconsistencies in support and note a lack of overall market visibility compared with the hyperscaler providers with which the firm sometimes competes. OVHcloud is best suited for cloud infrastructure-focused solutions for customers of various sizes.

- › **Otava targets regulatory-intensive industries with hybrid cloud solutions.** Hybrid cloud specialist Otava offers a VMware-centric solution, with data center locations primarily in North America but also in Manchester, UK; Melbourne, Australia; and Sydney. Otava is in the midst of a product transition; a secure hybrid cloud offering dominates its current revenues, but its catalog also includes a Zerto-based disaster-recovery-as-a-service (DRaaS) offering and colocation. Veeam is another major partner. Otava pursues SMB customers with high compliance requirements but also frequently white-labels its offering for service providers. The result is a highly channel-centric market approach.

Otava competes primarily with national and regional providers in the North American market, including Expedient, Flexential, and TierPoint. Customer references have concerns about Otava's billing process and application of discounts. Otava's solution lacks strong automation capabilities, and its range of data center locations is limited compared with those of other suppliers. Nevertheless, Otava's solution will be of great interest to SMB customers, especially to service providers.

- › **CenturyLink pursues cross-Atlantic synergies in its hosted private cloud strategy.** CenturyLink's hybrid cloud strategy is to connect workloads and data wherever necessary, leveraging its compute and innate networking capabilities. Like many other suppliers in this evaluation, CenturyLink offers a private cloud primarily on VMware Cloud Foundation, front-ending its solution with VMware vCloud Director. CenturyLink's heritage gives it strength in its networking

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options from customer-to-cloud and cloud-to-cloud, along with its large North American data center footprint and physical server options, which include customer premises and third-party data centers. CenturyLink covers an extremely broad range of customers, including large enterprise customers that are particularly comfortable with CenturyLink's build-to-order approach.

CenturyLink's cloud capabilities are the result of several acquisitions. While it may still deliver a somewhat rocky initial transition of service, its operational services are improving. VMware-centric shops, both large enterprises and SMBs, that are looking for an experienced player with strengths in networking and with data center presence in the US and Europe should consider CenturyLink.

- › **Tata Consultancy Services combines private cloud with a global sourcing capability.** Tata Consultancy Services, best known as one of the largest of the India pure-play providers, has been aggressive in pursuit of cloud services, including private cloud and, more recently, public cloud. Like other global systems integrators (GSIs) in this evaluation, TCS considers hosted private cloud to be a key enabling element of a broader palette, with large enterprise customers in mind. The company has a very broad selection of associated services, such as its extremely wide range of application services, including migration factories, and its focus on managed infrastructure solutions, including mainframe-as-a-service. Its range for complementary services is as extensive as any other supplier's in this evaluation. It also brings its Igneo automation platform to bear as a focal point for automation. TCS offers hypervisor options, including KVM, Microsoft Hyper-V, and VMWare, and offers its service from 12 availability zones in North America.

Despite the considerable energy that TCS focuses on the Igneo platform, reference customers want to see additional automation in the vendor's hybrid cloud solution. They'd also like to see additional clarity in pricing, despite TCS's published services catalog. TCS is a good fit for enterprise customers seeking a wide range of cloud solutions and services that encompass modernization and migration.

- › **Atos emphasizes complementary applications services.** Atos, a broad-based GSI, complements its hosted private cloud offering, Digital Hybrid Cloud, with a broad array of services and solutions, including vertical solutions across seven target verticals. Atos delivers Azure Stack-based, OpenStack-based, and VMware-based environments as well as Digital Virtual Cloud on its VMware stack. Atos is also pursuing solutions for hybrid cloud environments with hyperscaler cloud providers like AWS Outposts and Microsoft Azure Stack. In particular, it has significantly expanded its applications services as a result of its acquisition of Syntel in 2018.⁴ Customers can access Atos' solutions through ServiceNow, cloud-native facilities, or DevOps tooling. It competes primarily with traditional GSIs and holds a close partnership with Google, which it features. Atos offers its services from 11 data center locations in North America.

Atos' solution lacks an intuitive user interface and strong integration capabilities, and its range of physical server options appears limited. However, this vendor has obvious complementary strength in applications and infrastructure management services. Atos is well suited for large enterprises seeking significant complementary services, including applications and infrastructure management.

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Contenders

- › **Flexential combines offerings from three formerly distinct entities.** Flexential's VMware-centric hosted private cloud solution represents the combination of three previously independent businesses in 2018, including iNetU, Peak 10, and ViaWest.⁵ Because of this, the process of unifying the product line is still ongoing. Flexential Hosted Private Cloud is at the heart of Flexential's value proposition, but its solution normally encompasses other elements of hybrid cloud computing, including colocation and managed services, including its new managed Kubernetes offering. Complementary advisory services are available, but Flexential's professional services staff is of modest size. The company targets midsize and larger customers in highly regulated industries with its network of six cloud nodes and 40 total data centers in North America. Additional cloud data center expansion is also underway. Flexential's converged solution became available in October 2019.

Flexential's portal interface is a relative weakness, and customer references state that navigating through inconsistency between accumulated data center locations can be an issue for the combined firm. However, they're otherwise pleased with the company's responsiveness. Flexential is best suited for infrastructure-centric requirements for midsize customers in its target verticals, including technology, B2B commerce, and retail.

- › **TierPoint offers strong support for private cloud on HCIs.** TierPoint acquired its Hosted Private Cloud service from Windstream in 2015.⁶ This relatively small player is nevertheless a significant one in hosted private cloud, with a large North American data center footprint and a solution focused primarily on hyperconverged infrastructures (HCIs) for its mostly midsize customer base. TierPoint offers three flavors of hosted private cloud: Hosted Private Cloud powered by Nutanix, with support for ESXi or AHV hypervisors; Hosted Private Cloud powered by VMware VxRail, which is fairly unique in this market; and a three-tier "traditional" hosted private cloud based on the VMware stack (ESXi, NSX, and vSAN).⁷ TierPoint leverages its larger portfolio by delivering high levels of network and onsite security for its sizeable North American data center footprint, which consists of 41 locations, primarily in the Midwest and Northeast. However, its data center footprint is entirely US-focused. The company also offers managed public cloud.

TierPoint's customers give it high marks for its responsiveness and support capabilities. Although it serves numerous Fortune 1000 companies, TierPoint is best considered as a solution for small-to-midsize enterprises looking for top customer service for their North American cloud usage, in verticals including technology, professional services, and finance.

- › **Sungard Availability Services offers synergy between private cloud/recovery services.** Best known for disaster recovery solutions, Sungard Availability Services brings resiliency to cloud services across private, virtual private, and colocation, along with the services and partnerships it has with large public cloud players. Sungard is evolving to a new architecture and toward the Sungard AS Modern Cloud, incorporating full support for the VMware stack on hyperconverged infrastructure. Doing this in a way that meets high resiliency expectations has been a particular

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focus. Sungard combines packaged offerings with a readiness to customize to specific customer requirements. Similarly, it will provide fully managed solutions but also allows for a self-managed approach. The company is best known for disaster recovery; complementary services include managed applications services. Its hosted private cloud strategy targets a range of customers extending from midsize firms to large enterprises, although it won't typically engage with the very largest enterprise customers.

For such a well-known company, Sungard's cloud-enabled data centers are relatively few. Moreover, its portal interface is undistinguished. Nevertheless, Sungard is well suited for customers seeking a hosted private cloud solution with adjacency to disaster recovery and managed applications services.

Evaluation Overview

We evaluated vendors against 32 criteria, which we grouped into three high-level categories:

- › **Current offering.** Each vendor's position on the vertical axis of the Forrester Wave graphic indicates the strength of its current offering. Key criteria for these solutions include compute infrastructure, network options, SLAs, contract agreements, and services and customer experience.
- › **Strategy.** Placement on the horizontal axis indicates the strength of the vendors' strategies. We evaluated vision, execution roadmap, innovation roadmap, and planned enhancements.
- › **Market presence.** Represented by the size of the markers on the graphic, our market presence scores reflect each vendor's revenue, sales force, and customer numbers.

Vendor Inclusion Criteria

Forrester included 11 vendors in the assessment: Atos, CenturyLink, Flexential, NTT DATA, Otava, OVHcloud, Rackspace Technology, Sungard Availability Services, Tata Consultancy Services, TierPoint, and Virtustream. Each of these vendors has:

- › **Sufficient revenue from North America.** Included vendors must have at least 30% of their hosted private cloud services revenue coming from North America.
- › **Sufficient hosted private cloud revenue.** Included vendors must have at least \$15 million in hosted private cloud services revenue.
- › **At least two data centers in North America.** Included vendors must have data centers located in at least two different North American cities/geographic areas.
- › **A generally available hosted cloud solution.** Each of the vendors had services available as of November 1, 2019.
- › **Dedicated compute resources.** Customers have access to dedicated servers accessed only by that customer, even when those resources aren't in use.

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- › **Automated, self-service provisioning.** Virtual resources can be provisioned through a cloud platform portal via an automated self-service portal. The vendor gives permissions to provision and access this portal through role-based access control (RBAC).
- › **A real-time or near-real-time resource usage dashboard.** Resource usage is available in a dashboard showing current health, status, and individual resource allocation for each user and admin.
- › **Default management up to the hypervisor or OS level.** Vendors manage the environment up to the hypervisor level or one level above the OS. Both models are included in this evaluation. This places the management burden of the data center, infrastructure, and element management software on the vendor.
- › **Significant market adoption and interest.** Forrester has seen evidence of significant adoption and interest among enterprise clients in the North American region, as demonstrated by customer numbers, surveys, and client inquiry calls.

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Supplemental Material

Online Resource

We publish all our Forrester Wave scores and weightings in an Excel file that provides detailed product evaluations and customizable rankings; download this tool by clicking the link at the beginning of this report on Forrester.com. We intend these scores and default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs.

The Forrester Wave Methodology

A Forrester Wave is a guide for buyers considering their purchasing options in a technology marketplace. To offer an equitable process for all participants, Forrester follows [The Forrester Wave™ Methodology Guide](#) to evaluate participating vendors.

In our review, we conduct primary research to develop a list of vendors to consider for the evaluation. From that initial pool of vendors, we narrow our final list based on the inclusion criteria. We then gather details of product and strategy through a detailed questionnaire, demos/briefings, and customer reference surveys/interviews. We use those inputs, along with the analyst's experience and expertise in the marketplace, to score vendors, using a relative rating system that compares each vendor against the others in the evaluation.

We include the Forrester Wave publishing date (quarter and year) clearly in the title of each Forrester Wave report. We evaluated the vendors participating in this Forrester Wave using materials they provided to us by February 14, 2020, and did not allow additional information after that point. We encourage readers to evaluate how the market and vendor offerings change over time.

In accordance with [The Forrester Wave™ Vendor Review Policy](#), Forrester asks vendors to review our findings prior to publishing to check for accuracy. Vendors marked as nonparticipating vendors in the Forrester Wave graphic met our defined inclusion criteria but declined to participate in or contributed only partially to the evaluation. We score these vendors in accordance with [The Forrester Wave™ And The Forrester New Wave™ Nonparticipating And Incomplete Participation Vendor Policy](#) and publish their positioning along with those of the participating vendors.

Integrity Policy

We conduct all our research, including Forrester Wave evaluations, in accordance with the [Integrity Policy](#) posted on our website.

Endnotes

¹ Source: "Rackspace Announces Completion of TriCore Solutions Acquisition," Rackspace Technology press release, June 20, 2017 (<https://www.rackspace.com/en-ph/newsroom/rackspace-announces-completion-tricore-solutions-acquisition>); "Rackspace Acquires RelationEdge to Broaden Application Services Portfolio for Customers," Rackspace

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Technology press release, May 17, 2018 (<https://www.rackspace.com/newsroom/rackspace-acquires-relationedge-to-broaden-application-services-portfolio>); and “Rackspace Completes Acquisition of Onica,” Rackspace Technology press release, December 3, 2019 (<https://www.rackspace.com/newsroom/rackspace-completes-acquisition-onica>).

- ² Source: “NTT DATA Closes Acquisition of Dell Services,” NTT DATA press release, November 6, 2016 (<https://in.nttdata.com/en/news/nttservices/2016/november/ntt-data-closes-acquisition-of-dell-services>).
- ³ Source: “OVH Completes Acquisition of VMware’s vCloud Air Business,” OVHcloud press release, May 8, 2017 (<https://us.ovhcloud.com/press/press-releases/2017/ovh-completes-acquisition-vmwares-vcloud-air-business>).
- ⁴ Source: “Atos digital leadership strengthened by the completion of the acquisition of the US-based Syntel,” Atos press release, October 9, 2018 (https://atos.net/en/2018/press-release_2018_10_09/atos-digital-leadership-strengthened-completion-acquisition-us-based-syntel).
- ⁵ Source: “Peak 10 + ViaWest Rebrands as Flexential to Bolster Leading Hybrid IT Market Position,” Flexential press release, January 18, 2018 (<https://www.flexential.com/resources/press-release/peak-10-viawest-rebrands-flexential-bolster-leading-hybrid-it-market>).
- ⁶ Source: “Windstream Completes Sale of Data Center Assets to TierPoint,” Windstream Communications press release, December 18, 2015 (<https://investor.windstream.com/news/news-details/2015/Windstream-Completes-Sale-of-Data-Center-Assets-to-TierPoint/default.aspx#:~:text=LITTLE%20ROCK%2C%20Ark.%20%2C%20Dec,transaction%20valued%20at%20%24575%20million%20>).
- ⁷ AVH is a native virtualization included in Nutanix’s Enterprise Cloud OS.

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