ISG Provider Lens®

Private/Hybrid Cloud – Data Center Services

Colocation Services

A research report that compares the strengths, challenges and unique selling points of the providers

Customized report courtesy of:

green

QUADRANT REPORT | JUNE 2025 | SWITZERLAND

Table of Contents

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Companies are reassessing their priorities and moving from a cloud-first approach to a differentiated cloud model

More and more companies are recognizing the challenges and limitations that come with a dependence on public cloud services. For this reason, they are increasingly turning their focus to private and hybrid cloud infrastructures. This strategic shift is being driven by a number of factors, including concerns about data security and regulatory compliance, increased performance and a desire for greater control over IT resources. Adopting private and hybrid cloud environments, organizations are able to leverage the benefits of cloud computing while effectively meeting specific operational, regulatory and security requirements.

ISG has found that a growing number of organizations are implementing hybrid cloud infrastructures. These solutions provide the necessary flexibility, scalability and agility and enable precise control over data residency, security and costs. In light of increasing economic uncertainties, companies have been actively looking for strategies to increase the efficiency and cost-effectiveness of their IT investments over the last four quarters.

In this context, CTOs are increasingly faced with the challenge of making their IT expenditure transparent. As a result, many companies are developing targeted strategies to optimize their IT costs to rationalize budgets and maximize the return on their technology investments. This includes the in-depth analysis of existing IT infrastructures, the identification of potential savings and the introduction of innovative approaches such as hybrid cloud computing, automation and outsourcing. Such measures lead to greater operational efficiency and financial resilience.

In addition, companies are increasing their investments in cloud resources such as FinOps, where responsibility for the consumption of such resources is specifically transferred to the IT teams. This promotes conscious management of resource consumption and supports sustainable cost control in the digital transformation.

Providers support their customers in **achieving** the **optimum balance** between **private and public cloud solutions**.

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Executive Summary

The following significant developments were observed in the past year:

Optimized use of data centers: In today's world, companies are facing a fundamental shift in the way they manage their data centers. The trend shows a significant decrease in physical space requirements in their own facilities. Increasingly, companies are opting for innovative alternatives such as public cloud services or colocation providers. This strategic change, of course, is driven by various factors. In particular, the goals of reducing costs, increasing scalability and maximizing operational efficiency play a decisive role. At the same time, colocation providers are increasingly investing in the expansion of their data center resources. These investments are a clear indication of the growing demand for flexible colocation services, as reliable, secure and scalable infrastructure solutions are required to meet changing IT requirements. Using the expertise and infrastructure provided by colocation providers, companies can significantly optimize their IT management processes. This gives them great flexibility, agility and resilience while allowing them to focus more on their core objectives. Adapting to these new framework conditions is a necessity and an opportunity for companies to position themselves for the future.

Increasing use of AI and ML technologies: This year, ISG has seen a significant increase in solutions that rely on AI-powered cognitive capabilities and ML tools and services. These technologies make it possible to achieve high-quality results, accelerate service delivery, increase IT efficiency and create a superior UX. Providers have developed innovative tools that use data from various sources to predict downtime and take proactive measures to prevent such incidents. In particular, the use of AI for IT operations (AIOps) has become increasingly relevant. This technology comprehensively monitors all aspects of the hybrid environment and provides predictive analyses for incident management. As a result, triggers are sensibly bundled, disruptions are minimized and automated correlations are created to identify the most likely cause using ML technology.

Focus on sustainability: National and international providers of cloud and colocation services use advanced cooling methods and waste heat from data centers to provide district heating and for agricultural and industrial purposes. This dual use enables companies to achieve their sustainability goals and contribute to environmental protection with optimized energy-saving measures.

Hybrid and multicloud strategies: More and more companies are turning to hybrid and multicloud approaches to make their IT infrastructure more efficient. Data center outsourcing providers offer solutions that can be seamlessly connected to public cloud services such as AWS, Azure and Google Cloud. These offerings enable companies to achieve flexibility, scalability and redundancy across different environments.

Considered investments in generative AI (GenAI): More and more companies are working to recognize the transformative potential of GenAI for their business processes. The comprehensive analysis of the costs and benefits of these technologies requires careful consideration to distinguish between unrealistic expectations and achievable results. Although the cost factor remains of central importance, it should be noted that significant savings take time to fully materialize. This increasing demand for GenAI requires additional capacity in data centers, while at the same time, the solutions are easily accessible due to availability via cloud platforms; leading hyperscalers already offer powerful voice models.

In the long term, GenAI is expected to play an increasingly central role. However, many organizations currently face the challenge of allocating adequate budgets for GenAI initiatives, which are often the responsibility of IT. These investments focus on equipping organizations with actionable insights, predictive analytics and intelligent automation solutions.

From ML models to powerful analytics tools to AI-powered tools, service providers are striving to give companies the tools and capabilities they need to achieve key business outcomes and drive innovation. These efforts are also designed to develop new revenue models and help companies realize the full transformative potential of AI technologies.

Focus on security and compliance: In light of growing cyberthreats and strict data protection

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regulations such as the GDPR, security aspects and legal compliance are becoming increasingly important in data center outsourcing. Providers are focusing on comprehensive security strategies that include physical security measures, network segmentation, encryption and compliance checks to protect sensitive information and ensure compliance with legal requirements.

Partnerships and alliances: Data center outsourcing providers are forming strategic partnerships and alliances with technology providers, cloud service providers and service integrators to expand their service portfolio and meet customers' changing needs. Such collaborations enable the smooth integration of services and provide access to advanced technologies and comprehensive solutions for hybrid IT environments.

Legacy challenges: Many organizations are reliant on legacy systems for financial, operational and cultural reasons. While some may not have the necessary skills to migrate to the cloud or make the most of their resources, others, especially those not under intense pressure to digitally transform, lack the incentive or a compelling business case to make the necessary system change.

The increasing demand for cloud computing and the growing interest in GenAI are leading to high investments in the expansion of data centers and the construction of new facilities that have the necessary capacity for large AI workloads. Providers are investing in the development of energy-efficient CPU and GPU technologies; colocation and hosting service providers are investing primarily in clean energy and decarbonization initiatives.

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Provider Positioning

Page 1 of 8

	Managed Services — Large Accounts	Managed Services — Midmarket	Managed Hosting — Large Accounts	Managed Hosting — Midmarket	Colocation Services	AI-Ready Infrastructure Consulting
Abraxas	Market Challenger	Not In	Market Challenger	Not In	Not In	Not In
Accenture	Leader	Not In	Not In	Not In	Not In	Leader
ACP	Not In	Contender	Not In	Not In	Not In	Not In
All for One Group	Not In	Product Challenger	Not In	Not In	Not In	Not In
AtlasEdge	Not In	Not In	Not In	Not In	Product Challenger	Not In
Atos	Leader	Not In	Leader	Not In	Not In	Product Challenger
Aveniq	Not In	Leader	Leader	Not In	Not In	Not In
Axians	Not In	Leader	Not In	Not In	Not In	Not In
Bancadati	Not In	Not In	Not In	Not In	Contender	Not In
Bechtle	Not In	Market Challenger	Not In	Leader	Not In	Not In
Bedag Informatik	Not In	Not In	Contender	Not In	Not In	Not In

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Provider Positioning

Page 2 of 8

	Managed Services — Large Accounts	Managed Services — Midmarket	Managed Hosting — Large Accounts	Managed Hosting — Midmarket	Colocation Services	AI-Ready Infrastructure Consulting
Birlasoft	Product Challenger	Not In	Product Challenger	Not In	Not In	Not In
BitHawk	Leader	Not In	Not In	Not In	Not In	Contender
BrainServe	Not In	Not In	Not In	Not In	Product Challenger	Not In
BT	Contender	Not In	Contender	Not In	Not In	Not In
CANCOM	Not In	Rising Star ★	Not In	Not In	Not In	Not In
Capgemini	Leader	Not In	Not In	Not In	Not In	Leader
Centron	Not In	Contender	Not In	Contender	Not In	Not In
CGI	Contender	Not In	Not In	Not In	Not In	Not In
CKW	Not In	Not In	Not In	Contender	Contender	Not In
Coforge	Not In	Contender	Not In	Contender	Not In	Not In
Cognizant	Product Challenger	Not In	Not In	Not In	Not In	Product Challenger

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Provider Positioning

Page 3 of 8

	Managed Services — Large Accounts	Managed Services — Midmarket	Managed Hosting — Large Accounts	Managed Hosting — Midmarket	Colocation Services	AI-Ready Infrastructure Consulting
ColoBâle	Not In	Not In	Not In	Not In	Contender	Not In
Computacenter	Not In	Not In	Not In	Not In	Not In	Contender
Controlware	Not In	Contender	Not In	Not In	Not In	Not In
CONVOTIS	Not In	Leader	Not In	Leader	Contender	Contender
Data11	Not In	Not In	Not In	Not In	Contender	Not In
Datasource	Not In	Not In	Not In	Not In	Contender	Not In
Devoteam	Contender	Market Challenger	Not In	Not In	Not In	Not In
Digital Realty	Not In	Not In	Not In	Not In	Leader	Not In
DXC Technology	Product Challenger	Not In	Not In	Not In	Not In	Contender
Econis	Not In	Contender	Contender	Not In	Not In	Not In
ELCA/EveryWare	Not In	Leader	Not In	Leader	Product Challenger	Contender

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Provider Positioning

Page 4 of 8

	Managed Services — Large Accounts	Managed Services — Midmarket	Managed Hosting — Large Accounts	Managed Hosting — Midmarket	Colocation Services	AI-Ready Infrastructure Consulting
eqipe	Not In	Not In	Not In	Contender	Not In	Not In
Equinix	Not In	Not In	Not In	Not In	Leader	Not In
exaSys	Not In	Not In	Not In	Not In	Market Challenger	Not In
Fujitsu	Contender	Not In	Product Challenger	Not In	Not In	Not In
Green	Not In	Leader	Not In	Leader	Leader	Contender
HCLTech	Leader	Not In	Not In	Not In	Not In	Leader
Hexaware	Contender	Not In	Not In	Not In	Not In	Not In
Hosttech	Not In	Not In	Not In	Contender	Product Challenger	Not In
IBM	Not In	Not In	Not In	Not In	Not In	Product Challenger
Infomaniak	Not In	Not In	Product Challenger	Not In	Contender	Not In
Infosys	Not In	Not In	Not In	Not In	Not In	Product Challenger

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Provider Positioning

Page 5 of 8

	Managed Services — Large Accounts	Managed Services — Midmarket	Managed Hosting — Large Accounts	Managed Hosting — Midmarket	Colocation Services	AI-Ready Infrastructure Consulting
ITpoint Systems	Not In	Contender	Not In	Contender	Not In	Not In
ITRIS One	Not In	Not In	Not In	Contender	Not In	Not In
IWB	Not In	Not In	Not In	Not In	Product Challenger	Not In
Kyndryl	Leader	Not In	Leader	Not In	Not In	Leader
LAKE Solutions	Not In	Contender	Not In	Not In	Not In	Not In
Leuchter IT	Not In	Not In	Not In	Market Challenger	Not In	Not In
LTIMindtree	Not In	Not In	Not In	Not In	Not In	Product Challenger
MTF	Not In	Leader	Not In	Leader	Not In	Not In
Naveum	Not In	Not In	Not In	Contender	Not In	Not In
Netcloud	Not In	Leader	Not In	Not In	Not In	Not In
Netskin	Not In	Not In	Not In	Contender	Not In	Not In

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Provider Positioning

Page 6 of 8

	Managed Services — Large Accounts	Managed Services — Midmarket	Managed Hosting — Large Accounts	Managed Hosting — Midmarket	Colocation Services	AI-Ready Infrastructure Consulting
nexellent	Not In	Not In	Contender	Not In	Not In	Not In
Nine Internet Solutions	Not In	Not In	Not In	Product Challenger	Not In	Not In
nLighten	Not In	Not In	Not In	Not In	Product Challenger	Not In
NorthC Datacenters	Not In	Not In	Not In	Not In	Rising Star ★	Not In
Novatrend	Not In	Not In	Contender	Not In	Not In	Not In
NTS Workspace	Not In	Not In	Not In	Not In	Leader	Not In
NTT DATA	Product Challenger	Not In	Product Challenger	Not In	Leader	Not In
Orange Business	Contender	Not In	Contender	Not In	Not In	Not In
ProCloud	Not In	Not In	Not In	Contender	Not In	Not In
Rackspace Technology	Rising Star ★	Not In	Product Challenger	Not In	Not In	Product Challenger
Safe Swiss Cloud	Not In	Not In	Not In	Product Challenger	Not In	Not In

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Provider Positioning

Page 7 of 8

	Managed Services — Large Accounts	Managed Services — Midmarket	Managed Hosting — Large Accounts	Managed Hosting — Midmarket	Colocation Services	AI-Ready Infrastructure Consulting
ServerTown	Not In	Not In	Not In	Contender	Not In	Not In
SmartIT Services	Not In	Not In	Not In	Contender	Not In	Not In
Sopra Steria	Contender	Not In	Contender	Not In	Not In	Not In
STACK Infrastructure	Not In	Not In	Not In	Not In	Leader	Not In
Stefanini	Not In	Contender	Not In	Not In	Not In	Not In
Swisscom	Leader	Leader	Leader	Leader	Leader	Leader
TCS	Leader	Not In	Not In	Not In	Not In	Product Challenger
Tech Mahindra	Not In	Not In	Not In	Not In	Not In	Product Challenger
ti&m	Leader	Not In	Leader	Not In	Not In	Not In
T-Systems	Product Challenger	Not In	Leader	Not In	Not In	Market Challenger
UMB	Leader	Not In	Not In	Not In	Not In	Not In

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Provider Positioning

Page 8 of 8

	Managed Services — Large Accounts	Managed Services — Midmarket	Managed Hosting — Large Accounts	Managed Hosting — Midmarket	Colocation Services	AI-Ready Infrastructure Consulting
Unisys	Product Challenger	Not In	Not In	Not In	Not In	Contender
Vantage Data Centers	Not In	Not In	Not In	Not In	Product Challenger	Not In
VSHN	Contender	Product Challenger	Not In	Not In	Not In	Not In
Wipro	Leader	Not In	Not In	Not In	Not In	Product Challenger
Zensar Technologies	Not In	Contender	Not In	Contender	Not In	Not In

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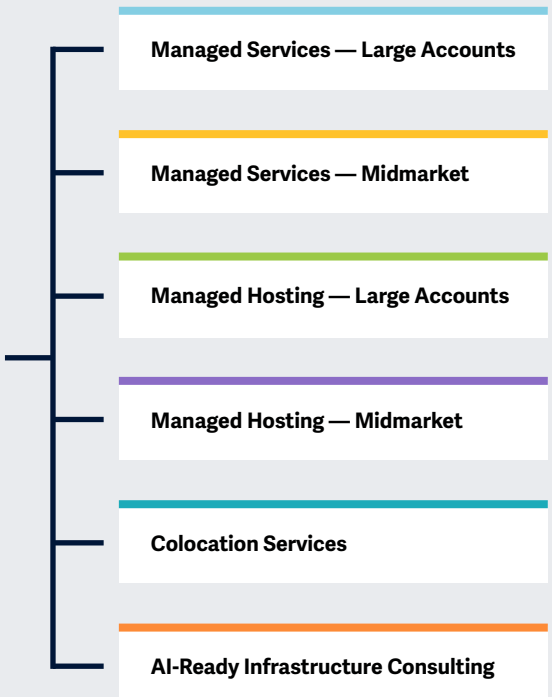
This study focuses on what ISG considers to be particularly important aspects for the **private/ hybrid cloud & data center sector in 2025**.



Simplified Illustration Source: ISG 2025

Definition

This study evaluates global and regional providers that offer hybrid cloud and data center services: Managed Services, Managed Hosting, Colocation Services and AI-Ready Infrastructure Consulting.

In today's digital age, organizations are increasingly turning to private and hybrid cloud computing to improve their operations and gain a competitive advantage. Private cloud infrastructures are growing in popularity as they provide more control while improving scalability, flexibility and cost efficiency in data management and storage. With the rise of AI and generative AI (GenAI) technologies, there is a need for powerful, robust and secure infrastructures capable of effectively handling these AI workloads.

Every organization has its own reasons for using a hybrid cloud, such as security, data location, regulations, control over assets and custom applications running on mainframes, for example. A hybrid cloud configuration offers more control and customization options while leveraging public cloud platforms. According to the ISG definition, a hybrid cloud combines existing on-premises infrastructure services with private and public clouds. Companies can use colocation and hosting providers and do not need to have their own data center to set up a hybrid cloud.

ISG has also observed that companies are requiring infrastructure service providers to implement ESG initiatives. The rapid increase in digital transformation initiatives is increasing energy demand and contributing to climate change, while regulatory requirements are mandating a faster transition to carbon neutrality.

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Scope of the Report

This ISG Provider Lens® Quadrant Report covers the following six service/solution quadrants: Managed Services — Large Accounts, Managed Services — Midmarket, Managed Hosting — Large Accounts, Managed Hosting — Midmarket, Colocation Services and AI-Ready Infrastructure Consulting.

The ISG Provider Lens® study Private/ Hybrid Cloud - Data Center Services offers business and IT decision-makers the following benefits:

- Transparent presentation of the strengths and weaknesses of relevant providers
- Differentiated positioning of providers by segment based on competitive strengths and portfolio attractiveness
- Focus on the regional market

The study provides an essential basis for positioning, relationship and go-to-market considerations. ISG Advisors and enterprise clients also use information from these reports to evaluate their current and potential new vendor relationships.

Provider Classifications

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

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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.

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.

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 follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

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.

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Colocation Services

Who Should Read This Section

This report is valuable for service providers offering **colocation services** in **Switzerland** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

IT and infrastructure leaders

Should read this report to analyze the capabilities of colocation service providers and the market advancements that impact the management and operation of key workloads.

Software development and technology leaders

Should read this report to understand providers' positioning, offerings and impact on ongoing software development at an enterprise level.

Sourcing, procurement and vendor management professionals

Should read this report to better understand the current landscape and partner ecosystem of colocation service providers in Switzerland.

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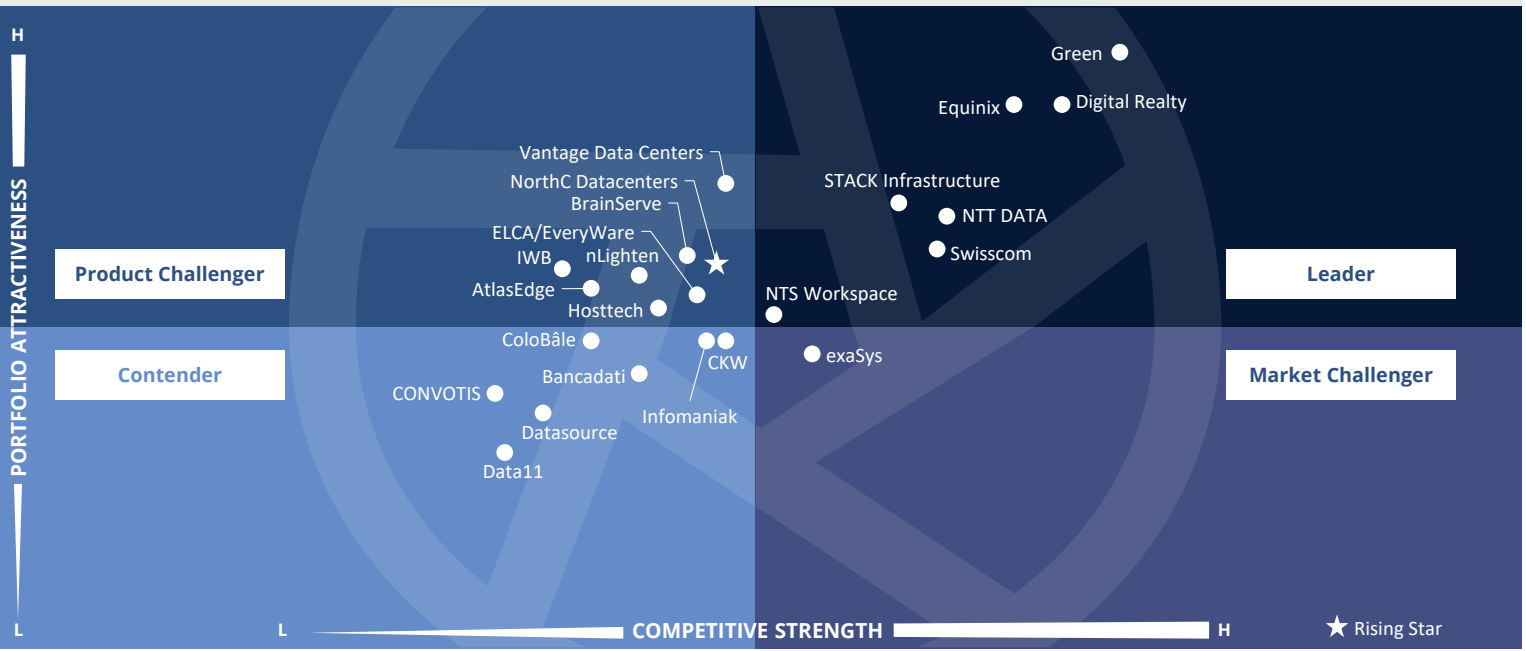
ISG Provider Lens

Source: ISG RESEARCH

Private/Hybrid Cloud – Data Center Services
Colocation Services

Switzerland 2025



This quadrant evaluates colocation providers that offer **highly available, certified data centers** with a **wide range of services and secure connectivity** for enterprises, hyperscalers, managed service providers and integrators.

Wolfgang Heinhaus

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Definition

This quadrant assesses colocation providers offering standardized data center operations for enterprise clients, where they rent space for servers and computing hardware in a third-party infrastructure space. At a minimum, providers are expected to offer building, cooling, power and security services while clients manage their hardware. Key provider offerings include high-quality data center setups and onboarding services, diverse connectivity with various carriers and telecommunication providers, low latency, high bandwidth for content delivery, and scalability and flexibility in services, with much focus on security and compliance to ensure data and infrastructure protection.

Enterprises expect a standardized and sophisticated data center setup, several carrier options, and low latency and high bandwidth, along with professional support, remote hands, and monitoring and maintenance capabilities. Colocation providers are keeping up with enterprise demand for advanced infrastructure that can accommodate AI workload requirements such as high-performance computing, enhanced network connectivity through software-defined interconnections (SDI), data sovereignty and edge-ready colocation services. They are expected to offer a secure, high-performance environment for critical IT infrastructure by leveraging next-generation AI and ML technologies that are adaptive to changing business needs.

Eligibility Criteria

1. Own facilities that offer **modern** and **standardized data center** architecture design for colocation
2. Offer **secure** and high-quality **network** equipment, appliances, and connectivity systems
3. Guarantee **power density** to support current and future technologies
4. Provide at least **five layers** of **data center security**
5. Have relevant **certifications** such as SSAE 16, HIPAA, ISO 14001, ISO 22301, ISO 27001, ISO 50001, EN 50600, PCI DSS, NIST2, FISMA, and SOC Type 1 and 2
6. Be amenable to SLAs related to **hands-and-feet support** and hardware replacement
7. Offer **facilities with traffic exchange points** in proximity to users and hyperscalers
8. Offer **disaster recovery and backup solutions**
9. Provide **modular** and **scalable** solutions to allow **rapid deployment** for custom or temporary needs
10. Have measures to improve **sustainability**
11. Offer facilities that meet industry standards for security and compliance, and support clients' sovereignty objectives

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Observations

The demand for colocation services continues to rise unabated. The Swiss data center market continues to be in high demand; new data centers that are planned for operation this year are being built or are in the planning stage. Green is currently building three more data centers in Zurich, NorthC Datacenters opened its fourth data center in Winterthur in March 2025, Stack Infrastructure is building its fourth data center in Beringen and Vantage Datacenters is expanding with a second data center in Glattfeld. The main location with around 30 data centers and 115,000 m² of whitespace is still the canton of Zurich, followed by Bern with 11 data centers and 23,000 m² of space. Companies are giving up all or part of their own data centers due to the inability to meet compliance requirements, the prohibitively high costs of upgrading, and a shortage of qualified personnel. National and international companies, public cloud providers, system houses, administrations and increasingly, the healthcare sector are seeing the enormous benefits of high availability and security and fast connections to other data centers and participants and direct connections to cloud providers. These advantages make it easy to set up and operate hybrid or multicloud scenarios. Data center operators are constantly modernizing their infrastructure, improving sustainability, offering high scalability and higher power densities and providing liquid cooling for the operation of high-performance systems for AI-supported workloads.

From the 82 companies assessed for this study, 23 qualified for this quadrant, with seven being Leaders and one Rising Star.

Digital Realty

Digital Realty: is one of the world's largest colocation providers, with over 300 data centers. In Switzerland, the company operates three advanced data centers in Zurich.

Equinix

Equinix umaintains around 270 data centers (IBX) worldwide and is one of the largest providers with an outstanding range of colocation services. In Switzerland, three data centers are available in Zurich and two in Geneva, which enable geo-redundant data exchange.

Green is one of the most innovative and imaginative colocation providers in Switzerland. It operates six high-availability data centers in Zurich and three more will soon be added. The new data centers will be built using highly efficient materials.

NTS Workspace

NTS Workspace maintains three data centers in Bern and Zurich. The colocation offer includes a flexible portfolio. The modernized backbone offers fast connections to other participants, both nationally and internationally.

NTT DATA maintains a large data center in Zurich with 10,500 m² of white space and offers state-of-the-art colocation services and comprehensive connectivity all over the world.

STACK Infrastructure

STACK Infrastructure operates 23 colocation data centers at 15 locations in the U.S., Asia and EMEA for demanding large companies and cloud providers. In Switzerland, three data centers are available in the Zurich and Geneva area; a fourth is currently under construction.

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Swisscom has increased the number of data centers by nine, thereby strengthening its colocation offering in western Switzerland.

NorthC Datacenters

NorthC Datacenters (Rising Star) took over three data centers from Netrics in Münchenstein and Biel in 2022 and is already very successful in the market. The high demand has led to a fourth data center in Winterthur, which has been available since March 2025.

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Leader

"Green has been impressing customers for years with its expertise, customer focus and operational excellence in meeting the highest demands."

Wolfgang Heinhaus

Green

Overview

Green, headquartered in Lupfig, is the most successful data center provider in Switzerland and operates six high-performance data centers in the Zurich area. The Swiss provider is currently doubling its data center capacity with three additional data centers. More than 500 demanding companies from the banking, insurance, healthcare, pharmaceutical, industrial, integrator and hyperscaler sectors are highly satisfied with the excellent facilities and services. Green is the only Swiss provider to have been awarded an M&O Stamp of Approval by the Uptime Institute for top performance in management and operations.

Strengths

Outstanding and future-oriented colocation services: Green impresses with high-quality colocation services and comprehensive support from local experts who develop and implement customized designs for the customer. Green also offers colocation solutions for high power densities and new hybrid cooling solutions. With consistent operational excellence, international certifications and continuous development, Green is the first choice for data centers.

Exemplary energy efficiency: Green invests in high energy efficiency and is continuously evolving. Its architecture, facilities and systems are well coordinated. Waste heat recovery, which Green implemented early on as a pioneer, is part of Green's reference architecture. In the community where the Zurich Metro Campus is located and its neighboring areas, 11,500 households benefit from climate-neutral heating.

Network connections and security: Green offers a wide range of state-of-the-art connectivity technologies. Among other things, the company provides Cloud Connects for direct access to all leading cloud providers and connects customers to 950 global data center locations. Green is also a core site of the Swiss IX and offers direct connections to over 50 network operators.

Caution

With four data center locations, Green is the perfect choice for companies looking for geo-redundancy. Due to increasing demand, Green should consider expanding by establishing further locations.

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Appendix

Methodology & Team

The market research study "ISG Provider Lens® 2025 - Private/Hybrid Cloud – Data Center Services" analyzes the relevant software providers/service providers in the Switzerland market on the basis of a multi-stage market 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 study will include data from the ISG Provider Lens® program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. The data collected for this report represent information that ISG believes to be current as of May 2025 for providers that actively participated and for providers that did not. ISG recognizes that many mergers and acquisitions may have occurred since then, but this report does not reflect these changes.

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 Center 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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Senior Analyst

Ulrich is significantly involved in the ISG Provider Lens® quadrant studies involved. He mainly writes about digital technology, IT services and cloud technology. His research agenda includes the assessment of the impact the digital transformation that Analysis of market dynamics, the Positioning of providers on the market, the writing of POVs, the Observation of the software market and the identification of opportunities for Company.

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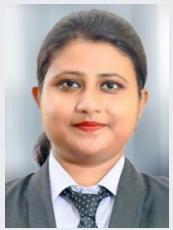
Analyst for corporate context and overview



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Senior Research Analyst

As a Senior Research Analyst at ISG, Arpita is responsible for supporting and co-authoring the Provider Lens® studies on Public Cloud and Private Hybrid Cloud Data Center Solutions & Services. She supports the Lead Analysts in several regions in the research process and writes the Global Summary Report as well as focus reports. She also works with the lead analysts to evaluate providers and gain insights into market trends and drivers.

She has led and supported ad hoc research assignments in the investment banking, healthcare, energy and information and communications technology sectors. A significant part of her work during this time has also involved supporting technology sales in presales market research. Arpita is an expert in insight generation, market sizing and forecasting, storyboarding, design thinking, financial analysis, go-to-market strategies, competitive analysis and benchmarking. Her overarching areas of interest are technology, finance and corporate strategy.

Study Sponsor

Heiko Henkes

Director and Principal Analyst

Heiko Henkes serves as Director and Principal Analyst at ISG, overseeing the Global ISG Provider Lens® (IPL) Program for all IT Outsourcing (ITO) studies alongside his pivotal role in the global IPL division as a strategic program manager and thought leader for IPL lead analysts.

Henkes heads Star of Excellence, ISG's global customer experience initiative, steering program design and its integration with IPL and ISG's sourcing practice. His expertise lies in guiding companies through IT-based business model transformations, leveraging his deep understanding of continuous transformation, IT competencies, sustainable business strategies and change management in a cloud-AI-driven business landscape. Henkes is known for his contributions as a keynote speaker on digital innovation, sharing insights on using technology for business growth and transformation.

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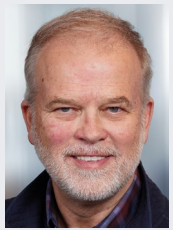
IPL Product Owner



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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