

# The Forrester Wave™: Hosted Private Cloud Services In Europe, Q2 2020

The Seven 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 in Europe, we identified the seven most significant ones — Atos, CenturyLink, Orange, OVHcloud, Rackspace Technology, Sungard Availability Services, and Tata Consultancy Services (TCS) — 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 OVHcloud Lead The Pack**

Forrester's research uncovered a market in which Rackspace Technology and OVHcloud are Leaders; Orange, CenturyLink, Tata Consultancy Services, and Atos are Strong Performers; and Sungard Availability Services is a Contender.

### **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 services.

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June 24, 2020

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### Related Research Documents

- [Adoption Profile: Hosted Private Cloud In Europe, Q2 2020](#)
- [Now Tech: Hosted Private Cloud, Q1 2020](#)
- [Research Overview: Benchmark Your Enterprise Cloud Adoption](#)



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## 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 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 in Europe, in particular, embrace hosted private cloud, in part because of its stronger suitability for regulatory compliance amid a welter of data protection requirements.

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” pre-sized infrastructure alternatives, support for custom configurations, and broad storage options are 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, and 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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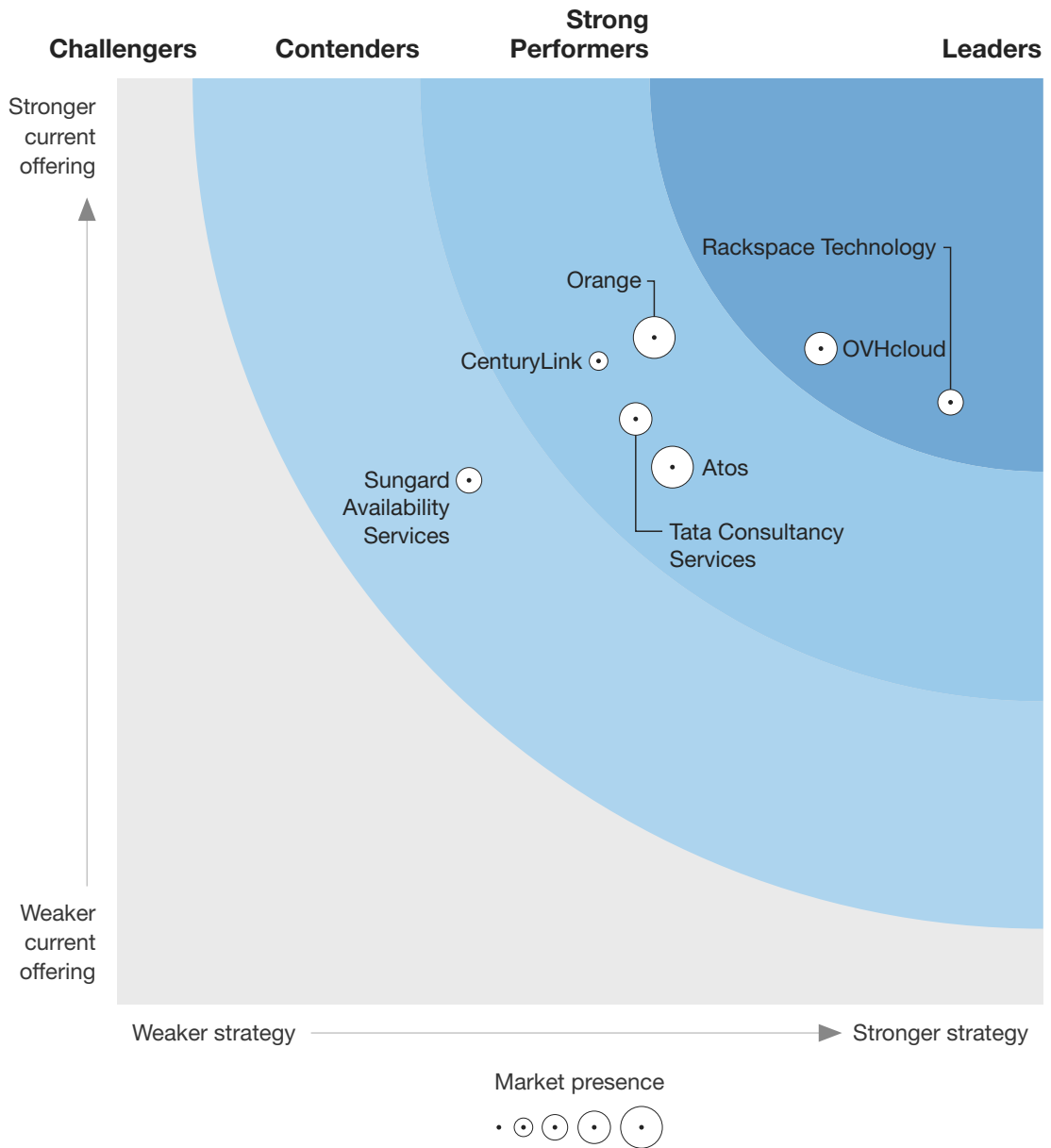
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FIGURE 1 Forrester Wave™: Hosted Private Cloud Services In Europe, Q2 2020

## THE FORRESTER WAVE™

### Hosted Private Cloud Services In Europe

Q2 2020



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**FIGURE 2** Forrester Wave™: Hosted Private Cloud Services In Europe Scorecard, Q2 2020

	Forrester's weighting	Atos	CenturyLink	Orange	OVHcloud	Rackspace Technology	Sungard Availability Services	Tata Consultancy Services
<b>Current offering</b>	50%	2.90	3.47	3.60	3.54	3.25	2.83	3.16
Self-service portal and user interface	5%	1.00	3.00	5.00	1.00	3.00	1.00	3.00
Permissions, roles, and image library	5%	3.00	3.00	3.00	5.00	5.00	3.00	3.00
Integration capabilities	5%	3.00	3.00	5.00	3.00	5.00	3.00	3.00
Compute infrastructure	5%	2.00	3.00	3.00	2.00	3.00	4.00	4.00
Network options	10%	3.00	5.00	5.00	3.00	3.00	2.00	2.00
Security capabilities	5%	3.00	3.00	3.00	3.00	5.00	3.00	5.00
Storage options	5%	3.00	5.00	3.00	5.00	3.00	3.00	3.00
Automation capabilities	5%	3.00	3.00	1.00	1.00	5.00	3.00	3.00
Data center locations	10%	5.00	5.00	5.00	5.00	3.00	1.00	3.00
Certifications	10%	3.00	3.00	5.00	5.00	1.00	3.00	5.00
Service-level agreements (SLAs)	10%	3.00	3.00	3.00	3.00	3.00	5.00	3.00
Contract agreements	5%	1.00	3.00	3.00	3.00	3.00	5.00	3.00
Services and customer experience	10%	1.80	2.40	3.00	4.20	3.80	1.80	2.40
Price scenarios	5%	3.00	3.00	1.00	5.00	1.00	3.00	1.00
Complementary advisory services	5%	4.34	3.66	3.00	2.34	4.32	3.00	4.34

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 Europe Scorecard, Q2 2020 (Cont.)

	Forrester's weighting	Atos	CenturyLink	Orange	OVHcloud	Rackspace Technology	Sungard Availability Services	Tata Consultancy Services
<b>Strategy</b>	50%	3.00	2.60	2.90	3.80	4.50	1.90	2.80
Vision for the future of HPC and cloud	20%	3.00	3.00	3.00	5.00	5.00	3.00	3.00
Execution roadmap	20%	3.00	3.00	3.00	5.00	5.00	1.00	1.00
Market approach	10%	3.00	1.00	5.00	5.00	3.00	3.00	3.00
Innovation roadmap	15%	1.00	3.00	1.00	3.00	5.00	1.00	3.00
Planned enhancements	15%	5.00	3.00	3.00	3.00	3.00	3.00	3.00
Partner ecosystem	10%	3.00	3.00	3.00	1.00	5.00	1.00	3.00
Commercial model	10%	3.00	1.00	3.00	3.00	5.00	1.00	5.00
<b>Market presence</b>	0%	4.04	1.40	4.68	3.40	3.00	3.00	3.40
Customer numbers	40%	5.00	1.00	5.00	5.00	3.00	3.00	1.00
Sales force	20%	5.00	3.00	5.00	1.00	3.00	3.00	5.00
Revenue	40%	2.60	1.00	4.20	3.00	3.00	3.00	5.00

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

## Vendor Offerings

Forrester included seven vendors in this assessment: Atos, CenturyLink, Orange, OVHcloud, Rackspace Technology, Sungard Availability Services, and Tata Consultancy Services (see Figure 3). We invited Tieto and Vodafone to participate in this Forrester Wave, but they chose not to participate, and we couldn't make enough estimates about their capabilities to include them in the assessment as nonparticipating vendors.

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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 Family — CenturyLink Private Cloud on VMware Foundation	9.7
Orange	Orange Hosted Dedicated Cloud and Orange Hosted Private Cloud	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

## Vendor Profiles

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

### Leaders

› **Rackspace Technology brings “fanatical support” to the hosted private cloud market.**

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. Once notable for its OpenStack contributions, Rackspace Technology still supports OpenStack for its dedicated followers, but future investments will favor Azure Stack and the VMware stack. Rackspace Technology stands out by virtue of its customer-centric, fanatical-support strategy as well as its coexistence with hyperscale providers through its management and migration services. Despite its small and medium-size business (SMB) focus, with a location in West London and seven data centers in Amsterdam, Frankfurt, London, and Moscow, Rackspace Technology has shown success in penetrating larger enterprises, even in Europe.

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

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isn't as high, the company has expanded its applications services significantly, most recently with its acquisition of Onica, RelationEdge, and Tricore.<sup>1</sup> This vendor doesn't offer direct General Data Protection Regulation (GDPR) certification. Rackspace Technology is a solid choice for both enterprise and SMB customers for hosted private cloud services.

- › **OVHcloud unifies services while ensuring a Cloud Act free European offering.** OVHcloud, a cloud pure play headquartered in France, offers a VMware-centric solution as its primary offering for hosted private cloud. The company also has a public cloud solution based on OpenStack and supports bare metal that can be used with or without hypervisors. OVHcloud acquired VMware's vCloud Air offering in 2017, and since that time, it has focused on consistency.<sup>2</sup> OVHcloud is also creating definitive separation between geographies to improve its European data privacy stance by creating a free Cloud Act European offering. In Europe, OVHcloud delivers unique data center capabilities by leverage water-cooled server infrastructure assembled by the firm itself. OVHcloud is also pursuing expansion into Asia.

While it's active in both North American and Europe, OVHcloud's position is stronger in the European market, where it targets large enterprise clients with its 17 data center locations offering hosted private cloud services across the continent. OVHcloud's virtual storage network offering is a plus with these customers. 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. This vendor will expand its server infrastructure options significantly in 2020. OVHcloud is best suited for organizations focused on strong cloud infrastructure solutions for customers of various sizes.

### Strong Performers

- › **Orange combines its services with its recent Basefarm acquisition.** Along with its cloud solutions, Orange offers a range of services, from initial consulting through apps management, including enterprise resource planning (ERP) and managed workplace services. Orange has two VMware-based private cloud solutions: a hosted dedicated solution that can run either on- or off-premises and a hosted private solution intended for mission-critical workloads, which it acquired in 2018 from Basefarm, a cloud service provider active primarily in Austria, Germany, The Netherlands, Norway, and Sweden.<sup>3</sup> The combined service offerings extend to 34 data center locations, making Orange a truly pan-European supplier. Orange is also pursuing OpenStack-based hosted private cloud environments based on Huawei hardware and software infrastructure, paired with its own strength on networking. The company intends to rise above purely infrastructure-based competitors through its willingness to take customers on a more comprehensive transformational journey.

Reference customers believe that Orange demonstrates strong customer advocacy and responsiveness but express some concerns about its ability to reconcile its disparate solutions, both internally developed and acquired, for future clarity. Although it's limited in terms of absolute



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numbers of its professional services staff, Orange has a broader range of complementary services than most telecom-oriented competitors. The company demonstrates an intuitive self-service interface and offers GDPR compliance. Orange is a good choice for European customers with geographically distributed requirements.

- › **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 options from customer-to-cloud and cloud-to-cloud, along with its large North American data center footprint and physical server options, including customer premises and third-party data centers. CenturyLink's European footprint is more limited, with locations in Frankfurt; London; Reading, UK; and Slough, UK. 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, including 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 cloud services, including private cloud and, more recently, public cloud. Its hosted private cloud, called the TCS Enterprise Cloud, is a key enabling element of a broader palette with large enterprise customers in mind. TCS offers hypervisor options that include KVM, Microsoft Hyper-V, and VMWare. The company has a very broad assortment of associated services, such as its extremely wide range of application services, including migration factories, advisory services, and its focus on managed infrastructure solutions, which includes a mainframe-as-a service offering and support for containers. Its range for complementary services is as extensive as that of any other supplier in this evaluation. TCS also brings its Igneo automation platform to bear as a focal point for automation.

TCS offers a solid range of infrastructure options as well as strong security capabilities. Despite the considerable energy that it focuses on the Igneo platform, reference customers want to see additional automation capabilities in the vendor's hybrid cloud solution. They'd also like to see additional clarity in pricing, despite TCS's published services catalog. For European customers, TCS offers support for GDPR compliance, with data center locations in Germany, Sweden, and the UK, with two additional nodes in Finland. TCS is a good choice for enterprise customers seeking a broad-based solution encompassing infrastructure management, application modernization, migration, and even cloud brokerage.

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- › **Atos blends hosted private cloud with a focus on applications management.** Atos, a broad-based global systems integrator (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. The firm offers Digital Hybrid Cloud for Azure Stack, Open Stack, and VMware as well as Digital Virtual Cloud on the 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.<sup>4</sup> Customers can access Atos' solutions through ServiceNow, cloud-native facilities, or DevOps tooling. Atos offers its hosted private cloud services from a network of 31 data centers across Europe; it competes primarily with traditional GSIs and holds a close partnership with Google, which it features prominently.

Atos's solution lacks an intuitive user interface and strong integration capabilities, and its range of physical server options appears limited. However, it has obvious complementary strength in applications and infrastructure management services. Atos is a good fit for large enterprises looking for significant cloud migration and application modernization services.

### Contenders

- › **Sungard Availability Services is an alternative for customers in Ireland and the UK.** Sungard Availability Services is not as familiar in Europe as some local suppliers but is best known for disaster recovery solutions. It offers its hosted private cloud services from four data centers located in Ireland and the UK. Sungard's solution is in transition; it's evolving to a new architecture and toward the Sungard AS Modern Cloud, incorporating full support for the VMware stack on hyperconverged infrastructure, among other innovations. The firm's hosted private cloud strategy targets a range of customers extending from midsize companies to large enterprises, including public-sector institutions, although it typically won't engage with the very largest enterprise customers. Sungard combines packaged offerings with a readiness to customize to specific customer requirements. Similarly, Sungard will provide fully managed solutions but also allows for a self-managed approach. In addition to disaster recovery, complementary services include managed applications services, colocation, and virtual private solutions based on the VMware stack.

Sungard's current solution lacks an intuitive interface, strong support for usage-based billing, and software-defined storage, but it will address these in the successor product. Nevertheless, Sungard is a good candidate for customers seeking to establish a recovery strategy in a complex cloud environment and looking for data center presence in Ireland or the UK.

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## 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 seven vendors in the assessment: Atos, CenturyLink, Orange, OVHcloud, Rackspace Technology, Sungard Availability Services, and Tata Consultancy Services. Each of these vendors has:

- › **Sufficient revenue from Europe.** Included vendors must have at least 30% of their hosted private cloud services revenue coming from Europe.
- › **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 Europe.** Included vendors must have data centers located in at least two different European 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.
- › **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 hypervisor or OS.** 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.

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- › **Significant market adoption and interest.** Forrester has seen evidence of significant adoption and interest among enterprise clients in the European 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.

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## 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

- <sup>1</sup> Source: "Rackspace Announces Completion of TriCore Solutions Acquisition," Rackspace Technology press release, June 20, 2017 (<https://www.rackspace.com/newsroom/rackspace-announces-completion-tricore-solutions-acquisition>); "Rackspace Acquires RelationEdge to Broaden Application Services Portfolio for Customers, Rackspace 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>).
- <sup>2</sup> 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>).
- <sup>3</sup> Source: "Orange acquires Basefarm Holding and becomes a European leader in cloud computing services for the enterprise sector," Orange press release, July 16, 2018 (<https://www.orange.com/en/Press-Room/press-releases/press-releases-2018/Orange-acquires-Basefarm-Holding-and-becomes-a-European-leader-in-cloud-computing-services-for-the-enterprise-sector>).

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<sup>4</sup> 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](https://atos.net/en/2018/press-release_2018_10_09/atos-digital-leadership-strengthened-completion-acquisition-us-based-syntel)).

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