Case study

Cloud Service Providers

Industry Challenges

This has been the decade of the cloud, as a tectonic shift drives data from PCs and proprietary racks to mobile endpoints and virtualized public infrastructure. Cloud services vary hugely in nature and size, but between them they now provide the foundation for the digital economy. Forecast to account for $1 trillion of IT spend by 2027 (Gartner) cloud providers are now launching a new wave of generative AI-driven applications to stimulate the market and drive innovation.

Cloud infrastructure requirements have changed over the years. Space, power, interconnection, and compliance are still vital, but their scope has changed. Space scalability covers a wider range of needs, with huge demand for dedicated custom builds as well as smaller presences in multi-tenant facilities where a mix of providers can operate closer to consumers. A global footprint is more critical, with seamless remote services and automation to accelerate availability.

Power procurement and management have changed most of all. GenAI requires far higher power densities and new forms of cooling, and this growing demand in the face of the climate crisis makes efficiency and carbon-free energy imperative. AI-infused APIs for multiple sectors and the increasing focus on security services also make the broadest possible compliance framework critical.

IRON MOUNTAIN®
DATA CENTERS

Industry

Cloud

Challenges

- AI integration
- Scalability
- Interconnection
- Security
- ESG

Solutions

- Scalable power
- Fast-growing footprint
- Mature ecosystems
- Comprehensive compliance
- Carbon-free energy & ITAD Services

An AI-Ready, Climate-Friendly Partner

Iron Mountain Data Centres (IMDC) serves every type of cloud provider from IaaS and PaaS through SaaS, private clouds, hosters and MSPs. Sometimes we build whole data centers for them and sometimes we offer private suites or cages across our footprint that they can present to clients as their own.

More Power in More Places

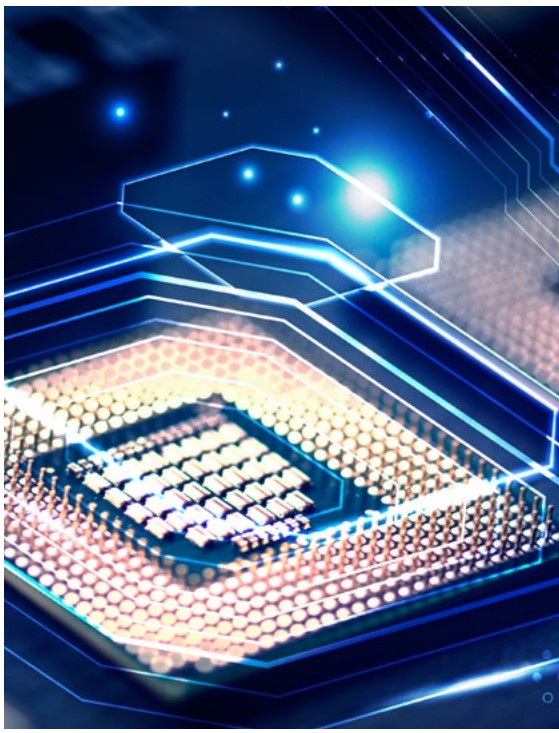
IDC predicts that by 2026 two-thirds of cloud applications will use AI. The implications of this for power requirements are significant, and our strategy is shaped to address this shift. We operate 25+ data centers across three continents with 255 MW of current customer capacity and 230 MW under construction. We also invest in advance power procurement, and have a pipeline which will soon increase total customer load to 860 MW. As the bulk of our data centers are new builds with flexible power management, we can also offer the high densities and advanced cooling AI requires.

"Iron Mountain adds value for our customers by opening up partnerships. Our portfolio is extremely broad, but it stops at Hypervisor level so is not very deep. For depth our customers need to find partners, and if they can access them within the data center then this reduces sprawl and improves performance and security."

Integrated Ecosystems

As Iaas, PaaS and SaaS customers develop more retail-style and sector-specific clouds they are also beginning to own the ecosystems they build. Customers are not just interested in a vendor's cloud application stack and delivery models, they look at the whole ecosystem of providers that bring them value. These long-term alliances require shared values and in many cases - for guaranteed performance - shared space. IMDC's long-term global carrier-neutral campus focus ensures we can offer cloud, hosting and MSP businesses mature ecosystems across our whole footprint.

"Currently we're using Iron Mountain's Direct Internet Access service in both New York and Phoenix. We also use GTT and Telia in both locations - our approach is to use a mix of tier 1s and 2s. We're also interested in any available eyeball-rich IXs, so we will sign up with AMS-IX as soon as we get to Amsterdam, and DE-CIX in New Jersey also looks like a good option."



Secure Services

Investments in end-to-end managed security services such as zero-trust are forecast to reach $170 billion in 2026 (Gartner). For infrastructure to support these and other services, data security levels, operational and sector-specific standards need to be consistent across continents to support APIs. An obsessively thorough and wide-ranging program of third party certifications is an excellent indicator of quality. We offer ISO 27001, SSAE18 SOC 2 (Type II)/SOC 3*, PCI-DSS, ISO -50001, ISO 140641. Region-specific certifications are also key; in North America, NIST SP 800-53*, FISMA HIGH, FedRAMP and HIPAA (Type I); OSPAR in Asia; ISO 450001 and 9001 in EMEA.

Industry-leading Sustainability

Several of these standards (e.g. ISO 50001, ISO 14001, ISO 14064) have been implemented to support customer sustainability. This is particularly critical to cloud customers as, with the rise of the cloud, they and their brands are now the de facto guardians of the environmental impact of IT.

> "A critically important aspect of our business case was finding a partner who not only met our renewable energy requirements but also understood what we were trying to do and could help us to achieve our goals. With Iron Mountain, we found a partner who could do all that — in ways that gave us a competitive advantage."

We have been offering 100% renewable energy since 2017. We are in the top five of leading providers in terms of efficiency and number one in transparency (according to Structure Research). All of our new builds are being accredited to BREEAM sustainable building standards. We are also the only global colocation provider to have pledged (in 2021) to match site by site electricity use with local carbon-free power generation every hour of every day. This simplifies and strengthens cloud sustainability propositions and feeds into your ESG reporting.

The other area where Iron Mountain is unique in the data center industry is that we have also built a 30-country IT Asset Disposal (ITAD) capability, providing secure data center decommissioning and enabling reuse. For our cloud customers, this means we can provide an integrated end-to-end global service that minimizes emissions and e-waste from their infrastructure.

A Trustworthy Partner

According to IDC's Cloud Pulse Survey trust is the number one factor in cloud vendor selection, and its definition is broadening. Climate change, diversity and data protection and sovereignty are now key factors. We believe that, as trusted partners, data center providers should do their utmost to support their cloud customers in each of these areas.

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About Iron Mountain Data Centers

Iron Mountain Data Centers operates a global colocation platform that enables customers to build tailored, sustainable, carrier and cloud-neutral data solutions. As a proud part of Iron Mountain Inc., a world leader in the secure management of data and assets trusted by 90% of the Fortune 1000, we are uniquely positioned to protect, connect and activate high-value customer data. We lead the data center industry in highly regulated compliance, environmental sustainability, physical security and business continuity. We collaborate with our 1,300+ customers in order to build and support their long-term digital transformations within our 4M+ SF global footprint spanning 3 continents. For more information, visit www.ironmountain.com/data-centers.