ISG Provider Lens™

Private/Hybrid Cloud – Data Center Services

Managed Services — Midmarket

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

unisys

QUADRANT REPORT | JUNE 2025 | U.S.

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AI-powered platforms and tools are significantly reducing manual intervention and operational costs

The rapid adoption of AI technologies, such as large language models (LLMs) and generative AI (GenAI), has led to an unprecedented demand for data processing and storage capabilities. AI is fundamentally transforming the digital landscape, with data centers at the heart of this revolution. Data centers are evolving from simple storage facilities into complex ecosystems that must support massive computational workloads. This transformation is driven by the need for high-performance processors like GPUs, CPUs and TPUs, which are essential for training and running advanced AI models. As a result, data centers are now critical infrastructure underpinning everything from online transactions to AI-powered services.

However, this growth comes with significant challenges, particularly in terms of power consumption, connectivity and cooling. AI workloads are energy intensive, requiring robust power supplies and advanced cooling systems to prevent overheating. Also, there is a need for high-speed, low-latency connectivity to ensure efficient data transfer between servers and users. These technical demands push service providers and data center operators to innovate rapidly, but they must also navigate an evolving regulatory landscape. New laws, such as the AI Act and expanded cybersecurity directives, are introducing stricter risk management and operational transparency requirements, compelling data centers to adapt quickly to stay compliant.

At the same time, the global expansion of data centers is facing increasing opposition from local communities and environmental groups. Concerns range from increased energy and water consumption to potential harm to local ecosystems and higher carbon emissions. High-profile protests have emerged in locations such as Virginia, the U.S.; London, the U.K.; Uruguay; and the Netherlands, where residents and activists argue that new data center projects threaten conservation areas, strain local

MSPs offer unified operations, ensure **business continuity** and deliver measurable **business value.**

resources and offer limited community benefits. In response, some developers are attempting to mitigate these impacts by repurposing industrial sites, investing in renewable energy and offering local economic incentives. At the same time, major tech companies have pledged to achieve ambitious sustainability targets.

Service providers are innovating and integrating AI, ML and intelligent automation into their offerings to optimize workflow, enhance monitoring and reduce manual intervention. For example, AI-powered platforms now proactively identify anomalies, automate alerts and support predictive maintenance, while IoT data is used for capacity planning and resource optimization. Cloud and hybrid delivery models are central to these innovations. Providers are helping enterprises migrate workloads to cloud or colocation data centers, implement server virtualization and manage multicloud environments with cloud-agnostic operations. For instance, a few providers have enabled clients to move away from traditional data centers and transition to cloud-based infrastructure, improving scalability, security and cost efficiency. Their managed services emphasize observability, automation and a strong FinOps framework to manage cloud spend and enhance security through *policy-as-code* and SecOps practices. Some providers deliver integrated management services using a cloud-first strategy, intelligent automation (through their proprietary platforms) and contextual business knowledge to customize solutions for clients seeking agility and scalability.

While the broader market is witnessing advancements like software-defined data centers (SDDC), edge computing enablement and the adoption of 5G networks, which are expanding the capabilities of managed services, these innovations are enabling real-time data processing, improved disaster recovery, and more agile, self-healing infrastructure management. As enterprises increasingly adopt hybrid and multicloud strategies, managed service providers respond with solutions that unify operations, ensure business continuity and deliver measurable business value through automation, observability and continuous optimization.

Some of the trends observed in the past year are discussed in the following sections.

AI-powered automation and AIOps:
Service providers are revolutionizing managed operational services for private and hybrid cloud infrastructure by integrating AI and ML technologies into daily operational activities. This trend encompasses proactive monitoring and predictive analytics, where AI and ML algorithms analyze real-time data, logs and metrics to detect anomalies and forecast potential operational disruptions. This early warning system allows for preemptive action, minimizing downtime and ensuring business continuity. Furthermore, AI insights trigger automated remediation and self-healing mechanisms, enabling systems to resolve common incidents, perform routine maintenance and optimize resource allocation autonomously, significantly reducing manual intervention and enhancing operational efficiency. AI is also leveraged for intelligent workload placement and optimization, ensuring the applications are dynamically positioned across private and public clouds based on a multitude of factors, including cost, performance requirements, compliance mandates and resource availability, leading to optimal utilization and cost-effectiveness.

Enhanced security and compliance:
Security continues to be one of the top priorities in managed operational services for hybrid cloud. Providers are embedding integrated security operations directly into their offerings, ensuring a consistent security posture across all managed environments. This includes continuous security monitoring, advanced threat detection capabilities and swift incident response mechanisms. Furthermore, the automation of compliance and governance processes is a key trend, with providers utilizing specialized tools and frameworks to automate compliance checks, enforce predefined security policies and maintain comprehensive audit trails across the hybrid infrastructure, thereby facilitating adherence to stringent regulatory requirements and mitigating potential risks. The implementation and management of zero trust architectures, based on the principle of continuous verification, further strengthens the security landscape across the hybrid environment.

Cost optimization and FinOps: Optimization of cloud resources has become central to the value proposition of managed services. Service providers deliver comprehensive cost visibility, providing organizations with detailed insights into their cloud spending across various platforms, enabling a clear understanding of expenditure patterns and identifying areas for potential savings. In addition, AI and ML facilitate AI-driven cost optimization recommendations, identifying opportunities to reduce cloud waste, optimize resource utilization and improve overall cost efficiency. Implementing showback and chargeback models provides granular cost allocation to specific business units or projects, fostering greater financial accountability and promoting cost-conscious behavior within the organization.

DevOps and containerization support: Service providers heavily invest in DevOps and containerization technologies, emphasizing skills and expertise in the domain. Integration with DevOps pipelines is a key focus, enabling consistent application deployment and management across hybrid environments through CI/CD processes. Skills and tools for managing containerized applications and Kubernetes clusters across private and public clouds are also crucial offerings. Adopting infrastructure-as-code (IaC) practices, where infrastructure is managed through code, ensures consistency, repeatability and deployment automation. Service providers also offer valuable consulting and advisory services to guide organizations in formulating effective hybrid cloud strategies and optimizing their operating models, alongside training and upskilling initiatives to enhance clients' internal capabilities.

As demand for digital infrastructure continues to soar, the challenge will be to ensure that responsible development practices and effective regulatory oversight match technological progress in AI and data centers. Innovations in this space are helping organizations simplify operations, boost agility and maximize value from their hybrid cloud investments.

Provider Positioning

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	Managed Services — Large Accounts	Managed Services — Midmarket	Managed Hosting	Colocation Services	AI-Ready Infrastructure Consulting
11:11 Systems	Not In	Contender	Contender	Not In	Not In
365 Data Centers	Not In	Not In	Not In	Product Challenger	Not In
Accenture	Leader	Not In	Not In	Not In	Leader
Atos	Product Challenger	Not In	Product Challenger	Not In	Not In
Birlasoft	Not In	Product Challenger	Not In	Not In	Not In
Capgemini	Leader	Not In	Not In	Not In	Leader
CDNetworks	Not In	Not In	Not In	Contender	Not In
Centersquare	Not In	Not In	Not In	Leader	Not In
CGI	Product Challenger	Not In	Not In	Not In	Not In
Codero	Not In	Not In	Contender	Not In	Not In
Coforge	Not In	Rising Star ★	Not In	Not In	Product Challenger

Provider Positioning

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	Managed Services — Large Accounts	Managed Services — Midmarket	Managed Hosting	Colocation Services	AI-Ready Infrastructure Consulting
Cogent	Not In	Not In	Not In	Product Challenger	Not In
Cognizant	Leader	Not In	Not In	Not In	Leader
Colocation America	Not In	Not In	Contender	Contender	Not In
Cologix	Not In	Not In	Not In	Product Challenger	Not In
Computacenter	Not In	Contender	Not In	Not In	Not In
CoreSite	Not In	Not In	Not In	Leader	Not In
CyrusOne	Not In	Not In	Not In	Leader	Not In
DataBank	Not In	Not In	Not In	Leader	Not In
Deloitte	Not In	Not In	Not In	Not In	Leader
Digital Realty	Not In	Not In	Not In	Leader	Not In

Provider Positioning

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	Managed Services — Large Accounts	Managed Services — Midmarket	Managed Hosting	Colocation Services	AI-Ready Infrastructure Consulting
DXC Technology	Leader	Not In	Leader	Not In	Product Challenger
Ensono	Not In	Leader	Leader	Not In	Not In
Equinix	Not In	Not In	Not In	Leader	Not In
Expedient	Not In	Not In	Not In	Contender	Not In
Flexential	Not In	Not In	Product Challenger	Leader	Not In
FNTS	Not In	Contender	Not In	Not In	Not In
Fujitsu	Not In	Product Challenger	Product Challenger	Not In	Not In
HARMAN	Not In	Product Challenger	Not In	Not In	Not In
HCLTech	Leader	Not In	Not In	Not In	Product Challenger
Hexaware	Contender	Leader	Not In	Not In	Not In

Provider Positioning

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	Managed Services — Large Accounts	Managed Services — Midmarket	Managed Hosting	Colocation Services	AI-Ready Infrastructure Consulting
Hitachi Digital Services	Not In	Product Challenger	Not In	Not In	Not In
HorizonIQ	Not In	Not In	Contender	Not In	Not In
HPE	Rising Star ★	Not In	Not In	Not In	Product Challenger
IBM	Not In	Not In	Product Challenger	Not In	Leader
Infinite Computer Solutions	Not In	Leader	Not In	Not In	Contender
Infosys	Leader	Not In	Not In	Not In	Product Challenger
Innova Solutions	Not In	Product Challenger	Not In	Not In	Contender
InterVision	Contender	Not In	Contender	Not In	Not In
Iron Mountain	Not In	Not In	Not In	Contender	Not In
Kyndryl	Leader	Not In	Leader	Not In	Leader

Provider Positioning

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	Managed Services — Large Accounts	Managed Services — Midmarket	Managed Hosting	Colocation Services	AI-Ready Infrastructure Consulting
Lenovo	Not In	Not In	Not In	Not In	Product Challenger
Liquid Web	Not In	Not In	Product Challenger	Not In	Not In
LTIMindtree	Product Challenger	Not In	Not In	Not In	Product Challenger
Lumen Technologies	Not In	Contender	Product Challenger	Product Challenger	Not In
Microland	Contender	Leader	Not In	Not In	Not In
Mphasis	Product Challenger	Leader	Not In	Not In	Not In
NTT DATA	Leader	Not In	Leader	Leader	Not In
Orange Business	Not In	Contender	Not In	Not In	Not In
Park Place Technologies	Not In	Contender	Not In	Not In	Not In
Persistent Systems	Not In	Product Challenger	Not In	Not In	Product Challenger

Provider Positioning

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	Managed Services — Large Accounts	Managed Services — Midmarket	Managed Hosting	Colocation Services	AI-Ready Infrastructure Consulting
phoenixNAP	Not In	Not In	Not In	Contender	Not In
PwC	Not In	Not In	Not In	Not In	Leader
QTS	Not In	Not In	Not In	Leader	Not In
Rackspace Technology	Product Challenger	Leader	Leader	Product Challenger	Product Challenger
Red River	Not In	Product Challenger	Not In	Not In	Not In
Stefanini	Contender	Not In	Not In	Not In	Not In
Sutherland	Not In	Contender	Not In	Not In	Contender
Switch	Not In	Not In	Not In	Contender	Not In
Syntax	Not In	Product Challenger	Contender	Not In	Not In
TCS	Leader	Not In	Product Challenger	Not In	Leader

Provider Positioning

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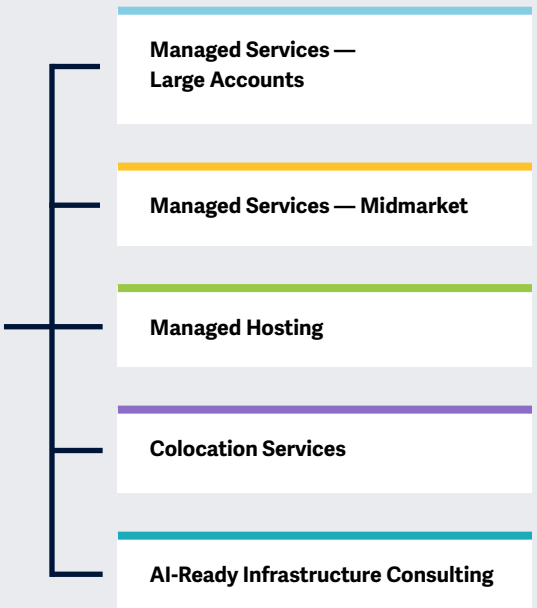
	Managed Services — Large Accounts	Managed Services — Midmarket	Managed Hosting	Colocation Services	AI-Ready Infrastructure Consulting
Tech Mahindra	Product Challenger	Not In	Not In	Not In	Not In
TierPoint	Not In	Not In	Contender	Product Challenger	Not In
T-Systems	Product Challenger	Not In	Not In	Not In	Not In
Unisys	Product Challenger	Leader	Product Challenger	Not In	Product Challenger
UnitedLayer	Not In	Product Challenger	Leader	Product Challenger	Not In
US Signal	Not In	Not In	Not In	Product Challenger	Not In
UST	Not In	Product Challenger	Not In	Not In	Contender
Wipro	Leader	Not In	Not In	Not In	Product Challenger
Zensar Technologies	Not In	Product Challenger	Not In	Not In	Not In
Zones	Not In	Product Challenger	Not In	Not In	Not In

This study focuses on what ISG perceives as the most critical aspects of **private/ hybrid cloud and data center** outsourcing services in 2025.



Simplified Illustration Source: ISG 2025

Definition

This study assesses global and regional providers offering hybrid cloud and data center services, including managed services, managed hosting, colocation services and AI-ready infrastructure consulting.

In today's digital age, enterprises are increasingly turning to private and hybrid cloud computing to enhance their operations and gain a competitive edge. Private cloud infrastructure is gaining popularity as it enables enterprises to exercise more control while enhancing scalability, flexibility and cost-effectiveness in data management and storage. With AI and GenAI technologies coming into the mix, enterprises are seeking high-performance, robust and secure infrastructures capable of effectively handling these AI workloads.

Each enterprise has different reasons for using a hybrid cloud, including security, data location, regulations, control over assets and custom applications such as those running on mainframes. A hybrid cloud setup provides more control and customization while leveraging public cloud platforms simultaneously. As per ISG, a hybrid cloud connects the existing on-premises infrastructure services with private and public clouds. An enterprise may also leverage colocation and hosting providers instead of owning a data center to have a hybrid cloud setup.

ISG has also observed enterprises demanding the implementation of ESG initiatives from infrastructure services providers. The rapid increase in digital transformation engagements is accompanied by a rise in energy demand, contributing to climate change, while government regulations are mandating a fast transition to carbon neutrality.

Scope of the Report

This ISG Provider Lens™ quadrant report covers the following five quadrants for services: Managed Services — Large Accounts, Managed Services — Midmarket, Managed Hosting, Colocation Services and AI-Ready Infrastructure Consulting.

This ISG Provider Lens™ study offers IT decision-makers:

- ransparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments
- Focus on the regional market

Our study serves as the basis for important decision-making by covering providers' positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing vendor relationships and potential engagements.

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).

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.

Managed Services — Midmarket

Who Should Read This Section

This report is valuable for providers offering **managed services** to enterprises in the **U.S.** 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 and examines how each provider addresses key regional challenges.

IT and infrastructure leaders

Read this report to analyze managed service providers' modernization and service capabilities and the market advancements that impact hybrid cloud strategies.

Software development and technology leaders

Should read this report to understand providers' positioning and offerings, and their impact on the ongoing infrastructure transformation initiatives.

Sourcing, procurement and vendor management professionals

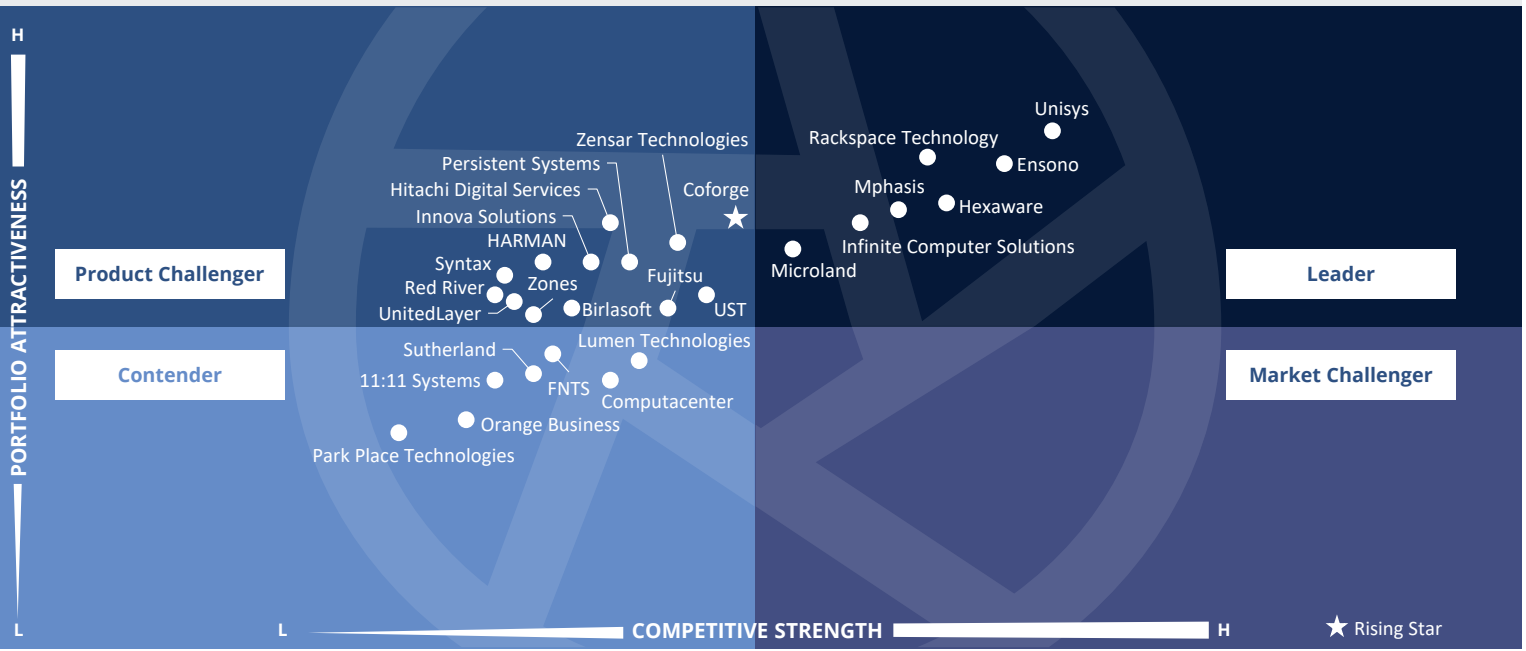
Should read this report to better understand the current landscape and partner ecosystem of managed service providers in the U.S.

ISG Provider Lens™

Source: ISG RESEARCH

Private/Hybrid Cloud – Data Center Services
Managed Services – Midmarket

U.S. 2025



This quadrant assesses providers offering **managed services** for **private** and **hybrid clouds** and **traditional data centers** for the **midmarket**. They provide **transition** services, **manage daily operations** and help **optimize** clients' existing IT landscapes.

Shashank Rajmane

Definition

This quadrant assesses a provider's ability to offer ongoing managed services for private and hybrid clouds and traditional data center infrastructures and platforms to enterprise clients. These services include managing physical and virtual servers, middleware, storage, databases, and networking components across various environments, including client data centers, multicloud settings, provider facilities, or third-party colocation centers.

Such providers typically offer transition services, guiding clients to optimize their existing IT landscapes. Common projects include large-scale data center consolidation, virtualization, cloud enablement and configuration, and a software-defined data center implementation. These services may also include expanding existing facilities, migrating workloads, or creating new private/hybrid clouds and making them AI-ready.

Managed services involve transferring responsibilities to a service provider and are governed by SLAs with penalties for nonadherence. Key services include provisioning, real-time and predictive analysis, and monitoring and managing operations of a customer's on-premises, private, and hybrid cloud environments. These activities aim to maximize workload performance on the cloud, reducing costs and ensuring compliance, security, and, therefore, sovereignty. Providers are expected to adeptly manage both traditional and cloud-native application releases, encompassing continuous integration and delivery processes. They can also offer AIOps and MLOps capabilities by leveraging advanced AI and ML technologies to automate operational activities, train models, predict outages, and offer actionable insights.

Eligibility Criteria

1. Offer **services for private and hybrid clouds and data center infrastructure** (servers, middleware, storage, and databases) without depending on partners
2. Provide services within a client's premises or remotely and preferably through its **shared service centers** under the remote infrastructure management (RIM) model
3. Demonstrate experience in **large transition** projects that include **automation**, **consolidation, virtualization**, and **containerization**
4. Act as an **extension of clients' IT organization** and get involved in creating blueprints, architecture frameworks, and management processes at the client's location
5. Provide services for the **centralized orchestration,** monitoring, and management of a hybrid IT infrastructure
6. Showcase relevant **certifications** to ensure security and compliance at the local level, contributing to greater sovereignty

Observations

The midmarket enterprises have undergone a decisive shift this year, shaped by the convergence of AI-driven automation, outcome-based service expectations and sector-specific regulatory demands. This year, competitive differentiation is less about the breadth of infrastructure and more about the depth of intelligent automation. Providers that can deliver predictive analytics, agentic operations and low-touch remediation are setting new standards for operational resilience. Notably, client expectations have pushed the market toward commercial models that reward tangible business outcomes over time-and-materials (T&M) or asset-based pricing, with a greater willingness to shift workloads dynamically between environments.

The quadrant has also seen repositioning among key players, with several providers making strategic alliances, especially around AI, GPU enablement and regulatory/compliant solutions, to address the increasing complexity of AI and GenAI workloads and vertical compliance. There is a growing focus on integrating edge-to-core hybrid architectures, leveraging automation for operational efficiency, securing distributed assets and ensuring compliance at scale. As midmarket enterprises accelerate their adoption of hybrid models, the competitive landscape is increasingly defined by a provider's ability to combine industry knowledge, automation and flexible commercial constructs to deliver value beyond basic infrastructure management, thereby setting a higher bar for midmarket managed services in 2025 and beyond.

From the 71 companies assessed for this study, 27 qualified for this quadrant, with seven being Leaders and one a Rising Star.

ensono

Ensono strengthens its role as an automation-driven managed services partner, enhancing service elasticity and operational control at the edge. It supports distributed, client-owned environments via unified platforms and helps orchestrate legacy, edge and hybrid infrastructure.

HEXAWARE

Hexaware has transitioned from a modernization-centric provider to an orchestration-focused partner, blending automation, edge-native capabilities and GenAI to serve distributed enterprise environments.

Infinite Computer Solutions

Infinite Computer Solutions increasingly differentiates itself by embedding AI-native capabilities within its core delivery architecture. Through its SRE-first approach and domain-specific agentic automation, it delivers robust managed services with a modular and industry-aligned service stack.

MICROLAND®

Microland is shifting from a traditional infrastructure services role to an AI-first modernization enabler, combining GenAI-powered agents with HPC-ready infrastructure delivery. It addresses a growing demand for intelligent, on-premises hybrid cloud operations.

Mphasis

Mphasis has moved beyond traditional infrastructure transformation by embedding domain-aware modernization pathways tailored to regulated industries. Its ability to orchestrate carve-outs, legacy exits, and hybrid adoption without vendor lock-in reflects a consultative posture.

rackspace technology

Rackspace Technology is repositioning itself as a specialist in production-grade AI infrastructure within hybrid environments by using its FAIR offering with its FinOps-aligned orchestration. It has pivoted toward use case-based incubation and industry-leading support.

Unisys integrates compliance-aware automation, observability and governance into a unified ZeroOps model, offering a seamless hybrid cloud experience tailored to regulated sectors seeking predictability, auditability and reduced service fragmentation.

Coforge (Rising Star) has recently acquired Rythmos to bolster its cloud capabilities. This move is in line with the company's strategic objectives of expanding into industry-specific technology services and strengthening its geographical presence in the U.S.

Leader

"Unisys has advanced its AI-driven ZeroOps approach, leveraging strong automation capabilities to deliver outcome-centric managed services for complex hybrid environments. It can be a reliable partner for clients seeking modernization of legacy workloads."

Shashank Rajmane

Unisys

Overview

Unisys is headquartered in Pennsylvania, U.S. It has more than 16,500 employees across 48 offices in 22 countries. In FY24, the company generated $2.0 billion in revenue, with Enterprise Computing Solutions as its largest segment. Unisys has broadened its AI-infused cloud management solutions and services, focusing on hyperautomated, zero-touch operations and application modernization for regulated and commercial industries. In the U.S., it invests in outcome-based public sector engagements while strengthening verticalized AI offerings for BFSI, manufacturing and travel clients.

Strengths

One-stop shop for hybrid cloud: Unisys offers end-to-end coverage from consultative design and automation-led assessments to hybrid cloud managed operations under a single framework, reducing complexity and accelerating digital transformation. This approach also integrates security and compliance from the outset, ensuring rapid and consistent outcomes across diverse cloud footprints.

Strong public sector practice: Unisys has significant experience serving U.S.-based government agencies, state-owned organizations, public communities, U.S. federal entities, and other organizations within the highly regulated industry framework. It has helped several organizations manage their IT infrastructure estate by bringing in automation techniques, delivering quick support and offering high availability.

AIOps-driven ZeroOps approach: The cloud IT framework leverages AI and ML to deliver near-zero manual interventions through automated incident detection, predictive remediation and self-healing capabilities. The ZeroOps principle reduces manual overhead drastically and accelerates resolution times by leveraging AI for real-time event correlation, lowering the operational costs for clients by up to 30–40 percent.

Caution

Compared with its peers, Unisys has fewer local FTEs supporting its clients — most of the support is offered remotely. With new government policies anticipated, the company needs to relook its talent strategy and try to deliver cloud services through an onshore model.

Appendix

Methodology & Team

The ISG Provider Lens 2025 – Private/Hybrid Cloud – Data Center Services study analyzes the relevant software vendors/service providers in the U.S. market, based on a multi-phased 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

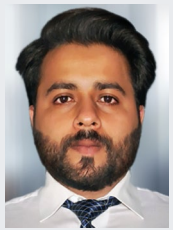
Author

Shashank Rajmane

Manager and Principal Analyst

Shashank Rajmane has more than a decade of extensive experience in research and works as a Principal Analyst at ISG. He leads the efforts for ISG Provider Lens™ studies — Public Cloud Services & Solutions and Private/Hybrid Cloud & Data Center Outsourcing Services. He also authors the U.S. and Global reports. Apart from these, Shashank has been part of many consulting engagements and helping ISG's enterprise clients with their cloud strategy, along with selecting the right service providers/ vendors based on their IT-related buying requirements. He has authored several white papers, thought leadership articles, briefing notes, blogs and service provider intelligence reports, especially in the next-generation hybrid cloud and infrastructure services domain. Shashank has also delivered several workshops, webinars and podcasts and has been quoted in IT journals.

Research Analyst and Co-Author



Yatharth Bharti

Senior Research Analyst

Yatharth is a Senior Research Analyst at ISG. He is responsible for supporting and co-authoring Provider Lens™ studies on Public Cloud and Private Hybrid Cloud Data Centre Solutions and Services. Yatharth supports the Lead Analysts in the research process on multiple regions and authors the global summary report, and focal points. He also collaborates with the Lead Analysts in the process of rating the providers and building insights around the market trends and drivers. Yatharth has over six years of experience with a strong background in research, data analysis, and business analysis. In his previous role, Yatharth oversaw custom research and analysis projects to support businesses in better decision-making. Specializing across various industries with Everest Group, Yatharth provided valuable insights and recommendations and led in-depth analyses of enterprises and their operations to provide tailored insights to the clients.

Study Sponsor

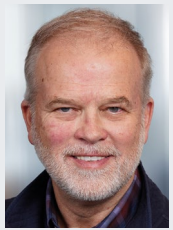
Heiko Henkes

Director & Principal Analyst, Global IPL Content Lead

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.

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.

ISG Provider Lens™

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For more information about ISG Provider Lens™ research, please visit this webpage.

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The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.

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JUNE, 2025

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