ISG Provider Lens®

Private/Hybrid Cloud – Data Center Services

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

unisys

QUADRANT REPORT | JUNE 2026 | U.S.

Table of Contents

Executive Summary

Report Author: Shashank Rajmane

U.S. firms are adopting a governance-driven AI-ready hybrid cloud operating model with outcome-focused service delivery.

This report presents an independent benchmarking of leading service providers delivering private hybrid cloud and data center (PHCDC) services in the U.S. market. It is designed to help enterprise buyers evaluate providers based on their ability to support modernization, manage complex hybrid cloud environments and enable AI-ready infrastructure. As enterprises increasingly balance legacy stability with cloud transformation and AI adoption, this study assesses how effectively providers align their portfolios, operating models and delivery capabilities to evolving enterprise needs.

Market Context

The U.S. PHCDC services market is undergoing a structural shift driven by three converging forces: the rise of AI workloads, the persistence of legacy infrastructure and increasing regulatory and governance requirements. Enterprises are no longer pursuing full cloud migration strategies; instead, they are adopting hybrid models that allow them to retain control over sensitive workloads while leveraging cloud scalability and innovation. This shift has elevated the significance of private cloud, managed hosting and colocation services as strategic components rather than transactional solutions.

A defining trend in the market is the emergence of AI-ready infrastructure as a core design principle. Service providers are restructuring offerings to include GPU-enabled environments, AI factories and agentic operations frameworks. These capabilities are being tightly integrated with observability, FinOps and automation to create unified operating models that support both traditional and AI workloads. Enterprises are demanding stronger governance, sovereignty and cost control, particularly in regulated industries and public sector environments.

Another key market dynamic is the convergence of infrastructure services with

Providers differentiate with **AI-led integrated, automated and outcome-focused** delivery.

managed operations and transformation. Providers are no longer evaluated solely on their ability to host or manage infrastructure but on their ability to deliver continuous modernization while maintaining operational stability. This has led to increased emphasis on platform-led delivery, automation maturity and integrated lifecycle services spanning advisory, build and run.

Economic pressures and cost optimization priorities are reshaping enterprise expectations. Buyers are increasingly scrutinizing pricing models, pushing providers toward outcome-based and consumption-driven constructs. This shift is also accelerating the adoption of automation and AI-led operations, as enterprises seek measurable efficiency gains alongside transformation outcomes.

Enterprise Priorities

Enterprise buyers in the U.S. are responding to the market shifts by redefining their infrastructure and operations strategies around control, flexibility and measurable outcomes. Rather than pursuing large-scale, disruptive transformations, enterprises are adopting phased modernization approaches that allow them to evolve hybrid cloud environments while maintaining continuity for mission-critical systems. A central theme observed is to run AI workloads in controlled environments. Enterprises are increasingly seeking private and hybrid cloud solutions that support GPU-intensive workloads while ensuring data sovereignty, security and compliance. This is particularly relevant for industries such as financial services, healthcare and the public sector, where regulatory constraints limit the use of public cloud for certain workloads.

Another key priority is operational efficiency through automation and AI-driven management. Enterprises expect providers to deliver AIOps, agentic operations and predictive analytics as part of managed services, enabling faster incident resolution, reduced manual effort and improved system reliability. However, buyers are also cautious about over-reliance on automation, favoring models that balance machine-driven operations with human oversight. Cost governance has also emerged as a critical concern. Enterprises are looking for integrated FinOps capabilities that provide real-time visibility into infrastructure spend across hybrid environments. This includes the ability to optimize resource utilization, forecast costs and align spending with business outcomes. Providers that can demonstrate continuous cost optimization rather than one-time savings are gaining stronger traction.

Enterprises are prioritizing vendor flexibility and ecosystem integration. As hybrid environments become more complex, buyers are seeking providers that can operate across multiple platforms, avoid lock-in and integrate seamlessly with hyperscalers and third-party tools. This shift is driving the demand for vendor-neutral architectures and platform-agnostic operating models. Finally, enterprises are placing greater emphasis on resilience and continuity. Disaster recovery, cyber recovery and business continuity are no longer optional capabilities but core requirements embedded into managed services. Buyers expect providers to deliver these capabilities as part of a unified operating model rather than as standalone solutions.

Provider Dynamics

Service providers in the U.S. PHCDC market are actively evolving their portfolios and delivery models to align with these changing enterprise priorities. A key trend is the shift toward platform-led managed services, where providers integrate infrastructure, operations and governance into a unified control layer. These platforms combine observability, automation, FinOps and security to enable consistent management across hybrid cloud environments. Another significant development is the increasing focus on AI-enabled infrastructure and operations. Providers are investing heavily in AI factories, GPU-as-a-service offerings and agentic operations frameworks. These capabilities are designed to support the full lifecycle of AI workloads, from deployment to ongoing management. However, there is considerable variation in maturity, with some providers offering advanced autonomous operations while others remain in early adoption stages.

Providers are also strengthening their hybrid cloud and private cloud capabilities to

address enterprise demand for control and flexibility. This includes the development of vendor-neutral architectures, sovereign cloud offerings and modular deployment models that allow enterprises to tailor infrastructure to their specific needs. Partnerships with hyperscalers and technology vendors are becoming increasingly important, enabling providers to extend their capabilities and deliver integrated solutions. A notable trend is the emphasis on governance and compliance as core differentiators. Providers are embedding zero-trust architectures, policy-driven controls and audit-ready frameworks into their services, especially for regulated industries and public sector clients. This reflects the growing importance of security and compliance in enterprise decision-making.

However, several challenges remain. Many providers face complexity in standardizing delivery across legacy and modern environments, leading to variability in execution. Reliance on traditional pricing models and global delivery structures can limit agility and transparency. Providers are also under pressure to demonstrate clear differentiation in a crowded market, particularly as capabilities such as automation and hybrid cloud become table stakes.

Future Outlook

The PHCDC services market in the U.S. will continue to evolve toward AI-centric, platform-driven operating models. Enterprises will increasingly treat infrastructure as a strategic enabler of innovation, rather than a cost center, driving demand for providers that can deliver both stability and transformation.

For enterprise buyers, the focus should be on selecting providers that can act as long-term transformation partners rather than transactional service vendors. This includes evaluating providers based on their ability to deliver measurable outcomes, scale automation and support AI workloads in production environments. Buyers should also prioritize flexibility, ensuring chosen providers can operate across diverse platforms and adapt to changing requirements.

For service providers, the key imperative will be to move beyond capability building to execution maturity. This includes demonstrating real-world proof points for AI-led operations, standardizing delivery models and adopting outcome-based pricing structures that align with enterprise expectations. Providers must also continue to invest in ecosystem partnerships and innovation to maintain competitiveness.

Finally, both enterprises and providers must address the growing complexity of hybrid cloud environments. This will require greater emphasis on governance, observability and integrated operations to ensure infrastructure can scale effectively while maintaining control and compliance. The market is moving toward a model where hybrid cloud, managed services and AI operations converge into a unified operating layer, enabling enterprises to modernize with confidence while preparing for future innovation.

Enterprise demand to integrate AI in their operations has resulted in service providers evolving their solutions into platform-led offerings that integrate infrastructure, automation, FinOps and AI-driven operations into a unified operating model. Providers' key differentiator is to deliver consistent execution, support production-scale AI workloads and enable continuous modernization while maintaining stability and compliance.

Provider Positioning

Page 1 of 7

	AI-ready Infrastructure Managed Services — Large Accounts	AI-ready Infrastructure Managed Services — Midmarket	Managed Cloud Hosting and Resilient Infrastructure Services	Sustainable Colocation Services
11:11 Systems	Not In	Contender	Contender	Not In
365 Data Centers	Not In	Not In	Not In	Product Challenger
Accenture	Leader	Not In	Not In	Not In
Altimetrik	Not In	Product Challenger	Not In	Not In
Atos	Product Challenger	Not In	Product Challenger	Not In
Birlasoft	Not In	Product Challenger	Not In	Not In
Capgemini	Leader	Not In	Not In	Not In
CDNetworks	Not In	Not In	Not In	Contender
CGI	Product Challenger	Not In	Not In	Not In
Codero	Not In	Not In	Contender	Not In

Provider Positioning

Page 2 of 7

	AI-ready Infrastructure Managed Services — Large Accounts	AI-ready Infrastructure Managed Services — Midmarket	Managed Cloud Hosting and Resilient Infrastructure Services	Sustainable Colocation Services
Coforge	Not In	Leader	Not In	Not In
Cogent	Not In	Not In	Not In	Product Challenger
Cognizant	Leader	Not In	Not In	Not In
Colocation America	Not In	Not In	Contender	Contender
Cologix	Not In	Not In	Not In	Rising Star ★
Computacenter	Not In	Product Challenger	Not In	Not In
CoreSite	Not In	Not In	Not In	Leader
Csquare	Not In	Not In	Not In	Leader
CyrusOne	Not In	Not In	Not In	Leader
DataBank	Not In	Not In	Not In	Leader

Provider Positioning

Page 3 of 7

	AI-ready Infrastructure Managed Services — Large Accounts	AI-ready Infrastructure Managed Services — Midmarket	Managed Cloud Hosting and Resilient Infrastructure Services	Sustainable Colocation Services
Digital Realty	Not In	Not In	Not In	Leader
DXC Technology	Leader	Not In	Product Challenger	Not In
Ensono	Not In	Leader	Product Challenger	Not In
Equinix	Not In	Not In	Not In	Leader
Expedient	Not In	Not In	Not In	Contender
Flexential	Not In	Not In	Product Challenger	Leader
FNTS	Not In	Product Challenger	Not In	Not In
Fujitsu	Not In	Product Challenger	Product Challenger	Not In
HCLTech	Leader	Not In	Not In	Not In
Hexaware	Contender	Leader	Not In	Not In

Provider Positioning

Page 4 of 7

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

Provider Positioning

Page 5 of 7

	AI-ready Infrastructure Managed Services — Large Accounts	AI-ready Infrastructure Managed Services — Midmarket	Managed Cloud Hosting and Resilient Infrastructure Services	Sustainable Colocation Services
Lenovo	Product Challenger	Not In	Not In	Not In
Liquid Web	Not In	Not In	Contender	Not In
LTM	Product Challenger	Not In	Not In	Not In
Lumen Technologies	Not In	Contender	Product Challenger	Product Challenger
Microland	Contender	Leader	Not In	Not In
Mphasis	Product Challenger	Leader	Not In	Not In
NTT DATA	Leader	Not In	Leader	Leader
Park Place Technologies	Not In	Contender	Not In	Not In
Persistent Systems	Not In	Product Challenger	Not In	Not In
phoenixNAP	Not In	Not In	Not In	Contender

Provider Positioning

Page 6 of 7

	AI-ready Infrastructure Managed Services — Large Accounts	AI-ready Infrastructure Managed Services — Midmarket	Managed Cloud Hosting and Resilient Infrastructure Services	Sustainable Colocation Services
QTS	Not In	Not In	Not In	Leader
Rackspace Technology	Product Challenger	Leader	Leader	Product Challenger
Red River	Not In	Contender	Not In	Not In
Stefanini	Contender	Not In	Not In	Not In
Sutherland	Not In	Contender	Not In	Not In
Switch	Not In	Not In	Not In	Contender
Syntax	Not In	Product Challenger	Product Challenger	Not In
TCS	Leader	Not In	Product Challenger	Not In
Tech Mahindra	Product Challenger	Not In	Not In	Not In
TierPoint	Not In	Not In	Contender	Product Challenger

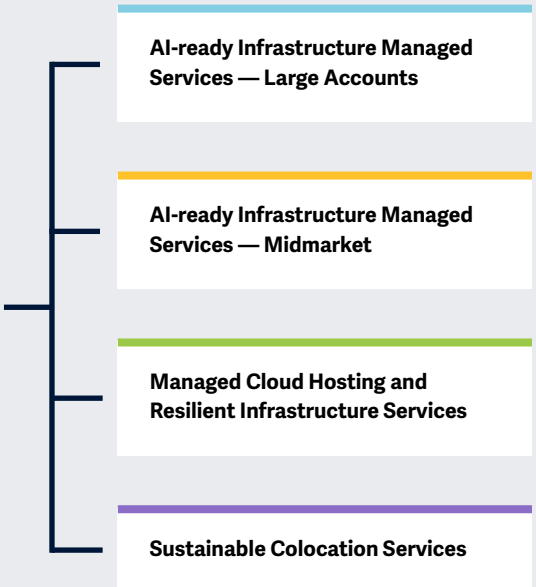
Provider Positioning

Page 7 of 7

	AI-ready Infrastructure Managed Services — Large Accounts	AI-ready Infrastructure Managed Services — Midmarket	Managed Cloud Hosting and Resilient Infrastructure Services	Sustainable Colocation Services
T-Systems	Product Challenger	Not In	Not In	Not In
Unisys	Product Challenger	Leader	Leader	Not In
UnitedLayer	Not In	Product Challenger	Leader	Product Challenger
US Signal	Not In	Not In	Not In	Product Challenger
UST	Not In	Product Challenger	Not In	Not In
Wipro	Leader	Not In	Not In	Not In
Zensar Technologies	Not In	Product Challenger	Product Challenger	Not In
Zones	Not In	Product Challenger	Not In	Not In

This study focuses on what ISG perceives as the most critical aspects of **private/ hybrid cloud and data center services** in 2026.

Simplified Illustration Source: ISG 2026



Definition

This study assesses global and regional providers delivering private and hybrid cloud-centric infrastructure services to enterprises across regions and the U.S. public sector. The research covers AI-ready infrastructure managed services, managed cloud hosting and resilient infrastructure services, sustainable colocation services, and edge computing services, reflecting how organizations are modernizing their core IT foundations to support data-intensive and AI-driven workloads.

AI technologies are increasingly being embedded across an entire infrastructure services stack, spanning on-premises, private, hybrid and public cloud environments. This shift is moving operations from reactive maintenance to predictive, automated and increasingly autonomous models. Providers leverage AI for intelligent monitoring, anomaly detection, automated root-cause analysis, predictive maintenance, dynamic resource scaling and enhanced cybersecurity. GenAI further improves operational efficiency through copilots, self-service interfaces and advanced analytics that support incident resolution, capacity planning and infrastructure optimization.

Enterprises and public sector institutions are also re-evaluating where they run their workloads. Managed hosting, colocation and sovereign cloud infrastructure have become central to hybrid cloud strategies, particularly for sensitive or regulated workloads, requiring jurisdictional control, compliance and risk mitigation. At the same time, sustainability has emerged as a critical infrastructure priority, owing to rising energy demand, limitations in power availability and regulatory pressure. Providers are increasingly applying AI both to optimize infrastructure efficiency and to reduce the environmental footprint of AI workloads.

The dedicated lens on the U.S. public sector, for this study, encompasses state and local government and education (SLED) organizations, public utilities, public health entities and other U.S. agencies. For these organizations, private and hybrid cloud environments form the foundation for secure and compliant AI adoption, enabling innovation at scale while protecting sensitive data and meeting stringent governance and regulatory compliance requirements.

Scope of the Report

This ISG Provider Lens® quadrant report covers the following four quadrants for services: AI-ready Infrastructure Managed Services — Large Accounts, AI-ready Infrastructure Managed Services — Midmarket, Managed Cloud Hosting and Resilient Infrastructure Services and Sustainable Colocation Services.

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

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments (quadrants)
- Focus on the regional market

Our study serves as an important decision-making basis for positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their current 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.

AI-ready Infrastructure Managed Services — Large Accounts

Who Should Read This Section

This report is valuable for providers offering **AI-ready infrastructure managed services to large accounts** 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 based on the depth of their service offerings and market presence.

IT and infrastructure leaders

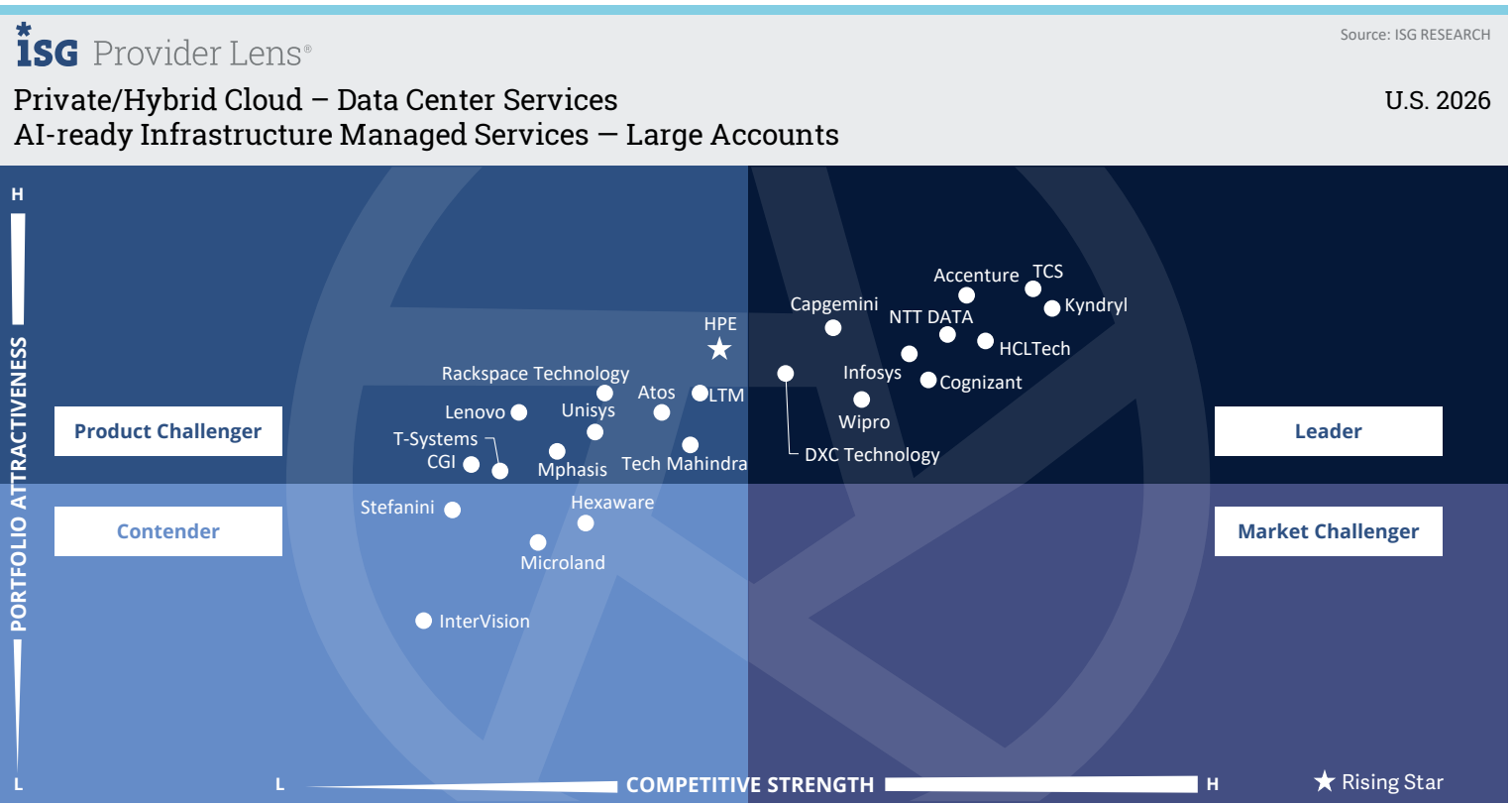
Should read this report to assess providers' ability to operate end-to-end AI-ready private and hybrid estates, managing GPUs/accelerators, data pipelines, container platforms and AI runtimes with AIOps/MLOps, automated compliance and cost-to-performance controls. They can use this report to benchmark partners that can modernize core workloads, while integrating with public cloud and on-premises environments securely and at scale.

Software development and technology leaders

Should read this report to understand how managed services teams foster reliable platforms for model training, inference and data-intensive applications to standardize observability, CI/CD for infrastructure, and platform APIs and guardrails for responsible AI. The insights can help align road maps for platform engineering, ML engineering and DevOps across private, edge and multicloud integrations.

Sourcing, procurement and vendor management professionals

Should read this report to compare providers' service depth, operating models and commercial levers for AI-ready infrastructure services in the U.S. It would enable adherence to SLAs, as well as foster GPU capacity commitments, sustainability metrics, security attestations and automation toolchains, supporting partner selection, risk management and value realization in multi-year engagements.



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

Shashank Rajmane

Definition

This quadrant assesses providers delivering managed services for private and hybrid cloud and data center environments, with particular focus on continuous optimization and operation of infrastructure to support AI workloads, alongside traditional workloads. Providers take on end-to-end responsibility for operating, automating and transforming infrastructure environments across client data centers, their own setups and third-party colocation facilities.

Unlike managed hosting, AI-ready infrastructure managed services include continuous transformation, AI-driven optimization and lifecycle management of AI-integrated infrastructure, including GPUs, high-performance storage, container platforms and data pipelines. Providers leverage advanced automation, AIOps and MLOps to foster predictive operations, self-healing environments and optimized training and inference runtimes. Their services support both traditional and cloud-native applications and are tightly aligned with enterprise AI strategy, governance and sustainability objectives.

Eligibility Criteria

1. Offer managed services for **private, hybrid cloud** and **data center infrastructure** (servers, middleware, storage and databases) without partner dependency
2. Take responsibility for **continuous optimization and transformation of AI-integrated infrastructure**
3. Operate and **manage GPUs, accelerators, container platforms and AI runtime** environments
4. Leverage automation, AIOps and MLOps for **predictive operations and self-healing**
5. Support **infrastructure for AI training, inference and data pipeline readiness**
6. Show experience in **transition** projects that include **automation, consolidation, virtualization** and **containerization** with proven modernization or AI-enablement outcomes
7. Act as an **extension of clients' IT organization**, creating blueprints, architecture frameworks and management processes at their location
8. Provide services for the **centralized orchestration**, monitoring and management of a hybrid IT infrastructure, augmented with AI-driven observation and self-optimization
9. Showcase relevant security and compliance **certifications** at the local level and adhere to emerging AI governance, sustainability and data sovereignty standards
10. Have **expertise in cost monitoring, spend management and FinOps** for AI workloads

Observations

The U.S. managed services market for large enterprises is moving toward agentic operations. Large service providers are increasingly repositioning private and hybrid cloud managed services as the operational backbone for AI adoption, not merely as infrastructure management. Most are converging on platform-led models that integrate GPU infrastructure, agentic AIOps, FinOps and governance into a unified operating layer. This shift reflects enterprise demand for scalable, cost-governed and compliant AI-ready environments, particularly as workloads move from pilot to production. However, there is still variability in how deeply these capabilities are embedded, ranging from human-in-the-loop models to more autonomous, agentic operations.

From an enterprise buyer perspective, managed services in this space are evolving from traditional *run* models into continuous transformation platforms that combine modernization, operations and AI lifecycle management. Large providers offer scale, resilience and full-stack capabilities, but challenges remain in execution consistency, pricing transparency, ecosystem dependence and differentiation of AI-led operations. U.S. enterprises should prioritize providers that can demonstrate measurable operational outcomes, strong governance frameworks and credible automation at scale, rather than relying solely on AI messaging or legacy infrastructure strengths.

From the 68 companies assessed for this study, 24 qualified for this quadrant, with 10 being Leaders and one a Rising Star.

accenture

Accenture is advancing private AI factory concepts into a repeatable managed services model with stronger operational and financial governance, positioning it well for enterprises moving from pilots to production and needing AI environments operated with enterprise controls.

Capgemini

Capgemini stands out this year for focusing on the Day 2 realities of running hybrid AI environments at scale, supported by managed GPU operations, automation-led delivery and financial discipline buyers increasingly expect in production-grade operating models.

cognizant

Cognizant differentiates itself through a combined focus on AI Factory operations, agentic service delivery and strategic hypervisor relationships. This approach aligns well with enterprises that are modernizing infrastructure and operationalizing AI across large estates.

DXC

DXC Technology positions private AI as a practical, governed extension of enterprise infrastructure, fitting regulated buyers seeking production discipline, compliance alignment and controlled modernization over a broad AI narrative without clear operational grounding.

HCLTech

HCLTech is strengthening its position by presenting AI-ready infrastructure as a full-stack managed environment across data center, platform and AI workload layers, appealing to buyers seeking credible run state execution rather than AI ambition alone.

Infosys

Infosys uses hybrid cloud control and estate orchestration to connect infrastructure modernization with AI readiness. This approach fits enterprises that must industrialize and govern complex estates before scaling AI operations with confidence.

kyndryl

Kyndryl differentiates through a modernization path that moves legacy-heavy estates toward more autonomous, AI-enabled operations without requiring a full reset, making it relevant for enterprises seeking steady operational change built on what they already run.

NTT DATA brings complete full-stack infrastructure capabilities to AI-ready managed services. The company is expanding its innovative data center facilities to improve client delivery and infrastructure efficiencies.

TCS stands out for linking private AI, automation-led operations and governance into an end-to-end operating model for complex enterprise estates, strengthening its relevance for buyers embedding AI into sovereign, regulated and highly distributed environments at scale.

Wipro is showing greater discipline in its managed services story through stronger alignment across agentic operations, private AI patterns and cost governance. This gives buyers a more credible path to running hybrid AI environments at scale across large enterprises.

HPE

HPE (Rising Star) continues to build an integrated managed services story around its HPE GreenLake platform and infrastructure strengths for hybrid and AI-oriented environments, improving its relevance for buyers seeking broader operational value.

AI-ready Infrastructure Managed Services — Midmarket

Who Should Read This Section

This report is valuable for providers offering **AI-ready infrastructure managed services to mid-size businesses** 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 based on the depth of their service offerings and market presence.

IT and infrastructure leaders

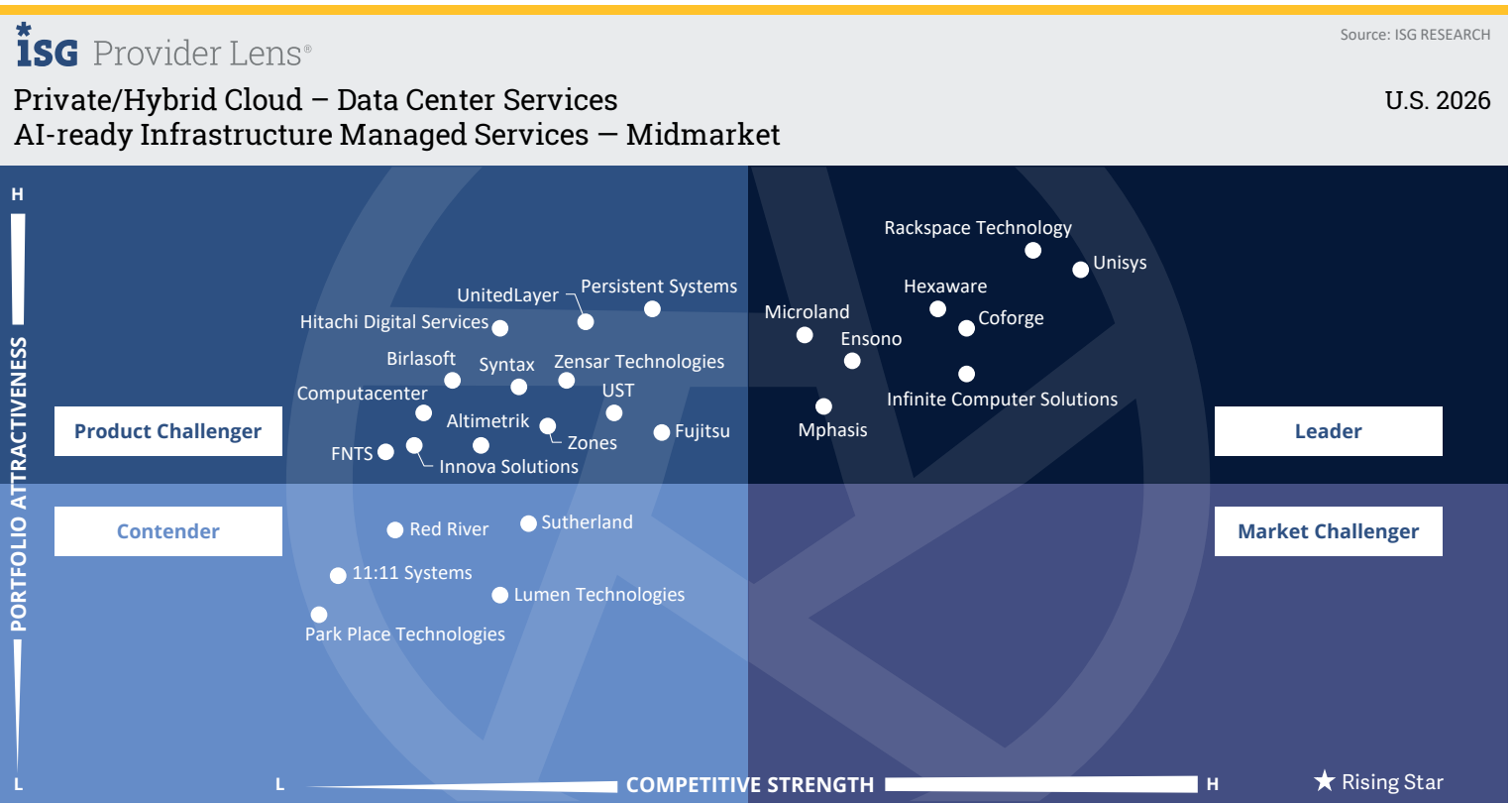
In the U.S. should read this report to analyze the modernization capabilities of MSPs to identify the ones offering innovative solutions aligned with evolving technology trends. An understanding of these market advancements is critical for IT executives to design effective, future-proof private cloud strategies and ensure their organizations maintain competitive agility and resilience.

Software development and technology leaders

Should read this report to gain insights into providers' strategic positioning, technological expertise and innovations in infrastructure transformation. This insight would empower them to align internal software development and technology road maps with external expertise, driving efficient and impactful digital transformation.

Sourcing, procurement and vendor management professionals

Should read this report to better understand the current landscape and partner ecosystem of AI-ready managed services in the U.S. A deep understanding of provider competencies, differentiation and market presence would support informed selection decisions and negotiation strategies, ensuring the establishment of optimal partnerships that deliver both immediate value and sustainable long-term benefits.



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 providers delivering managed services for private and hybrid cloud and data center environments, with particular focus on continuous optimization and operation of infrastructure to support AI workloads, alongside traditional workloads. Providers take on end-to-end responsibility for operating, automating and transforming infrastructure environments across client data centers, their own setups and third-party colocation facilities.

Unlike managed hosting, AI-ready infrastructure managed services include continuous transformation, AI-driven optimization and lifecycle management of AI-integrated infrastructure, including GPUs, high-performance storage, container platforms and data pipelines. Providers leverage advanced automation, AIOps and MLOps to foster predictive operations, self-healing environments and optimized training and inference runtimes. Their services support both traditional and cloud-native applications and are tightly aligned with enterprise AI strategy, governance and sustainability objectives.

Eligibility Criteria

1. Offer managed services for **private, hybrid cloud and data center infrastructure** (servers, middleware, storage and databases) without partner dependency
2. Take responsibility for **continuous optimization and transformation of AI-integrated infrastructure**
3. Operate and **manage GPUs, accelerators, container platforms and AI runtime** environments
4. Leverage automation, AIOps and MLOps for **predictive operations and self-healing**
5. Support **infrastructure for AI training, inference and data pipeline readiness**
6. Show experience in **transition** projects that include **automation, consolidation, virtualization** and **containerization** with proven modernization or AI-enablement outcomes
7. Act as an **extension of clients' IT organization**, creating blueprints, architecture frameworks and management processes at their location
8. Provide services for the **centralized orchestration**, monitoring and management of a hybrid IT infrastructure, augmented with AI-driven observation and self-optimization
9. Showcase relevant security and compliance **certifications** at the local level and adhere to emerging AI governance, sustainability and data sovereignty standards
10. Have **expertise in cost monitoring, spend management and FinOps** for AI workloads

Observations

Across midmarket providers, a clear theme is the shift toward AI-infused managed services delivered through focused, platform-led operating models rather than large-scale, monolithic outsourcing constructs. These providers emphasize agentic operations, SRE-led delivery and integrated FinOps and governance frameworks to make hybrid cloud environments more manageable and cost-efficient. Many also align their services with specific enterprise pain points such as VMware transitions, cost control or regulated workloads, instead of offering broad, one-size-fits-all solutions. This resonates with enterprises seeking targeted modernization without large upfront transformation risk.

For U.S. enterprise buyers, midmarket providers offer a more flexible, execution-focused alternative to large GSIs, particularly for organizations that want faster time-to-value, modular consumption models and closer alignment between engineering and operations. However, common trade-offs include limited scale, AI infrastructure operations maturity, narrower ecosystem depth and concentration risks across industries or geographies. U.S. enterprise buyers should evaluate these providers based on their ability to scale automation, demonstrate production-grade AI operations and sustain delivery consistency, especially as workloads move from pilot to enterprise-wide deployment.

From the 68 companies assessed for this study, 26 qualified for this quadrant, with eight being Leaders.

Coforge

Coforge is moving beyond dependable hybrid infrastructure management toward an AI-ready operating model built around AgenticOps, platform engineering and managed environments for AI-adjacent workloads. This shows clear momentum toward more modern run operations.

ensono

Ensono stands out for turning infrastructure disruption into a practical managed services proposition, helping midmarket clients stabilize operations, modernize workloads and maintain Day 2 control and mobility through VMware change and broader estate transition.

HEXAWARE

Hexaware reflects the enterprise demand shift from conventional automation to reasoning-led operations, combining stronger governance, decision support, controlled autonomy and cost accountability to position AI-ready managed services as a disciplined operating model.

infinite

Infinite Computer Solutions stands out as a domain-led provider whose healthcare depth gives its AI-ready managed services story stronger operational credibility, especially for midmarket buyers in regulated environments that value contextual fit and run state reliability.

MICROLAND®

Microland stands out for packaging AI-ready managed services around governed software-defined operations and a practical inference-led consumption model, making its offering more usable and economically realistic for midmarket clients in the hybrid cloud space.

Mphasis
The Next Applied

Mphasis stands out for integrating hybrid cloud modernization, platform engineering and AI-augmented operations into an easy-to-consume managed services delivery model. This gives buyers a credible path from estate transformation to more automated run state operations.

rackspace technology.

Rackspace Technology stands out for moving toward a productized, production-oriented private AI managed services model, showing stronger readiness to support governed AI workloads in live hybrid cloud environments.

unisys

Unisys stands out for emphasizing secure and governed AI-ready operations, making it relevant for buyers that need tighter control as they move from infrastructure transformation to steady-state managed outcomes in control-heavy environments.

Leader

"Unisys stands out for seamlessly connecting infrastructure transformation with steady-state operations, enabling U.S. enterprises to transition from modernization to governed run services and build practical, AI-ready hybrid cloud environments."

Shashank Rajmane

Unisys

Overview

Unisys is headquartered in Pennsylvania, U.S. It has more than 15,000 employees across 20 countries. In FY25, the company generated $2.0 billion in revenue. Its AI-ready infrastructure managed services portfolio centers on hybrid cloud managed services, data center management, cloud transformation and cloud financial analysis and optimization, combining AIOps, self-healing and zero-touch automation, observability, FinOps and security-integrated operations. In the U.S., Unisys applies this portfolio to data center modernization, multicloud operations and AI-infused service delivery across regulated commercial and state-level environments.

Strengths

AI-driven intelligent automated operations: Unisys has moved beyond conventional monitoring to an operating model combining observability, AIOps, automation, zero-touch patching and CloudOps, SecOps and FinOps. Its current model is positioned to improve IT operations efficiency and reduce operational risk through policy-based remediation, creating a more stable, lower-touch base for U.S. clients running both AI and traditional workloads.

Cost optimization into hybrid operations: Unisys embeds FinOps-based cost governance into ongoing service delivery rather than treating it as a separate advisory workstream. Its cloud financial analysis and optimization service combines chargeback, anomaly detection, budgeting, rightsizing and rate optimization to identify waste, technical debt and automation opportunities early. This gives U.S. clients a clearer, practical path to continuous savings as hybrid estates evolve.

Robust security practice: Unisys integrates security into infrastructure delivery rather than treating it as a separate silo. Its model combines cloud security, identity controls, zero trust principles, cyber recovery, managed detection and response and automated compliance checks across on-premises and cloud environments. For U.S. enterprises, this improves audit readiness and strengthens resilience for business-critical and AI-related workloads.

Caution

Unisys' ecosystem partnerships, while evolving and expanding, remain less extensive across hyperscalers, vertical-specific platforms and emerging AI solutions. Enterprises may expect broader alliances to enhance integration flexibility, support diverse use cases and improve adaptability in rapidly changing hybrid cloud environments.

Managed Cloud Hosting and Resilient Infrastructure Services

Who Should Read This Section

This report is valuable for providers offering **managed cloud hosting and resilient infrastructure services** 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 based on the depth of their service offerings and market presence.

IT and infrastructure leaders

Should read this report to evaluate managed cloud hosting providers in the U.S. that deliver resilient architectures, covering high availability, backup/DR, cyber recovery, zero trust operations and workload portability across private, hosted and public environments. They use the capabilities to guide the modernization of mission critical platforms, optimize decisions on workload and ensure business continuity.

Software development and technology leaders

Software development and technology leaders should read this report to understand the way hosted platforms support application modernization, including Kubernetes, databases, middleware and integration services, while meeting latency, performance and compliance needs. This report clarifies provider road maps for automation, observability and platform SRE to enable teams with reliable launches, reduced efforts and accelerated release cycles for regulated and enterprise workloads.

Sourcing, procurement and vendor management professionals

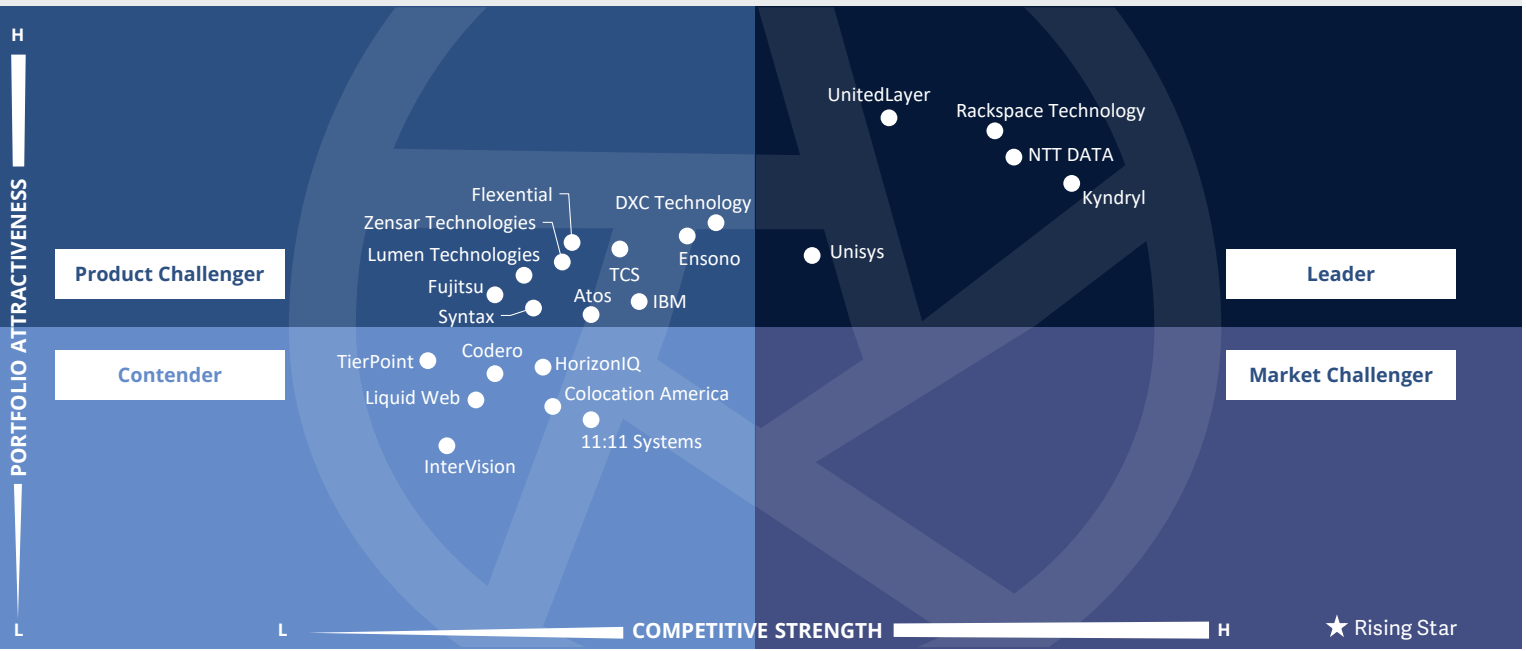
Should read this report to compare contracts designed for resilience, covering recovery objectives, immutable backups, security controls, burst capacity and cross-region designs, alongside transparent pricing, exit options and governance. These insights can foster structured RFPs, robust negotiations and measurable outcomes for hosted and hybrid infrastructure programs.

ISG Provider Lens®

Source: ISG RESEARCH

Private/Hybrid Cloud – Data Center Services
Managed Cloud Hosting and Resilient Infrastructure Services

U.S. 2026



This quadrant assesses providers offering **enterprise-grade hosting solutions** using their own or **third-party facilities**. Providers are responsible for the **ongoing management** of **data center** equipment such as **servers, storage, operating systems** and **networks**.

Shashank Rajmane

Managed Cloud Hosting and Resilient Infrastructure Services

Definition

This quadrant assesses providers delivering enterprise-grade managed cloud hosting and resilient infrastructure services using their own, colocated or contracted third-party facilities. The providers take on the responsibility of provisioning, operating and maintaining core infrastructure components, including compute, storage, networking, operating systems and AI-integrated infrastructure, to ensure high availability, performance, security and recovery under definitive SLAs.

Managed cloud hosting focuses on the stable and predictable operations of infrastructure environments, with providers ensuring infrastructure runtime stability, data protection, disaster recovery and workload proximity. However, they do not take the responsibility of continuous infrastructure transformation, AI pipeline optimization or the lifecycle management of AI workloads beyond hosting support. The quadrant also evaluates providers that support AI- and data-intensive workloads from a hosting and capacity perspective, emphasizing resilience, scalability and cost efficiency.

Eligibility Criteria

1. Offer **enterprise-grade** managed hosting services using own, colocated (realty only) or contractually secured infrastructure
2. Provide **SLA-backed** availability, **resilience, backup** and **disaster recovery** (active-active or active-passive)
3. Demonstrate the ability to **maintain** and **expand** infrastructure capacity in tandem with demand
4. Operate and manage **dedicated** and **shared infrastructure** environments on a unified platform
5. Implement **multilayered security** controls across **physical, network** and **system** layers
6. Support **AI- and data-intensive** workloads through required infrastructure support and runtime stability
7. Provide **data locality, compliance** and **regulatory** alignment support as required

Observations

Managed hosting in the U.S. is evolving from a traditional *keep-the-lights-on* model into a governed, automation-led operating layer for hybrid infrastructure. A consistent theme is the integration of hosting with observability, AIOps, disaster recovery and FinOps into a single control plane, enabling enterprises to manage legacy and modern workloads together. Managed hosting providers are increasingly positioning hosting as a continuity-first foundation, especially for regulated, latency-sensitive and business-critical environments where full public cloud migration is not practical.

Another notable trend is the convergence of hosting with hybrid cloud flexibility and workload placement strategies. Enterprises are no longer treating hosting as a static destination but as a dynamic layer that supports workload mobility across on-premises, colocation and cloud environments. Capabilities such as vendor-neutral architectures, VMware-based private cloud models and workload-proximate deployment are becoming central, allowing buyers to balance cost, control and performance while avoiding lock-in. Providers are embedding cyber recovery, DraaS and predictive operations directly into hosting services rather than offering them as add-ons.

From an enterprise buyer perspective, managed hosting remains highly relevant, particularly for core systems, regulated workloads and hybrid estates. Enterprises in the U.S. should prioritize providers that can demonstrate automation maturity, consistent governance across environments and clear modernization pathways, not just infrastructure stability.

From the 68 companies assessed for this study, 22 qualified for this quadrant, with five being Leaders.

kyndryl

Kyndryl is bringing stronger governance and operational consistency to complex hybrid cloud estates while preserving IBM Z and IBM i environments. It is a managed hosting partner for clients seeking resilience, control and continuity across critical legacy workloads.

NTT DATA

NTT DATA stands out for its disciplined resilience, recovery and workload placement across hybrid environments. It is well suited for enterprises seeking managed hosting that reduces operational risk while maintaining control and continuity across distributed hybrid cloud estates.

rackspace technology.

Rackspace Technology offers a clearer managed hosting proposition built around a VMware-centered private cloud model aligned to clients' compliance and recovery needs. It gives buyers a coherent option for sensitive and proximity-dependent workloads with high resilience.

UNISYS

Unisys presents managed hosting as a governed operating model that combines AIOps, FinOps, workload placement and disaster recovery. This positions it well for clients seeking tighter control, resilience and economic discipline across complex hybrid cloud estates.

UnitedLayer

UnitedLayer stands out for its platform-led approach that combines multi-hypervisor flexibility with embedded operations and resilience. It gives buyers a mission-critical private cloud solution with specialized options, separating control from recovery readiness.

Leader

"Unisys differentiates itself by translating hybrid infrastructure transformation into a governed operating model by addressing hosting, recovery and optimization as a single service, making it highly relevant for complex U.S. enterprise environments."

Shashank Rajmane

Unisys

Overview

Unisys is headquartered in Pennsylvania, U.S. It has more than 15,000 employees across 20 countries. In FY25, the company generated $2.0 billion in revenue. It delivers managed cloud hosting services through its Intelligent Operations model, spanning hybrid cloud managed services, data center management, DRaaS, cyber recovery, unified observability, AIOps and FinOps across hybrid and multicloud estates. In the U.S., Unisys supports managed hosting through a hybrid operating model spanning on-premises, colocation and cloud environments, with unified observability, automation, FinOps and disaster recovery built into steady-state operations.

Strengths

AI-driven intelligent automated operations: Unisys has built its hybrid hosting proposition around Intelligent Operations, a run-state model that combines unified observability, AIOps, runbook automation, zero-touch patching and policy-controlled self-healing. It connects monitoring, service management, security and cost controls rather than treating them separately. For U.S. firms, this integration supports better predictable runtime stability, faster incident handling and lower manual effort.

Governed workload placement: Unisys links hosting decisions to workload placement, infrastructure rebalancing and financial governance. Its Rapid Value Assessment offering and FinOps model use usage, asset, ticketing and observability data to expose underutilization, technical debt and cost anomalies. This helps clients to optimally place workloads between data center, colocation and cloud without forcing a single destination model.

Flexible disaster recovery design: Unisys offers a configurable recovery architecture rather than treating disaster recovery as a single pattern. Its disaster recovery-as-a-service (DraaS) model combines primary site assessment, replicated site design, backup and restoration automation, and service catalog-driven recovery workflows. This helps firms easily match recovery speed and data protection for each hosted workload.

Caution

While Unisys is highly effective in steady-state operations, its automation and modernization-led hosting narrative may not be as strong as some of its peers. Enterprises in the U.S. may need to assess the firm's ability to proactively drive transformation alongside ongoing managed hosting services.

Sustainable Colocation Services

Who Should Read This Section

This report is valuable for providers offering **sustainable colocation services** 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 based on the depth of their service offerings and market presence.

IT and infrastructure leaders

In the U.S. should read this report to assess colocation providers on sustainability and operational excellence, renewable energy sourcing, verified carbon data, PUE, heat reuse options, liquid cooling readiness and high-density AI racks alongside network fabrics to clouds and carriers. They can use the report to plan capacity for AI-based workloads without compromising on resilience or compliance.

Software development and technology leaders

Should read this report to understand how colocation ecosystems enable the performance of sustainable platforms in proximity to clouds and data sources, allowing low-latency interconnects, edge on ramps and secure data exchange, as well as support for regulated datasets. These factors determine the architecture patterns for AI/ML pipelines, data platforms and event-driven applications.

Sourcing, procurement and vendor management professionals

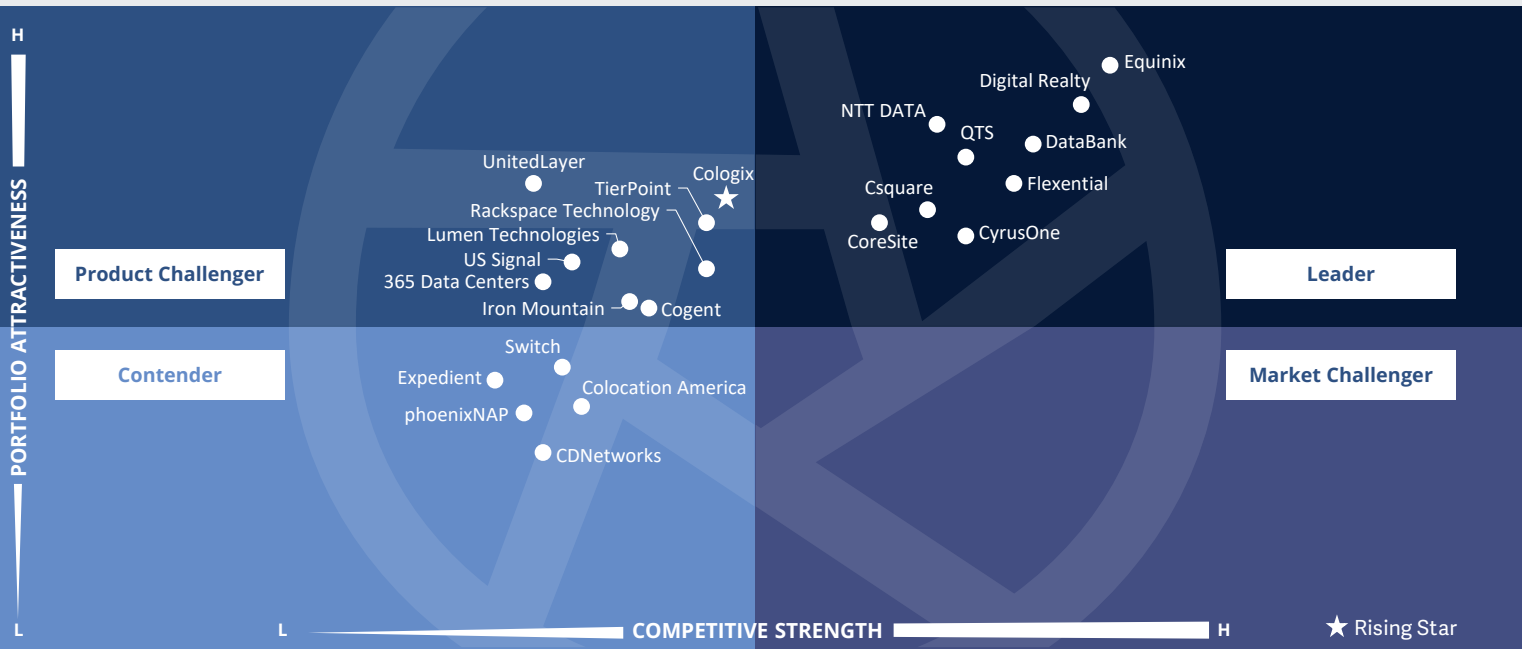
Should read this report to compare sustainability disclosures, energy contracts, carbon free SLAs, metering granularity and reporting, as well as cross connect pricing, relocation services and growth paths of providers. It would help structure outcome-based deals that balance total cost of occupancy with ESG commitments, resiliency targets and flexibility for expansions.

ISG Provider Lens®

Source: ISG RESEARCH

Private/Hybrid Cloud – Data Center Services
Sustainable Colocation Services

U.S. 2026



This quadrant assesses providers that offer **standardized data center operations** as **sustainable colocation** services, including sophisticated and **secure data center setups, several carrier options, interconnectivity, low latency** and **high bandwidth.**

Shashank Rajmane

Definition

This quadrant assesses colocation providers offering standardized and secure data center facilities on rent for the computing hardware of enterprises. They must also offer diverse carrier connectivity, low latency and high bandwidth for seamless operations. A critical differentiator is the commitment to sustainability, involving the deployment of renewable energy, energy-efficient cooling and circular economy practices such as e-waste recycling. Concurrently, providers must show a measurable commitment to environment-related mandates through carbon offset programs and real-time sustainability reporting, ensuring a compliant and environmentally responsible perimeter.

In keeping with developments in AI, colocation providers must support high-performance computing through high-density racks and advanced liquid cooling for GPU hosting. This modernization should extend to networking and security, incorporating software-defined interconnections (SDI), edge-ready services and robust data sovereignty controls. By combining professional remote hands support with scalable, flexible infrastructure, these colocation services must include the high-performance environment necessary for AI-intensive workloads.

Eligibility Criteria

1. Own facilities that offer **modern, standardized and energy-efficient data center** architectures for colocation
2. Offer **secure** and high-quality **network** equipment, appliances and connectivity systems
3. Can guarantee **power density and renewable energy usage** to support current and future technologies
4. Implement **multilayered security** controls across **physical, network** and **system** layers
5. Have relevant **certifications** such as SSAE 16, HIPAA, ISO 14001, ISO 22301, ISO 27001, ISO 50001, EN 50600, PCI DSS, NIST2, KRITIS, FISMA and SOC Type 1 and 2, as well as LEED, ENERGY STAR and ISO 14001 accreditations for environmental support
6. Have the ability to meet SLAs related to **hands-and-feet support** and hardware replacement
7. Render **facilities with traffic exchange points** in proximity to users and hyperscalers
8. Offer d**isaster recovery and backup solutions**
9. Provide **modular** and **scalable** solutions that allow **rapid deployment** for custom or temporary needs
10. Furnish detailed sustainability measures and public reporting on **PUE**, **WUE**, carbon intensity, **renewable power** sourcing and **waste reduction**

Observations

The U.S. sustainable colocation market has entered a demanding stage. Sustainability is no longer treated as an ESG message. It is now part of the core colocation value proposition, alongside resiliency, connectivity and service quality. Providers increasingly highlight renewable energy sourcing, cooling efficiency, water stewardship and operating transparency as buying criteria. For enterprise buyers, the real differentiator is proof at the site level, especially in newer campuses or select facilities, which makes direct validation more important than broad portfolio claims.

Colocation is being positioned less as a space and power offering and more as a programmable hybrid infrastructure layer. Leading providers are combining facilities with software-defined interconnection, cloud on-ramps, customer portals and remote operations to simplify hybrid operations across multicloud environments. Although carrier neutrality still matters, the bigger question is whether providers can speed provisioning, improve control and make distributed infrastructure easier to manage.

AI-led demand is also reshaping the market. Since high-density support is expected among market leaders, broad AI-ready messaging is less persuasive. Providers are differentiated based on whether they can move customers from conventional colocation to high-density, liquid-cooled and other AI-optimized environments without major disruption. As a result, buyers are placing greater weight on measurable sustainability outcomes, software-enabled hybrid connectivity and execution consistency across the colocation portfolio.

From the 68 companies assessed for this study, 23 qualified for this quadrant, with nine being Leaders and one Rising Star.

CoreSite

CoreSite stands out for combining compliant, high-bandwidth colocation with close cloud adjacency for data-intensive and AI-oriented hybrid cloud workloads. It gives enterprises cloud-proximate performance while preserving operational control.

CSQUARE

Csquare is strengthening its position by pairing software-defined connectivity and dense-power flexibility with a stronger decarbonization posture. This fits into enterprises' shifting buyer priorities, resonating consistency across the broader hybrid cloud estates.

CyrusOne

CyrusOne differentiates itself as an engineering-led platform for enterprises scaling high-density AI and HPC environments. Its value comes from build-to-suit execution and density specialization, making it relevant for advanced requirements over standard colocation.

DataBank

DataBank offers a clear path, from traditional colocation to higher-density environments, without forcing an abrupt reset. Stronger operational visibility and clearer interconnection sourcing make it a credible option for enterprises modernizing in stages.

Digital Realty

Digital Realty stands out for turning a large estate into a standardized platform for hybrid and AI-oriented colocation. Its differentiation comes from combining multi-site consistency, broad interconnection and delivering high-density capability in one operating model.

Equinix

Equinix strengthens its position by making sustainability execution part of its colocation identity alongside ecosystem density and private interconnection. This broadens its appeal for buyers seeking liquid-cooled AI capacity, environmental fit and strong connectivity.

Flexential

Flexential is building a more measurable colocation proposition through auditable efficiency standards and software-defined interconnection. This capability is more relevant than footprint scale alone, although its strongest proof still sits in selected markets.

NTT DATA

NTT DATA appears stronger in colocation execution than in market visibility, especially where flexible deployment models and site-level sustainability engineering intersect, making it a credible option for enterprises seeking expansion headroom and tighter control.

QTS

QTS stands out for linking its automation-rich campus model with low-water facility design and sustainability visibility. This strengthens its relevance for enterprises seeking digital operating control and environmental efficiency, especially across newer environments.

Cologix

Cologix (Rising Star) is extending its interconnection-first model into selective AI-adjacent and hybrid capacity, giving network-centric enterprises a clearer path beyond carrier-dense colocation.

Appendix

The ISG Provider Lens 2026 – 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.

Study Sponsor:
Heiko Henkes

Lead Author:
Shashank Rajmane

Editor:
Shaurya Vineet

Research Analyst:
Yatharth Bharti

Data Analysts:
Sachitha Kamath and Lakshmi Kavya Bandaru

Consultant Advisors:
Anay Nawathe and Rob Brindley

Project Manager:
Manikanta Shankarane

Information Services Group Inc. is solely responsible for the content of this report. Unless otherwise cited, all content, including illustrations, research, conclusions, assertions and positions contained in this report were developed by, and are the sole property of, Information Services Group Inc.

The research and analysis presented in this report includes research 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 2026 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 otherwise.

The study was conducted in 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 and use cases
4. Leverage ISG's internal databases and advisor knowledge & experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts & figures received from providers and other sources.
6. Use of the following key evaluation criteria:
   * Strategy and vision
   * Innovation
   * Brand awareness and presence in the market
   * Sales and partner landscape
   * Breadth and depth of portfolio of services offered
   * Technology advancements

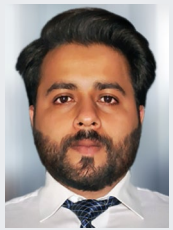
Author

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 7 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

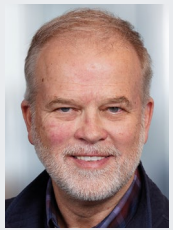
Heiko Henkes

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®

The ISG Provider Lens® Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners. ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

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

ISG Research™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

ISG offers research specifically about providers to state and local governments (including counties and cities) and higher education institutions. Visit: Public Sector.

For more information about ISG Research™ subscriptions, please email contact@isg-one.com, call +1.203.454.3900, or visit research.isg-one.com.

ISG

ISG (Information Services Group) (Nasdaq: III) is a leading global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth.

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.

For more information, visit isg-one.com.

ISG Provider Lens®

JUNE, 2026

REPORT: PRIVATE/HYBRID CLOUD — DATA CENTER SERVICES