

Private/Hybrid Cloud — Data Center Services

A research report comparing provider strengths,
challenges and competitive differentiators

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Modern UK data centres must balance high-density AI demands with strict net zero mandates

The ISG Provider Lens® Private/Hybrid Cloud — Data Center Services study benchmarks providers delivering private and hybrid cloud-centric infrastructure services in the UK. It assesses service providers across three critical quadrants: AI-ready Infrastructure Managed Services, Managed Cloud Hosting and Resilient Infrastructure Services and Sustainable Colocation Services. The evaluation analyses how providers help UK enterprises modernise core IT foundations to ensure resilience, sustainability and support for data-intensive, AI-driven workloads across on-premises, colocation and distributed edge environments.

Market context

The UK macroeconomic landscape in 2026 is defined by a strong focus on productivity and

digital sovereignty amid fluctuating energy costs and tightening environmental regulations. Following years of *cloud-first* mandates, the market has matured into a *cloud-smart* era where structural changes in the global economy, especially high interest rates and the UK's commitment to net zero, are forcing a re-evaluation of data centre strategies.

- **Regulatory and sustainability pressure:** The UK's stringent regulatory environment is driving structural change. The expansion of the Energy Savings Opportunity Scheme (ESOS) and new Sustainable Industry Policies have shifted carbon reporting from a voluntary ESG metric into a mandatory operational requirement. Consequently, power availability in the Golden Triangle (London, Slough and Reading) has become a key constraint, driving increased interest in regional data centre clusters that can offer renewable energy guarantees and lower latency to non-London hubs.
- **Geopolitical and economic drivers:** The UK faces unique labor market dynamics, with a persistent shortage of high-end engineering talent specialising in GPU orchestration

UK infrastructure
shifts from
cloud-first to
AI-native and
sovereign-always
strategies.



and AI-native architecture. Geopolitical instability has also intensified the demand for sovereign cloud infrastructure, requiring sensitive data to remain within UK jurisdictional control to mitigate cross-border risk. Macroforces such as the plateauing of traditional hyperscale cost efficiencies are leading enterprises to repatriate specific high-performance computing (HPC) workloads to private or colocation environments to maintain fiscal predictability.

- **The AI infrastructure boom:**

The rapid growth of GenAI has placed unprecedented strain on traditional data centre architectures, increasing the need for high-density power and cooling to support GPU-intensive workloads. Providers are now racing to retrofit existing facilities or build new AI-native hubs capable of supporting over 50 kW per rack, a significant jump from the traditional 5-10 kW average seen just a few years ago.

- **Enterprise priorities**

UK enterprises have moved beyond basic infrastructure maintenance and now prioritise

resilient, AI-ready foundations that reduce technical debt and accelerate innovation.

- **Bridging the legacy gap:** A primary buyer prioritises eliminating *legacy drag*. With most systems currently beyond end-of-life support, digital ambitions face a critical bottleneck. Therefore, CIOs are seeking providers that can modernise legacy environments into containerised, AI-integrated platforms rather than just maintaining them in a *steady state*.
- **Sovereign and compliant AI:** As GenAI moves from experimentation to production, UK buyers are increasingly concerned with data locality and governance. Most enterprises now rank sovereignty among the top-three factors in their infrastructure decisions. They are prioritising private AI, where LLMs are trained or tuned on proprietary data within a secure, private perimeter to prevent data leakage into public models, and to comply with the UK Data Protection and Digital Information (DPDI) framework.
- **Operational resilience and FinOps:** As workloads shift rapidly between public cloud, hosted environments and the edge,

enterprises are struggling with *gravity* issues, visibility and cost control across fragmented landscapes. Key priorities include the following:

- **FinOps adoption:** Implementing rigorous cloud financial management to curb sticker shock from unmanaged cloud consumption and ensure ROI on hybrid investments.
- **Adaptive resiliency:** Moving beyond traditional disaster recovery (DR) to continuous availability, where workloads automatically failover between private and public regions based on health and cost parameters.
- **Skill gap mitigation:** Partnering with providers that are equipped with niche engineering talent (comprising Kubernetes specialists, GPU orchestrators and prompt engineers) that is currently scarce in the UK labor market.

- **Provider dynamics**

The market in the UK is witnessing a radical shift in providers' delivery models. These models are moving away from labor-heavy

managed services towards platform-driven, AI-orchestrated environments.

- **AI-infused service delivery:** Leading providers are repositioning their portfolios by embedding AIOps and MLOps at the core of their managed services. This shift moves operations from reactive maintenance to predictive, autonomous models. Leaders are differentiating themselves by offering *AI-ready* blueprints that include management of specialised hardware such as GPUs and high-performance storage, which are essential for UK enterprises scaling GenAI pilots into production.
- **Evolution of resilient hosting:** The managed hosting segment has evolved into a *resilient infrastructure* play. Providers have moved beyond selling space and power to offering integrated DR and active-active architectures that bridge the gap between private environments and public cloud availability zones. An increasing number of providers are leveraging hybrid-native technologies, such as Azure Stack and AWS Outposts, to extend control planes directly into the client's or provider's data centre.



- **Sustainability as a competitive edge:** In the Sustainable Colocation Services quadrant, sustainability has emerged as the primary differentiator in 2026. Providers are investing heavily in the following:
 - **Advanced cooling:** Liquid-to-chip and immersion cooling are becoming standard requirements for AI-heavy tenants to manage extreme heat signatures.
 - **Edge connectivity:** To support low-latency applications such as autonomous logistics and smart manufacturing, providers are expanding their *near-edge* presence in regional UK hubs such as Manchester, Birmingham and Edinburgh. This regionalisation helps avoid congestion and the high costs associated with the London data centre market.

Outlook

Over the next 12-24 months, the UK private/hybrid cloud market will be characterised by a re-centralisation of data governance and a decentralisation of compute.

- **Future trajectory:**

1. **The rise of the edge:** As 5G and IoT mature, edge computing will move from niche use cases to a core component of the UK's industrial strategy, particularly in manufacturing and logistics.
2. **Agentic IT maturity:** We expect a shift towards autonomous infrastructure where AI agents handle 60-80 percent of Level 1 and Level 2 support tasks, allowing human talent to focus on high-value architecture.

- **Strategic guidance for enterprises:**

Buyers must prioritise providers that offer modular, vendor-agnostic orchestration. Avoiding lock-in at the management layer will be critical as the UK market oscillates between different AI chipsets and cloud platforms. Enterprises should also audit their providers' sustainability credentials, as regulatory penalties for carbon non-compliance are expected to escalate by 2027.

- **Strategic guidance for providers:**

Providers must close the gap between marketing AI and operational AI. Success in the UK will depend on the ability to handle high-density HPC workloads and demonstrate measurable ROI through FinOps. Those lagging in investing in sustainable, liquid-cooled infrastructure will likely be sidelined as the demand for AI-specific hosting is trending upward.

Enterprises in the UK are no longer content with reactive support; they demand *agentic IT* where AI integrates autonomy into infrastructure operations to reduce their technical debt barrier.





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
Accenture	Leader	Not In	Not In	Not In
Acora	Not In	Contender	Not In	Not In
ANS Group	Not In	Not In	Not In	Contender
Ark Data Centres	Not In	Not In	Not In	Product Challenger
AtlasEdge	Not In	Not In	Not In	Contender
Atos	Leader	Not In	Product Challenger	Not In
Axians	Contender	Contender	Not In	Not In
BT	Contender	Contender	Market Challenger	Contender
Capgemini	Leader	Not In	Not In	Not In
CDW	Not In	Contender	Not In	Not In





Provider Positioning

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	AI-ready Infrastructure Managed Services — Large Accounts	AI-ready Infrastructure Managed Services — Midmarket	Managed Cloud Hosting and Resilient Infrastructure Services	Sustainable Colocation Services
CGI	Market Challenger	Not In	Not In	Not In
Claranet	Product Challenger	Leader	Leader	Not In
Coforge	Not In	Leader	Not In	Not In
Cognizant	Leader	Not In	Not In	Not In
Colt Tech Services	Not In	Not In	Rising Star ★	Product Challenger
Computacenter	Leader	Not In	Not In	Not In
Csquare	Not In	Not In	Not In	Contender
Custodian Data Centres	Not In	Not In	Not In	Contender
CWCS	Not In	Not In	Contender	Contender
CyrusOne	Not In	Not In	Not In	Leader





Provider Positioning

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	AI-ready Infrastructure Managed Services — Large Accounts	AI-ready Infrastructure Managed Services — Midmarket	Managed Cloud Hosting and Resilient Infrastructure Services	Sustainable Colocation Services
Datum	Not In	Not In	Not In	Contender
Deutsche Telekom/T-Systems	Not In	Leader	Leader	Not In
Digital Realty	Not In	Not In	Not In	Leader
DXC Technology	Leader	Not In	Leader	Not In
Ensono	Contender	Product Challenger	Leader	Not In
Equinix	Not In	Not In	Not In	Leader
Fujitsu	Product Challenger	Product Challenger	Product Challenger	Not In
Global Switch	Not In	Not In	Not In	Leader
HCLTech	Leader	Not In	Not In	Not In
Hexaware	Leader	Leader	Not In	Not In





Provider Positioning

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	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
HYVE	Not In	Not In	Contender	Not In
Infosys	Leader	Not In	Not In	Not In
iomart	Not In	Not In	Contender	Product Challenger
Iron Mountain	Not In	Not In	Not In	Product Challenger
Kao Data	Not In	Not In	Not In	Rising Star ★
Kyndryl	Leader	Not In	Leader	Not In
Lenovo	Product Challenger	Not In	Not In	Not In
Logicalis	Contender	Contender	Not In	Not In
LTM	Product Challenger	Leader	Not In	Not In





Provider Positioning

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	AI-ready Infrastructure Managed Services — Large Accounts	AI-ready Infrastructure Managed Services — Midmarket	Managed Cloud Hosting and Resilient Infrastructure Services	Sustainable Colocation Services
Microland	Contender	Rising Star ★	Not In	Not In
Mphasis	Product Challenger	Product Challenger	Not In	Not In
Navisite (Accenture)	Not In	Not In	Market Challenger	Not In
nLighten	Not In	Not In	Not In	Contender
Node4	Not In	Not In	Not In	Contender
NTT DATA	Rising Star ★	Not In	Leader	Leader
OneAdvanced	Not In	Not In	Contender	Not In
Persistent Systems	Not In	Product Challenger	Not In	Not In
Pulsant	Not In	Not In	Leader	Leader
Rackspace Technology	Product Challenger	Leader	Leader	Product Challenger





Provider Positioning

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	AI-ready Infrastructure Managed Services — Large Accounts	AI-ready Infrastructure Managed Services — Midmarket	Managed Cloud Hosting and Resilient Infrastructure Services	Sustainable Colocation Services
Redcentric	Not In	Not In	Product Challenger	Market Challenger
Six Degrees	Not In	Not In	Not In	Contender
Softcat PLC	Not In	Contender	Not In	Not In
Sopra Steria	Contender	Product Challenger	Product Challenger	Not In
SysGroup	Not In	Not In	Contender	Not In
TCS	Leader	Not In	Not In	Not In
Tech Mahindra	Product Challenger	Product Challenger	Not In	Not In
Telefonica Tech	Not In	Leader	Contender	Not In
Telehouse	Not In	Not In	Not In	Leader
Trianz	Not In	Contender	Not In	Not In





Provider Positioning

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	AI-ready Infrastructure Managed Services — Large Accounts	AI-ready Infrastructure Managed Services — Midmarket	Managed Cloud Hosting and Resilient Infrastructure Services	Sustainable Colocation Services
Unisys	Product Challenger	Leader	Product Challenger	Not In
UnitedLayer	Not In	Product Challenger	Product Challenger	Not In
UST	Not In	Product Challenger	Product Challenger	Not In
VIRTUS	Not In	Not In	Not In	Leader
Vodafone	Contender	Contender	Not In	Not In
Wipro	Leader	Not In	Not In	Not In
Zensar Technologies	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 centre services** in 2026.

Simplified Illustration Source: ISG 2026

AI-ready Infrastructure Managed Services — Large Accounts

AI-ready Infrastructure Managed Services — Midmarket

Managed Cloud Hosting and Resilient Infrastructure Services

Sustainable Colocation Services

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 organisations are modernising 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 optimisation.

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 optimise infrastructure efficiency and to reduce the environmental footprint of AI workloads.



Scope of the Report

This ISG Provider Lens® quadrant report covers the following four (spell out the number of quadrants; do not use a digit) 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 the following to business and IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers.
- A differentiated positioning of providers by segments on their competitive strengths and portfolio attractiveness
- 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.

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.

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.

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 **UK** 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 UK 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 modernise 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 standardise observability, CI/CD for infrastructure, and platform APIs and guardrails for responsible AI. The insights can help align roadmaps for platform engineering, ML engineering and DevOps across private, edge and multicloud integrations.

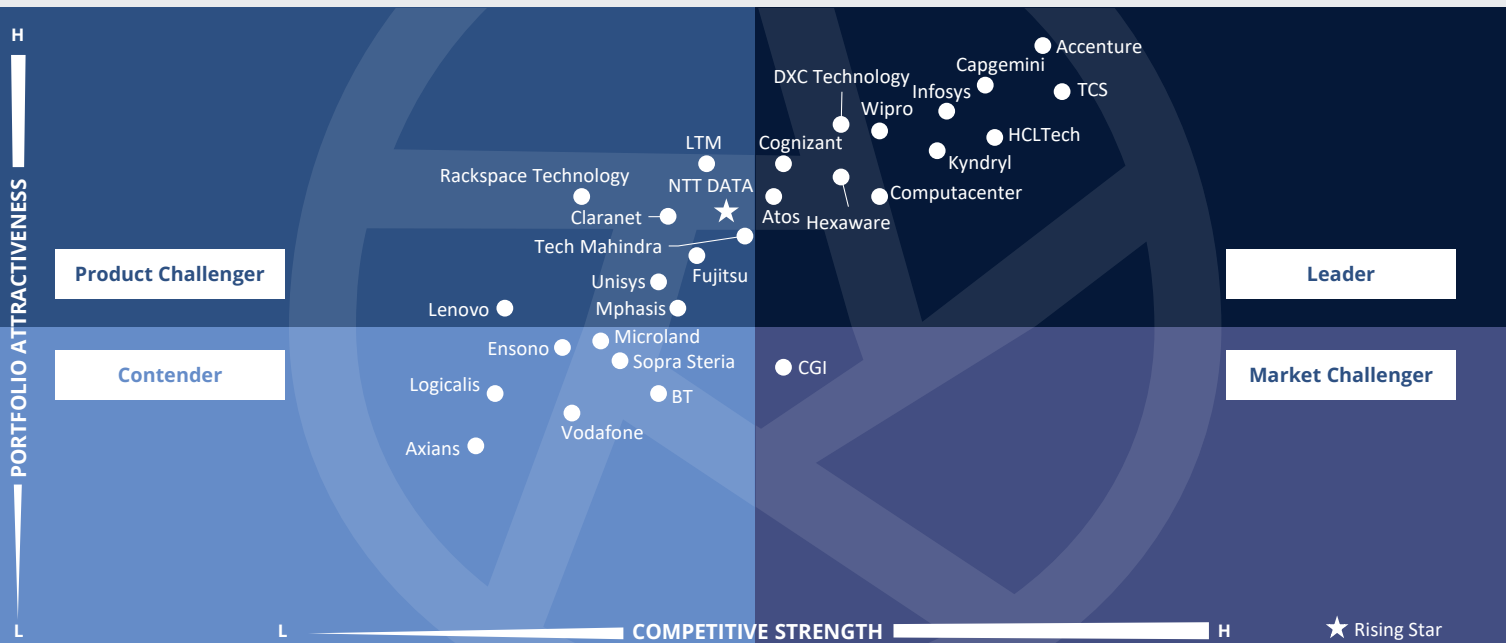
Sourcing, procurement and vendor management professionals

Should read this report to compare providers' service depth, operating models and commercial levers for AI-ready infrastructure services in the UK. 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 realisation in multiyear engagements.



Private/Hybrid Cloud – Data Center Services AI-ready Infrastructure Managed Services – Large Accounts

U.K. 2026



This quadrant assesses service providers managing private and hybrid clouds and data centre environments for large enterprises, **optimising infrastructure** for AI and traditional workloads through **end-to-end management, automation, AIOps and MLOps**.

Meenakshi Srivastava



AI-ready Infrastructure Managed Services — Large Accounts

Definition

This quadrant assesses providers delivering managed services for private and hybrid cloud and data centre environments, with particular focus on continuous optimisation 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 centres, their own setups and third-party colocation facilities.

Unlike managed hosting, AI-ready infrastructure managed services include continuous transformation, AI-driven optimisation 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 optimised 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 centre infrastructure** (servers, middleware, storage and databases) without partner dependency
2. Take responsibility for **continuous optimisation 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, virtualisation and containerisation** with proven modernisation or AI-enablement outcomes
7. Act as an **extension of clients' IT organisation**, creating blueprints, architecture frameworks and management processes at their location
8. Provide services for the **centralised orchestration**, monitoring and management of a hybrid IT infrastructure, augmented with AI-driven observation and self-optimisation
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



AI-ready Infrastructure Managed Services — Large Accounts

Observations

This quadrant is witnessing a transition from experimentation to large-scale operationalisation, driven by strategic consolidation and a pivot towards agentic AI and sovereign cloud solutions. Market leaders are aggressively expanding their technical footprints, exemplified by Accenture's acquisition of Faculty and Kyndryl's multi-billion-pound infrastructure commitment in Liverpool. Success depends on the ability to act as *sovereign engineers*, integrating high-performance computing with localised data governance to meet strict regulatory standards.

Position changes reflect this realignment: Cognizant has advanced to become a Leader by scaling its Intuitive Operations framework and deepening government partnerships. NTT DATA emerged as a Rising Star through investments in self-optimising data centres, while Mphasis and Unisys advanced to Product Challenger status by deploying agentic operating models and high-density cooling solutions. Conversely, Fujitsu transitioned to becoming a Product Challenger as its focus

shifted towards internal software initiatives. The repositioning of BT, Ensono, Logicalis and Sopra Steria as Contenders reflects a market shift in which foundational infrastructure and basic connectivity are increasingly regarded as baseline capabilities rather than sources of competitive differentiation. While BT and Sopra Steria remain critical for sovereign foundations and ethical governance, their focus on these pre-requisites, coupled with a preference for low-risk progress by Ensono and Logicalis, lags behind the high-velocity, self-healing platforms required for higher quadrant status. Ultimately, the market has narrowed to providers capable of bridging the skills gap through *Engineering + IT* synergies to deliver verified ROI.

From the 67 companies assessed for this study, 29 qualified for this quadrant, with 12 being Leaders and one a Rising Star.

accenture

Accenture leverages its \$3 billion AI investment and Cloud First strategy to deliver large-scale, outcome-driven infrastructure transformations with deep industry expertise.

Atos

Atos provides AI-powered engineering and sovereign cloud solutions using its *Eviden* capabilities, offering secure, decarbonised and compliant hybrid cloud management.

Capgemini

Capgemini stands out by delivering AI-ready fabric and automation-first operations, offering sovereign-ready architectures and deep integration of cloud with enterprise data.

cognizant

Cognizant modernises core infrastructure through robust AIOps backed by a strong data foundation, enabling predictive operations and scalable AI-driven managed services for global enterprises.

Computacenter

Computacenter provides high-performance infrastructure lifecycle services with a strong focus on hardware-led, software-defined solutions for the European mid-to-large market, including the UK.

DXC

DXC Technology utilises Platform X to drive AI-enabled self-healing and operational efficiency, helping enterprises modernise legacy estates while transitioning to AI-ready environments.

HCLTech

HCLTech employs an engineering-led approach and its Cybervigilia.AI platform to deliver proactive, self-healing infrastructure and advanced hybrid cloud management services.

HEXWARE

Hexaware is focusing on an agile approach, using its Tensai and Decode AI frameworks to deliver highly automated, cost-effective managed services with rapid time-to-value.

Infosys

Infosys leads with its Topaz AI-first suite and Cloud Cobalt ecosystem, accelerating cloud-native migrations and building scalable, production-ready AI infrastructure.



AI-ready Infrastructure Managed Services — Large Accounts



Kyndryl, as the world's largest dedicated infrastructure provider, leverages its Kyndryl Bridge platform to provide AI-powered insights and mission-critical system modernisation.



TCS leads with AI-driven delivery via its Ignio platform, offering comprehensive, large-scale managed services focused on autonomous operations and business resilience.



Wipro integrates its ai360 ecosystem and deep hyperscaler partnerships to deliver flexible, AI-driven cloud managed services focused on cost optimisation and business innovation.



NTT DATA (Rising Star) adopts a modular, cloud-agnostic approach along with its GenAI TechHub to deliver large-scale automation and consistent governance across global infrastructure.





AI-ready Infrastructure Managed Services — Midmarket

Who Should Read This Section

This report is valuable for providers offering **AI-ready infrastructure managed services** to **midsize** businesses in the **UK** 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 UK should read this report to analyse the modernisation 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 organisations 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 roadmaps with external expertise, driving efficient and impactful digital transformation.

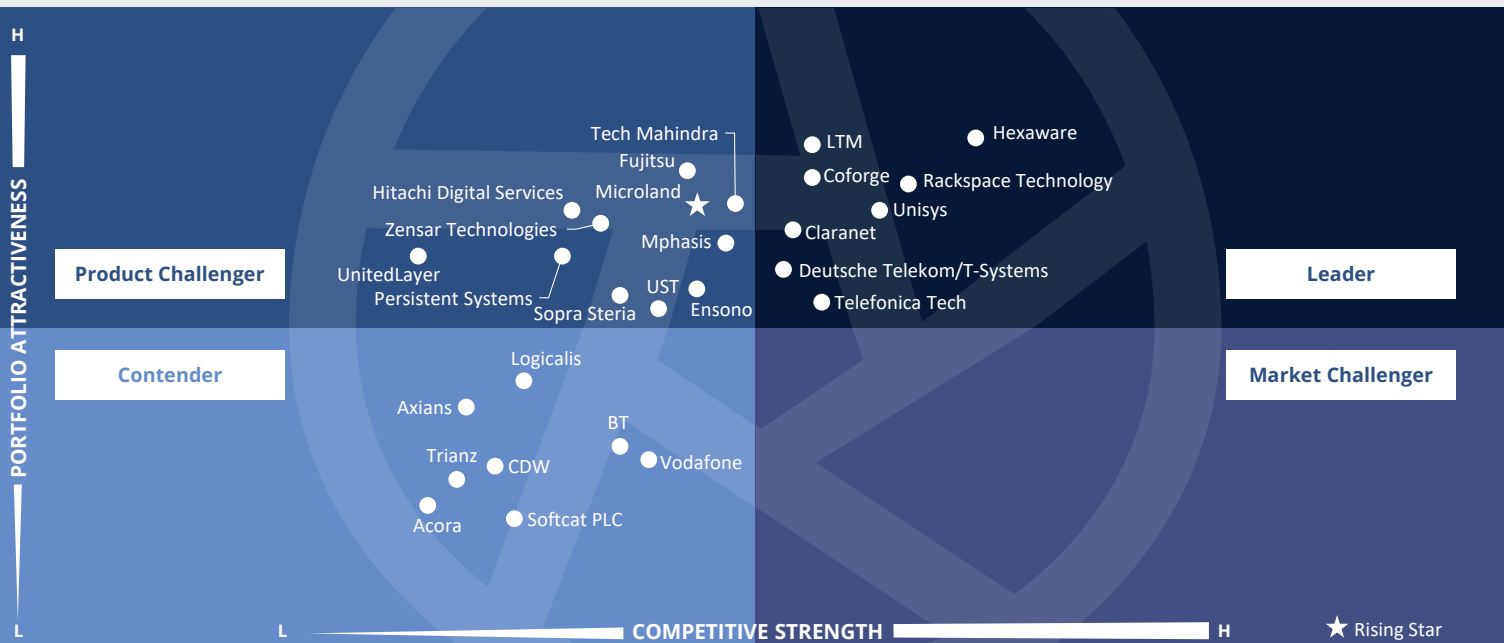
Sourcing, procurement and vendor management professionals

Should read this report to better understand the current landscape and partner ecosystem of AI-ready managed services in the UK. 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.



Private/Hybrid Cloud – Data Center Services
AI-ready Infrastructure Managed Services – Midmarket

U.K. 2026



This quadrant assesses providers delivering managed infrastructure services across private and hybrid environments for midmarket firms, emphasising simplified, **cost-effective** operations for **AI** and **legacy workloads** through **automation** and **AIOps**.

Meenakshi Srivastava



AI-ready Infrastructure Managed Services — Midmarket

Definition

This quadrant assesses providers delivering managed services for private and hybrid cloud and data centre environments, with particular focus on continuous optimisation 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 centres, their own setups and third-party colocation facilities.

Unlike managed hosting, AI-ready infrastructure managed services include continuous transformation, AI-driven optimisation 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 optimised 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 centre infrastructure** (servers, middleware, storage and databases) without partner dependency
2. Take responsibility for **continuous optimisation 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, virtualisation and containerisation** with proven modernisation or AI-enablement outcomes
7. Act as an **extension of clients' IT organisation**, creating blueprints, architecture frameworks and management processes at their location
8. Provide services for the **centralised orchestration**, monitoring and management of a hybrid IT infrastructure, augmented with AI-driven observation and self-optimisation
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



AI-ready Infrastructure Managed Services — Midmarket

Observations

The UK managed services landscape is undergoing a structural transition as providers reorient their infrastructure for an AI-centric market. Key players such as BT, Claranet and Vodafone are prioritising domestic data residency and 5G-enabled edge computing to meet new national security standards. At the same time, providers such as Coforge, Hitachi and Fujitsu are pivoting from general cloud management to specialised agentic AI and LLM-optimised infrastructure, leveraging proprietary platforms and NVIDIA-powered hardware to automate cross-functional decision-making for enterprise and private equity clients.

Provider positions in the quadrant reflect these strategic shifts. Coforge advanced to the Leader position following the successful integration of Encora and the Quasar AI platform. Microland secured the Rising Star status owing to its continued expansion of European Digital Hubs in Birmingham and leadership in intelligent automation. Hitachi Digital Services advanced to Product Challenger due to its appointment

to the major UK Government Technology Services 4 framework and other strategically significant public sector wins. Conversely, Ensono and Fujitsu are repositioned to Product Challenger as market pressures shifted leadership towards providers with deeper sovereign or automated AI stacks. Mphasis slipped to the Product Challenger position, reflecting broader sector shifts in discretionary spending. Finally, BT and Vodafone acquired the Contender status as their primary market focus shifted towards massive core network integration and sovereign infrastructure development rather than specialised midmarket managed service differentiation.

From the 67 companies assessed for this study, 27 qualified for this quadrant, with eight being Leaders and one a Rising Star.

claranet

Claranet utilises its extensive UK data centre footprint and public cloud expertise to manage modular, localised infrastructure for midmarket AI workloads.

Coforge

Coforge integrates its Quasar AI platform with specialised engineering to provide midmarket firms with agile, cloud-to-edge managed infrastructure solutions.



Deutsche Telekom/T-Systems combines German engineering standards with UK midmarket needs by providing sovereign-compliant cloud architecture and high-security managed AI services.

HEXAWARE

Hexaware uses its Tensai platform to deliver an automation-led strategy that reduces operational complexity and accelerates AI readiness for UK enterprises.

LTM

LTM offers global scale and sovereign cloud capabilities to provide UK midmarket clients with secure, end-to-end AI-ready infrastructure transformation.

rackspace technology.

Rackspace Technology, through its FAIR initiative, provides specialised multicloud managed services focused on secure, UK-based AI data residency.

Telefónica Tech

Telefónica Tech operates as a regional UK leader, providing end-to-end managed cloud and security infrastructure optimised for local midmarket AI adoption.

UNISYS

Unisys strengthens midsize enterprises in the UK by delivering AI-infused managed services and resilient digital workplace solutions to enhance infrastructure reliability.

MICROLAND®

Microland (Rising Star) applies vendor-agnostic automated frameworks to simplify the deployment and management of AI-ready digital infrastructure for midsize UK organisations.



Unisys



"Unisys' robust partner ecosystem, especially its integration with ManageEngine for automated hybrid infrastructure, allows it to deliver the technical sophistication of a global integrator with the commercial agility required by the midmarket."

Meenakshi Srivastava

Overview

Unisys is headquartered in Pennsylvania, US. It has more than 15,000 employees across 20 countries. In FY25, the company generated \$2.0 billion in revenue. Unisys' private hybrid cloud managed services deliver AI infused intelligent operations across on premises, private and public clouds, combining AIOps, automation, FinOps and security to ensure resilient, compliant and cost optimised hybrid IT foundations. With expertise in the public sector and regulated industries, Unisys offers end-to-end hybrid cloud transformation and secure private cloud hosting in the UK.

Strengths

Agentic AI-driven managed operations:

Unisys embeds agentic AI into hybrid operations to enable a self-healing, autonomous IT environment. Its agentic workflows continuously monitor the hybrid estate using unified telemetry to detect anomalies and autonomously execute remediation tasks such as patching, scaling and recovery. This automation-first model reduces MTTR and lowers overhead costs for UK midmarket enterprises.

Proprietary rapid value assessments

(RVA): Unisys' RVA, a key differentiator, converts raw client data into actionable insights within weeks. By ingesting data from existing monitoring tools and applying GenAI models, it identifies underutilisation, technical debt and immediate cloud

cost-saving opportunities, often unlocking significant annual value. This data provides a fact-based foundation to validate ROI before modernisation.

Scalable midmarket partner ecosystem:

Unisys leverages partners such as Microsoft, AWS and ManageEngine to deliver end-to-end AI infrastructure tailored for midmarket needs. This infrastructure includes AI-enabled service desks and observability tools, combining hyperscaler innovation with flexible pricing and commercial agility.

Caution

In its UK-centric marketing, Unisys should more strongly highlight regional outcomes, such as the cost reduction achieved through patching or infrastructure modernisation, to build trust with local firms that may perceive it as a primarily enterprise-level global integrator.





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 **UK** 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 UK that deliver resilient architectures, encompassing 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 modernisation of mission critical platforms, optimise decisions on workload and ensure business continuity.

Software development and technology leaders

Should read this report to understand the way hosted platforms support application modernisation, including Kubernetes, databases, middleware and integration services, while meeting latency, performance and compliance needs. This report provides an understanding of provider roadmaps for automation, observability and platform SRE to enable teams with reliable launches, reduced efforts and accelerated release cycles for regulated and enterprise workloads.

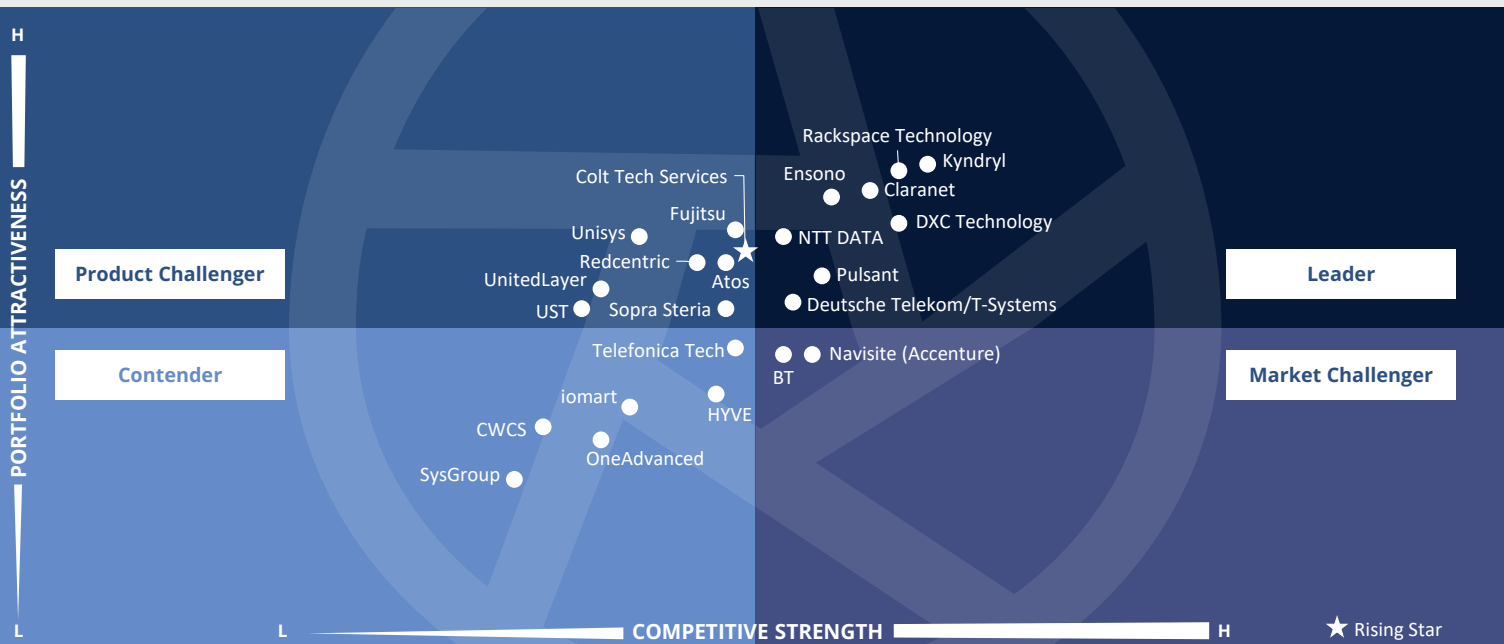
Sourcing, procurement and vendor management professionals

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.



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

U.K. 2026



This quadrant assesses **managed cloud hosting** providers that ensure **resilient, secure, high-availability infrastructure** under SLAs and support AI workloads focused on **stable operations and capacity**, not transformation.

Meenakshi Srivastava



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 optimisation 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, emphasising resilience, scalability and cost efficiency.

Eligibility Criteria

1. Offer **enterprise-grade** managed hosting services using own, colocated (reality 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 **multi-layered 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



Managed Cloud Hosting and Resilient Infrastructure Services

Observations

The UK managed cloud hosting and resilient infrastructure service market is undergoing sustained consolidation and strategic realignment, driven by acquisitions, capability expansion and evolving partnership models. Key developments include Accenture's acquisition of Navisite to strengthen its managed services portfolio, Pulsant's acquisition of Amito to expand its regional edge data centre footprint, SysGroup's acquisition of Orchard Computers to broaden its reach in managed services, and iomart's acquisition of Extrinsic Global to enhance its capabilities. Although strategic partnerships are intensifying, with Kyndryl and NTT DATA expanding their collaborations with hyperscalers for high-availability infrastructures, Atos continues its structural separation, affecting its UK operations.

These developments have led to notable shifts in provider positioning within the quadrant. Colt Technology Services has advanced from being a Product Challenger to a Rising Star owing to strengthened connectivity-integrated cloud offerings, while NTT DATA

moved to the Leader quadrant for its increased market share and delivery maturity. However, Fujitsu dropped from Leader to Product Challenger, indicating competitive pressure and portfolio repositioning. Telefonica Tech's position declined to Contender, while UST improved its standing to Product Challenger, driven by expanding technical depth and market presence.

Overall, the market remains highly competitive, with providers prioritising sovereign cloud capabilities, low-latency edge infrastructure and AI/ML-driven resiliency to address the evolving requirements of regulated and public sector organisations.

From the 67 companies assessed for this study, 24 qualified for this quadrant, with eight being Leaders and one a Rising Star.

claranet

Claranet provides localised SOC capabilities and migration frameworks to help midmarket enterprises in the UK transition from legacy infrastructure to cloud-native operations.



In the UK, **Deutsche Telekom/T-Systems** uses its Future Cloud Infrastructure platform to emphasise sovereign cloud compliance and SAP workload management within automated environments.



DXC Technology focuses on modernising mission-critical workloads through its Cloud Right strategy, facilitating large-scale infrastructure transitions and disaster recovery for UK public sector entities.



Ensono manages hybrid environments by providing mainframe modernisation and high-availability infrastructure services for regulated industries such as retail and banking in the UK.

kyndryl

Kyndryl provides infrastructure orchestration and AI/ML-driven resiliency services to manage legacy estates and complex IT environments for large-scale organisations in the UK.



NTT DATA offers sovereign cloud solutions and edge computing services in the UK, with a focus on integrating sustainable infrastructure practices into data processing operations.

Pulsant

Pulsant operates a network of UK-based data centres to deliver edge computing and colocation services, targeting organisations with specific regional data residency requirements.



Managed Cloud Hosting and Resilient Infrastructure Services



Rackspace Technology provides multicloud support for AWS and Azure environments while maintaining private cloud options for UK clients requiring managed services across diverse infrastructure platforms.



Colt Tech Services (Rising Star) leverages its fibre networking footprint to provide low-latency cloud connectivity and sovereign networking options, frequently supporting the UK financial services sector.





Sustainable Colocation Services

Who Should Read This Section

This report is valuable for providers offering **sustainable colocation services** in the **UK** 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 UK 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.

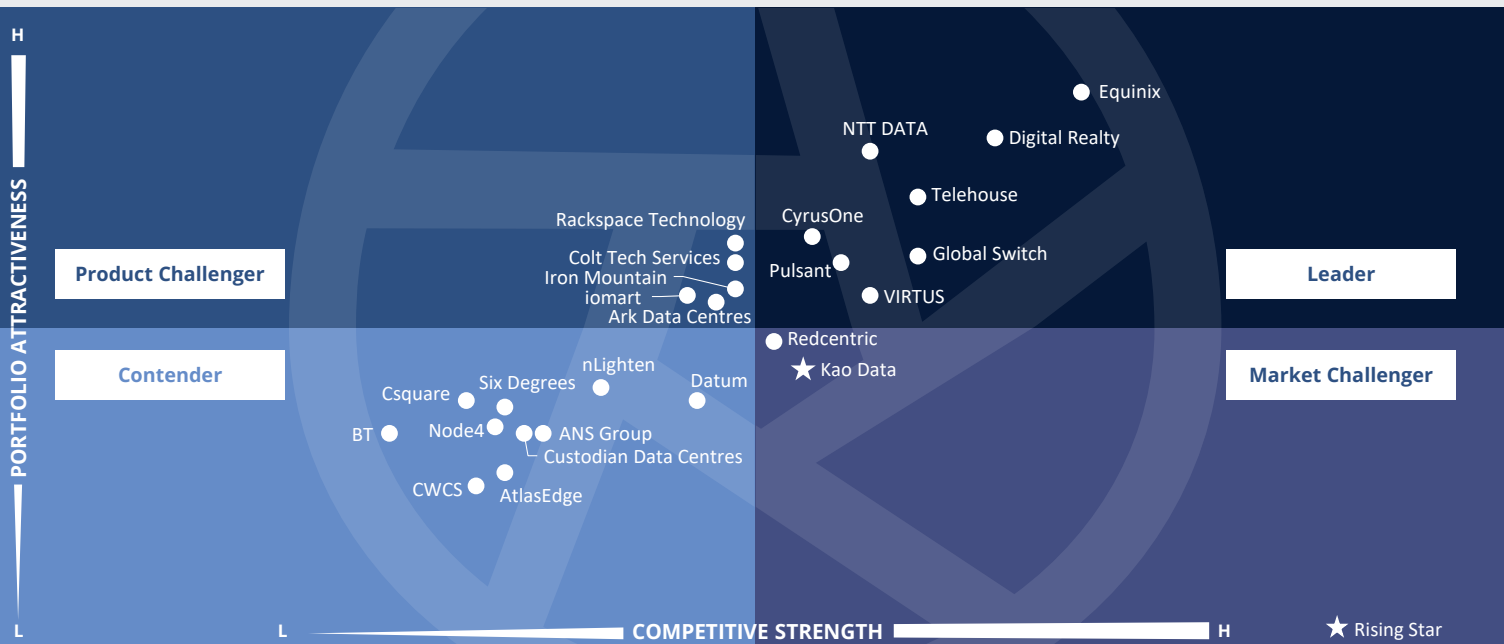
Sourcing, procurement and vendor management professionals

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.



Private/Hybrid Cloud – Data Center Services Sustainable Colocation Services

U.K. 2026



This quadrant assesses providers in the UK that **own and operate energy efficient colocation facilities** offering **secure, certified and scalable** infrastructure, renewable-powered operations, **strong SLAs, rich connectivity and disaster recovery** solutions.

Meenakshi Srivastava



Sustainable Colocation Services

Definition

This quadrant assesses colocation providers offering standardised and secure data centre 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 modernisation 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, standardised and energy-efficient data centre** 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 **multi-layered 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 **disaster 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**



Sustainable Colocation Services

Observations

The UK sustainable colocation services market is entering a new phase of growth, shaped largely by increasing AI workloads, limited power availability and stronger government involvement. London and Slough continue to dominate the market, hosting close to 80 percent of the country's operational capacity. However, expansion in these areas is increasingly constrained by electricity shortages and long grid upgrade timelines. As a result, both hyperscalers and enterprise buyers are committing capacity earlier and showing more openness to alternative locations. Cities such as Manchester are gaining traction due to better power availability, lower land costs and improving connectivity.

Government policies are now playing a more prominent role in shaping the market. The decision to classify data centres as critical national infrastructure has raised expectations around security, resilience and operational transparency. The UK's AI Opportunities Action Plan and the introduction of AI Growth Zones aim to accelerate planning approvals and improve access to power.

The colocation customer base in the UK is broad and increasingly segmented. Large cloud service providers and AI focused firms account for a growing share of demand, particularly for high density, wholesale style facilities. At the same time, financial service firms, digital media companies, SaaS providers and regulated public sector organisations remain core customers, favouring retail and hybrid colocation for latency, compliance and resilience requirements. Midmarket enterprises continue to use colocation as a stable platform for hybrid cloud, disaster recovery and interconnection led use cases.

From the 67 companies assessed for this study, 25 qualified for this quadrant, with eight being Leaders and one a Rising Star.

CyrusOne

CyrusOne announced a new 90 MW hyperscale campus (LON6) at Iver Heath in June 2025, signalling sustained investment in London West, with a strong emphasis on sustainability, biodiversity net gain and AI ready capacity.

Digital Realty

Digital Realty has integrated and scaled its Slough acquisition over the past year, positioning the site as a connectivity rich extension of its London platform amid tightening West London capacity.

Equinix

In October 2025, **Equinix** announced its largest UK commitment to date, announcing a £3.9 billion, over 250 MW Hertfordshire mega campus to support sovereign AI, hyperscale and enterprise demand beyond the constrained London core.

Global Switch

Global Switch expanded its London Docklands footprint and launched Europe's first liquid cooling showcase, reinforcing its role as a premium AI ready colocation hub in the interconnection dense Docklands market.



NTT DATA confirmed new land acquisition in London as part of its global \$10 billion expansion plan, underlining long term intent to scale AI ready colocation capacity in the UK capital.

Pulsant

Pulsant strengthened its sovereign and regulated sector positioning through partnerships and acquisitions in 2025 and completed a £187 million refinancing in late 2025 to accelerate regional colocation and edge expansion across the UK.

Telehouse

Telehouse broke ground in October 2025 on Telehouse West Two, a £275 million, 33 MW AI and HPC focused facility at Docklands, reinforcing London East's role as a dense, carrier neutral colocation hub.



Sustainable Colocation Services

VIRTUS

VIRTUS advanced its construction and planning refinements across its Buckinghamshire and London adjacent campuses, maintaining its focus on large scale, power secured colocation capacity for hyperscalers and AI platforms.

Kao Data

Kao Data (Rising Star) actively positioned its Harlow campus as a national AI reference site, hosting UK government stakeholders and advancing liquid cooled expansion (KLON 03) aligned with AI Growth Zone priorities.





Appendix

The ISG Provider Lens 2026– Private/Hybrid Cloud — Data Center Services study analyzes the relevant software vendors/service providers in the U.K. 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 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 and Editor Biographies

Author



Meenakshi Srivastava
Lead Analyst

Meenakshi Srivastava has nearly eight years of expertise and knowledge in IT infrastructure and analysis and insight generation. At ISG, Meenakshi is a lead analyst for ISG Provider Lens®, leading research activities and benchmarking exercises on the regional adoption of digital infrastructure such as private and hybrid cloud. She holds a bachelor's degree from Mumbai University in electronics engineering and an MBA degree in marketing from the Indian Institute of Management, Jammu (IIM Jammu).

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Arpita Choudhury
Senior research Analyst

Arpita is a Senior Research Analyst at ISG. She is responsible for supporting and co-authoring Provider Lens® studies on Public Cloud and Private Hybrid Cloud Data Center Solutions and Services. Arpita supports the Lead Analysts in the research process on multiple regions and authors the global summary report, and focal points. She also collaborates with the Lead Analysts in the process of rating the providers and in building insights around the market trends and drivers.

She has led and supported ad-hoc research requests in investment banking, healthcare, energy, and information and communication technology. During this period, she has also

spent a significant time enabling technology sales in pre-sales research teams. Arpita is skilled in insights generation, market sizing and forecasting, storyboarding, design thinking, financial analysis, go-to-market strategies, competitive intelligence, and benchmarking. Her areas of interest broadly are- technology, finance, and business strategy.



Author and Editor Biographies

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Heiko Henkes
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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.



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.

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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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