ISG Provider Lens®

Private/Hybrid Cloud – Data Center Services

A research report comparing provider strengths, challenges and competitive differentiators

BROCHURE | JANUARY 2026 | BRAZIL, FRANCE, GERMANY, NORDICS, SWITZERLAND, U.K., U.S. AND U.S. PUBLIC SECTOR

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Introduction

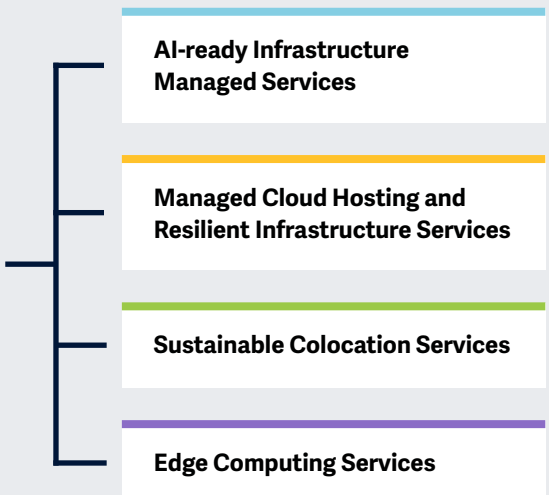
This study assesses global and regional providers delivering private and hybrid cloud-centric infrastructure services to enterprises across regions and the U.S. public sector. The research covers AI-ready infrastructure managed services, managed cloud hosting and resilient infrastructure services, sustainable 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.

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

The ISG Provider Lens® Private/Hybrid Cloud — Data Center Services study offers the following to businesses 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 markets in Brazil, France, Germany, the Nordics, Switzerland, the U.K., the U.S. and the U.S. Public Sector

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.

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

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

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 **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**

Definition

This quadrant assesses providers designing, deploying and managing distributed computing infrastructures, platforms and services at or near the network edge. They enable enterprises to process, store and analyze data close to users, devices or operational sites, thereby reducing latency (close to real-time) and optimizing bandwidth, along with meeting regulatory or sovereignty requirements. Their offerings typically include edge infrastructure-as-a-service (IaaS), edge platform-as-a-service (PaaS) and edge-enabled managed services, often integrated with hybrid or multicloud environments.

Providers differentiate themselves through scale and automation of their distributed infrastructure, integration with cloud and network ecosystems, security mandates and governance capabilities, together with their ability to support, using AI, industry-specific use cases, encompassing, among others, manufacturing, logistics, healthcare, agriculture, smart city, AI inference, augmented reality (AR), virtual reality (VR) and IoT analytics. Storing data close to its origin addresses sovereignty concerns and avoids the movement of data across national borders.

Eligibility Criteria

1. Provide **integrated edge computing solutions** with modular hardware and software components (such as micro data centers, gateways and orchestration), designed for industry-specific use cases and seamless cloud integration
2. Demonstrate **successful deployments** across multiple regulated industries, meeting complex security, latency and compliance requirements in hybrid and multicloud environments involving telcos, hyperscalers and enterprises
3. Deliver scalable **AI-driven orchestration and automation platforms** for edge workload management, supporting real-time monitoring, anomaly detection, self-healing and lifecycle management of distributed edge nodes
4. Offer **energy-efficient, resilient hardware optimized for edge sites** with dedicated compute, storage and acceleration (GPU/FPGA) to support AI and ML and data-intensive workloads near the network edge
5. Demonstrate **commitment to sustainability** through energy-efficient designs, and environmental certifications
6. Support advanced AI and ML workloads with **embedded real-time inference**, predictive maintenance and operational anomaly detection using AI algorithms, with a clear roadmap for AI-driven service optimization.
7. Provide **AI-powered remote and onsite lifecycle** support with automated operations

Quadrants by Region

As a part of this ISG Provider Lens® quadrant study, we are introducing the following four quadrants in our Private/Hybrid Cloud — Data Center Services 2026 study:

Quadrants	Brazil	France	Germany	Nordics	Switzerland	U.K.	U.S.	U.S. Public Sector
AI-ready Infrastructure Managed Services	✓	✓	✓	✓	✓	✓	✓	✓
Managed Cloud Hosting and Resilient Infrastructure Services	✓	✓	✓	✓	✓	✓	✓	✓
Sustainable Colocation Services	✓	✓	✓	✓	✓	✓	✓	✓
Edge Computing Services			✓					

The research phase falls in the period between January and March 2026, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in June 2026.

Milestones	Beginning	End
Survey Launch	January 12, 2026	
Survey Phase	January 12, 2026	February 12, 2026
Sneak Preview	May 2026	
Press Release & Publication	June 2026	

Please refer to the **ISG Provider Lens® 2026** research agenda to view and download the list of other studies conducted by ISG Provider Lens.

Access to Online Portal

You can view/download the questionnaire from here using the credentials you have already created or refer to instructions provided in the invitation email to generate a new password. We look forward to your participation!

Buyers Guide

ISG Software Research, formerly "Ventana Research," offers market insights by evaluating technology providers and products through its Buyers Guides. The findings are drawn from the research-based analysis of product and customer experience categories, ranking and rating software providers and products to help facilitate informed decision-making and selection processes for technology.

In the course of the Private/Hybrid Cloud — Data Center Services IPL launch, we want to take advantage of the opportunity to draw your attention to related research and insights that ISG Research will publish in 2026. For more information, refer to the Buyers Guide research schedule.

Research Production Disclaimer:

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing the work identified by clients. This data is collected as part of the ISG FutureSource™ process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not produce ISG Provider Lens® reports. These decisions will be made based on the level and completeness of the information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.

ISG Star of Excellence™ – Call for nominations

The Star of Excellence™ is an independent recognition of excellent service delivery based on the concept of "Voice of the Customer." The Star of Excellence™ is a program, designed by ISG, to collect client feedback about service providers' success in demonstrating the highest standards of client service excellence and customer centricity.

The global survey is all about services that are associated with IPL studies. In consequence, all ISG Analysts will be continuously provided with information on the customer experience of all relevant service providers. This information comes on top of existing first-hand advisor feedback that IPL leverages in context of its practitioner-led consulting approach.

Providers are invited to nominate their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

It is our vision that the Star of Excellence™ will be recognized as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments.

To ensure your selected clients complete the feedback for your nominated engagement please use the Client nomination section on the Star of Excellence™ website.

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply.

Here is the email address:
star@cx.isg-one.com

ISG Star of Excellence

Methodology & Team

The ISG Provider Lens® 2026 – Private/Hybrid Cloud — Data Center Services research study analyzes the relevant software vendors/service providers in the global market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this study will include data from the ISG Provider Lens® program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. ISG recognizes the time lapse and possible market developments between research and publishing, in terms of mergers and acquisitions, and acknowledges that those changes will not reflect in the reports for this study.

All revenue references are in U.S. dollars ($US) unless noted.

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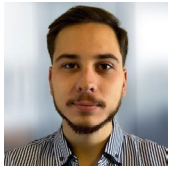

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ISG Provider Lens® Advisors Involvement Program

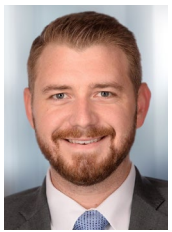
ISG Provider Lens® offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context.

In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three consultant advisors participate as part of each study's quality and consistency review process. The consultant advisors ensure each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the consultant advisors' group and contribute at different levels depending on their availability and expertise.

The QCRT advisors:

- Help define and validate quadrants and questionnaires,
- Advise on service provider inclusion, participate in briefing calls,
- Give their perspectives on service provider ratings and review report drafts.

ISG Advisors to this study



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Accenture
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All for One Group
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Ascenty
Atea
AtlasEdge
atNorth
Atos
Aveniq
Axians
Bechtle
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CGI
CHEOPS TECHNOLOGY
Claranet
Cloud Temple
Cogent
Cognizant
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CONVOTIS
CoreSite
CyrusOne
DATA4
DataBank
DATAGROUP
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Deloitte
Deutsche Telekom (T Business)
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DXC Technology
Ecritel
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ELCA/EveryWare
Elea Data Centers
Ensono
Equinix
Eurofiber Cloud Infra
EVEO
Flexential
Fujitsu
Global Switch
Green
Green Mountain
HCLTech
Hexaware
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HPE
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KAMP

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Materna
Microland
Mphasis
MTF
Netcloud
noris network
NorthC Datacenters
NTS Workspace
NTT DATA
ODATA
Orange Business
OVHcloud
PFALZKOM
plusserver
Pulsant
PwC
q.beyond
QTS
Rackspace Technology
Redcentric
SBA Edge
Scala Data Centers
ScaleSquad
Scaleway
SCC
Skynova
Sopra Steria
STACK Infrastructure
STACKIT
Stefanini
Swisscom
Syntax
Takoda
TCS
Tech Mahindra
Telefonica Tech
Telehouse
TelemaxX
ti&m
TierPoint
Tietoevry
TIVIT
T-Systems
UMB
Under
Unisys
United Layer
WIIT
Wipro

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, while 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.

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ISG

ISG (Nasdaq: III) is a 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®

JANUARY, 2026

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