

Private/Hybrid Cloud – Data Center Solutions

A research report comparing vendor strengths,
challenges and competitive differentiators



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The global software platforms market, enabling private and hybrid cloud environments, is expanding as enterprises modernize their digital foundations and pursue control, sovereignty and resilience. ISVs play a key role here, offering platforms with the orchestration, automation and governance capabilities needed to operate distributed private data centers, public clouds and sovereign cloud regions. The demand for sovereign-ready solutions is rising, mainly in Europe but also in regions where national data governance, digital autonomy and jurisdictional control have become a priority.

AI is accelerating this evolution, making AI- and ML-enabled platforms essential for managing complex distributed architectures, dynamic workloads and large-scale data flows. Modern hybrid cloud management, observability and cyber-resilient platforms now rely on AIOps-driven insights, predictive analytics and autonomous remediation for

performance, optimized resource consumption and strong security postures. Concurrently, AI is driving a resurgence of edge computing, as organizations prefer data processing near the sources for low latency, reduced storage costs and to process sensitive information within controlled environments.

Rising energy costs, data center capacity constraints and the growing power demands of AI workloads are making enterprises prioritize sustainability and evaluate ISVs on energy-efficient infrastructure utilization, granular consumption insights and carbon-aware workload placement. ISVs are moving toward productized, platform-based delivery models that enable consistent, scalable operations across environments. This study evaluates software vendors that underpin modern private, hybrid and sovereign cloud ecosystems with the required platforms, automation and resilience.



This study focuses on what ISG perceives as the most critical aspects of **Private/Hybrid Cloud – Data Center Solutions** in 2026.

Simplified Illustration Source: ISG 2026

Hybrid Cloud Operations Platforms (AIOps enabled)

Resiliency Platforms

The ISG Provider Lens® Private/ Hybrid Cloud — Data Center Solutions study offers the following to businesses and IT decision-makers:

- Transparency on the strengths and weaknesses of relevant vendors
- Differentiated positioning of vendors by segments based on their competitive strengths and portfolio attractiveness
- Focus on the global 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.



Hybrid Cloud Operations Platforms (AIOps enabled)

Definition

This quadrant evaluates software vendors offering integrated platforms to operate, orchestrate and optimize public, private and hybrid cloud environments, including on-premises infrastructure. These platforms provide a unified operational layer to help enterprises manage complex, distributed architectures through consistent policies, standardized processes and automation.

AI-enabled operations are now essential. Leading platforms use AI and ML to reduce alert noise, correlate events across infrastructure layers and translate signals into actionable incidents. They analyze historical and real-time data to support failure prediction, performance optimization and quick root cause analysis (RCA). Automation and workflow engines further improve operational efficiency, service reliability and mean time to resolution (MTTR).

Vendors deliver these platforms as licensed software or platform-based services. They offer cost visibility and optimization features such as chargeback and showback. Security, compliance, API extensibility and ecosystem integration remain core requirements, positioning these platforms as critical enablers of scalable and resilient hybrid cloud operations.

Eligibility Criteria

1. **Provide a unified operations platform** to manage on-premises, public, private and hybrid cloud environments
2. **Deliver AIOps capabilities**, including event correlation, anomaly detection and predictive analytics
3. **Reduce alert fatigue and predict failures** using AI- and ML-driven signal analysis
4. **Accelerate RCA** through automated dependency mapping across infrastructure layers
5. **Support automated remediation workflows** to resolve recurring operational issues with limited manual intervention
6. **Offer cost visibility and optimization**, including chargeback and showback dashboards
7. **Provide a single-pane-of-glass interface** with role-based self-service for multiple stakeholders
8. **Support catalog-based provisioning** and automated deployment via standardized workflows
9. **Ensure secure data handling and policy enforcement** across managed environments
10. **Integrate with third-party tools and platforms** through APIs



Resiliency Platforms

Definition

This quadrant assesses independent solution vendors offering AI-powered resiliency platforms that support backup, disaster recovery (DR) and cyber resilience across on-premises, private, public, hybrid, edge cloud and SaaS environments. These platforms enable enterprises to maintain fault-tolerant operations by protecting data, applications and system states, thus ensuring business continuity during disruptions such as outages, performance degradation, cyber incidents or infrastructure failures. The platforms are delivered either as software licenses or as managed, platform-based services.

AI plays a central role in enhancing the effectiveness of these platforms; modern resiliency platforms use ML and advanced analytics to reduce fault detection time, identify clean and uncompromised recovery points, accelerate incident investigation, and support or automate recovery runbooks under definitive policy guardrails. Their core capabilities include backup and recovery orchestration, system failover, failback and alternate-site operations. These platforms also support business continuity, DR planning, implementation and continuous testing to validate readiness.

Eligibility Criteria

1. **Provide a unified platform** for backup and DR across on-premises, private, public, hybrid, edge cloud and SaaS environments
2. **Offer real-time monitoring** and visibility into recovery environments and protected assets
3. **Support through reporting and analytics** to track performance metrics, identify trends and ensure compliance
4. **Use AI and ML to detect anomalies or malware** and to validate or recommend clean recovery points
5. **Support manual and automated recovery** of data, applications and system states under defined policy controls
6. **Use AI to accelerate investigation and RCA**, and to recommend protection or recovery policies aligned with recovery point objective/recovery time objective (RPO/RTO) requirements
7. **Enable AI-assisted or automated recovery workflows** with continuous testing under suitable guardrails
8. **Implement best-practice DR procedures**, including solution testing, readiness validation and refresh cycles
9. **Integrate with adjacent platforms**, including infrastructure management, cyber resilience and backup ecosystems
10. **Provide robust failover and failback capabilities** to ensure continuity and controlled restoration



Quadrants by Regions

As a part of this ISG Provider Lens® quadrant study, we are introducing the following two quadrants on Private/Hybrid Cloud — Data Center Solutions 2026:

Quadrant	Global
Hybrid Cloud Operations Platforms (AIOps enabled)	✓
Resiliency Platforms	✓



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

Milestones	Beginning	End
Survey Launch	January 19, 2026	
Survey Phase	January 19, 2026	February 19, 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 Solutions 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



The ISG Provider Lens® 2026 – Private/Hybrid Cloud – Data Center Solutions 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.



Contacts For This Study

Study Sponsor



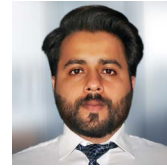
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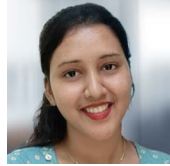
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ISG Provider Lens® Advisors Involvement Program

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 consultant 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



Anay
Nawathe

Partner



Rob
Brindley

Partner



Invited Companies

If your company is listed on this page or you feel your company should be listed, please contact ISG to ensure we have the correct contact person(s) to actively participate in this research.

Abiquo	Druva	SEP
Acronis	Emma	ServiceNow
Arcserve	Flexera	Unitrends
Axcient	HCLSoftware	UnityOne.AI
BMC Software	HPE	Veeam
Broadcom (VMware)	IBM	Vembu Technologies
Centilytics	ManageEngine	
Cisco	N-able	
CloudBolt Software	NAKIVO	
CloudSphere	NetApp	
Cohesity	Nutanix	
Commvault	OpenText	
CoreStack	Redstor	
Datto	Resolve Systems	
Dell Technologies	Rubrik	



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](#).

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, cities) as well as 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 (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.





JANUARY, 2026

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