*iSG Provider Lens™

Private/Hybrid Cloud – Data Center Services

Managed Services

A research report assessing private and hybrid cloud and colocation services for SLED clients

Customized report courtesy of:

U unisys

QUADRANT REPORT | JUNE 2025 | U.S. PUBLIC SECTOR

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Market is shifting to delivering measurable modernization outcomes through AI-powered tools and automation

The U.S. state, local and education (SLED) IT infrastructure services market is projected to grow approximately to $150 billion by the end of 2025, with expectations to reach over $170 billion by 2028, with a moderately flat growth rate when compared to last year, mainly due to budget constraints and the changes brought in by the new government. High-impact services in modernization, cybersecurity and hybrid cloud technologies will drive spending as agencies will need to replace their legacy IT infrastructure. Hybrid cloud infrastructure managed services are gaining traction, as 90 percent of SLED agencies are expected to adopt hybrid cloud models, highlighting their importance in the U.S. public sector organizations.

Meanwhile, the U.S. public sector faces continuous budget limitations that significantly restrict its capacity to modernize IT infrastructure and adopt advanced managed services. These financial constraints often force state and local agencies to continue operating outdated legacy systems, which are expensive to maintain and introduce additional complexity and risk. Despite recent increases in federal infrastructure funding, such as allocations to the Technology Modernization Fund, spending as a share of GDP remains below historical levels, underscoring ongoing fiscal pressures. These budgetary realities slow the pace of modernization and make it difficult for agencies to attract and retain skilled IT professionals, further complicating efforts to manage sophisticated systems and implement robust security measures. As a result, agencies are frequently compelled to prioritize essential services at the expense of critical IT upgrades, exacerbating the technology gap and increasing operational risks. Along with this, they need to rely on external help in the form of infrastructure managed service providers that help them not only manage their IT assets but also fill the skill gaps needed for digital transformation engagements.

Modernization of legacy IT, enhancing citizen services and leveraging hybrid cloud effectively contribute to overall growth in SLED agencies.

Executive Summary

Heavy reliance on aging legacy systems poses a significant obstacle for public sector IT infrastructure management. These long-established systems, often decades old, are not only expensive to operate and maintain but also hinder integration with newer technologies and the adoption of modern managed services processes. A report by the Government Accountability Office (GAO) has repeatedly highlighted the billions of dollars spent annually on maintaining outdated federal IT systems. Modernization efforts are complex and costly, requiring significant upfront investment and specialized expertise that is often scarce within the public sector workforce. This inertia can stifle innovation and hinder the agility required to respond effectively to evolving citizen needs and technological advancements.

Legacy infrastructures often lack the inherent security features of contemporary systems, making them more susceptible to cyberattacks. Therefore, setting up security guardrails is a paramount challenge for the U.S. public sector clients, as they need to manage and protect vast amounts of sensitive data, ranging from citizen information to national security data.

It is a continuous and resource-intensive endeavor. Data breaches in the public sector can have severe consequences, eroding public trust and potentially compromising national security. Furthermore, navigating complex and evolving compliance and regulatory requirements, such as the Federal Information Security Modernization Act (FISMA) and the National Institute of Standards and Technology (NIST) frameworks, adds significant layers of difficulty to IT management. These regulations mandate stringent security controls, continuous monitoring and detailed reporting, requiring substantial resources and expertise to implement and maintain compliance.

Finally, the prevalence of data silos and interoperability issues across different government agencies poses a significant hurdle to efficient IT infrastructure management. The existence of disparate systems and isolated data repositories hinders the ability to gain a comprehensive view of government operations, impedes effective data sharing between agencies and complicates the implementation of unified IT solutions. Integrating these diverse systems and ensuring seamless data flow is

often a technically complex and politically challenging undertaking, requiring significant inter-agency collaboration and resource allocation. Unlocking the value of government data through improved interoperability could lead to significant efficiencies and better citizen services, but this needs to be approved by political leaders. Overcoming these data silos is crucial for enabling data-driven decision-making and improving overall government effectiveness.

A majority of service providers have advanced by offering modular pricing models, on-demand engineering services and outcome-based contracting, indicating that success is now tied to agility and packaged transformation capabilities instead of scale. Providers are investing selectively in assets that enhance hybrid operations automation, regulatory compliance alignment and vertical-specific modernization intellectual property. As larger providers rationalize business units or align with global partners, some public sector clients seek explicit assurance on service continuity and long-term support. The competitive field is also seeing more pronounced moves

toward industry-specific solutions, modular consumption models and innovation in automation and self-service.

Some of the key trends observed are:

Replacement or modernization of legacy IT systems: The public sector is prioritizing the modernization of outdated IT systems that often lead to high costs and inefficiencies. This transformation involves replacing legacy systems with advanced, secure and scalable cloud-based solutions. Managed service providers (MSPs) play a pivotal role in this effort, as they bring specialized knowledge in cloud migration, ensuring that applications are modernized to leverage the benefits of hybrid cloud environments. Additionally, MSPs facilitate infrastructure upgrades that enhance overall IT performance, security and compliance, thereby promoting a more agile and responsive public sector capable of meeting contemporary challenges.

Focus on automation and AIOps: As the complexity of modern IT environments escalates, the adoption of automation and AI for IT operations (AIOps) is on the rise.

Executive Summary

These tools are instrumental in proactively managing IT challenges by identifying potential issues before they escalate and automating repetitive tasks that consume valuable time and resources. AIOps also has strong capabilities in sifting through massive volumes of data generated by the U.S. public sector IT, extracting actionable insights and making predictions that enhance decision-making processes. This ultimately leads to resource optimization and improves incident response times, enabling agencies to function more effectively and efficiently.

Prioritizing cost optimization: Budget constraints remain a significant hurdle for U.S. public sector agencies, making cost optimization a critical focus. Managed services providers offer an effective strategy for achieving more prudent IT spending through efficient resource management practices and FinOps processes. The implementation of pay-as-you-go cloud models allows SLED agencies to align their IT expenditures directly with usage, minimizing waste and maximizing value. Additionally, automation reduces operational costs by streamlining processes and improving workforce efficiency. By employing these strategies, U.S. public sector entities can remain financially sustainable while advancing their technological capabilities.

Need for efficient data management and analytics: The capability to manage data effectively and harness its analytical insights is becoming crucial for U.S. public sector agencies seeking to enhance their service delivery and make informed decisions. Managed service providers are offering comprehensive solutions that facilitate data storage, enhance security and provide robust analytics capabilities. These solutions enable agencies to organize and protect sensitive data, while extracting valuable insights that drive policy and operational improvements. By leveraging data analytics, these SLED organizations can better meet the needs of their constituents, improving overall service quality and responsiveness.

Heavy emphasis on improving citizen experience: Enhancing the citizen experience is a major impetus behind public sector IT investments. As citizens increasingly expect seamless and user-friendly digital interactions, modern IT infrastructure and managed services become essential for delivering accessible online services. These investments aim to streamline service delivery, making processes quicker and more intuitive for users. By utilizing advanced technologies and ensuring high performance, SLED agencies can foster greater engagement with citizens, ensuring their needs are met efficiently and effectively, thereby improving satisfaction and trust in government services.

Hybrid cloud growth in the SLED sector is driven by the demand for operational resilience, improved citizen experience, data unification and modernization of legacy systems. The incorporation of AI and automation into hybrid cloud solutions boosts security, optimizes resource allocation and accelerates the deployment of digital services, benefiting education and government agencies amid rising cyberthreats and changing citizen expectations.

Provider Positioning

	Managed Services	Managed Hosting	Colocation Services
11:11 Systems	Not In	Contender	Not In
Accenture	Leader	Not In	Not In
Atos	Product Challenger	Not In	Not In
Capgemini	Product Challenger	Not In	Not In
Centersquare	Not In	Contender	Not In
CGI	Leader	Market Challenger	Not In
Colocation America	Not In	Contender	Contender
CoreSite	Not In	Not In	Product Challenger
CyrusOne	Not In	Not In	Product Challenger
Deloitte	Product Challenger	Not In	Not In

Provider Positioning

	Managed Services	Managed Hosting	Colocation Services
Digital Realty	Not In	Not In	Product Challenger
DXC Technology	Product Challenger	Product Challenger	Not In
Ensono	Leader	Leader	Not In
Equinix	Not In	Not In	Leader
Flexential	Not In	Not In	Product Challenger
FNTS	Contender	Not In	Not In
Fujitsu	Contender	Product Challenger	Not In
HPE	Leader	Not In	Not In
IBM	Not In	Leader	Not In
Infinite Computer Solutions	Product Challenger	Not In	Not In

Provider Positioning   **Page 3 of 4**

	Managed Services	Managed Hosting	Colocation Services
Infosys	Leader	Not In	Not In
Innova Solutions	Contender	Not In	Not In
InterVision	Not In	Contender	Not In
Iron Mountain	Not In	Not In	Leader
Kyndryl	Leader	Leader	Not In
Lumen Technologies	Contender	Product Challenger	Product Challenger
NTT DATA	Leader	Leader	Product Challenger
Rackspace Technology	Leader	Leader	Leader
Red River	Product Challenger	Not In	Not In
TCS	Product Challenger	Product Challenger	Not In

Provider Positioning

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	Managed Services	Managed Hosting	Colocation Services
TierPoint	Not In	Not In	Leader
Unisys	Leader	Leader	Not In
UnitedLayer	Product Challenger	Not In	Not In
US Signal	Not In	Not In	Contender
UST	Contender	Not In	Not In
Wipro	Product Challenger	Not In	Not In
Zensar Technologies	Product Challenger	Not In	Not In
Zones	Market Challenger	Not In	Not In

This study focuses on the most critical aspects in 2025 for **private/hybrid cloud and data center services** for U.S. public sector clients.

Managed Services

Managed Hosting

Colocation Services

Simplified Illustration Source: ISG 2025
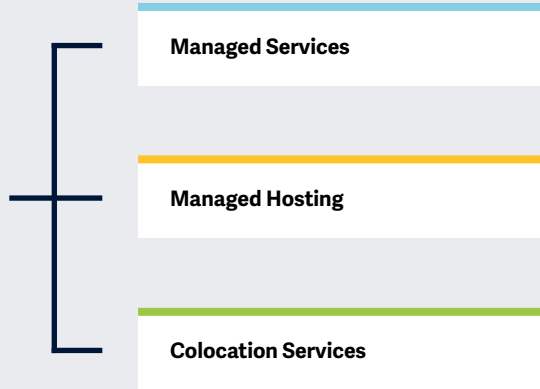
Definition

This study examines service providers that develop, enable and deliver the scope of private cloud, hybrid cloud, colocation and data center outsourcing services needed by public sector entities and agencies in the U.S. For this study, ISG includes state and local (municipal) government organizations and education (SLED) entities, public utility, public health, and other U.S. public sector agencies.

Public sector organizations are increasingly turning to private and/or hybrid cloud computing to enhance their operations and have improved control over citizens' data. Private and hybrid cloud environments also enable them to adhere to strict governance and regulation requirements and become more scalable, flexible and cost-effective in managing large data volumes and tight integration with enterprise applications and workflows.

Public sector organizations have different reasons for using a hybrid cloud, including security, data location, regulations, control over assets and custom applications, such as those running on mainframes. A hybrid cloud

setup provides more control and customization while leveraging public cloud platforms simultaneously. ISG has also observed entities demanding the implementation of ESG initiatives by infrastructure services providers. The rapid increase in digital transformation engagements is accompanied by a rise in energy demand, contributing to climate changes, while government regulations are mandating a faster transition to carbon neutrality.

As per ISG, a hybrid cloud connects the existing on-premises infrastructure services with private and public clouds. Clients may also leverage colocation and hosting providers instead of owning a data center to have a hybrid cloud setup.

Scope of the Report

This ISG Provider Lens™ quadrant report covers the following three quadrants for services/solutions: Managed Services, Managed Hosting and Colocation Services

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

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

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

Provider Classifications

The provider position reflects the suitability of providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the service requirements from enterprise customers differ and the spectrum of providers operating in the local market is sufficiently wide, a further differentiation of the providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between $20 million and $999 million with central headquarters in the respective country, usually privately owned.

- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above $1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens™ quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

- **Number of providers in each quadrant:** ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

Provider Classifications: Quadrant Key

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

★ **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.

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/services and follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

Managed Services

This report is valuable for providers offering **managed services** in the **U.S. public sector** 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 analyze managed service providers' modernization and service capabilities and the market advancements that impact hybrid cloud strategies.

Software development and technology leaders

Should read this report to understand providers' positioning, offerings and impact on ongoing infrastructure transformation initiatives.
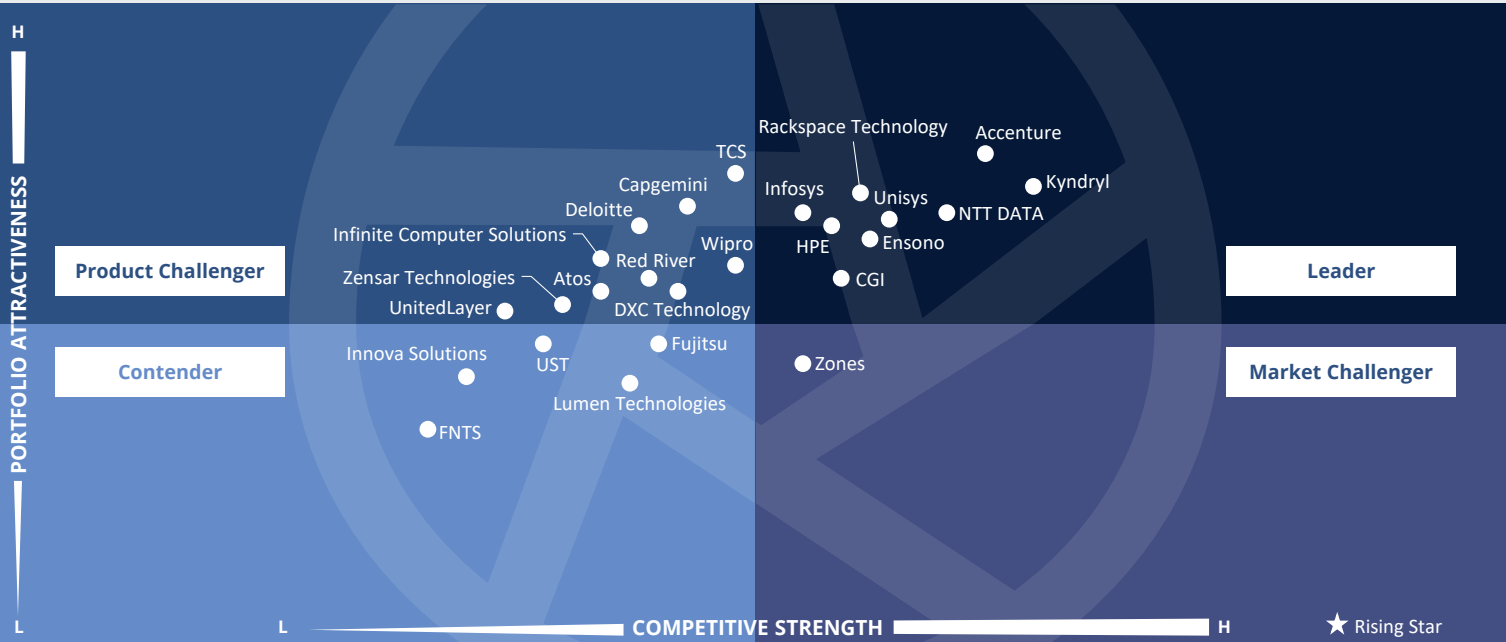
Sourcing, procurement and vendor management professionals

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

ISG Provider Lens™

Private/Hybrid Cloud – Data Center Services Managed Services

U.S. Public Sector 2025

PORTFOLIO ATTRACTIVENESS

H

Product Challenger

Contender

TCS

Rackspace Technology

Accenture

Capgemini

Infosys   Unisys   Kyndryl

Deloitte

Infinite Computer Solutions

HPE   Ensono   NTT DATA

Zensar Technologies   Atos   Red River   Wipro

UnitedLayer

DXC Technology

CGI

Leader

Innova Solutions   Fujitsu

UST

Zones

Market Challenger

Lumen Technologies

FNTS

L

L   **COMPETITIVE STRENGTH**   H   ★ Rising Star

This quadrant assesses providers offering **managed services** for **private and hybrid clouds** and **traditional data centers** for U.S. **public sector** clients. They offer **transition** services, **manage daily operations** and help **optimize** clients' existing IT landscapes.

Shashank Rajmane

Definition

This quadrant assesses a provider's ability to offer ongoing managed services for private and hybrid clouds and traditional data center infrastructure and platforms that consist of physical and virtual servers, middleware, storage, databases and networking components. The infrastructure may reside at a client's data center, in the service provider's facility or be colocated in a third-party facility.

Managed services are characterized by transferring cloud IT service responsibilities to the service provider. They are governed by service-level agreements (SLAs) with penalties for deviation from agreed performance goals. At a broad level, these services include large-scale data center consolidation, virtualization, cloud enablement and configuration and implementation of a software-defined data center (SDDC). These are aimed at maximizing the performance of workloads in the cloud, reducing costs and ensuring compliance, security and therefore sovereignty.

This quadrant evaluates providers that can manage traditional and hybrid cloud infrastructure. Key services include provisioning, real-time and predictive analysis, and monitoring and managing operations for U.S. public sector organizations. Providers are expected to adeptly manage both traditional and cloud-native application releases, encompassing continuous integration and delivery processes.

Eligibility Criteria

1. Demonstrate **existing** business contracting with **significant** U.S. public sector entities (especially state, local and education [SLED] organizations)

2. **Offer managed services for private and hybrid clouds and data center infrastructure** (servers, middleware, storage and databases) **by themselves** and through partners

3. Provide services within a client's premises or remotely and preferably through **shared service centers**

4. Have established, or emerging, **basic and standard relationships** with one or more **major public cloud hyperscalers** such as AWS, Microsoft, Google or IBM

5. Showcase experience in large transition projects that include automation, consolidation, virtualization and containerization

6. Act as an **extension of clients' IT organization** and get involved in creating **blueprints, architecture frameworks** and management processes at the client's location

7. Provide **centralized orchestration**, monitoring and management of hybrid IT infrastructure

8. Have experience in transforming **business continuity** planning while **managing** a client's hybrid infrastructure **remotely**

9. Have **appropriate certifications** to ensure compliance at state and local levels, contributing to greater sovereignty.

10. Provide robust **security services** to secure infrastructure at all levels

Observations

The managed services for U.S. public sector market is undergoing a transformation with the ability to deliver tangible modernization outcomes rather than merely managing traditional infrastructure for public agencies. Core managed services such as infrastructure provisioning, monitoring and compliance enforcement are now commoditized; what differentiates providers is their ability to operationalize legacy-to-cloud modernization through AI-enabled service models, automation and modular commercial structures. A unified control plane, embedded AIOps and governance-by-design have become standard expectations. The quadrant has become more consolidated, with a smaller set of providers commanding leadership by integrating strategic advisory, automation depth and sovereign data platforms into their offerings.

Simultaneously, divestment of legacy hosting and standalone data center assets has accelerated as capital is reoriented toward GPU as a service, private AI sandboxes and cloud-native orchestration. The quadrant has

also seen a sharp rise in public sector agencies' expectations for transparency, performance accountability and sustainability. This growth is reflected in the growing demand for standard service catalogs with SLA/XLA constructs and carbon-aware infrastructure strategies aligned to ESG mandates. As transformation timelines compress and digital equity initiatives expand, providers must demonstrate not only technological competence but also the ability to co-own citizen-facing outcomes. Looking forward, the ability to fuse automation, observability and sector-specific expertise into a unified, compliant and outcome-driven managed services envelope will define quadrant leadership.

From the 38 companies assessed for this study, 25 qualified for this quadrant, with nine being Leaders.

accenture

Accenture increasingly integrates managed services into comprehensive AI-driven modernization initiatives for agency infrastructure needs. Its strategic alignment of digital innovation with hybrid cloud lifecycle management supports long-term mission-critical operational needs.

CGI

CGI offers managed services with platform-led delivery and StateRAMP compliance, enabling modular, secure and scalable solutions. Its emphasis on hyperautomation supports the evolving modernization needs of U.S. state and local agencies.

ensono

Ensono offers proven public sector expertise in optimizing legacy infrastructure, modernizing and managing mainframes for cloud environments, and delivering robust cloud governance with automation and AI.

Hewlett Packard Enterprise

HPE combines intelligent operations through its GreenLake solution, and it offers SLA-driven hybrid cloud services to enhance the mission agility of SLED agencies. Its Demo Center and flexible pricing model support hands-on innovation and seamless legacy modernization.

Infosys

Infosys strengthens its U.S. public sector focus through a dedicated subsidiary and AI-driven hybrid cloud services. Its tailored, compliance-aware approach enhances infrastructure modernization, operational efficiency and secure digital transformation at scale.

kyndryl

Kyndryl is shifting from traditional infrastructure support to delivering platform-enabled, insights-driven managed services. Its use of AIOps and consulting-led engagements positions it as a strategic partner for hybrid cloud modernization in the U.S. public sector.

Managed Services

NTT DATA

NTT DATA blends private cloud flexibility with secure, AI-ready infrastructure to support mission-critical workloads. Its automation-driven and observability-enabled approach ensures scalable, resilient infrastructure services tailored to the evolving needs of U.S. public sector clients.

rackspace technology

Rackspace Technology combines AI-optimized private cloud capabilities with strong regulatory compliance to support U.S. public sector requirements. Its unified OpenCloud platform and FAIR initiatives enhance hybrid workload automation, governance and operational efficiency.

UNISYS

Unisys combines modernization consulting with secure, AI-powered managed services to support hybrid cloud transitions in the U.S. public sector. Its integrated focus on governance, DevSecOps and AIOps drives operational efficiency and regulatory alignment.

Unisys

Leader

> "Unisys accelerates public-sector digital transformation by uniting hybrid cloud modernization expertise, AI-powered operations and sector-centric governance, enabling SLED agencies to migrate confidently and realize measurable operational gains."

Shashank Rajmane

Overview

Unisys is headquartered in Pennsylvania, U.S. It has more than 16,500 employees across 48 offices in 22 countries. In FY24, the company generated $2.0 billion in revenue, with Enterprise Computing Solutions as its largest segment. The company has significant expertise in providing robust managed services, especially for traditional, virtual, hybrid cloud and legacy mainframe infrastructure systems. Its multicloud management offerings cover servers, storage and network capacity and FinOps. It holds certifications with key hyperscalers and cloud service providers for offering robust managed services to public sector clients.

Strengths

Hybrid cloud modernization expertise: Unisys offers comprehensive modernization services, including assessment, migration, integration and implementation through its managed services capabilities for the public sector. Its advisory and transformation services help SLED agencies design, plan and execute hybrid cloud transitions. These services also support deriving value through governance, compliance, change management and DevSecOps implementation.

Robust AI-infused offering: Unisys is actively expanding its AI-driven offerings by investing in talent, advanced technologies and strategic partnerships. Its CloudForte® AI-driven cloud management solution integrates AI and ML models and analytics to empower IT operations. The solution enables SLED agencies to derive actionable insights, leverage predictive analytics and implement intelligent automation, resulting in enhanced operational efficiencies and improved CX.

Strong security focus: Unisys offers a comprehensive suite of security services for hybrid cloud environments specifically tailored for the public sector. Services include assessments, threat detection, security posture management, patch management, backups and restores, identity and access management, and disaster recovery. With these services, several public sector clients could transition smoothly to cloud environments with improved data security and operational reliability.

Caution

While Unisys focuses its strategy on delivering significant business outcomes for clients, it needs to execute this approach at a larger scale, as it has currently completed fewer outcome-based deals than its peers.

Appendix

Methodology & Team

The ISG Provider Lens 2025 – Private/Hybrid Cloud – Data Center Services study analyzes the relevant software vendors/service providers in the U.S. Public Sector market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this study will include data from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. The data collected for this report represent information that ISG believes to be current as of May 2025 for providers that actively participated and for providers that did not. ISG recognizes that many mergers and acquisitions may have occurred since then, but this report does not reflect these changes.

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

The study was divided into the following steps:

1. Definition of Private/Hybrid Cloud – Data Center Services market

2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics

3. Interactive discussions with service providers/vendors on capabilities & use cases

4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)

5. Use of Star of Excellence CX-Data

6. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.

7. Use of the following key evaluation criteria:

   * Strategy & vision

   * Tech Innovation

   * Brand awareness and presence in the market

   * Sales and partner landscape

   * Breadth and depth of portfolio of services offered

   * CX and Recommendation

Author & Editor Biographies

Author

Shashank Rajmane
Manager and Principal Analyst

Shashank Rajmane has more than a decade of extensive experience in research and works as a Principal Analyst at ISG. He leads the efforts for ISG Provider Lens™ studies – Public Cloud Services & Solutions and Private/Hybrid Cloud & Data Center Outsourcing Services. He also authors the U.S. and Global reports. Apart from these, Shashank has been part of many consulting engagements and helping ISG's enterprise clients with their cloud strategy, along with selecting the right service providers/vendors based on their IT-related buying requirements.

He has authored several white papers, thought leadership articles, briefing notes, blogs and service provider intelligence reports, especially in the next-generation hybrid cloud and infrastructure services domain. Shashank has also delivered several workshops, webinars and podcasts and has been quoted in IT journals.

Enterprise Context and Overview Analyst

Manoj M
Senior Research Analyst

Manoj is a research analyst at ISG and supports ISG Provider Lens™ studies on Private/Hybrid Cloud – Data Center Services, Mainframes, Cloud Native Services & Solutions and Public Cloud Solution and Services. He also supports the lead analysts of multiple regions in the research process. Prior to this role, he supported the ROI process in sales intelligence platform and was an individual contributor in handling research requirements for advanced technologies in different sectors.

He has considerable expertise in predicting the automation impact by considering certain parameters such as productivity, efficiency and time reduction. During his tenure, he has supported research authors and authored Enterprise Context and Global Summary reports with market trends and insights.

Author & Editor Biographies

### Heiko Henkes
Director & Principal Analyst, Global IPL Content Lead

Study Sponsor

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.
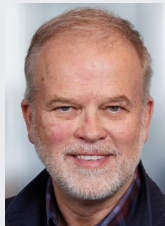
Jan Erik Aase
Partner and Global Head – ISG Provider Lens™

IPL Product Owner

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.

About Our Company & Research

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.

ISG Research™

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

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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.

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REPORT: PRIVATE/HYBRID CLOUD – DATA CENTER SERVICES