ISG Provider Lens™

Private/Hybrid Cloud – Data Center Services

Managed Services — Midmarket

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

unisys

QUADRANT REPORT | JUNE 2025 | U.K.

Table of Contents

Report Author: Meenakshi Srivastava

Security, compliance and cost optimisation remain top priorities as the market adapts to AI-driven transformation.

The EMEA ISG Index™ serves as a comprehensive metric for commercial outsourcing contracts with an annual contract value (ACV) of $5 million or more. According to the latest report, the ACV for the combined market, encompassing both managed services and cloud-based as-a-service, reached a historic high of $9.1 billion in the first quarter of the year. This represents a 23 percent year-over-year increase and a 9 percent rise from the previous quarter. The preceding quarter experienced a decline to $8.4 billion, following a peak of over $9 billion. In the first quarter, managed services ACV rose to $4.4 billion, marking a 13 percent increase and emerging as the second-best quarter on record, after last year's third quarter. During this period, 279 managed services contracts were signed—an increase of one contract compared to the same quarter last year, although this reflects a 4 percent decline from the fourth quarter. The quarter also witnessed the signing of three significant contracts (ACV of $100 million or more), an increase from two such contracts in the same period last year. New scope ACV experienced a robust increase of 27 percent, totalling $2.9 billion.

Sector-specific insights reveal substantial growth in managed services ACV in the energy sector (up 64 percent) and the travel, transport, and leisure sector (up 63 percent), while the manufacturing sector demonstrated double-digit growth. In contrast, the financial services and media/telecom sectors experienced a decline exceeding 10 percent.

According to the most recent EMEA ISG Index™ data, the UK managed services market generated $1.1 billion in ACV, reflecting a year-over-year decrease of 3.5 percent. Following a discontinuation of seven consecutive quarters where ACV surpassed $1 billion, the market rebounded to a more typical spending level in the first quarter, showing a 19 percent increase from the fourth quarter.

The surge in **AI** and **ML workloads** is fuelling demand for modernised, **high-performance** cloud infrastructures.

Executive Summary

On a year-over-year growth basis, France exhibited the most significant increase, with ACV soaring by 86 percent to $866 million, closely followed by the DACH region, experiencing a 35.5 percent rise to $884 million. In contrast, the Nordics reported a 15 percent decline, resulting in an ACV of $516 million.

The adoption of hybrid and multicloud models is gaining significant traction, particularly in the UK. Projections indicate an increase in adoption rates from 19 percent to 26 percent over the next three years, with the use of multiple public clouds expected to surge from 11 percent to an impressive 46 percent. These growth metrics substantially exceed both EMEA and global averages. The critical factors driving the selection of deployment platforms include performance, cost management, data sovereignty and privacy, and security against ransomware and malware threats. Flexibility remains a pivotal determinant in these decisions. Over the past year, 87 percent of UK organisations migrated applications across different environments to achieve enhanced cost efficiencies, improved capacity, greater security and increased innovation.

The growing prevalence of AI applications — such as custom large language models (LLMs), AI-driven customer relationship management (CRM) systems and advanced analytics — has generated significant demand for high-performance, scalable cloud storage and computational resources tailored to these workloads. Organisations are optimising their on-premises and private cloud environments by integrating graphics processing units (GPUs) and expanding storage capacities to effectively support AI and analytical tasks, with a pronounced focus on efficiency and resource utilisation.

Hybrid cloud environments are quickly solidifying as the preferred choice for many organisations due to their ability to match workloads with appropriate environments, enhance security by utilising private clouds for sensitive data storage and achieve cost savings through the scalability of public cloud resources. In addition, real-time monitoring and ML technologies are increasingly employed in private clouds to enhance data protection, particularly in highly regulated industries such as healthcare and finance.

A notable trend is emerging towards the development of customised cloud solutions to meet sector-specific demands, particularly among SMEs that seek agility and improved cost management. The adoption of modular data centre designs is on the rise, attributed to their lower total cost of ownership and expedited deployment capabilities, promoting flexible and scalable hybrid cloud architectures.

The significance of edge computing continues to grow as the Internet of Things (IoT) and AI heighten the demand for low-latency, high-speed data processing. By 2025, it is anticipated that 75 percent of enterprise data will be processed outside traditional data centres or cloud environments, indicating a significant shift in data management practices.

Data sovereignty and privacy are becoming critical concerns for UK organisations, closely following performance and cost considerations. In response to stringent data protection regulations and evolving UK-specific standards, there is an increased adoption of private cloud solutions for managing sensitive workloads.

The UK government has recently designated data centres as critical national infrastructure, leading to the introduction of streamlined planning laws that facilitate the establishment of new data centres, including those on greenbelt land. There is also an increased emphasis on regulatory compliance with GDPR and UK-specific data protection requirements, making hybrid and private cloud environments essential for meeting these standards. Additionally, sustainability and advanced security frameworks, including zero-trust models, are gaining increased attention within regulatory and operational best practices.

The capacity of UK data centres is expected to nearly double by 2028, driven by the soaring demand for generative AI (GenAI), cloud computing and government-supported infrastructure reforms. In the past year alone, nearly 50 new data centre projects have been announced, attracting significant investments across London, Manchester, Wales and Scotland.

GenAI has rapidly evolved into a mainstream technology within UK enterprises, especially in the financial services and public sectors, with projected investment growth from 12 percent to 16 percent by 2025. It is primarily

utilised for automating low-risk, resource-intensive processes, enhancing productivity and potentially exceeding a 30 percent improvement in sectors such as banking and insurance, thereby facilitating considerable cost savings. At the same time, agentic AI — comprising autonomous AI agents capable of decision-making — is being integrated into hybrid and private cloud environments, necessitating robust infrastructure to support real-time intelligence and data processing while ensuring strict compliance with regulatory requirements.

From 2024 to 2025, there has been a notable acceleration in the hybrid and multicloud domain within the UK private and hybrid cloud, as well as the data centre outsourcing sector, propelled by AI-focused infrastructure enhancements. This period has also witnessed significant advancements in modular and edge computing capabilities, alongside important regulatory and policy updates designed to promote capacity and data sovereignty.

Key priorities in this landscape remain security, compliance and cost optimisation, with the UK government and industry stakeholders synchronising efforts to address the demands of a digitally advanced, AI-enabled economy.

Enterprises are increasingly switching platforms for applications, citing cost, capacity, security, performance and innovation as key reasons. In the past year, 85 percent of UK organisations have migrated applications.

Provider Positioning

Page 1 of 7

	Managed Services — Large Accounts	Managed Services — Midmarket	Managed Hosting	Colocation Services	AI-Ready Infrastructure Consulting
Accenture	Leader	Not In	Not In	Not In	Leader
Acora	Not In	Contender	Not In	Not In	Not In
ANS Group	Not In	Not In	Not In	Contender	Not In
Ark Data Centres	Not In	Not In	Not In	Contender	Not In
AtlasEdge	Not In	Not In	Not In	Contender	Not In
Atos	Leader	Product Challenger	Product Challenger	Not In	Product Challenger
Axians	Contender	Contender	Not In	Not In	Not In
BT	Product Challenger	Market Challenger	Market Challenger	Product Challenger	Not In
Capgemini	Leader	Not In	Not In	Not In	Leader
CDW	Not In	Contender	Not In	Not In	Not In

Provider Positioning

Page 2 of 7

	Managed Services — Large Accounts	Managed Services — Midmarket	Managed Hosting	Colocation Services	AI-Ready Infrastructure Consulting
Centersquare	Not In	Not In	Not In	Contender	Not In
CGI	Market Challenger	Not In	Not In	Not In	Not In
Claranet	Product Challenger	Leader	Leader	Not In	Not In
Coforge	Not In	Product Challenger	Not In	Not In	Product Challenger
Cognizant	Product Challenger	Not In	Not In	Not In	Product Challenger
Colt Tech Services	Not In	Not In	Product Challenger	Product Challenger	Not In
Computacenter	Leader	Not In	Not In	Not In	Contender
Coreix	Not In	Not In	Not In	Contender	Not In
Custodian Data Centres	Not In	Not In	Not In	Contender	Not In
CWCS	Not In	Not In	Contender	Contender	Not In

Provider Positioning

Page 3 of 7

	Managed Services — Large Accounts	Managed Services — Midmarket	Managed Hosting	Colocation Services	AI-Ready Infrastructure Consulting
CyrusOne	Not In	Not In	Not In	Product Challenger	Not In
Datum	Not In	Not In	Not In	Market Challenger	Not In
Deloitte	Not In	Not In	Not In	Not In	Leader
Digital Realty	Not In	Not In	Not In	Leader	Not In
DXC Technology	Leader	Not In	Leader	Not In	Product Challenger
Ensono	Market Challenger	Leader	Leader	Not In	Not In
Equinix	Not In	Not In	Not In	Leader	Not In
Fujitsu	Leader	Leader	Leader	Not In	Not In
Global Switch	Not In	Not In	Not In	Leader	Not In
HCLTech	Leader	Not In	Not In	Not In	Product Challenger

Provider Positioning

Page 4 of 7

	Managed Services — Large Accounts	Managed Services — Midmarket	Managed Hosting	Colocation Services	AI-Ready Infrastructure Consulting
Hexaware	Leader	Leader	Not In	Not In	Not In
Hitachi Digital Services	Not In	Contender	Not In	Not In	Not In
HYVE	Not In	Not In	Contender	Not In	Not In
IBM	Not In	Not In	Not In	Not In	Leader
Infosys	Leader	Not In	Not In	Not In	Leader
iomart	Not In	Not In	Contender	Product Challenger	Not In
Iron Mountain	Not In	Not In	Not In	Product Challenger	Not In
Kao Data	Not In	Not In	Not In	Market Challenger	Not In
Kyndryl	Leader	Not In	Leader	Not In	Leader
Logicalis	Product Challenger	Contender	Contender	Not In	Not In

Provider Positioning

Page 5 of 7

	Managed Services — Large Accounts	Managed Services — Midmarket	Managed Hosting	Colocation Services	AI-Ready Infrastructure Consulting
LTIMindtree	Rising Star ★	Leader	Not In	Not In	Product Challenger
Microland	Contender	Product Challenger	Not In	Not In	Not In
Mphasis	Contender	Rising Star ★	Not In	Not In	Not In
nLighten	Not In	Not In	Not In	Contender	Not In
Node4	Not In	Not In	Not In	Contender	Not In
NTT DATA	Product Challenger	Product Challenger	Rising Star ★	Leader	Not In
OneAdvanced	Not In	Not In	Contender	Not In	Not In
Persistent Systems	Contender	Not In	Not In	Not In	Product Challenger
plusserver	Not In	Not In	Product Challenger	Not In	Not In
Pulsant	Not In	Not In	Leader	Leader	Not In

Provider Positioning

Page 6 of 7

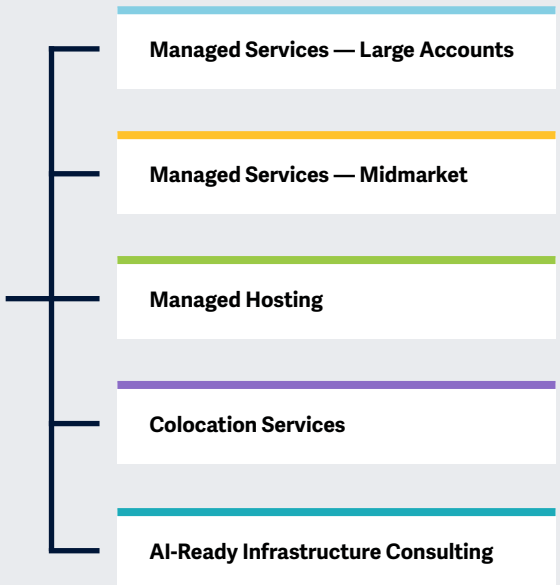
	Managed Services — Large Accounts	Managed Services — Midmarket	Managed Hosting	Colocation Services	AI-Ready Infrastructure Consulting
Rackspace Technology	Product Challenger	Leader	Leader	Product Challenger	Product Challenger
Redcentric	Not In	Not In	Product Challenger	Leader	Not In
Softcat PLC	Not In	Contender	Not In	Not In	Not In
Sopra Steria	Product Challenger	Product Challenger	Product Challenger	Not In	Product Challenger
Sutherland	Not In	Not In	Not In	Not In	Contender
SysGroup	Not In	Not In	Contender	Not In	Not In
TCS	Leader	Not In	Not In	Not In	Leader
Tech Mahindra	Product Challenger	Product Challenger	Not In	Not In	Contender
Telefonica Tech	Not In	Leader	Market Challenger	Not In	Not In
Telehouse	Not In	Not In	Not In	Leader	Not In

Provider Positioning

Page 7 of 7

	Managed Services — Large Accounts	Managed Services — Midmarket	Managed Hosting	Colocation Services	AI-Ready Infrastructure Consulting
Trianz	Not In	Contender	Not In	Not In	Not In
T-Systems	Not In	Leader	Leader	Not In	Market Challenger
Unisys	Contender	Leader	Product Challenger	Not In	Contender
UnitedLayer	Not In	Product Challenger	Product Challenger	Not In	Not In
UST	Not In	Product Challenger	Contender	Not In	Contender
VIRTUS	Not In	Not In	Not In	Market Challenger	Not In
Vodafone	Contender	Market Challenger	Not In	Not In	Not In
Wipro	Leader	Not In	Not In	Not In	Product Challenger
Zensar Technologies	Product Challenger	Product Challenger	Not In	Not In	Not In

This study focuses on what ISG perceives as the most critical aspects of **private/hybrid cloud and data center services** in 2025.



Simplified Illustration Source: ISG 2025

Definition

This study assesses global and regional providers offering hybrid cloud and data centre services, including managed services, managed hosting, colocation services and AI-ready infrastructure consulting.

In today's digital age, enterprises are increasingly turning to private and hybrid cloud computing to enhance their operations and gain a competitive edge. Private cloud infrastructure is gaining popularity as it enables enterprises to exercise more control while enhancing scalability, flexibility and cost-effectiveness in data management and storage. With AI and Generative AI (GenAI) technologies coming into the mix, enterprises are seeking high-performance, robust and secure infrastructures capable of effectively handling these AI workloads.

Each enterprise has 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 customisation while leveraging public cloud platforms simultaneously. As per ISG, a hybrid cloud connects the existing on-premises infrastructure services with private and public clouds. An enterprise may also leverage colocation and hosting providers instead of owning a data centre to have a hybrid cloud setup.

ISG has also observed enterprises demanding the implementation of ESG initiatives from infrastructure services providers. The rapid increase in digital transformation engagements is accompanied by a rise in energy demand, contributing to climate change, while government regulations are mandating a fast transition to carbon neutrality.

Scope of the Report

This ISG Provider Lens™ quadrant report covers the following five quadrants for services/solutions: Managed Services — Large Accounts, Managed Services — Midmarket, Managed Hosting, Colocation Services and AI-Ready Infrastructure Consulting.

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

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

Our study serves as 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.

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

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

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not in means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

Managed Services — Midmarket

Who Should Read This Section

This report is valuable for providers offering **managed services** to enterprises in the **U.K.** 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 and examines how each provider addresses key regional challenges.

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 and offerings, and their impact on the ongoing infrastructure transformation initiatives.

Sourcing, procurement and vendor management professionals

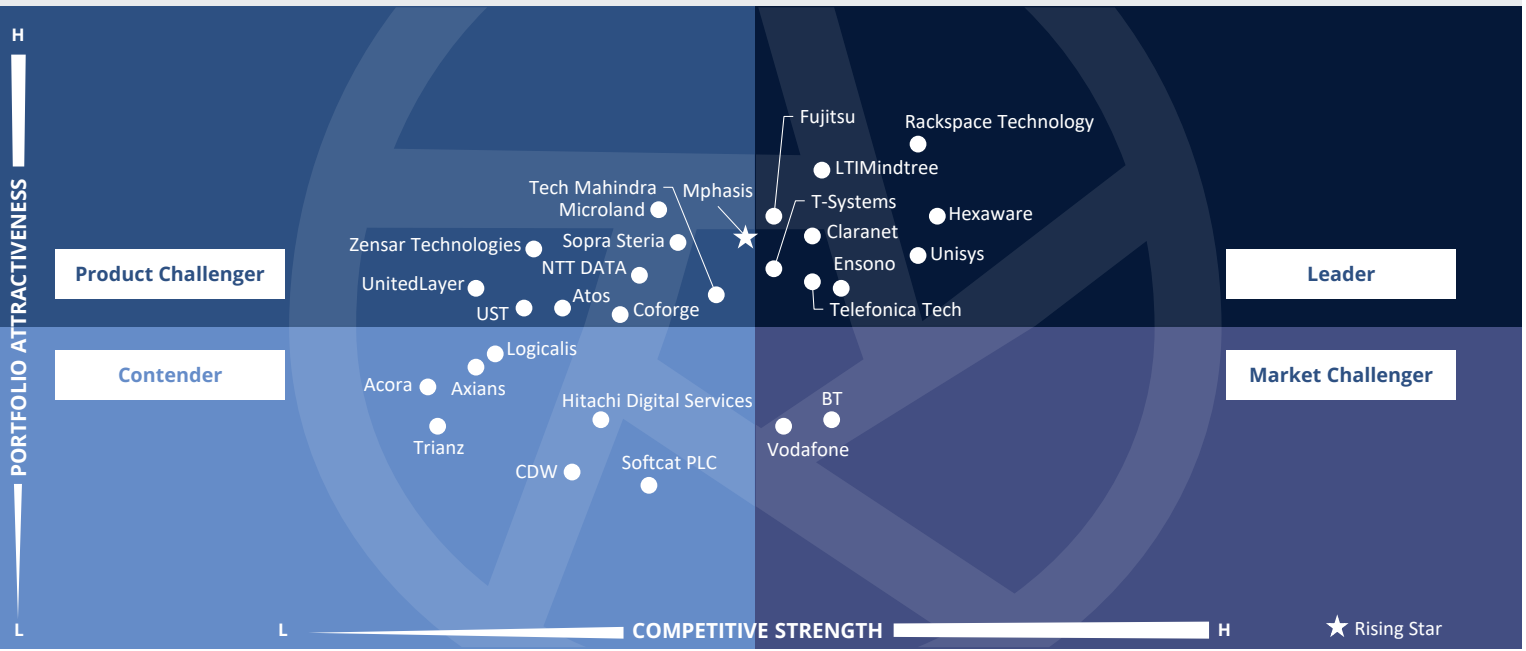
Should read this report to better understand the current landscape and partner ecosystem of managed service providers in the U.K.

ISG Provider Lens™

Source: ISG RESEARCH

Private/Hybrid Cloud – Data Center Services Managed Services – Midmarket

U.K. 2025



This quadrant assesses providers offering managed services to facilitate the convergence of **cloud computing, AI** and **cybersecurity** to transform operations. These providers equip midmarket enterprises with advanced tools to **strengthen their IT infrastructure.**

Meenakshi Srivastava

Definition

This quadrant assesses a provider's ability to offer ongoing managed services for private and hybrid clouds and traditional data centre infrastructures and platforms to enterprise clients. These services include managing physical and virtual servers, middleware, storage, databases and networking components across various environments, including client data centres, multicloud settings, provider facilities or third-party colocation centres.

Such providers typically offer transition services, guiding clients to optimise their existing IT landscapes. Common projects include large-scale data centre consolidation, virtualisation, cloud enablement and configuration and a software-defined data centre (SDDC) implementation. These services may also include expanding existing facilities, migrating workloads or creating new private/hybrid clouds and making them AI-ready.

Managed services involve transferring responsibilities to a service provider and are governed by SLAs with penalties for non-adherence. Key services include provisioning, real-time and predictive analysis and monitoring and managing operations of a customer's on-premises, private and hybrid cloud environments. These activities aim to maximise workload performance on the cloud, reducing costs and ensuring compliance and security, and, therefore, sovereignty. Providers are expected to adeptly manage both traditional and cloud-native application releases, encompassing continuous integration and delivery processes. They can also offer AIOps and MLOps capabilities by leveraging advanced AI and ML technologies to automate operational activities, train models, predict outages and offer actionable insights.

Eligibility Criteria

1. Offer **services for private and hybrid clouds and data centre infrastructure** (servers, middleware, storage and databases) without depending on partners
2. Provide services within a client's premises or remotely and preferably through its **shared service centres** under the remote infrastructure management (RIM) model
3. Demonstrate experience in **large transition** projects that include automation, consolidation, virtualisation and c**ontainerisation**
4. Act as an **extension of clients' IT organisation** and get involved in creating blueprints, architecture frameworks and management processes at the client's location
5. Provide services for the **centralised orchestration,** monitoring and management of a hybrid IT infrastructure
6. Showcase relevant **certifications** to ensure security and compliance at the local level, contributing to greater sovereignty

Observations

Midmarket enterprises in the UK are shifting from public cloud solutions to private and hybrid environments due to concerns about operational costs, security and availability. This transition allows for greater autonomy, privacy and control over data, with cost savings being a key motivator for adopting managed private/hybrid cloud services. By leveraging hybrid cloud, these firms optimise IT spending, reduce deployment costs and avoid complexities associated with managing their data centres.

Increased emphasis on security and compliance with evolving regulations also leads midmarket companies toward private and hybrid cloud models, which provide better protection for sensitive data and ensure data sovereignty. Leading managed service providers are forming strategic partnerships with ISVs and hyperscalers to enhance cloud efficiency through virtualisation and automation. This ecosystem approach allows midmarket enterprises to access more modern computing technologies and services.

Additionally, these enterprises are modernising their operations through automation, containerisation, AIOps and zero-touch support processes. To enhance efficiency, managed service providers adapt by offering advanced solutions such as serverless architecture, DevOps practices and database as a service. The adoption of hybrid and multicloud models is on the rise, enabling midmarket firms to balance performance, cost management, data privacy and flexibility, with significant growth expected in the use of these architectures in the coming years.

From the 69 companies assessed for this study, 28 qualified for this quadrant, with nine being Leaders and one a Rising Star.

claranet

Claranet has launched a complementary FinOps service aimed at helping businesses optimise their cloud financial operations, especially in Azure environments.

ensono

Ensono has enhanced its hybrid IT portfolio by introducing a new private cloud platform, expanding AWS and Azure managed services and launching UK mainframe support services, enabling seamless integration of legacy and cloud systems.

Fujitsu

Fujitsu is accelerating its transition to a services-oriented model through the Uvance program, focusing on sustainable technologies and digital transformation.

HEXAWARE

Hexaware's proprietary IT management platform, Tensai®, enhances observability and event correlation and integrates IT components to accelerate provisioning and lifecycle management.

LTIMindtree

LTIMindtree's cloud strategy prioritises end-to-end transformation by emphasising the purpose of cloud adoption and preparing clients for disruptive technologies through ecosystem building, cloud modernisation and AI integration.

rackspace technology

Rackspace Technology has expanded its Private AI offerings with enterprise-grade infrastructure and NVIDIA-powered GPU acceleration. It leverages automation to simplify AI model deployment and strengthen its competitive edge.

Telefónica

Telefónica Tech UK enhances its private/hybrid cloud solutions by integrating secure infrastructure with public cloud scalability. It focuses on cloud cost optimisation using FinOps and provides managed services to improve operational efficiency.

T-Systems

T-Systems in the UK focuses on AI-driven cloud services, cybersecurity and digital transformation across key industries. It strengthens infrastructure with secure European clouds and advanced technologies such as OTA updates and drone detection.

Unisys

Unisys has positioned itself as a trusted partner for medium to large enterprises, effectively targeting industries such as government, healthcare and financial services, which require secure and compliant cloud solutions.

Mphasis

Mphasis (Rising Star) is intensifying its focus on UK cloud innovation through R&D partnerships, workforce expansion and hybrid cloud solutions tailored to the needs of clients in industries such as financial services and public sector.

Leader

"Unisys demonstrates a robust capability in managing complex, heterogeneous and regulated environments. Its commitment to *right-sizing* managed service offerings highlights its agility in scaling services to meet specific client demands."

Meenakshi Srivastava

Unisys

Overview

Unisys is headquartered in Pennsylvania, US. 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. Unisys' portfolio of private and hybrid cloud solutions features single-tenant, fully managed environments equipped with automated central management, managed security systems and operations automation. Unisys provides support for VMware, Dell APEX, Azure VMware Solution and VMware on AWS. 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

Agile hybrid cloud modernisation: Unisys employs a unique approach to hybrid cloud transition and modernisation. Through agile advisory, automated assessments, application modernisation and phased migration, Unisys helps clients confidently navigate complex transformations. The company utilises proven frameworks to assess impact, integrate DevSecOps and ensure iterative changes align with business and regulatory objectives. With a global delivery model and ITIL/ISO-certified processes, Unisys consistently delivers high-quality results while advancing clients' IT management and modernisation goals

AI-driven ZeroOps for hyperautomation: Unisys leads with its AI-driven, hyperautomated ZeroOps delivery model, utilising its cloud IT framework. This approach integrates security, compliance and automation to enhance client value. Its Unified Data Center Infrastructure Management Services provide end-to-end visibility and actionable intelligence in hybrid cloud ecosystems.

Cybersecurity capabilities: Unisys provides a full spectrum of cybersecurity services encompassing advisory, consulting, compliance, governance and vulnerability monitoring, scanning and remediation. These capabilities are consistently demonstrated through strategic partnerships such as the Unisys Cyber Recovery developed in collaboration with Dell and Rubrik.

Caution

Unisys should clearly articulate its differentiated capabilities, such as automation bias, Zero Touch Patching, ethical AI and multicloud observability, by embedding success stories and KPIs into its client communications. It should employ feedback mechanisms to enhance reference ability and support continuous improvement.

Appendix

Methodology & Team

The ISG Provider Lens 2025 – Private/Hybrid Cloud – Data Centre 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.

Study Sponsor:
Heiko Henkes

Lead Author:
Meenakshi Srivastava

Editor:
Kondappan S

Research Analyst:
Arpita Choudhury

Data Analysts:
Sachitha Kamath and Lakshmi Kavya Bandaru

Consultant Advisor:
Rakesh Parameshwara

Project Manager:
Manikanta Shankaran

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

The research and analysis presented in this 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

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).

Research Analyst and Co-Author

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 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.

Study Sponsor

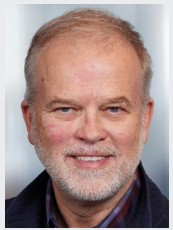
Heiko Henkes

Director and ISG Provider Lens™

Heiko Henkes serves as Director and Principal Analyst at ISG, overseeing the Global ISG Provider Lens™ (IPL) Program for all IT Outsourcing (ITO) studies alongside his pivotal role in the global IPL division as a strategic program manager and thought leader for IPL lead analysts.

Henkes heads Star of Excellence, ISG's global customer experience initiative, steering program design and its integration with IPL and ISG's sourcing practice. His expertise lies in guiding companies through IT-based business model transformations, leveraging his deep understanding of continuous transformation, IT competencies, sustainable business strategies and change management in a cloud-AI-driven business landscape. Henkes is known for his contributions as a keynote speaker on digital innovation, sharing insights on using technology for business growth and transformation.

IPL Product Owner



Jan Erik Aase

Partner and Global Head – ISG Provider Lens™

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor.

Now as a research director, principal analyst and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

ISG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, 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™

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

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™

JUNE, 2025

REPORT: PRIVATE/HYBRID CLOUD – DATA CENTER SERVICES