

# Private/Hybrid Cloud – Data Center Services

## Managed Services

A research report comparing provider strengths,  
challenges and competitive differentiators

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**Managing combined, adaptive services is the needed next step to predictable IT and business outcomes.**

As the commercial and consumer use of cloud-based IT infrastructure continues to grow, its use among state, local and education (SLED) and other public-service client organizations also increases. This, in turn, is driving rapidly growing interest in, and purchases of, private/hybrid/data center managed hosting and managed services by SLED organizations.

Cloud use by SLED organizations is by no means new. However, with the COVID-19 pandemic, digital work environment, which had already started evolving, rapidly expanded. To support this expansion, SLED organizations began adding more and different types of cloud, on-premises, and hybridized solutions.

Uncertainty regarding the role and value of traditional data centers has further complicated SLED IT management and decision making.

Few SLED organizations are building new data centers because instead they are moving to cloud-based IT-as-service models. However, hundreds of legacy data centers continue to support thousands of critical software, data and business systems. Most of these operations will shift to hybrid cloud environments over the coming years. This will increase the need to effectively manage many IT resources being shifted to the cloud; however, lack of skilled professionals will be a challenge. Thus, we have seen significant sector initiatives toward taming, if not controlling, complex private and public cloud environments that include legacy data center landscapes. Providers serving SLED entities indicate to ISG that public sector revenue from managed cloud services grew, on average, more than 20 percent in 2022 compared to 2021. There are no signs of this growth abating.

The core change drivers that we noted in the 2022 report not only remain, but continue to grow themselves. These include ever-expanding adoption of cloud services overall, end-of-life for core business software and server processing, increased use of edge computing,

**Merging** hybrid-cloud-optimized IT and business environments **enables sustainable control** of both.



new computing styles and development methods, rising cybersecurity threat levels and continuing staff shortages.

Practically, there is no easily discernable end to the growth. We expect continual movement of workloads to and within multiple clouds, including mainframe applications, while new types of workloads (for example, edge and IoT) proliferate. Simultaneously, public sector organizations will continue to face challenges in attracting and retaining IT staff.

### **SLED-specific complications must be addressed**

SLED organizations in the U.S. face many hybrid/multicloud complications that commercial enterprises do not. Many U.S. municipalities rely upon core IT capabilities from state government agencies, including infrastructure, applications, data management and cybersecurity. State- and municipality-controlled educational institutions frequently rely even more heavily on such resources. According to data published by the National Association of State CIOs (NASCIO), more than half of state IT organizations in the

U.S. deliver multiple IT services to cities, towns and educational entities. These services can be important revenue sources for state-level IT organizations. However, they also increase IT environment complexity, cost, data management overhead, and IT security needs, further straining limited state-level IT resources.

Meanwhile, state agencies must also continue to expand (and accelerate) their own digital business transformation capabilities, improve data privacy compliance and overall IT security, enhance citizen services and experiences, collaborate across a growing number of internal and external organizations and reduce costs. And they must do all of the above rapidly, to satisfy economic, regulatory and political requirements.

### **What makes a Leader?**

There is no shortage of providers qualified to support U.S. SLED organization needs for private/hybrid cloud hosting and managed services. There is, in fact, an influx of providers that either did not previously support SLED clients or did not actively pursue such opportunities. In ISG's 2022 Private/Hybrid Cloud

and Data Center study for the U.S. public sector, 12 qualified managed hosting service providers and 19 qualified managed services providers were identified and assessed. In 2023, we identified and assessed 17 qualified managed hosting services providers and 24 qualified managed services providers. The key selection criteria for managed hosting and managed services provider are detailed in each relevant section of this report.

Recognition as a Leader in these quadrants does not depend solely on provider size or portfolio. Although such factors are important, Leaders must also understand and satisfy current SLED client needs while anticipating and enabling next steps and ongoing improvement. This include proven capabilities supporting strategic imperatives such as infrastructure consolidation, the effectiveness of user services (for example, help desk and provisioning), and centralization of IT project management and oversight.

Leadership also requires excellence in delivering services required to deliver significant business improvement for clients. This requires demonstration of experience and expertise in working with U.S. public sector organizations resulting in high levels of client satisfaction.

**ISG expects continual movement of workloads to and within multiple clouds, including mainframe applications, while new types of workloads proliferate (for example, edge and IoT).**




## Provider Positioning

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	Managed Services	Managed Hosting
11:11 Systems	Not In	Contender
Accenture	Leader	Not In
Atos	Product Challenger	Product Challenger
Capgemini	Product Challenger	Not In
CGI	Market Challenger	Market Challenger
Coforge	Product Challenger	Not In
Colocation America	Not In	Contender
Cyxtera	Not In	Product Challenger
DXC Technology	Product Challenger	Product Challenger
Ensono	Leader	Leader




 Provider Positioning

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	Managed Services	Managed Hosting
Fujitsu	Contender	Product Challenger
Hexaware	Contender	Not In
HPE	Product Challenger	Not In
IBM	Not In	Leader
Infosys	Leader	Not In
Intervision	Not In	Contender
Kyndryl	Leader	Leader
Lumen	Market Challenger	Leader
Microland	Contender	Contender
Mphasis	Product Challenger	Not In



 Provider Positioning

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	Managed Services	Managed Hosting
NTT DATA	Not In	Leader
Orange Business	Contender	Not In
Rackspace Technology	Leader	Leader
TCS	Leader	Product Challenger
Tech Mahindra	Product Challenger	Not In
Unisys	Leader	Leader
UST	Product Challenger	Not In
Wipro	Leader	Not In
Zensar Technologies	Product Challenger	Not In
Zones	Market Challenger	Not In



This study focuses on what ISG perceives as critical for **Private/Hybrid Cloud and Data Center Outsourcing Services** for U.S. public sector clients in 2023.

Simplified Illustration; Source: ISG 2023



**Definition**

This ISG Public Sector Provider Lens™ research study examines service providers that develop, enable and deliver the scope of private cloud, hybrid cloud and data center outsourcing IT capabilities needed by public sector entities and agencies in the U.S. as they work to reduce IT and operational costs.

For the purposes of this study, ISG includes state and municipal government organizations, public utility, healthcare, education entities and similar organizations in the definition of the U.S. public sector.

Services assessed in this study are typically extensions of clients’ computing environments. Private clouds may be hosted at a client facility, but usually include third-party IT services with scalable virtual computing, networking and storage resources, either in providers’ data centers or over shared infrastructure. Clients seeking strict security and governance, large data volumes, and tight integration with enterprise applications and workflows often prefer private cloud environments.

Hybrid cloud environments combine on-premises infrastructure with private and public cloud services. They allow organizations to leverage public cloud capabilities without offloading entire systems to a third party. This offers adaptability and flexibility while keeping vital IT within the client’s firewall.

Data center outsourcing transfers the responsibility of orchestration, provisioning, monitoring and management of core IT assets and infrastructure to a third party. The data center may be owned by the client or by a services provider. Integrated monitoring and management services are usually delivered from the provider’s offshore, onshore or nearshore shared or dedicated delivery center.





### Scope of the Report

In this ISG Provider Lens™ quadrant report, ISG covers the following two quadrants for services/solutions: Managed Services and Managed Hosting.

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

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

Our study serves as the basis for important decision-making in terms of 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 IT providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT 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 IT 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 Challenger, Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens™ quadrant may include service providers that ISG believes have strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

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





### Provider Classifications: Quadrant Key

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

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

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

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

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

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





# Managed Services

### Who Should Read This Section

This report is relevant to U.S. public sector organizations for evaluating hybrid cloud managed service providers.

In this quadrant report, ISG defines the current market positioning of managed service providers in the U.S. public sector and how they address key challenges faced by the government sector with hybrid cloud models. These providers are adept at managing data center infrastructure for municipal, state, federal and local government agencies, enabling them to focus on core tasks.

U.S. SLED organizations are increasingly adopting managed services for private and hybrid cloud environments across a broad spectrum of capabilities. There is increasing pressure to enable shared services across state agencies and municipalities; however, public sector organizations lack capital and budget. Agencies seek providers that can offer faster time to market, along with better cost-saving opportunities, in a heterogeneous edge environment. Public sector organizations

are evaluating providers' unique toolsets for migrating applications to appropriate architectures, whether for maintaining legacy systems or porting them to cloud-native structures. These organizations look for providers that can deliver platform-based solutions powered with enhanced ML and AI technologies that help them transform their infrastructure to multicloud.

Service providers should also meet governance, compliance and security requirements with FISMA and FedRAMP certifications. Providers are expected to deliver a range of services that cater to the diverse needs of government agencies and have dedicated business units that specialize in different domains to achieve maximum return on investment.



**IT and infrastructure leaders** should read this report to analyze managed service providers' modernization and service capabilities and the market advancements impacting hybrid cloud strategies.



**Software development and technology leaders** should read this report to understand providers' positioning, offerings and impact on the ongoing infrastructure transformation initiatives.

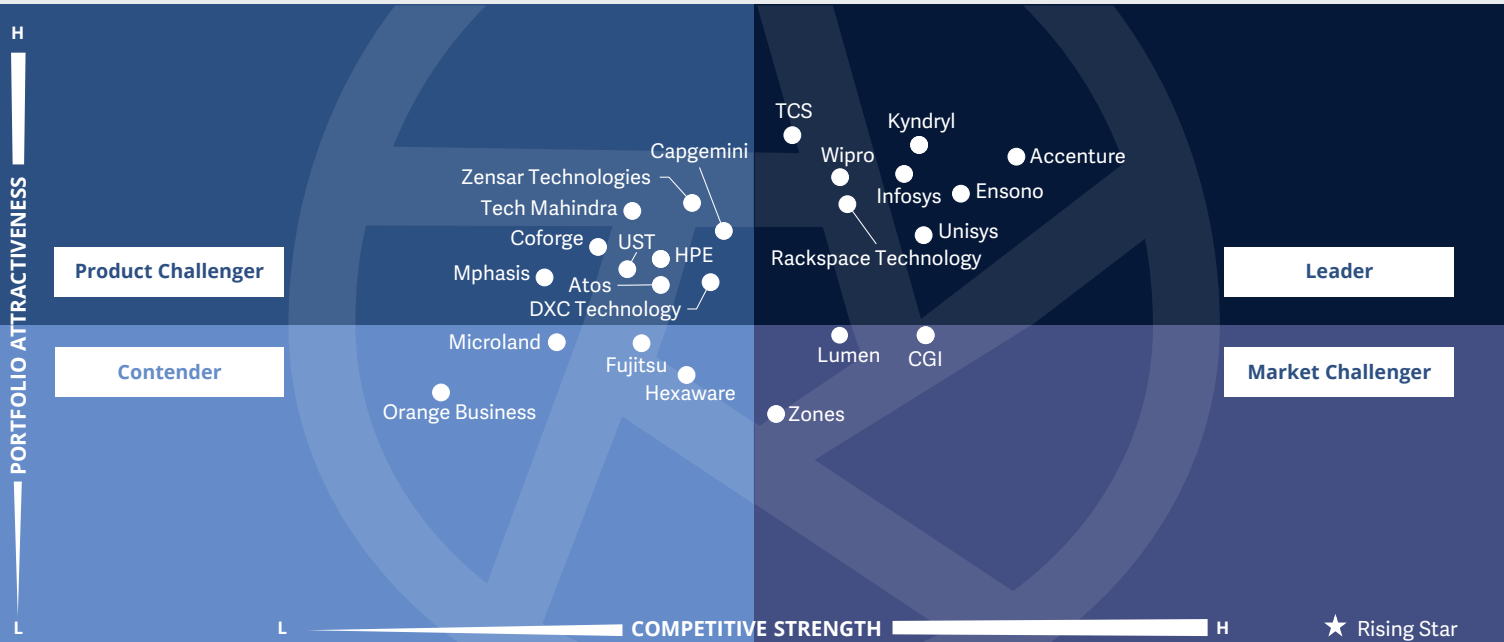


**Sourcing, procurement and vendor management professionals** should read this report to better understand the current landscape and partner ecosystem of managed service providers to the U.S. public sector.



Private/Hybrid Cloud – Data Center Services  
Managed Services

U.S. Public Sector 2023



This quadrant assesses providers' growing and **evolving range of managed services** available to U.S. public sector clients, as they rapidly develop and revamp **strategic and operational** uses of **cloud and data center resources**.

Bruce Guptill



## Managed Services

### Definition

This quadrant assesses a providers' ability to offer ongoing management 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 facilities or be co-located in a third-party facility.

Managed services are characterized by the transfer of cloud IT service responsibilities to the service provider and are governed by service level agreements (SLAs) with penalties for deviation from agreed performance goals. At a broad level, these 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 are aimed at maximizing the performance of workloads in the cloud, reducing costs, and ensuring compliance and security.

Providers included should have capabilities to manage traditional and cloud-native application releases, which also involve continuous integration and delivery processes.

One of the primary differences between managed service providers and managed hosting providers is that managed service providers have stronger integration practices that break up monolithic and traditional applications into individual services or microservices.

### Eligibility Criteria

1. **Demonstrate existing and significant business contracting** with U.S. public sector organizations (especially state, local and education organizations) and the ability to offer services to them
2. Ability to **offer services for private and hybrid clouds and data center infrastructure** (servers, middleware, storage and databases) by themselves and through partners
3. Ability to provide services within a client's premises or remotely and preferably through **shared service centers**
4. Established or emerging, **basic and standard relationships** with one or more **major public cloud hyperscalers** such as AWS, Microsoft, Google Cloud or IBM
5. **Experience in large transition projects** that include automation, consolidation, virtualization and containerization of data centers and cloud enablement
6. Ability to act as an **extension of the clients' IT organization** and get involved in creating blueprints, architecture frameworks and management processes at the client's location
7. Ability to provide **centralized orchestration**/management of hybrid IT infrastructure
8. Experience in transforming **business continuity** planning while managing a client's hybrid infrastructure remotely during unforeseen events
9. **Appropriate certifications** to ensure compliance at local levels



## Managed Services

### Observations

The most significant trends first reported in ISG's U.S. 2022 public sector research studies were the parallel shifts toward hybrid/multicloud and on-premises IT environments, and outsourcing of critical IT operations.

Public sector agencies are no strangers to outsourcing or multicloud, hybrid cloud data center environments. However, until recently they have rarely embraced both to the extent that many commercial entities have. The COVID-19 pandemic crystallized the economic and labor challenges that were already inhibiting SLED organizations' IT advancement. Organizations needed more IT services delivered quickly and more capabilities to manage them. Meanwhile, increased pressure to enable and support shared, uniform services across state agencies and and by municipalities/towns needing improved capabilities further strained SLED IT capital and budgets.

The influx of billions of dollars in federal aid for pandemic recovery and IT and operational improvements catalyzed a nationwide

expansion and acceleration of interest and investment in modernization. This resulted in enabling, expanding and managing hybrid public and private cloud and on-premises IT environments. This growth in demand has attracted more qualified providers; from 2022 to 2023, we saw the number of providers included in this study grow from 19 to 23, and the number of Leaders increase from seven to eight.

Even with this growing acceptance and expectation of IT-as-services models and outsourced responsibility for managing the same, we see no end regarding the debate of what to outsource and what to keep in-house. The scope and scale of use of external services will continue to vary for several years based on domain type, organization and political realities.

From the 57 companies assessed for this study, 24 have qualified for this quadrant with eight being recognized as Leaders.

### accenture

Accenture's unique combination of public sector business and IT consulting expertise with deep technological and operational capabilities enables significant, ongoing improvements in public sector clients' IT and business performances.

### Ensono

Ensono continues to improve its positioning among public sector clients with advancements such as its Flex Cloud Engineering for agile management, cloud platform engineering, DevSecOps and containerization, along with outstanding mainframe expertise and increasing investment in public sector sales and support.

### Infosys

Infosys demonstrates one of the most comprehensive cloud managed services portfolios in ISG's research. Increasing investment in its Infosys Public Sector business unit helps position the company as a strong leader in managed hosting services for U.S. public sector clients.

### Kyndryl

Kyndryl has decades of experience partnering with SLED and other public sector organizations in designing, building and managing IT systems and services. Workload optimization, operating model transformation and cybersecurity are core strengths of Kyndryl.



## Managed Services

### Rackspace Technology

**Rackspace Technology's** Government Solutions practice provides compliance-ready cloud and managed services developed for U.S. federal and SLED organizations. Rackspace Technology also has strategic partnerships with AWS, Google Cloud and Microsoft Azure.



**TCS** combines exceptional experience in public sector organizational and administrative domains with a range of configurable cloud services and solutions to meet and exceed U.S. public sector clients' managed services needs.



**Unisys'** Cloud, Applications & Infrastructure services for public sector clients include systems and software migration (including to hybrid cloud), applications and data modernization, cloud use optimization, industry clouds and BPO and cybersecurity services.



**Wipro** continues to make particularly strong progress in service automation. This enables a growing range of near-zero-touch operations of hybrid cloud infrastructure services management, with reduced costs and improved service levels.





# Unisys



“Strong presence in U.S. public sector and a robust managed services approach make Unisys a leader in private/hybrid cloud and data center services.”

*Bruce Guptill*

## Overview

Unisys is headquartered in Pennsylvania, U.S., and operates in 28 countries. It has more than 16,200 employees across 71 global offices. In FY22 the company generated \$2.0 billion in revenue, with Enterprise Computing Solutions as its largest segment. Unisys is one of the longest-established IT providers in the U.S. serving public sector organizations. It holds certifications with key hyperscalers and cloud service providers, including AWS, for offering managed services to public sector clients.

## Strengths

### **Robust consulting and solutions portfolio:**

Unisys’ Cloud, Applications & Infrastructure portfolio for public sector clients includes managed services for systems and software migration (including to hybrid cloud), applications and data modernization, cloud use optimization, industry clouds) and BPO and cybersecurity services. Its multicloud management practice covers server, storage and network capacity and FinOps. Automation and integration with legacy systems is Unisys’ key strength.

### **Modernization and digitalization for**

**public sector agencies:** Unisys focuses its public sector IT and consulting services on modernizing operations and enabling digital capabilities that reduce costs and improve constituent satisfaction. Unisys’ consulting

and migration expertise includes robust managed services for traditional, virtual, hybrid cloud and legacy mainframe infrastructure systems. Its ClearPath solution offers a modernization roadmap for migrating mainframes to cloud environments.

**Security capabilities:** Organizations with a particular need for strong security, for compliance or confidentiality, should consider Unisys. Its offerings include implementing security and compliance across hybrid cloud infrastructures that can include various platforms and technology partners.

## Caution

ISG has concerns about a lack of highly-visible sector developments by Unisys. The firm has been investing in relevant domain- and operation-optimized solutions for specific types of agencies. However, Unisys risks falling behind other Leaders in clients’ perception of its broader Public Sector strengths.





# Appendix

The ISG Provider Lens™ 2023 – Private/Hybrid Cloud – Data Center Services report 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 report includes research from the ISG Provider Lens™ program, ongoing ISG Research™ programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of April 2023, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

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

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**Bruce Guptill**  
**Lead Analyst**

Bruce Guptill brings more than 30 years of technology business and markets experience and expertise to ISG clients. Bruce has helped develop and lead ISG's enterprise research development and delivery, global ISG Research operations and Research client support. His primary research and analysis for ISG clients has focused on IT services market development, disruption, adaptation and change. He currently leads U.S. Public Sector research for ISG's Provider Lens global research studies, and also leads IPL studies in procurement and software vendor partner ecosystems.

Bruce holds a masters' degree in marketing and finance, and a B.A. combining business and mass media communication psychology. He also holds certifications in a wide range of software, hardware and networking technologies, and in mechanical and electrical engineering disciplines.

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**Manoj M**  
**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 Data Center 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.





*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](#).

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## iSG

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For more information, visit [isg-one.com](http://isg-one.com).





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