ISG Provider Lens®

AI-ready Infrastructure Solutions

A report comparing vendor strengths and differences across AI-ready Infrastructure Solutions

Table of Contents 🏠

AI has moved from experimentation to an operational backbone, redefining enterprise needs for compute, storage and networking. As AI models grow in scale, complexity and autonomy, infrastructure has become a key constraint and a differentiator of AI success. Enterprises are no longer debating whether to invest in AI, but how to build scalable, efficient, economically viable foundations for training, inference and deployment.

The market is shifting beyond general-purpose infrastructure toward solutions that maximize performance, energy efficiency and ease of management. Integrated AI infrastructure systems simplify deployment, orchestration and lifecycle management of complex AI stacks across on-premises, hosted and edge environments.

Consumption-based models, such as GPU as a service (GPUaaS), are gaining traction, allowing enterprises to access high-performance accelerators without long-term capital commitments while addressing demand volatility, skills shortages and capacity constraints. These models also introduce new considerations around pricing transparency, SLAs, data sovereignty and operational governance.

At the same time, enterprises face rising pressure to balance performance with cost clarity, power consumption, compliance and resilience. Fragmented vendor offerings, architectures and delivery models complicate buyers' ability to select solutions aligned with their AI strategies, maturity levels and regulatory environments. The ISG Provider Lens® AI-ready Infrastructure Solutions study helps address these challenges by evaluating providers across two interrelated quadrants — Integrated AI Infrastructure Systems and GPU as a Service (GPUaaS). The study offers a structured, standardized comparison of vendor capabilities, GTM models and enterprise relevance, enabling decision-makers to identify the most suitable partners for building robust, future-proof AI infrastructure foundations.
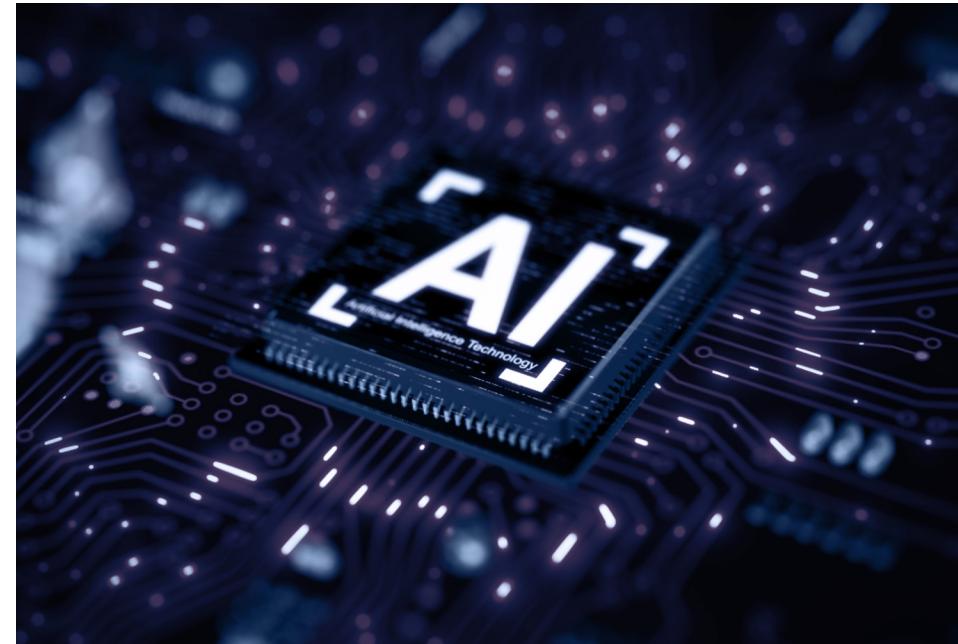
AI-ready Infrastructure Solutions IPL 2026

QUADRANTS   **SUB SEGMENTS**   **CORNERSTONES**

Integrated AI Infrastructure Systems (System Focus)

Pre-packaged, rack-scale or cluster-scale hardware/software solutions that combine compute, networking, and storage components.

TECHNICAL CAPABILITIES

AI System Design & Integration	AI Workload Orchestration & Lifecycle	Rack-Scale Hardware Integration	High-Performance Storage Systems	Enterprise Networking Fabrics	Global Enterprise Support	HPC/ Supercomputing Heritage

GPU as a Service (GPUaaS) (Consumption Model Focus)
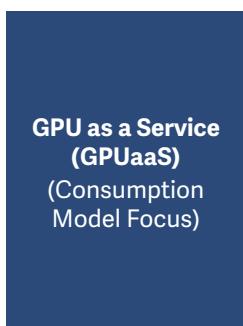
Cloud and service provider offerings that deliver on-demand access to AI-optimized compute resources

TECHNICAL CAPABILITIES

Virtualization Technologies	Cloud Compute Architecture	Service APIs and Automation	Cost Management & FinOps Layer	Network Architecture and Latency Optimization	AI Framework Integration and SDKs	Security and Tenant Isolation Mechanisms

Cornerstones:
- AI Factory Enablement Maturity
- Sustainability and Energy Efficiency
- Innovation and Roadmap Leadership
- Ecosystem and Alliances
- Security and Compliance Posture Across Stack

This study focuses on what **ISG perceives** as **most critical** in 2026 for **AI-ready Infrastructure Solutions**

Simplified Illustration Source: ISG 2025

Integrated AI Infrastructure Systems

GPU as a Service (GPUaaS)

Definition

The ISG Provider Lens® AI-ready Infrastructure Solutions 2026 study offers the following to business and IT decision-makers:

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

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

Integrated AI Infrastructure Systems

Definition

This quadrant evaluates platform originators that design, manufacture and ship proprietary rack-scale AI systems with system-level responsibility. The integrated enterprise-scale AI infrastructure unifies compute, storage, networking and AI lifecycle enablement. They support model development, training, deployment and inference across on-premises, hybrid and edge environments. Evaluation centers on architectural coherence, modularity, orchestration, data pipeline efficiency, security governance and deployment flexibility. The quadrant reflects vendor maturity in delivering repeatable, validated AI platforms with consistent performance, compliance, global delivery and credible roadmaps for next-GenAI system designs. Demonstrated HPC implementations acts as a supplementary evidence of system scalability and engineering maturity when aligned to integrated AI platform architectures and enterprise AI workloads.

This quadrant excludes vendors that provide only component hardware or unmanaged infrastructure without system-level responsibility.

Eligibility Criteria

1. **Offer commercially available, integrated AI infrastructure systems** that combine validated compute accelerators, high-performance storage, networking and aligned lifecycle management capabilities — demonstrated HPC maturity is a plus

2. **Provide orchestration and automation capabilities**, either natively or through certified partner integrations, to support AI workload scheduling, monitoring and cluster management

3. **Demonstrate production-grade deployments**, backed by customer references, benchmarked AI performance and evidence of operational use

4. **Support flexible deployment models**, including on-premises, hybrid and edge environments, with unified or federated management

5. **Meet enterprise security and compliance standards** with industry certifications, such as ISO 27001 and SOC 2 Type II, and built-in controls for encryption, access management and audit logging

6. **Deliver managed or fully supported AI platforms** with system-level responsibility

7. **Maintain ecosystem partnerships and support capabilities**, including with silicon vendors, software providers and global services organizations

8. **Provide documented use cases and references**, demonstrating applicability across industries, including regulated environments

GPU as a Service (GPUaaS)

Definition

This quadrant evaluates infrastructure providers delivering GPUaaS, including elastic, on-demand access to high-performance GPU compute for AI, ML and data-intensive workloads. Providers deliver on-demand access to modern GPU architectures through public, private or hybrid environments, allowing enterprises to avoid capital investment in dedicated hardware. They support flexible workloads, from rapid prototyping to large-scale distributed training, through virtualization, cluster orchestration and multi-tenant capabilities. Evaluation focuses on service breadth, performance consistency, orchestration maturity, AI development and MLOps integration, pricing and consumption flexibility, and security. Enterprise relevance is determined by a provider's ability to deliver predictable performance, transparent commercial models and reliable access to modern GPU architectures at scale.

The quadrant reflects enterprises' preference to consume AI infrastructure as a scalable service rather than own it and excludes vendors offering only generic compute or storage services without dedicated, AI-oriented GPU capabilities and proven enterprise deployments.

Eligibility Criteria

1. **Provide commercially available GPUaaS offerings** to external enterprise or professional customers, with the provider owning or operating the underlying GPU infrastructure

2. **Support flexible consumption models**, including on-demand usage, reserved capacity and burst or short-term access

3. **Provide streamlined dashboards**, with one-click deployment and integration to popular AI tools enterprises already use for model development and management

4. **Demonstrate geographic availability and data residency options** aligned to enterprise latency, sovereignty and regulatory requirements

5. **Meet enterprise security and compliance expectations**, with encryption, tenant isolation and recognized certifications, such as ISO 27001 and SOC 2, where applicable

6. **Present a compelling portfolio of customer success**, including case studies across multiple industries with measurable AI outcomes, complemented by responsive 24/7 support teams

7. **Demonstrate transparent sustainability and efficiency practices**, including energy-efficiency initiatives, renewable energy sourcing and reporting on infrastructure footprint

Quadrants by Region

As a part of this ISG Provider Lens® quadrant study, we are introducing the following two quadrants on AI-ready Infrastructure Solutions 2026:

Quadrant	Global
Integrated AI Infrastructure Systems	✔
GPU as a Service (GPUaaS)	✔

Schedule

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

Milestones	Beginning	End
Survey Launch	February 12, 2026	
Survey Phase	February 13, 2026	March 13, 2026
Sneak Preview	June 2026	June 2026
Press Release & Publication	July 2026	

Collecting client testimonials via the Star of Excellence™ Program requires early client referrals (no official reference needed) because CX scores have a direct influence on the provider's position in the IPL quadrant and the awards.

Please refer to the link to view/download the ISG Provider Lens® 2026 research agenda.

Access to Online Portal

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

Buyers Guide

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

In the course of the AI-ready Infrastructure Solutions IPL launch, we want to take advantage of the opportunity to draw your attention to related research and insights that ISG Research will publish in 2026. For more information, refer to the Buyers Guide research schedule.

Research Production Disclaimer:

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

ISG Star of Excellence™ — Call for nominations

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

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

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

Our vision for the Star of Excellence™ is to become acknowledged as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments.

To ensure your selected clients complete the feedback for your nominated engagement, please use the "Nominate (for Providers)" section on the Star of Excellence™ website.

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

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

ISG Star of Excellence™

Methodology & Team

The ISG Provider Lens® 2026 – AI-ready Infrastructure Solutions study analyzes the relevant providers in the global 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:
Sonam Chawla

Editor:
Sajina B

Research Analyst:
Mamtha R

Data Analyst:
Akshay Rathore

Project Manager:
Padma Mohapatra

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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 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 January 2026 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 otherwise.

Contacts For This Study

Study Sponsor

Heiko
Henkes

Study Sponsor

Sonam
Chawla

Lead Analyst

Mamtha
R

Research Analyst

Akshay
Rathore

Data Analyst

Padma
Mohapatra

Project Manager

ISG Provider Lens® Advisors Involvement Program

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

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

The consultant advisors:

- Help define and validate quadrants and questionnaires

- Advise on service provider inclusion, participate in briefing calls

- Give their perspectives on service provider ratings and review report drafts

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

AceCloud	FluidStack	MiTAC
Advantech	Fujitsu	Nebius
Akash Network	GCore Labs	NEC
Alibaba	Gigabyte	Oracle
ASRock Rack	H3C	OVHcloud
ASUS	Hetzner	Runpod
Atos	Hitachi	Scaleway
AWS	HPE	Sify Technologies
Cirrascale	Huawei	Sugon (Dawning Information Industry Co., Ltd)
CoreWeave	Hyperstack	Supermicro
Crusoe Cloud	IBM	Together AI
Cyfuture AI	Inspur	United Layer
DigitalOcean (Paperspace)	Lambda	Vultr
E2E Networks	Lenovo	Zenlayer
Exoscale	Microsoft	

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. 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.

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BROCHURE: AI-READY INFRASTRUCTURE SOLUTIONS