ISG Provider Lens®

Multi Public Cloud Services

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

unisys

QUADRANT REPORT | DECEMBER 2025 | U.S.

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Report Author: Shashank Rajmane and Yatharth Bharti

AI is being integrated into almost all public cloud engagements to improve productivity and efficiency

Public cloud platforms form the core of enterprise AI ecosystems, offering the scalability, elasticity and specialized infrastructure needed to train and deploy large models efficiently. ISG research shows that combining on-premises control with cloud-based acceleration enables organizations to integrate AI-powered intelligence into existing workflows and streamline their operations. Enterprises have been able to reduce development complexity, accelerate time to value and scale innovations from predictive analytics to autonomous operations by leveraging cloud-native AI services, pretrained models and GPU-optimized instances.

To support these growing AI demands, major hyperscalers such as AWS, Azure and Google Cloud have strengthened partnerships with semiconductor vendors and foundational model providers to deliver enterprises with AI-ready cloud services. For example, AWS integrates NVIDIA GPUs into high-performance instances to enable quick training and inference of large-scale AI models; Azure offers accelerated virtual machines (VMs) that allow enterprises to efficiently run complex AI workloads at scale; and Google Cloud combines its own TPUs and NVIDIA GPUs into a single ecosystem to deliver a powerful environment for enterprises to deploy and scale multi-modal AI applications seamlessly. Beyond the Big Three, other cloud service providers (CSPs) are also carving out distinct strategies to strengthen their AI-infrastructure portfolios. Oracle Cloud has deepened its partnership with NVIDIA to deliver GPU-accelerated OCI Superclusters purpose-built for GenAI training and inference at scale. Similarly, in Europe, OVH has progressed in establishing itself as an AI-ready CSP while delivering strong data sovereignty controls.

However, as enterprises scale AI initiatives across hybrid and multicloud environments, operational complexity has become the

The public cloud ecosystem has taken center stage for innovation around AI workloads.

new frontier of transformation. Running AI workloads in distributed environments introduces challenges, where models are trained in one environment, fine-tuned in another and deployed across multiple inference endpoints, each with unique data residency, compliance and performance constraints. These challenges extend far beyond compute performance, encompassing security, cost governance, monitoring and orchestration.

Below are some of the key trends that ISG observed in the last four quarters:

Growing but mixed demand for cloud services driven by AI workloads: AI is now the engine behind overall cloud consumption, but growth is uneven and highly architectural. Training models produce seasonal peaks, inference workloads are often always-on and data preparation involves steady analytics with occasional spikes in cloud resource consumption. The practical approach is to segment these profiles up front, place heavy training close to curated data and run latency-sensitive inference nearer to users or machines. Teams that codify these placement rules as policy avoid the slow bleed of egress, rebuilds and cross-region drift. The net effect is a clean operating model in which capacity planning, data adjacency and developer workflows align.

Cost optimization remains a top priority, and enterprises want it now: AI workloads are becoming table stakes for hybrid cloud architecture, increasing complexity and magnifying inefficiencies. The fastest outcomes come from treating cost as a design input rather than a month-end audit. To prevent waste before the product goes live, enterprises need to include budget as code in pipelines, tie rightsizing to deployment checks and map commitment plans to real usage patterns. On the model side, quantization, distillation and selective caching can reduce GPU minutes without hurting accuracy targets. For inference, moving preprocessing to the CPU and reserving accelerators for the tight loop improves utilization. The language of success becomes unit costs, which the business understands. This includes cost per answer or cost per transaction, reviewed alongside reliability and latency.

GenAI adoption remains in native stages: Incorporating GenAI into the existing mix of AI workloads remains nascent in enterprise adoption of AI, while scale requires discipline and high technology maturity. Many enterprises invest heavily in this space, with several funding multiple PoCs, but moving to production-grade GenAI initiatives only when the outputs are highly accurate. Naturally, these are very small in number. Enterprises that move fast set up a small PoC factory with strict guidelines and a simple rule for promotion to production: problem framing before model selection, red team testing before go-live and every use case carries an owner accountable for data, risk and budget. This structure enables teams to learn inexpensively, retire weak ideas quickly and concentrate investment where probability of success is high.

Focus on FinOps for AI and AI for FinOps: Sustainable FinOps and GreenOps are maturing and becoming integrated into FinOps platforms, while carbon currency is included in the same dashboard that drives infrastructure consumption decisions. Training workloads that can be deferred are scheduled into cleaner grids, while inference jobs use right-sized instances with power caps and storage teams clear duplicate or stale datasets on a cadence that optimizes AI workloads. Procurement departments now include energy disclosure in their vendor selection processes, while engineers receive a carbon budget just like a spend budget, with exceptions handled through the same approval flow.

AI application for cloud operations: Almost all providers have integrated GenAI and agentic AI technologies into their cloud management platforms, built with security and compliance guardrails. They now embed GenAI models to automate cloud governance, workload optimization and service orchestration. These AI systems enable predictive resource scaling, automated threat detection, drift monitoring and intelligent log analysis across environments, improving overall efficiency while automating the most mundane tasks and freeing engineers to focus on more critical tasks. Additionally, every action the agents take writes back into a knowledge base, so fixes become reusable

runbooks, not just memory. The agents have also included confidence scoring, dual approvals for risky steps and automatic post-incident reviews by keeping humans in the loop without slowing down the process.

The flip side of using AI: The primary downside of AI adoption is its potentially high and unpredictable infrastructure costs. Enterprises should avoid these surprises by making economics an explicit non-functional requirement. Before committing to a model, they should simulate traffic, concurrency and latency targets to estimate the accelerator share and memory pressure, then select an architecture and serving patterns that match the curve. Service providers are also guiding enterprises to control costs by keeping data close to compute to cut egress, trimming feature pipelines that add cost and preferring smaller models where possible.

Embedding both agentic AI and GenAI technologies enables autonomous task execution, optimization and automated decision-making. These help streamline operations, reduce manual intervention and deliver measurable outcomes for enterprises operating in multicloud and hybrid environments.

Provider Positioning

Page 1 of 7

	Consulting and Transformation Services — Large Accounts	Consulting and Transformation Services — Midmarket	Managed Services — Large Accounts	Managed Services — Midmarket	FinOps Services and AI-driven Optimization	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
Accenture	Leader	Not In	Leader	Not In	Leader	Not In	Not In
Alibaba Cloud	Not In	Not In	Not In	Not In	Not In	Contender	Contender
Altimetrik	Not In	Contender	Not In	Not In	Not In	Not In	Not In
Apexon	Not In	Product Challenger	Not In	Not In	Not In	Not In	Not In
Atos	Product Challenger	Not In	Product Challenger	Not In	Product Challenger	Not In	Not In
AWS	Not In	Not In	Not In	Not In	Not In	Leader	Leader
Birlasoft	Not In	Product Challenger	Not In	Product Challenger	Contender	Not In	Not In
Brillio	Not In	Rising Star ★	Not In	Product Challenger	Not In	Not In	Not In
Capgemini	Leader	Not In	Leader	Not In	Leader	Not In	Not In

Provider Positioning

Page 2 of 7

	Consulting and Transformation Services — Large Accounts	Consulting and Transformation Services — Midmarket	Managed Services — Large Accounts	Managed Services — Midmarket	FinOps Services and AI-driven Optimization	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
CDW	Product Challenger	Not In	Contender	Not In	Not In	Not In	Not In
CGI	Contender	Not In	Contender	Not In	Not In	Not In	Not In
CloudKeeper	Not In	Contender	Not In	Not In	Not In	Not In	Not In
Coforge	Not In	Leader	Not In	Leader	Not In	Not In	Not In
Cognizant	Leader	Not In	Leader	Not In	Product Challenger	Not In	Not In
Computacenter	Not In	Contender	Not In	Contender	Contender	Not In	Not In
Deloitte	Leader	Not In	Market Challenger	Not In	Leader	Not In	Not In
Deutsche Telekom/T-Systems	Product Challenger	Not In	Product Challenger	Not In	Not In	Not In	Contender
DigitalOcean	Not In	Not In	Not In	Not In	Not In	Contender	Not In

Provider Positioning

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DXC Technology	Product Challenger	Not In	Leader	Not In	Product Challenger	Not In	Not In
Ensono	Not In	Product Challenger	Not In	Product Challenger	Not In	Not In	Not In
EY	Contender	Not In	Not In	Not In	Not In	Not In	Not In
Fujitsu	Contender	Not In	Contender	Not In	Not In	Not In	Not In
Google	Not In	Not In	Not In	Not In	Not In	Leader	Leader
HARMAN	Not In	Product Challenger	Not In	Product Challenger	Not In	Not In	Not In
HCLTech	Leader	Not In	Leader	Not In	Leader	Not In	Not In
Hexaware	Not In	Leader	Not In	Leader	Not In	Not In	Not In
Hitachi Digital Services	Not In	Leader	Not In	Leader	Not In	Not In	Not In

Provider Positioning

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	Consulting and Transformation Services — Large Accounts	Consulting and Transformation Services — Midmarket	Managed Services — Large Accounts	Managed Services — Midmarket	FinOps Services and AI-driven Optimization	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
IBM	Leader	Not In	Rising Star ★	Not In	Not In	Product Challenger	Product Challenger
Infinite Computer Solutions	Not In	Product Challenger	Not In	Product Challenger	Not In	Not In	Not In
Infosys	Leader	Not In	Leader	Not In	Product Challenger	Not In	Not In
Innova Solutions	Not In	Leader	Not In	Leader	Product Challenger	Not In	Not In
KPMG	Contender	Not In	Not In	Not In	Not In	Not In	Not In
Kyndryl	Leader	Not In	Leader	Not In	Leader	Not In	Not In
Logicalis	Not In	Contender	Not In	Not In	Not In	Not In	Not In
LTIMindtree	Product Challenger	Not In	Product Challenger	Not In	Product Challenger	Not In	Not In
Microland	Not In	Product Challenger	Not In	Leader	Product Challenger	Not In	Not In

Provider Positioning

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	Consulting and Transformation Services — Large Accounts	Consulting and Transformation Services — Midmarket	Managed Services — Large Accounts	Managed Services — Midmarket	FinOps Services and AI-driven Optimization	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
Microsoft	Not In	Not In	Not In	Not In	Not In	Leader	Leader
Mphasis	Not In	Leader	Not In	Leader	Contender	Not In	Not In
MSRcosmos	Not In	Contender	Not In	Contender	Not In	Not In	Not In
NTT DATA	Rising Star ★	Not In	Leader	Not In	Leader	Not In	Not In
Ollion (2nd Watch)	Contender	Not In	Contender	Not In	Not In	Not In	Not In
Oracle	Not In	Not In	Not In	Not In	Not In	Rising Star ★	Not In
OVHcloud	Not In	Not In	Not In	Not In	Not In	Contender	Not In
Persistent Systems	Not In	Leader	Not In	Leader	Product Challenger	Not In	Not In
PwC	Product Challenger	Not In	Product Challenger	Not In	Not In	Not In	Not In

Provider Positioning

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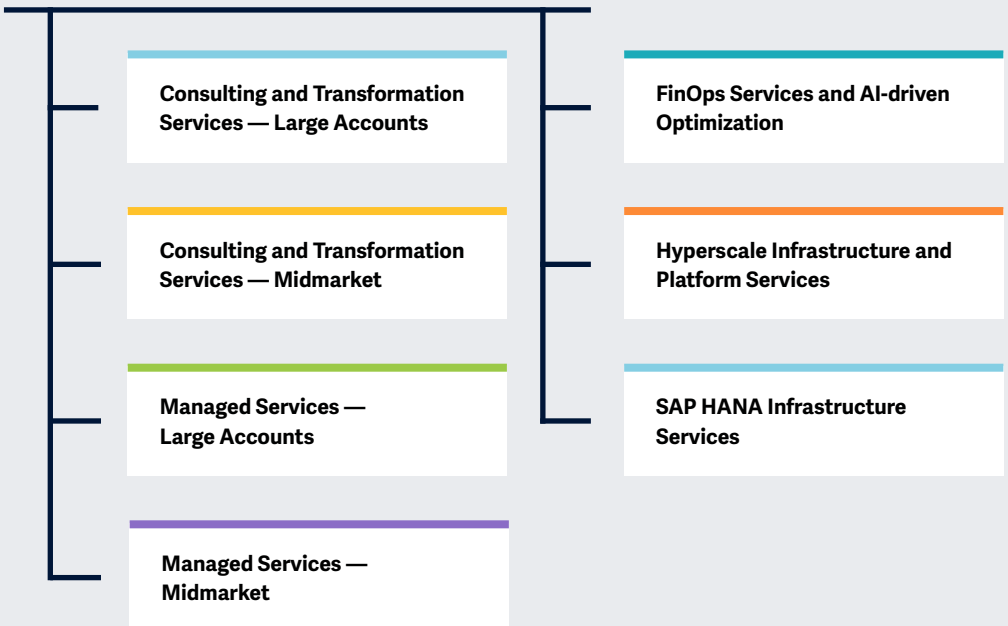
	Consulting and Transformation Services — Large Accounts	Consulting and Transformation Services — Midmarket	Managed Services — Large Accounts	Managed Services — Midmarket	FinOps Services and AI-driven Optimization	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
Rackspace Technology	Not In	Leader	Product Challenger	Leader	Leader	Not In	Not In
Randstad Digital	Product Challenger	Not In	Product Challenger	Not In	Not In	Not In	Not In
Red River	Not In	Contender	Not In	Contender	Not In	Not In	Not In
SAP	Not In	Not In	Not In	Not In	Not In	Not In	Product Challenger
Stefanini	Not In	Product Challenger	Not In	Product Challenger	Not In	Not In	Not In
Syntax	Not In	Not In	Not In	Product Challenger	Not In	Not In	Not In
TCS	Leader	Not In	Leader	Not In	Product Challenger	Not In	Not In
Tech Mahindra	Product Challenger	Not In	Product Challenger	Not In	Product Challenger	Not In	Not In
TO THE NEW	Not In	Product Challenger	Not In	Contender	Contender	Not In	Not In

Provider Positioning

	Consulting and Transformation Services — Large Accounts	Consulting and Transformation Services — Midmarket	Managed Services — Large Accounts	Managed Services — Midmarket	FinOps Services and AI-driven Optimization	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
Trianz	Not In	Contender	Not In	Contender	Not In	Not In	Not In
Unisys	Not In	Leader	Not In	Leader	Product Challenger	Not In	Not In
UST	Not In	Product Challenger	Not In	Product Challenger	Contender	Not In	Not In
Virtusa	Not In	Product Challenger	Not In	Product Challenger	Not In	Not In	Not In
Visionet	Not In	Product Challenger	Not In	Product Challenger	Not In	Not In	Not In
VVDN Technologies	Not In	Contender	Not In	Contender	Not In	Not In	Not In
Wipro	Leader	Not In	Leader	Not In	Product Challenger	Not In	Not In
Zensar Technologies	Not In	Product Challenger	Not In	Product Challenger	Product Challenger	Not In	Not In
Zones	Not In	Contender	Not In	Product Challenger	Not In	Not In	Not In

This study focuses on what ISG perceives as most critical in 2025 for **multi public cloud services**.

Simplified Illustration Source: ISG 2025



Definition

This study evaluates providers within the public cloud and AI value chain, offering consulting and transformation solutions, managed services, FinOps, sovereign infrastructure, cloud-native platforms, and SAP-focused solutions. These providers enable enterprises to modernize, secure, manage and scale multicloud and AI-native environments using automation, GenAI and advanced optimization frameworks.

Cloud adoption is accelerating not only for scalability or cost efficiency but also for fostering AI innovation, driving sustainability and ensuring regulatory compliance. Enterprises demand dynamic, composable cloud solutions that integrate intelligent operations, FinOps governance and AI orchestration across public and sovereign infrastructures. The widespread adoption of intelligent automation tools further streamlines data management processes and allows businesses to prioritize innovation over mundane tasks, driving demand for rearchitecting strategies and cloud-native solution expertise.

Introduction

Providers that support agentic AI, hybrid FinOps-AIOps models and transformation road maps tailored to cloud-native development are well-positioned to lead. Sovereignty, sustainability and interoperability are no longer optional; enterprises expect secure, jurisdiction-compliant infrastructure, workload portability and customer-controlled encryption models such as Hold Your Own Key (HYOK).

Enterprises aim to leverage agentic AI and GenAI to enhance productivity, streamline operations and foster innovation. To stay relevant, providers must demonstrate technical expertise, regulatory awareness and the ability to embed AI technologies into their service architectures. This study highlights those shaping the future of the public cloud through next-generation platforms and transformation services.

Scope of the Report

This ISG Provider Lens® quadrant report covers the following seven quadrants for services/solutions: Consulting and Transformation Services — Large Accounts, Consulting and Transformation Services — Midmarket, Managed Services — Large Accounts, Managed Services — Midmarket, FinOps Services and AI-driven Optimization, Hyperscale Infrastructure and Platform Services, SAP HANA Infrastructure 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 (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.

Consulting and Transformation Services — Large Accounts

Who Should Read This Section

This report is valuable for service providers offering **consulting and transformation services** in the **U.S.** 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 consulting and transformation service providers' modernization and service capabilities, assessing which providers offer innovative solutions aligned with evolving technology trends. Understanding these market advancements is critical for IT executives to shape effective, future-proof public cloud strategies and ensure their organizations maintain competitive agility and resilience.

Software development and technology leaders

Should read this report to gain insights into providers' strategic positioning, technological expertise and innovation in infrastructure transformation initiatives. This knowledge empowers them to align internal software development and technology road maps with external expertise, driving efficient and impactful digital transformation.

Sourcing, procurement and vendor management professionals

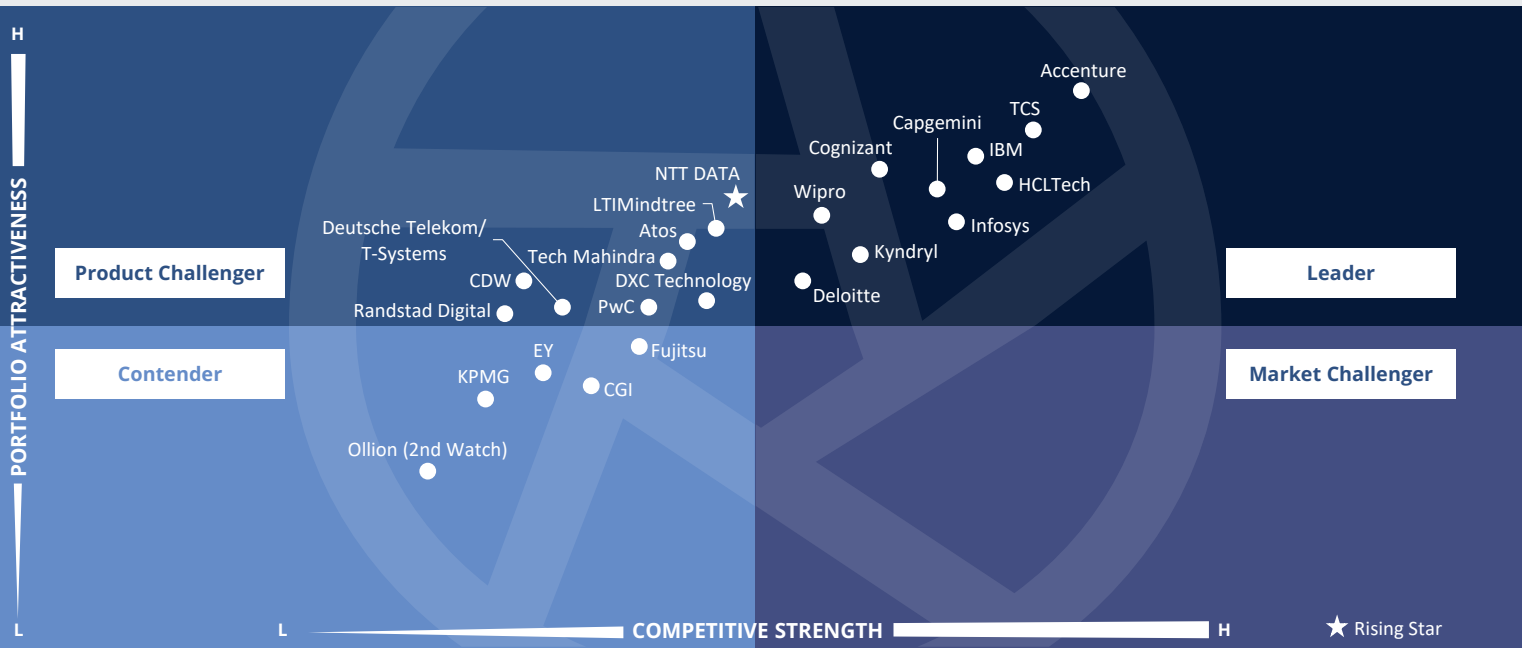
Should utilize this report to better understand the current landscape and partner ecosystem of consulting and transformation services in the U.S. A deeper understanding of provider competencies, differentiation and market presence supports informed vendor selection and negotiation strategies, ensuring optimal partnerships that deliver both immediate value and sustainable long-term benefits.

ISG Provider Lens®

Source: ISG RESEARCH

Multi Public Cloud Services
Consulting and Transformation Services — Large Accounts

U.S. 2025



This quadrant evaluates service providers that offer **consulting services** for **migrating applications** on **public cloud** infrastructure and **modernizing infrastructure** to public cloud environments, enabling large enterprises with their digital strategy.

Shashank Rajmane

Definition

This quadrant evaluates providers that offer consulting and technical support services to modernize, optimize and transform enterprise IT environments through cloud adoption. These providers help clients navigate multicloud complexity, industry-specific demands and AI integration to achieve agility, resilience and scalability.

Top providers deliver the following.

- **Consulting services** such as:
  - Transformation road maps, business case development and workload modernization
  - Cloud-native strategy design (including APIs, containers and serverless computing)
  - Governance and financial planning aligned with FinOps and hybrid cloud models
- **Transformation services** such as:
  - Design, migration and configuration of cloud-native and AI-native architectures
  - Integration of DevSecOps, AIOps, GenAI and FinOps capabilities
- **Compliance and governance services** include:
  - Establishing policy frameworks and ensuring alignment with ESG standards
  - Creating essential guardrails to implement GenAI solutions by adhering to aligning with sovereignty and security requirements

Providers are assessed based on their ability to drive scalable, intelligent and sustainable cloud transformations through proprietary frameworks, AI-powered toolsets and vendor-agnostic architectures.

Eligibility Criteria

1. Have experience in multicloud transformation across **major industries**, including regulated sectors such as finance, healthcare and manufacturing
2. Design and implement cloud transformation strategies that integrate **cloud-native services** (for example, containers, serverless computing and APIs), **AIOps, FinOps and GenAI** services
3. Demonstrate **proven methodologies** for analyzing and optimizing complex IT environments, preventing technical debt and enabling long-term agility
4. Possess expertise in cloud application migration, using **automation engines, templates, data conversion frameworks** and **well-architected blueprints**
5. Demonstrate **certified delivery capabilities** across at least two hyperscaler platforms (for example, AWS, Microsoft Azure, Google Cloud and OCI)
6. Leverage **GenAI-powered** services for **automation, documentation, knowledge retrieval, chatbot integration** and **incident resolution** (preferred)
7. Use **AI-native** toolsets or **agents** for **assessment** and **planning** (preferred)
8. Develop and utilize **AI assets, pre-trained models, ready-to-use industry solutions** or **responsible design** frameworks for improving overall efficiency (preferred)

Observations

The large-enterprise multicloud market is evolving from merely "migrating to the cloud" to "building AI-ready operating models." Providers now deliver through standardized platforms, landing zones, SRE practices and product-based teams, with AI embedded from planning to operations. Migration factories and policy-as-code technologies accelerate adoption, but relying solely on templates may overlook business context if not paired with in-depth design. FinOps is evolving into continuous transformational FinOps, managing graphics processing units (GPU) and LLM costs while incorporating GreenOps signals. Success is now measured by efficiency, cost per unit and reliability rather than merely effort.

Enterprises seek results, not just cloud migrations. They expect rearchitected, cloud-native systems instead of simple lift-and-shift migrations. They demand resilience, zero trust and responsible AI controls, clear cost structures for AI workloads and industry-specific blueprints that address regulations.

Buyers seek accountability from early strategy through ongoing operations, with visible gains in speed, reliability and business outcomes.

Providers respond by combining strategy, build and run into integrated teams. They strengthen landing zones with policy as code and package reusable intellectual property as accelerators and marketplaces. AI is applied in coding assistants and automated runbooks for cloud migration and transformations. FinOps is embedded directly into pipelines, providing anomaly detection and GPU visibility.

From the 63 companies assessed for this study, 24 qualified for this quadrant, with 10 being Leaders and one Rising Star.

accenture

Accenture increasingly treats multicloud reinvention as a product discipline, using partner-scale orchestration and intellectual property to compress time to value. The company has adopted outcome-led governance that demands strong client sponsorship to avoid drift.

Capgemini

Capgemini prioritizes business-tied modernization with AI at scale, steering toward shared-outcome constructs. It has sharpened FinOps and sustainability strategies, encouraging its teams to balance speed with risks in highly regulated environments.

cognizant

Cognizant drives a platform-first delivery rhythm that transforms modernization into a repeatable process. It has reinforced reliability playbooks to manage multicloud complexity while aligning optimization with domain-level guardrails.

Deloitte.

Deloitte positions its AI factories alongside core enterprise suites, turning change into a continuous service. It has matured its policy-as-code operations, ensuring that risk, spending and resilience metrics surface on the same executive dashboard.

HCLTech

HCLTech leverages engineering depth, aligning silicon-to-software choices with AI-led automation techniques. It frames GenAI as an operations accelerator to cut costs and increase delivery velocity across complex estates.

IBM

IBM reframes hybrid modernization around a consistent application platform with factory-styled delivery. Its investments are focused on observability and FinOps to justify ROI in large, compliance-heavy estates.

Infosys

Infosys integrates AI as the connective tissue across its transformation assets. It has pivoted advisory toward cloud-native value realization, facilitating seamless modernization and innovation.

Kyndryl anchors programs in measurable run outcomes, blending product-centric teams with continuous FinOps. It prioritizes cost transparency and AI-driven cost control as key deliverables for model-heavy multicloud estates.

TCS operationalizes modernization at scale through AI-assisted factories and rigorous governance. It has advanced purpose-led metrics, yet growth in government markets depends on certifications and partnerships aligned to state and local requirements.

Wipro views cloud change as a product lifecycle, standardizing pipelines and controls across cloud environments. It has tightened migration automation with agentic AI to minimize disruptions and accelerate release cadence.

NTT DATA, Rising Star, has invested in several cloud transformation platforms, including the GenAI Factory, FinOps accelerators and containerization frameworks, deployed across AWS, Microsoft Azure and Google Cloud for improved CX and faster time to market.

Consulting and Transformation Services — Midmarket

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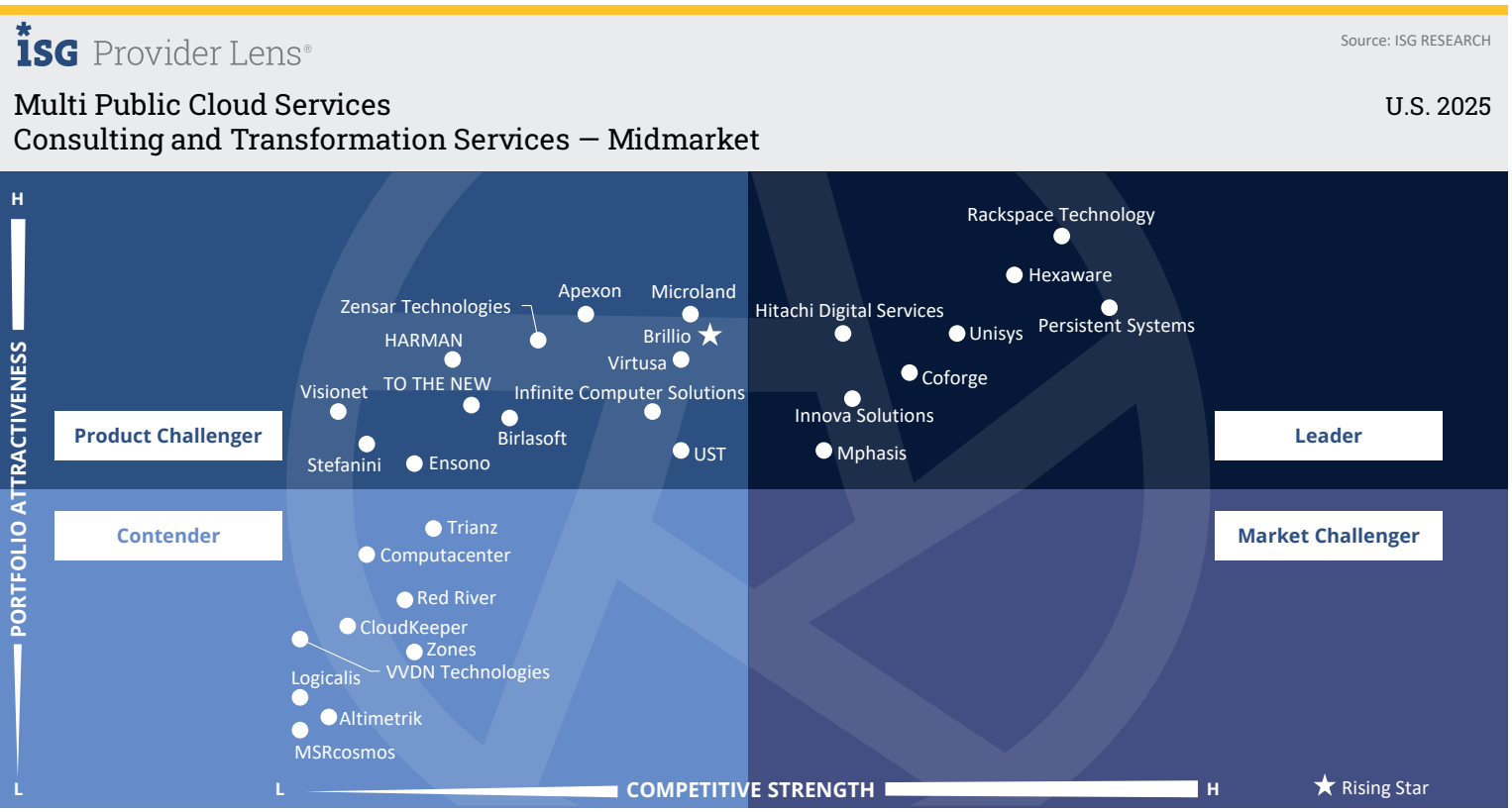
Should utilize this report to better understand the current landscape and partner ecosystem of consulting and transformation services in the U.S. A deeper understanding of provider competencies, differentiation and market presence supports informed vendor selection and negotiation strategies, ensuring optimal partnerships that deliver both immediate value and sustainable long-term benefits.



This quadrant evaluates service providers that offer **consulting services** for **migrating applications** on **public cloud** infrastructure and **modernizing infrastructure** to public cloud environments, enabling SMEs with their digital strategy.

Shashank Rajmane

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Providers are assessed based on their ability to drive scalable, intelligent and sustainable cloud transformations through proprietary frameworks, AI-powered toolsets and vendor-agnostic architectures.

Eligibility Criteria

1. Have experience in multicloud transformation across **major industries**, including regulated sectors such as finance, healthcare and manufacturing
2. Design and implement cloud transformation strategies that integrate **cloud-native services** (for example, containers, serverless computing and APIs), **AIOps, FinOps and GenAI** services
3. Demonstrate **proven methodologies** for analyzing and optimizing complex IT environments, preventing technical debt and enabling long-term agility
4. Possess expertise in cloud application migration, using **automation engines, templates, data conversion frameworks** and **well-architected blueprints**
5. Demonstrate **certified delivery capabilities** across at least two hyperscaler platforms (for example, AWS, Microsoft Azure, Google Cloud and OCI)
6. Leverage **GenAI-powered** services for **automation, documentation, knowledge retrieval, chatbot integration** and **incident resolution** (preferred)
7. Use **AI-native** toolsets or **agents** for **assessment** and **planning** (preferred)
8. Develop and utilize **AI assets, pre-trained models, ready-to-use industry solutions** or **responsible design** frameworks for improving overall efficiency (preferred)

Observations

The midmarket consulting and transformation services space is evolving from one-off migrations to industrialized assess-build-operate programs, with providers standardizing on platform engineering (IDPs, policy as code, Terraform blueprints) and layering agentic AI across discovery, design and run to compress cycle time and reduce handoffs. Reliability, security and FinOps are being integrated from Day 1 to modernize, optimize and secure multicloud estates. This shift delivers faster time to value and more consistent results; however, progress is tempered by the need for early proof points to validate investments in AI technologies in the U.S.

Midmarket enterprise clients now seek outcomes instead of hours, looking for ready-made landing zones with built-in industry controls, AI-ready data platforms and clear gains in reliability, cost efficiency and developer speed. They expect orchestration across tools to avoid lock-in, help with VMware exits and hybrid models, and focus on targeted refactoring instead of full lift-and-shift.

Providers are responding by turning roadmaps into code using template libraries, migration factories, GitOps pipelines and AI-assisted runbooks, supported by industry blueprints and hyperscaler cofunding. Pricing is shifting toward gain-share and consumption-linked models tied to service level objectives (SLOs). The next differentiators will include production-scale platform-engineering references, balanced onshore/nearshore capacity for regulated workloads and ESG-by-design with carbon tracking built into FinOps. Providers that address these gaps will capture midmarket demand for long-term transformation.

From the 63 companies assessed for this study, 30 qualified for this quadrant, with eight being Leaders and one Rising Star.

Coforge

Coforge doubles down on vertical IP with AI-native operations and aligns its commercials to measurable outcomes. It promotes open-source delivery platforms and expands nearshore collaboration to reassure U.S. stakeholders.

HEXAWARE

Hexaware is scaling factory-style modernization and expanding partnerships with hyperscalers. Its deals focus on faster time to value and compliance needs, with sustainability KPIs increasingly serving as differentiators in U.S. opportunities.

Hitachi Digital Services

Hitachi Digital Services (HDS) elevates reliability to board-level metrics and has formalized SLOs in contracting. Cross-industry operational technology insights differentiation, while AI-assisted runbooks progress from labs to production.

Innova Solutions

Innova Solutions emphasizes hands-on engineering with AI-assisted delivery, integrating accelerators into a cohesive transformation engine. The company is deepening partnerships while achieving parity across various infrastructure environments.

Mphasis

Mphasis formalizes platform-led build-run pipelines and demonstrates incident economics gains with AI. It is broadening U.S. sector coverage while codifying blueprint catalogs to compress change timelines and improve resiliency.

Persistent

Persistent Systems focuses on engineering-first cloud-native execution, unifying foundations, observability and FinOps into repeatable stacks. It is pivoting toward vertical-specific offerings with stronger local leadership to serve regulated industries.

rackspace technology.

Rackspace Technology is pivoting from an operate-led heritage to transformational leadership, embedding AI into discovery and governance. It is strengthening its modernization team into squads and enhancing third-party platform integrations to effectively deliver complex ERP migrations.

Unisys positions AI-ready consulting as a starting point and has strengthened its security portfolio to enable secure, compliant multicloud transformations. It is extending zero trust patterns and investing in modernization beyond public cloud infrastructure.

Brillio

Brillio, Rising Star, advances lifecycle automation through AI-driven orchestration and has productized a control layer above client tools. The company is scaling its offshore capacity and sector-specific solutions to win complex, multiregion midmarket transformations.

Leader

"Unisys blends deep industry expertise with client-centric and AI-infused methods to transform complex multicloud estates, align with regulatory mandates, and securely modernize and run mission-critical workloads on leading public clouds."

Shashank Rajmane

Unisys

Overview

Unisys is headquartered in Pennsylvania, U.S. It has more than 15,900 employees across 20 countries. In FY24, the company generated $2.0 billion in revenue, with Enterprise Computing Solutions as its largest segment. Its portfolio spans multicloud strategy and assessment, landing-zone design, application and data modernization, technology migrations and secure migration from on-premises to AWS, Azure, Oracle Cloud and Google Cloud, backed by DevSecOps, FinOps and observability. Unisys has developed a partner-led model with Microsoft and AWS to support clients with workload transformation, along with enabling them to expand private AI options to build compliant, AI-ready data foundations.

Strengths

AI-led innovation strategy: Unisys takes an AI-first approach to offer cloud transformation solutions to its clients. Its client engagement commences with a workshop-led advisory approach that includes maturity assessment for cloud infrastructure, applications and security services. Unisys has supported U.S. firms to improve outcomes by reducing time to market through innovative digital and data-driven services.

Robust modernization capabilities: Unisys leverages a structured methodology spanning a hybrid/multicloud architecture, modernization wave planning and runbook execution with automation. The firm also uses reference designs, landing zone accelerators and IaC templates, aligned to NIST/FedRAMP, while using DevSecOps and FinOps frameworks to shape costs, risks and governance. This approach has helped several U.S. enterprises to reduce their provisioning cycles from weeks to hours.

Security-by-design for highly regulated workloads: Unisys embeds Zero Trust capabilities, continuous compliance and threat-exposure management for clients from day one. The firm maps architectures and processes to U.S. frameworks (such as NIST and CJIS) and layers MDR/SIEM, IAM and policy-as-code. Unisys has implemented several cloud transformation projects that require multiagency interoperability and support large transaction volumes with governed auditability.

Caution

Compared with its peers, Unisys has invested in improving its AWS, Microsoft Azure and Oracle Cloud practices, but it lags in expanding its Google Cloud business, as evidenced by the low number of its engagements and certified engineers for the hyperscaler. Unisys has plans for improving its partnership with Google Cloud.

Managed Services — Large Accounts

Who Should Read This Section

This report is valuable for service providers offering **managed services** in the **U.S.** 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, assessing which providers offer innovative solutions aligned with evolving technology trends. Understanding these market advancements is critical for IT executives to shape effective, future-proof public cloud strategies and ensure their organizations maintain competitive agility and resilience.

Software development and technology leaders

Should read this report to gain insights into providers' strategic positioning, technological expertise and innovation in infrastructure transformation initiatives. This knowledge empowers them to align internal software development and technology road maps with external expertise, driving efficient and impactful digital transformation.

Sourcing, procurement and vendor management professionals

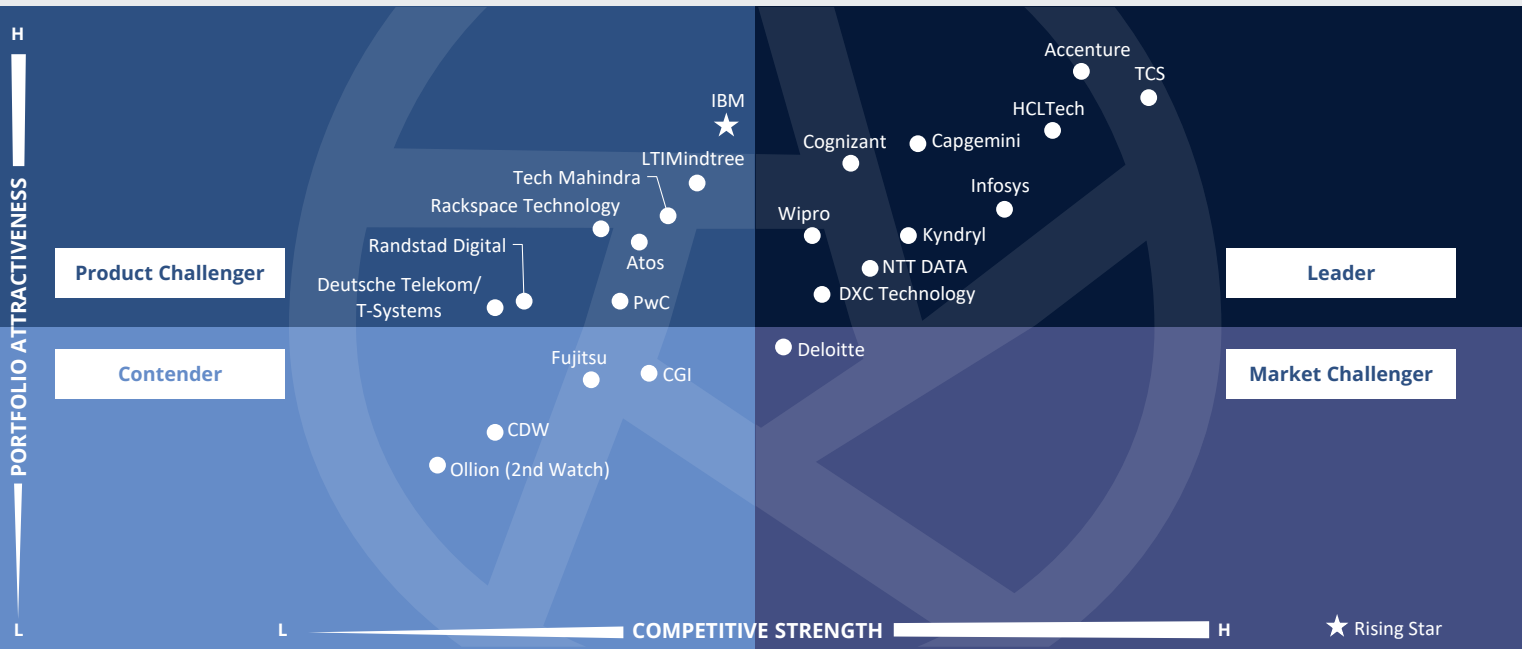
Should utilize this report to better understand the current landscape and partner ecosystem of managed services in the U.S. A deeper understanding of provider competencies, differentiation and market presence supports informed vendor selection and negotiation strategies, ensuring optimal partnerships that deliver both immediate value and sustainable long-term benefits.

ISG Provider Lens®

Source: ISG RESEARCH

Multi Public Cloud Services Managed Services — Large Accounts

U.S. 2025



This quadrant evaluates MSPs' ability to **support** the **complexities, security and compliance** requirements of managing and orchestrating **multiple public cloud** environments to deliver seamless day-to-day **operations** for large enterprises.

Shashank Rajmane

Definition

This quadrant evaluates providers delivering AI-native and automation-first managed services for complex, hybrid and multiple public cloud environments. These providers focus beyond routine cloud operations to orchestrate cost-efficient, secure and compliant cloud ecosystems integrated with GenAI, agentic automation and FinOps-as-code capabilities.

Services typically include the following:

- AI-native management platforms supporting GenAI workloads and AI-driven observability
- Advanced FinOps integration, including dynamic workload placement, autonomous rightsizing and outcome-linked financial optimization
- Real-time multicloud monitoring, cloud sovereignty control and predictive analytics to ensure compliance, performance and sustainability
- Automated provisioning, DevOps pipeline implementation, container and serverless orchestration, and cloud-native security integration
- Self-service and no-code/low-code platforms embedded with governance features, allowing users to easily access managed services
- Edge-to-cloud and IoT integration for distributed intelligence and latency-sensitive use cases
- Industry-specific service blueprints and support for regulated environments with tailored compliance and data locality strategies

Eligibility Criteria

1. Manage **complex multicloud** environments and ensure **interoperability** across hyperscaler platforms
2. Possess expertise in **agentic AI, SRE** and **AIOps** practices for autonomous operations and resilience engineering
3. Demonstrate strong **FinOps** and **cost governance** capabilities, preferably enabled via prompt-based orchestration or AI assistants
4. Have in-depth experience in integrating both **cloud-native** and **legacy systems** using open APIs and infrastructure-as-code
5. Demonstrate recognized **certifications** and **partnerships** with AWS, Microsoft Azure, Google Cloud and other public cloud providers
6. Offer advanced **cloud security** and **data governance** features, including AI model security, privacy-preserving analytics and sovereign cloud capabilities
7. Showcase expertise in **contextualized** service delivery and business-aligned cloud transformation across industries
8. Offer expertise in **prompt-based agent orchestration** to **automate FinOps** and incident response (preferred)

Observations

Managed services for large U.S. enterprises are evolving from tool integration to platform-based control planes above AWS, Microsoft Azure and Google Cloud. Providers are standardizing operations with prebuilt solutions, SRE guardrails and policy-as-code for Kubernetes and serverless environments, while integrating AI to link signals, suggest fixes and execute safely. The focus is shifting from counting closed tickets to proving speed and reliability, measured by XLAs rather than just SLAs. These platforms allow clients to analyze operations data without replacing systems, reducing lock-in and fostering consistent Day 2 operations.

Enterprises primarily seek simpler solutions for engineers and stronger auditability for risk leaders. They expect integration with existing tools, continuous compliance that is always evidence-ready and FinOps embedded into CI/CD pipelines, feeding insights for total business management (TBM) and unit-economics dashboards. GenAI is assessed by production use rather than pilot projects, with buyers requesting explainable automation, data residency options, predictable GPU costs and sustainability metrics that align with spending.

Providers are answering with unified control planes, hyperscaler-aligned IaC and GitOps, targets for autonomous operations and hybrid AI or edge blueprints that keep models close to sensitive data. The focus is shifting from having a platform to effectively integrating with clients' existing stack, layering governance, AIOps and FinOps without creating an additional shadow platform. Leaders publish automation baselines, enable self-service catalogs and embed budget guardrails directly into pipelines.

From the 63 companies assessed for this study, 23 qualified for this quadrant, with 10 being Leaders and one Rising Star.

accenture

Accenture increasingly treats managed services as product engineering with experience-level outcomes that steer automation priorities and budget guardrails. It has compressed build-to-run handoffs by aligning platform squads with run SREs.

Capgemini

Capgemini reframes run as a developer platform problem, emphasizing standardized lanes and policy reuse to tame multicloud sprawl. It has pushed toward no-touch change flows and cost governance that moves with code.

cognizant

Cognizant shifts from tool stacks to outcome pods, integrating spend and reliability inside developer workflows. It has preferred composable agent patterns over monoliths, accelerating triage without tool sprawl.

DXC TECHNOLOGY

DXC Technology elevates the control plane to a contract for change, reducing spend and risks. It has prioritized AI-secure runbooks operating near sensitive data, positioning for regulated AI operations and predictable modernization waves.

HCLTech

HCLTech treats automation as inventory, where each fix becomes a reusable asset with adoption targets. It has industrialized SRE at scale, making autonomy percentages and mean time to repair (MTTR) deltas the headline success measures.

Infosys

Infosys recasts cloud operations as a product with shared templates and executive KPIs connecting spend, reliability and risk. It has balanced central platforms with self-service to speed onboarding without tool lock-in.

kyndryl

Kyndryl turns integration depth into an advantage, normalizing client toolchains instead of displacing them. It has matured into a governed autonomy model that scales automation while preserving strict change control.

NTT DATA treats standardization as a growth lever and has codified its operations portfolios for consistent intelligence through telemetry data. It has invested in data plumbing that enables AI-driven prevention beyond infrastructure.

TCS frames managed services around reliability economics, integrating SLOs, automation and unit costs into a cohesive narrative. It has refined multitenant controls to ensure enterprise guardrails scale consistently.

Wipro pursues zero touch ambitions but anchors them in industry playbooks that bake in robust compliance guardrails. It has productized modernization patterns, allowing change and run to share the same tracks.

IBM, Rising Star, reasserts its software-centric posture, using asset reuse and economic transparency to shorten time to steady state. It assembles various tools and solutions to improve multicloud safety for developers without adding another platform silo.

Managed Services — Midmarket

Who Should Read This Section

This report is valuable for service providers offering **managed services** in the **U.S.** 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

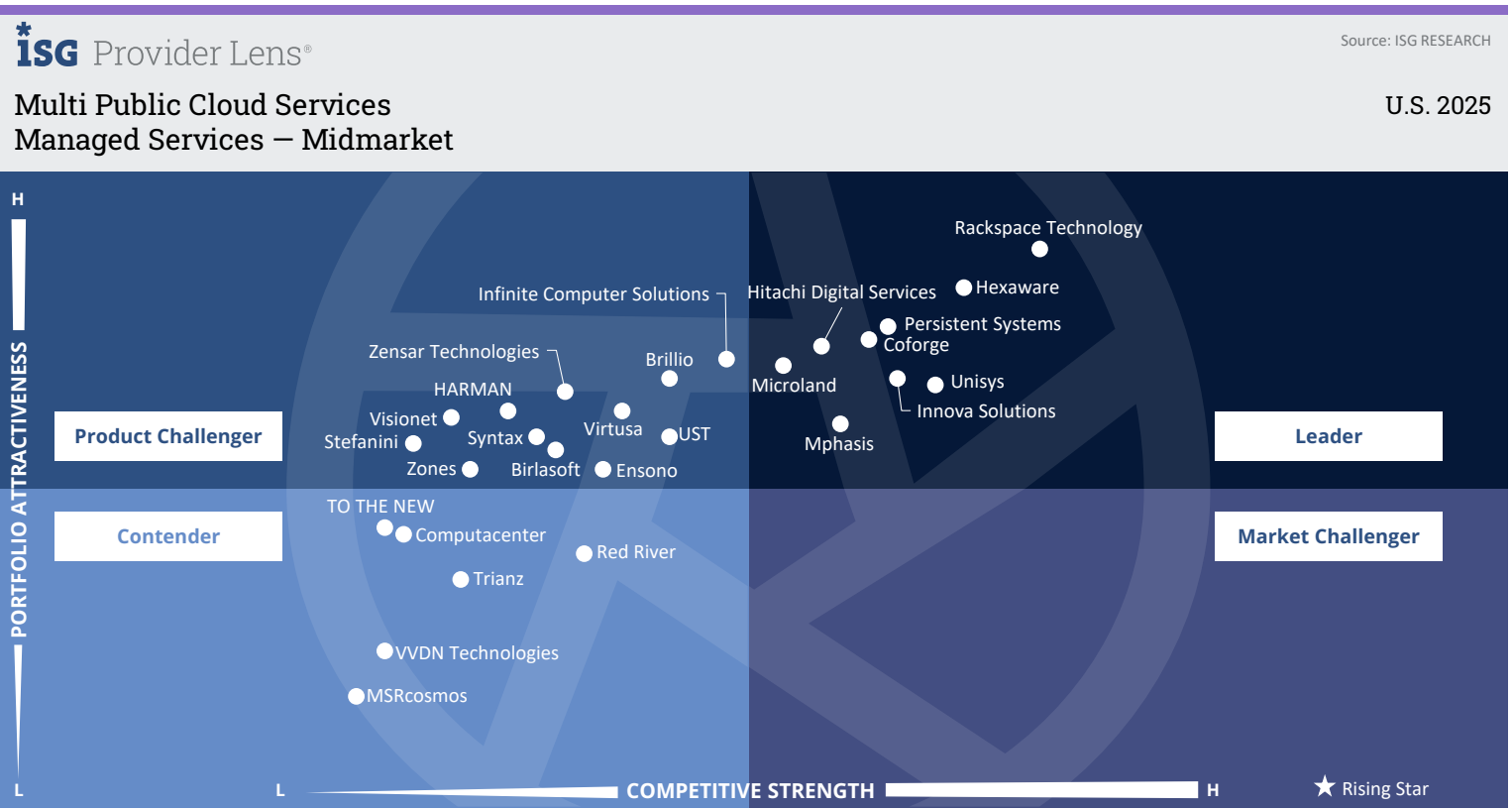
Should read this report to analyze managed service providers' modernization and service capabilities, assessing which providers offer innovative solutions aligned with evolving technology trends. Understanding these market advancements is critical for IT executives to shape effective, future-proof public cloud strategies and ensure their organizations maintain competitive agility and resilience.

Software development and technology leaders

Leaders should examine this report to gain insights into providers' strategic positioning, technological expertise, and innovation in infrastructure transformation initiatives. This knowledge empowers them to align internal software development and technology roadmaps with external expertise, driving efficient and impactful digital transformation.

Sourcing, procurement and vendor management professionals

Should utilize this report to better understand the current landscape and partner ecosystem of managed services in the U.S. A deeper understanding of provider competencies, differentiation, and market presence supports informed vendor selection and negotiation strategies, ensuring optimal partnerships that deliver both immediate value and sustainable long-term benefits.



This quadrant evaluates managed services providers' (MSPs) ability to **support** the **complexities, security and compliance** requirements of managing and orchestrating **multiple public cloud** environments to deliver seamless day-to-day **operations** for SMEs.

Shashank Rajmane

Definition

This quadrant evaluates providers delivering AI-native and automation-first managed services for complex, hybrid and multiple public cloud environments. These providers focus beyond routine cloud operations to orchestrate cost-efficient, secure and compliant cloud ecosystems integrated with GenAI, agentic automation and FinOps-as-code capabilities.

Services typically include the following:

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- Self-service and no-code/low-code platforms embedded with governance features, allowing users to easily access managed services
- Edge-to-cloud and IoT integration for distributed intelligence and latency-sensitive use cases
- Industry-specific service blueprints and support for regulated environments with tailored compliance and data locality strategies

Eligibility Criteria

1. Manage **complex multicloud** environments and ensure **interoperability** across hyperscaler platforms
2. Possess expertise in **agentic AI, SRE** and **AIOps** practices for autonomous operations and resilience engineering
3. Demonstrate strong **FinOps** and **cost governance** capabilities, preferably enabled via prompt-based orchestration or AI assistants
4. Have in-depth experience in integrating both **cloud-native** and **legacy systems** using open APIs and infrastructure-as-code
5. Demonstrate recognized **certifications** and **partnerships** with AWS, Microsoft Azure, Google Cloud and other public cloud providers
6. Offer advanced **cloud security** and **data governance** features, including AI model security, privacy-preserving analytics and sovereign cloud capabilities
7. Showcase expertise in **contextualized** service delivery and business-aligned cloud transformation across industries
8. Offer expertise in **prompt-based agent orchestration** to **automate** FinOps and incident response (preferred)

Observations

The midmarket multi public cloud managed services quadrant has tipped from people-led ops to software-defined operations. Leaders anchor delivery on control planes that fuse observability, IaC/GitOps, SRE and FinOps, then layer agentic/GenAI to reduce MTTD/MTTR and close tickets with minimal or zero touch. Differentiation has moved from tools to economics, and the runbooks, bots and policies are productized as work units, pushing toward ZeroOps with repeatable SLOs.

Enterprises signal three priorities: predictable outcomes, disciplined financial governance and risk management. They want one operating fabric, self service catalogs with approvals, policy as code and guardrails, plus consistent disaster recovery automation. FinOps must be embedded in run, along with monthly advice with real time showback/chargeback, anomaly detection and commitment planning tied to tagging hygiene. Buyers also expect faster onboarding via hardened landing zones, proof of data residency and zero trust patterns, genuine multicloud depth (not just AWS/Microsoft Azure) and sustainability metrics coupled to cost.

Providers are responding by codifying operating models into platforms, expanding U.S. delivery proximity and seeding agentic AI/knowledge graph layers for correlation, RCA and self-heal. FinOps is shifting from reports to closed-loop governance wired into change queues. Gaps remain in uneven uptake of outcome-based commercials, partner tool dependencies that add integration overhead and Google Cloud skill depth issues.

From the 63 companies assessed for this study, 27 qualified for this quadrant, with nine being Leaders.

Coforge

Coforge advances a software-led run model that ties reliability and spend to measurable outcomes. It has sharpened commercial storytelling around automation ROI and expanded ecosystem alliances beyond its core to derisk growth.

HEXAWARE

Hexaware systematizes resilience as code across cloud environments. It has elevated partner stature and pivots go-to-market toward cross-industry solutions to dilute concentration risk while proving faster recovery and budget control.

Hitachi Digital Services

Hitachi Digital Services recasts operations as an engineering discipline. It has fused modernization and managed services motions towards improving efficiencies, and pursues broader cloud breadth to back ROI claims with repeatable, multicloud delivery.

MICROLAND
Making digital happen

Microland converts automation into contract currency, where it has piloted automation licensing constructs that align price with autonomy and now focuses on scale metrics and governance proof to win outcome-anchored deals.

Mphasis

Mphasis makes platform engineering the control plane for SRE and finance. It has accelerated blueprint reuse and counters third-party dependencies by tightening reference architectures and service guardrails.

Persistent

Persistent Systems shifts its operational capabilities from headcount-focused to reliability economics. It has productized AI-driven runbooks and hardened landing zones, appealing to midmarket buyers seeking lean, predictable, high-automation operations.

rackspace technology.

Rackspace Technology has deepened its unified control plane and POD-based delivery. It has reframed engagements around continuous modernization and competitive dynamics that push faster adoption of outcome-linked pricing and stronger automation commitments.

Unisys

Unisys elevates governance focus with policybound automation. It has gained trust in regulated workloads and now seeks broader multicloud credibility to extend into data and AI-intensive estates.

Innova Solutions

Innova Solutions unifies run, cost and change into one operating fabric. It has scaled its engineering bench and experiments with value-based commercials to stand apart from fixed-price execution and reduce time to operate.

Leader

"Unisys blends platform led AIOps, FinOps and ZeroOps to automate cloud operations across hybrid estates, delivering faster recovery, lower run costs and stronger governance for regulated, mission critical workloads."

Shashank Rajmane

Unisys

Overview

Unisys is headquartered in Pennsylvania, U.S. It has more than 15,900 employees across 20 countries. In FY24, the company generated $2.0 billion in revenue, with Enterprise Computing Solutions as its largest segment. The company delivers platform-driven managed cloud services centered on its Cloud IT and AI frameworks, unifying AIOps, FinOps and ZeroOps to automate operations and enforce policy as code. A Morpheus Data- and ServiceNow-based cloud management platform standardizes provisioning, approvals and observability across AWS and Azure, with governance anchored in Zero Trust. The firm primarily serves enterprises in the financial services and healthcare industries and organizations in the U.S. public sector.

Strengths

Robust predictive AIOps offering: Unisys' ZeroOps model, built on its Cloud IT and AI frameworks, automates run operations, with zero-touch patching, anomaly detection and self-healing tied to ITSM. The IaC-driven landing zones and policy as code approach standardize builds — lead time from commit to production can be as short as two hours. Unisys expertly manages container-heavy footprints for priority incidents, improving reliability while reducing manual efforts.

FinOps-led cost optimization solution: Unisys has integrated FinOps frameworks deeply into its CMP and advisory practice, providing consolidated views by cloud/tenant/group/user, automated commitment management and forecasting. It has helped several U.S. enterprises reduce average costs by 25–40 percent, with a median RI/savings plan utilization of nearly 84 percent. It enforces tagging standards, budget controls and showback/chargeback through catalog templates and governance workflows.

Compliance-first platform engineering: Unisys' integrated cloud management technology and services unify provisioning, multilevel approvals and observability with role-based policies and automated remediation. The firm underpins support for enterprises in regulated sectors with Zero Trust principles, ensuring adherence with CIS, HIPAA and GDPR, alongside support for NIST- or FedRAMP-aligned templates.

Caution

Unisys' Google Cloud footprint is smaller than its AWS and Azure practices. Indicators include fewer Google Cloud certifications and a small managed VM base. Clients with Google Cloud- heavy estates should validate team composition, local delivery coverage and Unisys' partner-augmentation plans before large-scale engagements.

FinOps Services and AI-driven Optimization

Who Should Read This Section

This report is valuable for service providers offering **FinOps services and AI-driven optimization** in the **U.S.** 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 leadersInfrastructure Leaders

Should read this report to analyze providers' FinOps services and AI-driven optimization service capabilities, assessing which providers offer innovative solutions aligned with evolving technology trends. Understanding these market advancements is critical for IT executives to shape effective, future-proof public cloud strategies and ensure their organizations maintain competitive agility and resilience.

Software development and technology leaders

Should read this report to gain insights into providers' strategic positioning, technological expertise and innovation in infrastructure transformation initiatives. This knowledge empowers them to align internal software development and technology road maps with external expertise, driving efficient and impactful digital transformation.

Sourcing, procurement and vendor management professionals

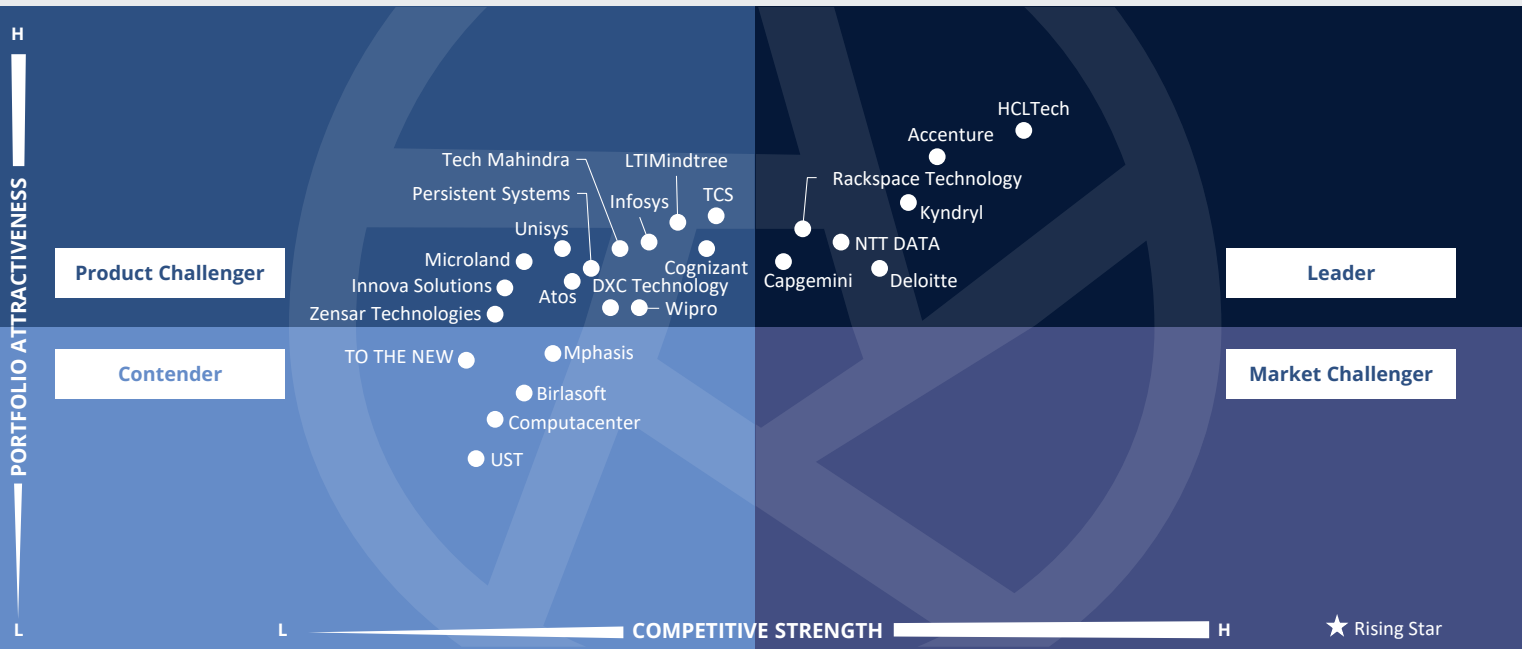
Should utilize this report to better understand the current landscape and partner ecosystem of FinOps and AI-driven optimization in the U.S. A deeper understanding of provider competencies, differentiation, and market presence supports informed vendor selection and negotiation strategies, ensuring optimal partnerships that deliver both immediate value and sustainable long-term benefits.

ISG Provider Lens®

Source: ISG RESEARCH

Multi Public Cloud Services
FinOps Services and AI-driven Optimization

U.S. 2025



This quadrant evaluates providers' ability to offer **consulting** and **managed services** around **FinOps** services, enabling enterprises to **optimize** their **cloud costs** on multiple public cloud environments, maximize cloud **resource utilization** and **reduce waste**.

Shashank Rajmane

FinOps Services and AI-driven Optimization

Definition

This quadrant assesses providers that specialize in enabling intelligent, automated and predictive cost optimization and governance across multiple public cloud environments by leveraging FinOps frameworks and principles, along with AI technologies. These providers use LLMs, AI agents and predictive analytics to orchestrate cloud financial optimization in real time, delivering tangible business value beyond simple cost savings.

Leading providers deliver FinOps services through the following:

- AI-native FinOps portals that integrate usage and pricing telemetry, GenAI-based cost forecasting and business-aligned reporting
- LLM-orchestrated automation for budget enforcement, anomaly detection, policy-based approvals and dynamic allocation
- Predictive optimization engines to forecast cloud usage trends, rightsize resource portfolios and simulate cost impacts of workload scaling
- Autonomous remediation of inefficiencies through prompt-based spend insights, explainability frameworks and bias detection in optimization decisions
- Integrated chargeback/showback strategies that empower business units with cost transparency and accountability
- FinOps policy governance, covering tagging compliance, approval workflows, access policies and sustainability-aware budget recommendations
- Organizational change management (OCM), including FinOps capability building, federated governance models and cross-functional operating models to sustain financial discipline

Eligibility Criteria

1. Showcase measurable outcomes from **AI-enhanced FinOps** optimization across at least three major hyperscalers (AWS, Microsoft Azure, Google Cloud and OCI)
2. Have **FinOps-certified practitioners** with experience deploying and operating across all three pillars of the FinOps framework — inform, optimize and operate
3. Possess expertise in **agentic AI** or **LLM-based orchestration** to drive near real-time cost governance actions, not limited to dashboarding
4. Support **prompt-based spend insights** with contextual explainability and policy-driven financial controls
5. Support **SLA-backed cost-saving targets, dynamic budgeting** and **adaptive financial operations**
6. Integrate FinOps practices within client organizations through **training, change management and internal cloud CoE**
7. Demonstrate **case-based evidence** of **financial outcomes** and optimization beyond traditional reporting capabilities
8. Empower clients with OCM for **sustainable FinOps** practices (preferred)

Observations

FinOps services and AI-driven optimization are evolving from a focus on tactical cost-cutting to becoming an operating system for multicloud decision-making. Providers are normalizing cost and usage data across clouds and enriching the data with telemetry from containers, SaaS applications and GenAI workloads. They are enabling AI agents to trigger policy-based actions through governed approvals. FinOps is also embedded within engineering backlogs and platform teams, extending beyond just finance to turn tagging and showback into enforceable guardrails.

Enterprises now demand accountability for outcomes rather than tools. They expect always-on operations that proactively monitor budget drift, automate low-risk changes and explain tradeoffs in business terms. CFOs seek forecast fidelity; engineers need guardrails that preserve velocity; product teams require cost signals in CI/CD; and risk teams demand auditable agentic workflows. However, two primary challenges persist: inconsistent tagging across hybrid estates and weak visibility into containers and AI training/serving, which hinder effective chargeback and unit metrics. Buyers also insist on vendor neutrality and near-term proof of ROI.

In response, providers are implementing client-embedded CoEs, establishing budget-as-code policies and utilizing AI copilots in approvals, ensuring the involvement of humans in the loop. Their coverage spans SaaS, private/edge and AI data centers, and integrates with ITFM/ITSM/SecOps as a single spend and compliance control plane. Industry leaders drive dynamic commitment management, persona-based dashboards, lakehouse-aware patterns and carbon-aware scheduling; while laggards continue to ship reports and leave savings on the table.

From the 63 companies assessed for this study, 25 qualified for this quadrant, with seven being Leaders.

accenture

Accenture increasingly treats FinOps as an enterprise change program, hardwiring governance into engineering backlogs and portfolio planning. The company has shifted its focus from short-term savings to sustained business impact via automated guardrails across multicloud environments.

Capgemini

Capgemini unifies cloud, AI and application spending under a consistent policy while adopting a cross-domain control plane mindset. It has built self-tuning detection mechanisms and proactive governance strategies, ensuring that costs align with scalability, reliability and sustainability goals.

Deloitte.

Deloitte reframes FinOps as board-ready financial planning, linking usage forecasts to investment cases and business KPIs. The firm has deepened its vertical playbooks and modern data platform patterns to offer CFOs and CTOs a shared model for decision-making and accountability.

HCLTech

HCLTech operationalizes FinOps within delivery towers, emphasizing granular ownership and purchase strategy at scale. The firm has pivoted from dashboards to closed-loop actions, using AI-assisted guidance to embed cost discipline without slowing engineering.

kyndryl

Kyndryl leverages its operational heritage and treats FinOps as the connective tissue across run functions, turning reliability, asset and security signals into informed spending decisions. The company has matured its automated remediations while maintaining human oversight for high-impact changes.

NTT DATA

NTT DATA positions FinOps as a dual mandate by pairing financial stewardship with ESG outcomes. The firm has standardized data flows and governance frameworks, enabling finance, engineering and risk teams to co-own targets, which fosters predictable budgets and verifiable sustainability gains.

rackspace technology.

Rackspace Technology emphasizes outcome-based engagements that translate cloud costs into business-level metrics in practice. The company has prioritized fast-start programs and automation to quickly identify savings while building capacity for ongoing optimization.

Hyperscale Infrastructure and Platform Services

Who Should Read This Section

This report is valuable for service providers offering **hyperscale infrastructure and platform services** in the **U.S.** 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

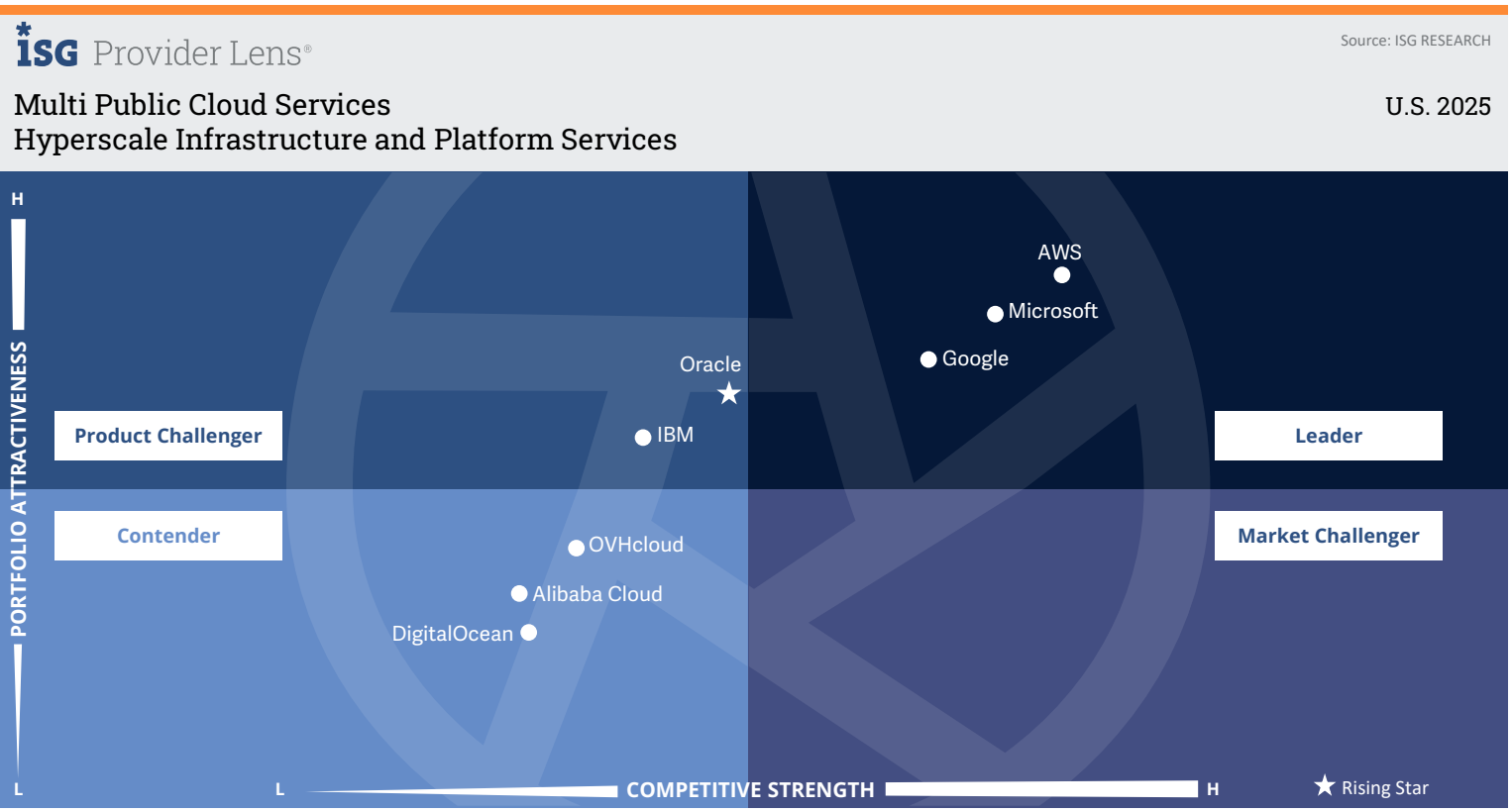
Should read this report to analyze hyperscale infrastructure and platform Service providers' modernization and service capabilities, assessing which providers offer innovative solutions aligned with evolving technology trends. Understanding these market advancements is critical for IT executives to shape effective, future-proof public cloud strategies and ensure their organizations maintain competitive agility and resilience.

Software development and technology leaders

Should examine this report to gain insights into providers' strategic positioning, technological expertise, and innovation in infrastructure transformation initiatives. This knowledge empowers them to align internal software development and technology roadmaps with external expertise, driving efficient and impactful digital transformation.

Sourcing, procurement and vendor management professionals

Should utilize this report to better understand the current landscape and partner ecosystem of hyperscale infrastructure and platform Services in the U.S. A deeper understanding of provider competencies, differentiation, and market presence supports informed vendor selection and negotiation strategies, ensuring optimal partnerships that deliver both immediate value and sustainable long-term benefits.



This quadrant evaluates **hyperscale public cloud** infrastructure and **platform** providers that offer a **pay-as-you-go** model and support numerous clients on **shared infrastructure** with **on-demand** and web-centric services.

Shashank Rajmane

Definition

This quadrant evaluates hyperscale cloud providers that deliver enterprise-grade IaaS and PaaS capabilities through scalable, resilient and AI-native cloud platforms. These providers are foundational enablers of digital transformation and modern application development, offering infrastructure and platform services designed to support high-performance computing, GenAI workloads and multi-agent system orchestration at a global scale.

Leading hyperscalers deliver extensive cloud capabilities through the following:

- Self-service IaaS platforms for compute, memory, storage, networking and high-throughput processing, including HPC clusters, ML-optimized instances and GPU/TPU acceleration
- Modern PaaS environments supporting containerization, event-driven functions, databases, DevOps pipelines, backup and DR automation, and orchestration of AI and ML tools and microservices
- AI-native cloud platforms with integrated access to foundational models, fine-tuning pipelines, multimodal GenAI tools and open model registries (LLMs, vector DBs and RAG frameworks)
- Runtime environments and SDKs for creating cloud-native, edge-aware and agent-centric applications, including support for infrastructure-as-code (IaC) practices, serverless computing and autonomous software agents across hybrid/multicloud deployment.
- Integrated marketplaces with curated third-party applications, GenAI agents, data services and industry-specific blueprints
- Sovereign-by-design architecture, providing granular data access control, encryption and compliance with local data residency laws, along with support for regulated industries
- Sustainable cloud infrastructure, backed by clean energy commitments and carbon-reduction targets
- Global scalability, featuring high-bandwidth connectivity and extensive availability zones.

Eligibility Criteria

1. Offer a comprehensive IaaS portfolio, including **ML-** and **HPC-optimized** compute instances, container services, serverless platforms, backup solutions, storage tiering and network orchestration
2. Showcase **dedicated infrastructure for AI and ML**, including specialized silicon, GPU/TPU clusters, access to foundational LLMs and managed AI infrastructure services
3. Have expertise in orchestrating **agent-based computing** across cloud regions, supporting real-time, autonomous workloads
4. Offer **low-latency, high-bandwidth** and **sovereign** environments to orchestrate agents across public cloud environments
5. Offer transparent and flexible **billing models,** including on-demand, reserved, spot and sustainable pricing tiers with public pricing disclosures
6. Ensure compliance with global and regional **certification standards** such as ISO, SOC, GDPR and C5 and implement advanced cloud security controls
7. Have **an extensive partner ecosystem**, offering training, developer enablement, certification programs and coinnovation initiatives to accelerate cloud adoption and enhance maturity
8. Offer **clean energy** and **carbon-reduction** programs
9. Provide support for IaC and **serverless computing** in combination with **automated provisioning**, event triggering and failover

Observations

The U.S. hyperscale infrastructure and platform services market is transitioning from hyperscale as capacity to hyperscale as an AI platform fabric. Providers are vertically integrating silicon–network–runtime stacks and exposing GenAI-aware control planes that automate placement, scaling and cost/performance tuning. Competitiveness among the providers is shifting to data adjacency (continuity) and cross-cloud integration with core databases and services that are natively operated in other regions. This enables a reduction in egress and latency while avoiding vendor lock-in.

Enterprises now select platforms based on outcomes rather than SKUs, prioritizing time to value for AI products, unit economics per training/inference and robust compliance. They expect zero ETL paths between operations and analytics, curated marketplaces for models and accelerators, and developer experiences that mask multicloud differences.

Providers are responding with AI-first PaaS layers, natural language-driven ops copilots and prescriptive landing zones that bake in security, FinOps and MLOps. They are colocating flagship databases and high throughput fabrics across clouds and customer sites, bound by private interconnects, shared identity and policy as code, so data can remain in place while services move to the best venue. Control planes now span edge and on premise environments, with sovereign variants.

From the 63 companies assessed for this study, eight qualified for this quadrant, with three being Leaders and one Rising Star.

AWS increasingly pivots from SKU catalogs to blueprints for AI-enabled workloads, tying commercials to KPI outcomes and shared FinOps baselines. It has strengthened data-adjacent architectures to keep analytics near applications while preserving portability.

Google

Google Cloud positions itself as an analytics-first AI platform, using integrated governance and open tooling to lower switching risk. It has deepened a developer-led motion with prescriptive patterns that speed data-to-model pipelines across estates.

Microsoft

Microsoft Azure steers customers toward an end-to-end cloud ecosystem by leaning into a full-stack developer productivity portfolio, along with DevOps and cloud. It has recast operations around natural language assistants and policy guardrails that standardize deployment footprints.

Oracle

OCI (Rising Star) targets buyers valuing predictable performance and placement control, offering an anywhere cloud footprint with consistent operations. It has pursued cooperative go-to-market strategies with peers to meet data gravity needs while sharpening price-performance for demanding workloads.

SAP HANA Infrastructure Services

Who Should Read This Section

This report is valuable for service providers offering **SAP HANA infrastructure services** in the **U.S.** 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

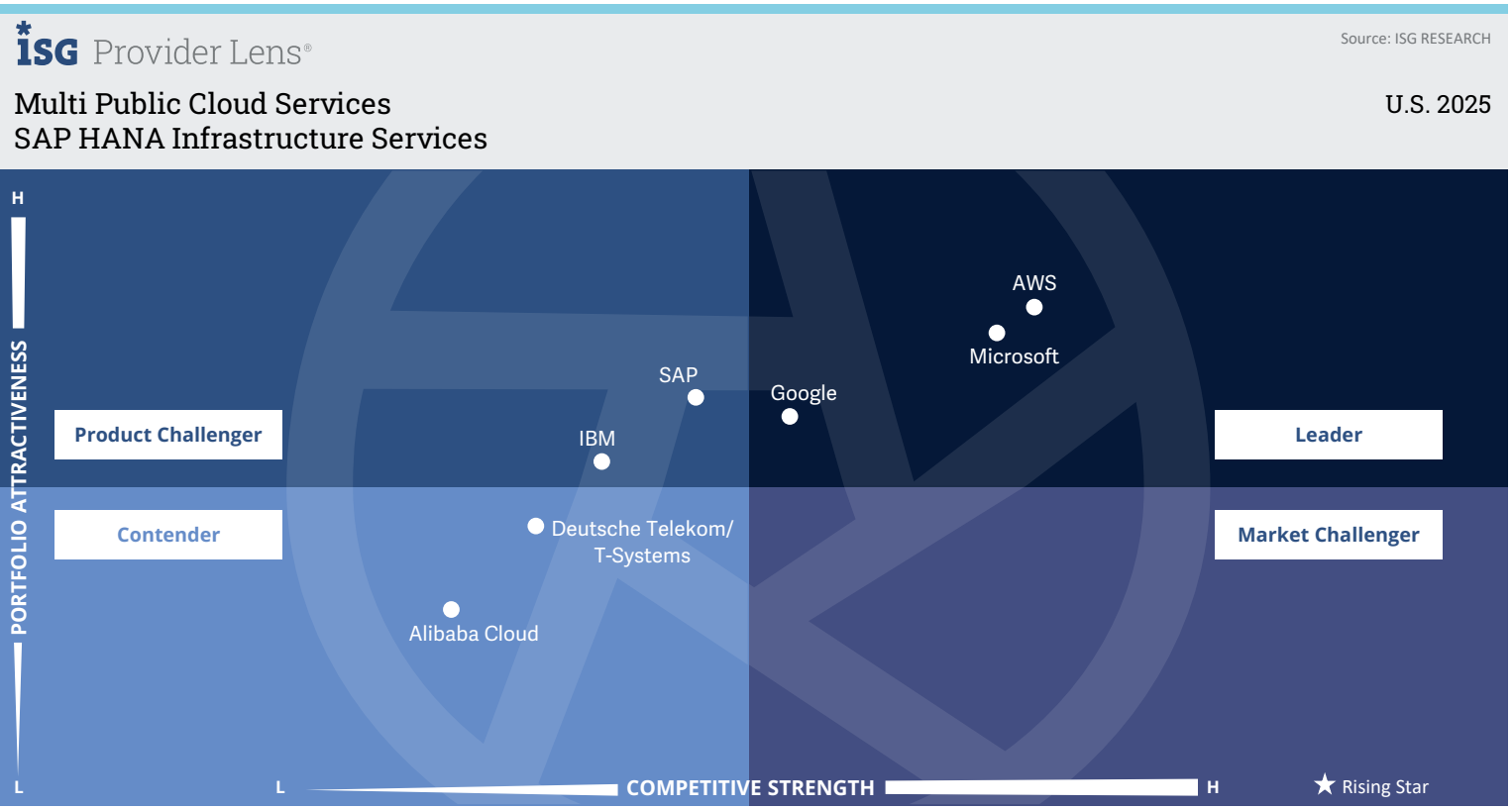
Should read this report to analyze SAP HANA infrastructure Service providers' modernization and service capabilities, assessing which providers offer innovative solutions aligned with evolving technology trends. Understanding these market advancements is critical for IT executives to shape effective, future-proof public cloud strategies and ensure their organizations maintain competitive agility and resilience.

Software development and technology leaders

Should examine this report to gain insights into providers' strategic positioning, technological expertise, and innovation in infrastructure transformation initiatives. This knowledge empowers them to align internal software development and technology roadmaps with external expertise, driving efficient and impactful digital transformation.

Sourcing, procurement and vendor management professionals

Should utilize this report to better understand the current landscape and partner ecosystem of SAP HANA infrastructure Services in the U.S. A deeper understanding of provider competencies, differentiation, and market presence supports informed vendor selection and negotiation strategies, ensuring optimal partnerships that deliver both immediate value and sustainable long-term benefits.



The quadrant evaluates service providers offering **SAP product hosting**, particularly **SAP S/4HANA**, within **public cloud-shared environments** using **SAP-certified infrastructure** and standard services.

Shashank Rajmane

Definition

This quadrant evaluates public cloud IaaS providers — both global hyperscalers and regional infrastructure specialists — that offer certified, scalable and SAP-optimized platforms for hosting SAP S/4HANA, SAP HANA database and related workloads. These providers offer robust infrastructure services aligned with SAP's performance, scalability and compliance standards, while increasingly integrating AI-driven tools to accelerate migration, streamline operations and enhance lifecycle management.

Key service capabilities include the following:

- SAP-certified infrastructure components, encompassing memory-intensive VMs with over 6 TB of capacity, flexible storage tiers, high-throughput networking and disaster recovery architectures across multiple regions or availability zones
- AI-powered assistants for SAP landscape sizing, architecture design, cost simulation, migration planning and dynamic configuration recommendations
- Automated operations, including provisioning, service orchestration, backup/restore, patching and performance optimization
- Integration with SAP-native tooling, including SAP LaMa, SAP Data Hub and certified third-party automation tools
- Support for both RISE with SAP and custom SAP hosting models, including advisory services for coexistence, hybrid cloud strategies and SAP licensing optimization
- Partner ecosystems, encompassing certified SAP service providers, enabling end-to-end transformation, including migration, application modernization and platform operation

Eligibility Criteria

1. Offer **SAP-certified compute and memory-optimized VMs**, with scalability to support high-growth workloads and SAP HANA instances in various configurations
2. Have regional **data center presence** that ensures data locality and compliance with local regulations and certifications specific to industries such as finance, healthcare and the public sector
3. Support diverse **commercial models**, including on-demand, reserved and dedicated capacity options, along with transparent and competitive pricing
4. Have automated **backup** and **restore capabilities** integrated with SAP application consistency
5. Provide low-cost, long-term **storage** tiers for backup, archives and system copies
6. Actively participate in or ensure alignment with the **RISE with SAP program** and support migration to or from RISE architectures
7. Demonstrate structured **SAP migration methodologies** and **certified frameworks** to ensure a seamless transition from on-premises or legacy environments
8. Enable **AI-driven monitoring**, resource **optimization** and operational **analytics**

Observations

The SAP HANA Infrastructure Services market has moved from selling bigger certified hardware to delivering industrialized day-2 SAP operations. Differentiation now comes from prebuilt infrastructure-as-code blueprints, AI-driven monitoring and built-in backup and disaster recovery, aligned with SAP APIs. Reliability is being packaged as a product through cross-AZ (availability zones) designs, snapshot recovery and live maintenance, which reduce risk after cutover and accelerate stabilization. GenAI is emerging as a control loop for workload sizing, performance tuning and cost management.

Enterprises want predictable outcomes rather than trial and error. They look for prescriptive landing zones with built-in disaster recovery, automated patching and auditable recovery objectives. They expect clear cost structures for large memory SKUs (16-32TB), including storage and network impact, along with unified monitoring across SAP Basis and cloud layers. Migration paths must align with RISE, handle existing brownfield environments, support non-SAP systems and link ERP data with analytics and AI.

Providers are addressing this with run-ready stacks that include as-code baselines, native infrastructure health and backup agents, and disaster recovery with tested failover. Advisory now covers sizing, TDI validation, licensing advice and financial models (such as reserved or committed capacity) to reduce cost uncertainty. Ecosystems are curated to fill skill gaps and deliver RISE-aware accelerators, while joint innovation with SAP adds AI-assisted operations and data integration.

From the 63 companies assessed for this study, seven qualified for this quadrant, with three being Leaders.

aws

AWS positions SAP as a high-priority workload, building outcome-led run operations and prescriptive landing zones. It has shifted emphasis to risk transfer, automated resiliency, compliance proof and cost hygiene for large, regulated estates.

Google

At the data AI seam, **Google** orchestrates automation to compress migration time and tune economics; it optimizes for insight-driven operations. It has turned analytics adjacency into credible run value for midmarket and digitally mature SAP programs.

Microsoft

Microsoft Azure's SAP approach is governed by SAP-validated design, along with ancillary services such as identity, policy and hybrid continuity. The firm has codified these controls into adoption patterns that derisk coexistence with legacy estates and ensure a smooth global rollout.

Appendix

The ISG Provider Lens® 2025 – Multi Public Cloud Services study analyzes the relevant software vendors/service providers in the U.S. 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 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 November 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 otherwise.

The study was conducted in the following steps:

1. Definition of Multi Public Cloud 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 and use cases
4. Leverage ISG's internal databases and advisor knowledge & experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts & figures received from providers and other sources.
6. Use of the following key evaluation criteria:
   * Strategy and vision
   * Innovation
   * Brand awareness and presence in the market
   * Sales and partner landscape
   * Breadth and depth of portfolio of services offered
   * Technology advancements

Author

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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.

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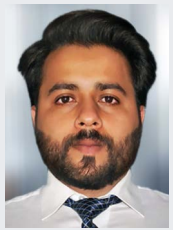

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Senior Research Analyst

Yatharth is a Senior Research Analyst at ISG. He is responsible for supporting and co-authoring Provider Lens® studies on Public Cloud and Private Hybrid Cloud Data Centre Solutions and Services. Yatharth supports the Lead Analysts in the research process on multiple regions and authors the global summary report, and focal points. He also collaborates with the Lead Analysts in the process of rating the providers and building insights around the market trends and drivers.

Yatharth has over 7 years of experience with a strong background in research, data analysis, and business analysis. In his previous role, Yatharth oversaw custom research and analysis projects to support businesses in better decision-making. Specializing across various industries with Everest Group, Yatharth provided valuable insights and recommendations and led in-depth analyses of enterprises and their operations to provide tailored insights to the clients.

Study Sponsor

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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.

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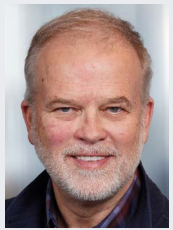

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Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, 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.
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DECEMBER, 2025

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