ISG Provider Lens™

Multi Public Cloud Services

SAP HANA Infrastructure Services

A research report comparing provider strengths, challenges and competitive differentiators

QUADRANT REPORT | DECEMBER 2025

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ISG Provider Lens™

Multi Public Cloud Services

A research report comparing provider strengths, challenges and competitive differentiators

QUADRANT REPORT | DECEMBER 2025 | U.S.

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

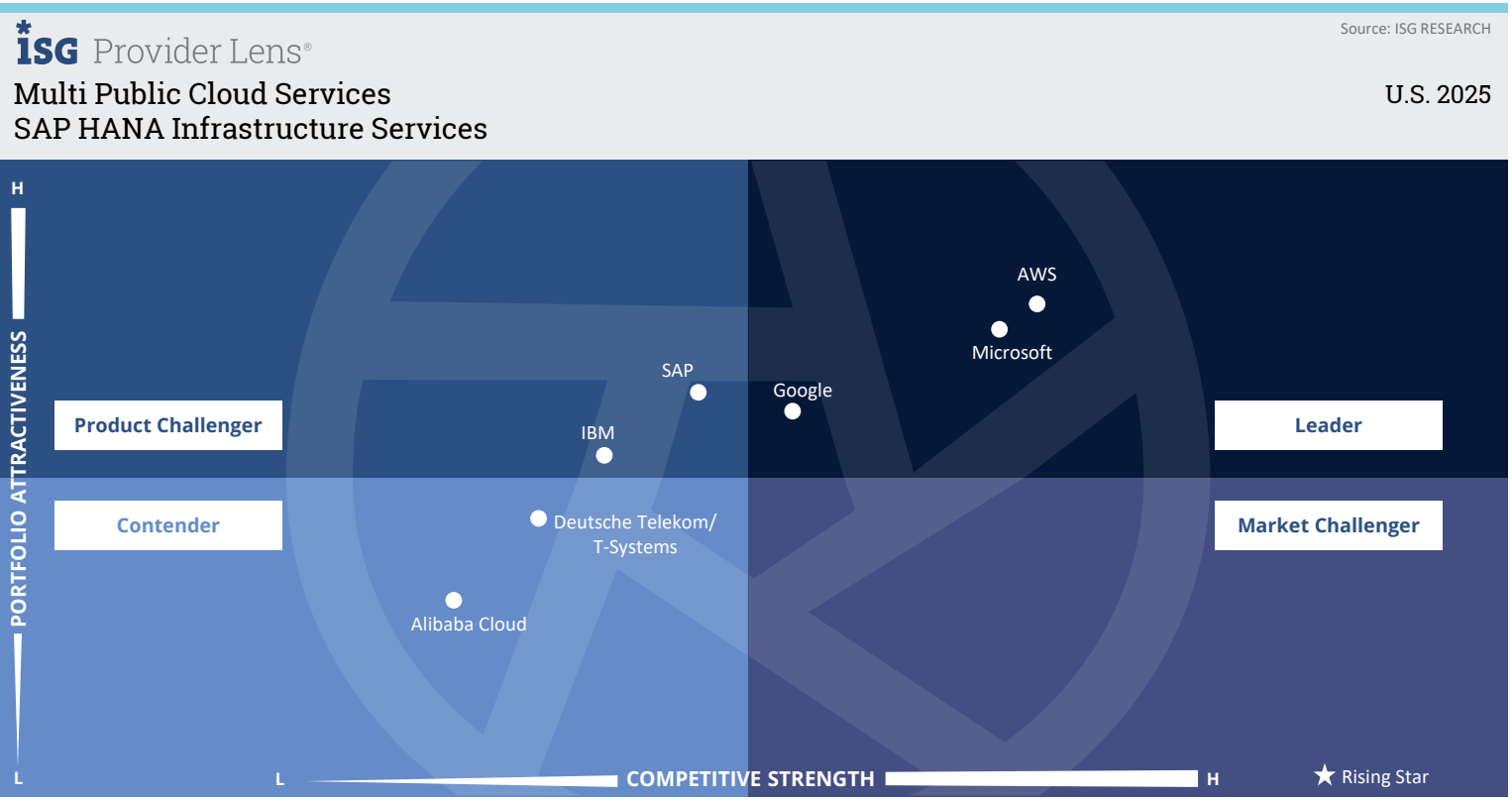
Should read this report to analyze SAP HANA infrastructure Service providers' modernization and service capabilities, assessing which providers offer innovative solutions aligned with evolving technology trends. Understanding these market advancements is critical for IT executives to shape effective, 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.

AWS

Leader

"AWS leads in the SAP HANA market through its extensive range of services and highly trusted cloud infrastructure for SAP workloads, giving enterprises the flexibility to scale their SAP HANA systems, from small development environments to multi-TB production systems."

Shashank Rajmane

Overview

AWS is headquartered in Seattle and Arlington, U.S., and operates 38 dedicated AWS regions. In FY24, the company generated $107.6 billion in revenue. The company offers a comprehensive portfolio of infrastructure and platform services to host SAP HANA workloads. AWS' long-standing partnership with SAP enables it to offer a solid foundation for enterprise adoption and innovation, especially in AI initiatives. In the U.S., AWS supports SAP HANA deployments across 16 availability zones in 4 commercial US regions, enabling high availability and disaster recovery configurations for enterprise workloads.

Strengths

GenAI-led innovation: The AI co-innovation program, which is jointly run by AWS and SAP, enables clients and partners to create and deploy GenAI solutions tailored to real-time ERP challenges. The program integrates support for Amazon Bedrock in BTP, to accelerate intelligent application development and business innovation across industries, ensuring U.S. enterprises innovate their SAP workloads on AWS rapidly.

Unmatched infrastructure reliability and scale: AWS' infrastructure for hosting mission-critical SAP applications is one of the best, due to its vast footprint, industry-leading architecture design, large number of regions/availability zones and lowest annual downtime rates. Several U.S. enterprises have benefitted from the high-impact design for failure isolation and low latency, ensuring SAP workloads stay available, resilient and performance-driven at scale.at scale.

Industry-leading security and compliance: AWS offers the largest set of security, identity and compliance features (464) and holds 143 certifications, outpacing its competition. Its Nitro System architecture ensures unique protection against unauthorized access. Combined with AWS ProServe's robust SAP practices and best-in-class customer satisfaction, AWS is the favored platform for highly regulated enterprises in the U.S.

Caution

SAP HANA on AWS involves complex architecture, needing expertise on deployment, monitoring and optimization of high-availability, backup, security and disaster recovery. Firms may face a steep learning curve, integrating SAP workloads with AWS-native services, especially in hybrid environments and regulated industries.

ISG Provider Lens™

Multi Public Cloud Services

A research report comparing provider strengths, challenges and competitive differentiators

QUADRANT REPORT | DECEMBER 2025 | BRAZIL

Who Should Read This Section

This report is valuable for service providers offering **SAP HANA Infrastructure Services** in **Brazil** 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 capabilities, assessing which providers in Brazil 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 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 SAP HANA infrastructure services in Brazil. 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
SAP HANA Infrastructure Services

Brazil 2025

This quadrant assesses the hyperscalers offering **SAP hosting**, focusing on SAP HANA instances in the **public cloud** for SAP S/4HANA private edition and **RISE with SAP.** Services include security, automation and monitoring tools.

Pedro L. Bicudo Maschio

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
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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
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8. Enable **AI-driven monitoring**, resource **optimization** and operational **analytics**

Observations

The mainstream maintenance for SAP ECC 6.0 ends in 2027, although the older enhancements, such as the EHP 0-5 package, end this year. The market expects an acceleration of upgrades to SAP S/4HANA on the cloud to avoid running SAP ECC without vendor support. ISG estimates that about half of the SAP ECC clients have not started their upgrade process. SAP offers an extended maintenance option at a cost, but the company aims to migrate all of its ERP clients to the S/4HANA platform on the cloud as soon as possible.

Hyperscalers aim to capitalize on clients' rush to upgrade to S/4HANA. Upgrades are complex and take months to complete, and moving from one cloud to another is cumbersome. Hyperscalers aim to capture this opportunity early, when enterprises initiate upgrades, as such clients will exhibit high retention. SAP ERP is a core business application that interfaces with all other applications within an enterprise; therefore, SAP clients often consume other cloud services at large.

From the 40 companies assessed for this study, seven qualified for this quadrant, with two being Leaders.

aws

AWS offers automation and tools that differentiate it from the competition. It reduces the risk in complex cloud migrations, helping clients achieve benefits rapidly.

Microsoft

Microsoft Azure offers seamless integration with Microsoft products. Enterprises benefit from enhanced collaboration using Teams and easy-to-use analytics with the Power Platform.

AWS

Leader

"AWS offers a reliable, scalable infrastructure with advanced automation and management tools, enabling seamless cloud migrations and optimized operations. AWS' AI Co-Innovation Program accelerates business results further."

Pedro L. Bicudo Maschio

Overview

AWS is headquartered in Seattle and Arlington, U.S., and operates 38 dedicated AWS regions. In FY24, the company generated $107.6 billion in revenue. AWS has 120 AZs in 38 geographic regions, including Brazil, where it offers three AZs in São Paulo State and a launched Local Zone in Rio de Janeiro. The company provides a robust suite of services for running SAP workloads, from migration and modernization to ongoing operations. Its portfolio includes SAP-certified Amazon EC2 instances, Amazon EBS and Amazon S3. The company supports clients running SAP private edition, RISE with SAP and GROW with SAP.

Strengths

Comprehensive portfolio: AWS boasts a substantial track record of supporting SAP workloads. This long-standing relationship allows AWS to build and optimize a comprehensive toolset, including AWS Launch Wizard and AWS Systems Manager for SAP. AWS' portfolio includes robust security features, extensive compliance certifications and a dedicated professional services team with specialized SAP expertise.

Focus on business transformation: AWS and SAP created the AI Co-Innovation Program focused on solving real-world challenges effectively. This program, which builds solutions leveraging Amazon Bedrock within SAP BTP, together with AWS' extensive portfolio of AI and ML services, allows organizations to unlock new business value, illustrating AWS' dedication to helping businesses innovate beyond traditional cloud migration. The company offers training programs to accelerate AI model deployment within SAP environments, providing clients with the tools to maintain a competitive edge in their respective industries.

Extended SAP capabilities: AWS Launch Wizard for SAP automates SAP applications' sizing, configuration and deployment. Its SAP SDK enables enterprises to leverage GenAI and keep a clean core SAP S/4HANA. AWS Backint Agent for SAP HANA and AWS CloudWatch provide seamless integration for backup and monitoring, enabling clients to leverage AWS' security, reliability and scalability to optimize their SAP environments.

Caution

Enterprises should ensure their SAP partners hold AWS certifications to adopt cloud best practices and enable SAP BTP, avoiding inefficiencies and overspending due to inappropriate reference architectures.

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QUADRANT REPORT | DECEMBER 2025 | FRANCE

Who Should Read This Section

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IT and infrastructure leaders

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

Software development and technology leaders

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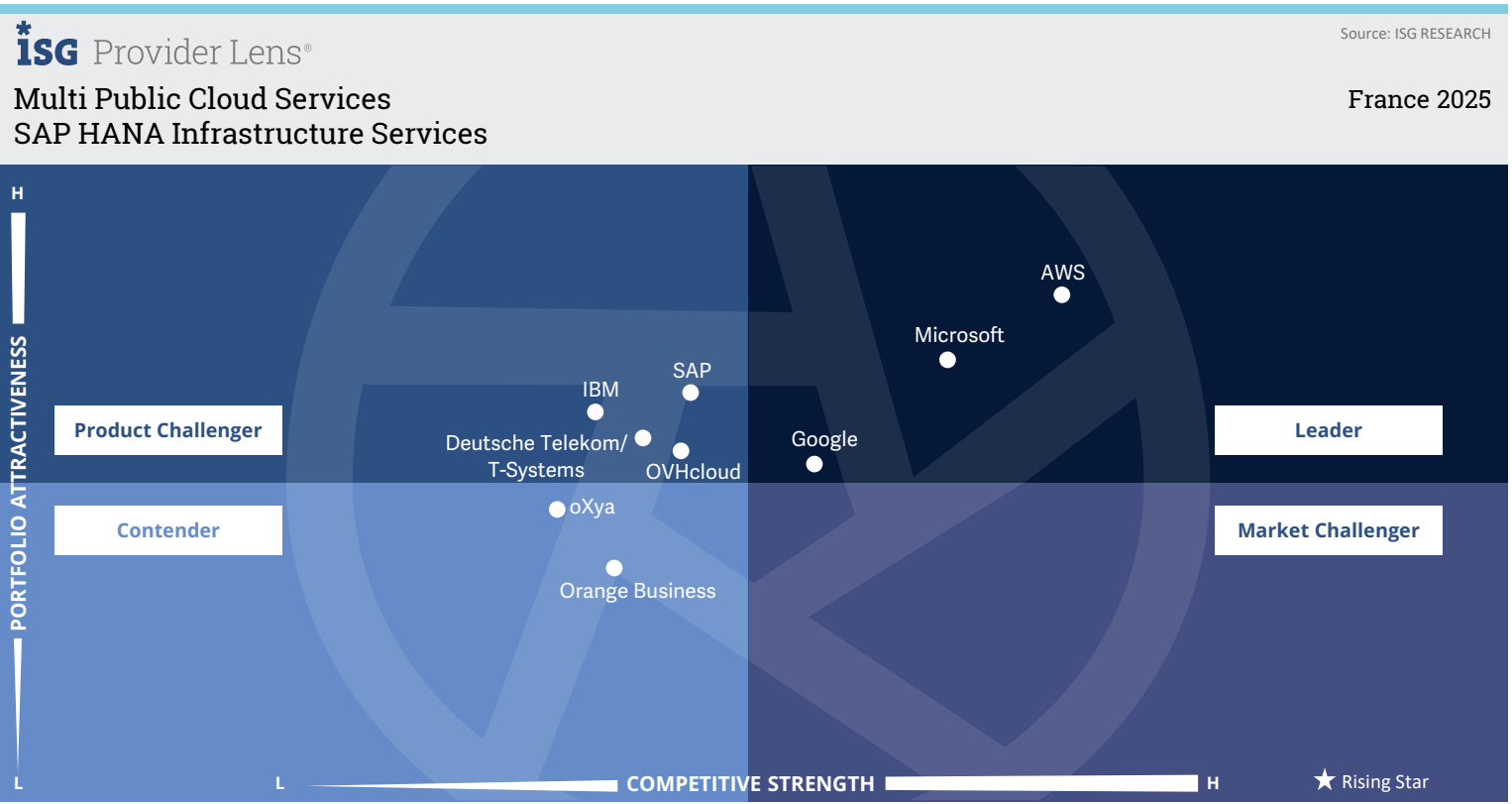
Sourcing, procurement and vendor management professionals

Should utilize this report to better understand SAP HANA infrastructure services' current landscape and partner ecosystem in France. 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 assesses service providers that **host SAP products**, particularly SAP HANA, in **public cloud** shared environments, offering standardized services and using **SAP-certified infrastructure** to ensure performance, scalability and compliance.

Manoj M

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
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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
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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

In 2025, the SAP HANA infrastructure market is going beyond certified hosting into a more intelligent, automated and compliance-driven ecosystem. Cloud providers are moving beyond SAP's technical benchmarks by embedding AI, automation and sovereignty to drive enterprise transformation at scale.

This quadrant reflects a convergence of core infrastructure capabilities, with leading providers offering scalable, SAP-certified environments and deep integration with AI and analytics frameworks. The key differentiator now lies in how effectively these platforms enable secure, intelligent and adaptive operations, particularly in regulated sectors in France.

AI-powered tools for landscape sizing, migration planning and performance optimization are enabling enterprises to shift from static deployments to dynamic, insight-driven SAP environments. These tools increasingly support real-time analytics, predictive modeling and seamless integration with GenAI services.

Sovereignty has become a strategic priority. Enterprises require infrastructure that meets local data residency rules while enabling low-latency interoperability across cloud and SaaS ecosystems. This has led to increased investments in sovereign regions, localized control planes and hybrid models.

Additionally, demand for RISE with SAP-aligned infrastructure continues to grow, with providers offering flexible hosting options, partner-led transformation services and advisory support for long-term SAP modernization.

Cloud providers that combine certified infrastructure with automation, AI integration and regulatory alignment are best positioned to support the evolving needs of enterprise SAP landscapes.

From the 51 companies assessed for this study, nine qualified for this quadrant, with three being Leaders

AWS expands SAP HANA modernization with GenAI integration and industry-specific services. Its scalable infrastructure and automation tools enable seamless transformation of SAP environments across a globally distributed cloud network.

Microsoft

Microsoft enhances SAP HANA hosting through unified AI integration, Sentinel-based security and optimized storage. Azure's orchestration capabilities streamline SAP operations while supporting real-time insights and scalable infrastructure.

Google

Google Cloud advances SAP HANA services with AI-native infrastructure and certified bare metal hosting. Its proactive workload validation ensures reliable performance and intelligent automation for large-scale SAP deployments.

Leader

"AWS leads in SAP HANA infrastructure services through its unmatched global scale and deep integration of SAP with AWS-native innovations, making it a comprehensive and future-ready platform for enterprises modernizing their SAP environments."

Manoj M

AWS

Overview

AWS is headquartered in Seattle and Arlington, U.S., and operates 38 dedicated AWS regions. In FY24, the company generated $107.6 billion in revenue. AWS has 120 cloud Availability Zones (AZs), including those in the AWS Europe (Paris)Region, and many edge locations, including five in Paris and one in Marseille. AWS provides SAP automation assets and professional services and leverages a broad SAP partner network for implementations and operations across the France region. It supports RISE with SAP and native SAP system migrations, providing French enterprises with scalable and low-latency infrastructure to run and modernize their SAP environments.

Strengths

Comprehensive toolsets: AWS offers a suite of purpose-built tools for SAP workloads, including Launch Wizard, Migration Hub Orchestrator, Backint Agent, Backup Service, Q CLI (AI tool) and SAP ABAP SDK. These tools integrate SAP HANA with over 200 AWS services and 83 SAP BTP services, streamlining automation, monitoring and backups. This integration allows clients to transform their SAP investments into broad innovative solutions using any chosen AWS services.

Strong AI innovation: The AWS SAP AI Co-Innovation Program combines SAP technology with AWS GenAI services such as Bedrock, Nova models and custom chips (Inferentia, Trainium). With Bedrock integrated into SAP BTP AI Core and also with Q Developer for both ABAP and BTP development, clients in France can extend SAP HANA using advanced foundation models to develop GenAI applications within their SAP landscape and drive modernization with improved efficiency.

Industry-specific services: AWS offers a broad portfolio of purpose-built services across industries such as healthcare (AWS Healthomics and AWS HealthLake), retail and consumer goods (Amazon Personalize and Multi-Channel Fulfillment), and media (CloudFront for M&E and Elemental MediaConnect). This allows SAP HANA clients to adopt tailored industry capabilities with enhanced business processes and accelerate innovation within their sector.

Caution

Although AWS has announced the European Sovereign Cloud, its full availability in France is still in progress. Enterprises in highly regulated sectors may need to carefully assess timelines and alignment with strict French and EU sovereignty requirements when planning compliance-driven SAP HANA deployments.

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Multi Public Cloud Services

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QUADRANT REPORT | DECEMBER 2025 | GERMANY

Who Should Read This Section

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IT and infrastructure leaders

Should read this report to analyze modernization and service capabilities of SAP HANA infrastructure service providers and the market advancements that impact public cloud strategies. Understanding these market advancements is critical for IT executives to develop effective, future-proof public cloud strategies and ensure their organizations maintain competitive agility and resilience.

Software development and technology leaders

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Sourcing, procurement and vendor management professionals

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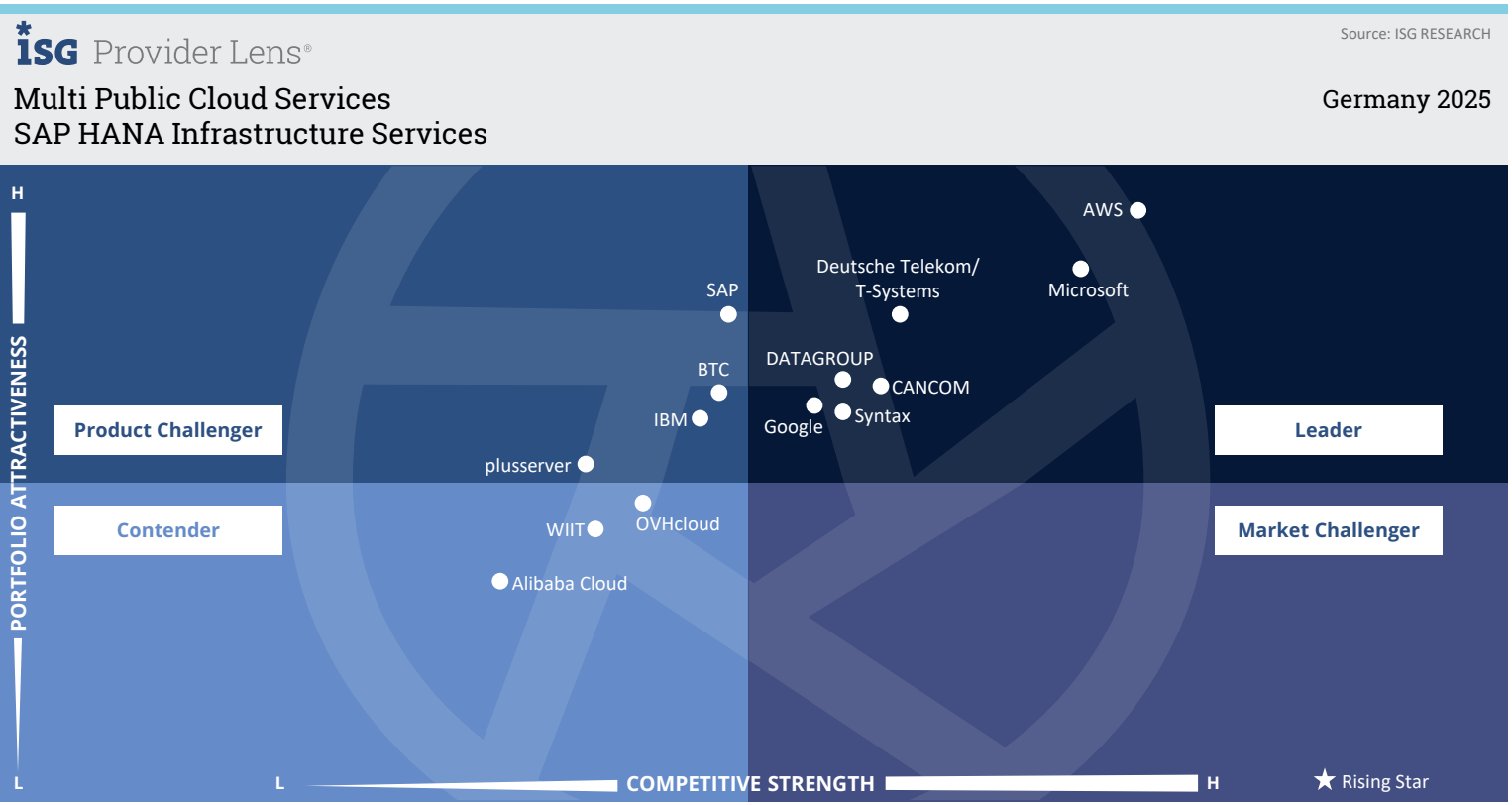

This quadrant evaluates providers that offer SAP Basis operations and are certified by SAP. The **transformation of SAP S/4HANA** to the cloud requires a comprehensive portfolio and **secure operations in highly secure data centers.**

Wolfgang Heinhaus

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.

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8. Enable **AI-driven monitoring**, resource **optimization** and operational **analytics**

Observations

The use of SAP systems in the cloud has become an increasingly important part of the digital transformation for many companies in Germany. The migration of SAP S/4HANA to the cloud has grown rapidly, with around 40 percent of companies across all industries and sizes currently having ongoing projects, a significant increase from last year's figure of around 20 percent. According to DSAG (the German speaking SAP user group), the decision in favor of a cloud strategy (private or public cloud) has increased significantly, from 13 percent in the previous year to 38 percent in the current year. Many customers opt for basic operations with one of the major public cloud providers, such as AWS, Microsoft or Google. Increasingly, companies are opting for the RISE with SAP cloud solution to modernize their SAP landscapes, which are operated by one of the three major hyperscalers. Cloud providers offer powerful, scalable, and flexible SAP-certified platforms, working closely with SAP to implement improvements and enhancements. The services provide secure operation and comply with compliance requirements, which is hardly possible in a company's own data center. Customers who are reluctant to switch to an international public cloud provider have the option in Germany of switching to a sovereign cloud with one of the local providers that offer comparable services and guarantee that their data will remain in the country. These include CANCOM, DATAGROUP, Syntax Systems and T-Systems. T-Systems is the only provider that has the privilege of operating RISE with SAP in its own data centers.

Of the 100 companies assessed for this study, 14 qualified for this quadrant, seven of which were Leaders.

AWS is a leading provider of SAP-based operating services worldwide, including in Germany, and offers the most comprehensive services, features and security.

CANCOM offers an excellent portfolio of services for small and midsize businesses, catering to a diverse range of needs.

DATAGROUP is an agile SAP service provider that continually expands its portfolio. The provider has developed from last year's Rising Star to a Leader.

Google

Google maintains two regions in Berlin and Frankfurt am Main, each with three data centers for secure, innovative SAP operations.

Microsoft

Microsoft is one of the leading hyperscalers and has been offering a comprehensive range of SAP solutions for over 30 years, now with extensive AI support.

Syntax Systems can look back on 50 years of SAP experience and is constantly developing innovations such as comprehensive RISE with SAP support.

With its Open Telekom Cloud, **Deutsche Telekom/T-Systems** is one of the largest SAP providers in Germany. Its services, security and flexibility are highly valued by many customers of all sizes and from all industries.

Leader

"AWS is an experienced SAP service provider that prioritizes customer satisfaction and security. It is the ideal partner for companies seeking to migrate their SAP environment to the cloud."

Wolfgang Heinhaus

AWS

Overview

AWS is headquartered in Seattle and Arlington, U.S., and operates 38 dedicated AWS regions. In FY24, it generated revenue of $107.6 billion. The leading cloud computing provider for SAP HANA workloads continues to expand, now boasting 120 Availability Zones worldwide. 10 additional Availability Zones and three AWS regions have already been announced. Since 2008, thousands of customers worldwide have been utilizing the comprehensive SAP services. An AWS region with three highly secure, fail-safe Availability Zones is available in Frankfurt am Main. Customers of all sizes and from various industries appreciate the comprehensive portfolio of over 200 services; they choose the ones that best suit their needs.

Strengths

Simplifying complex transformations with AI: In collaboration with SAP, AWS is developing the AWS SAP AI Co-Innovation Program to support companies seeking to transform their complex business processes with the aid of GenAI. The software provides structured guidance from ideation to full deployment and supports Amazon Bedrock in SAP BTP.

AWS product strategy: The best-in-class portfolio includes a secure infrastructure platform, assistance with workload migration to AWS, streamlining of complex tasks, extensive support for RISE with SAP and custom SAP hosting models, along with consulting services for the coexistence of SAP and non-SAP workloads in a hybrid cloud environment.

Optimal security for business-critical applications: AWS provides SAP customers with a high standard of security and compliance for their business-critical applications. It currently has 464 security, identity and compliance features, which are constantly being expanded, more than any competitor. Another security feature is that workloads on AWS Nitro-based systems are isolated and protected by Nitro, making unauthorized access impossible. Customers confirm AWS' leading role in security and compliance.

Caution

AWS offers more than 200 features and services, and the number continues to grow. For customers, the complex service offering can be confusing, making it difficult to find and select the right solutions.

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QUADRANT REPORT | DECEMBER 2025 | NORDICS

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Sourcing, procurement and vendor management professionals

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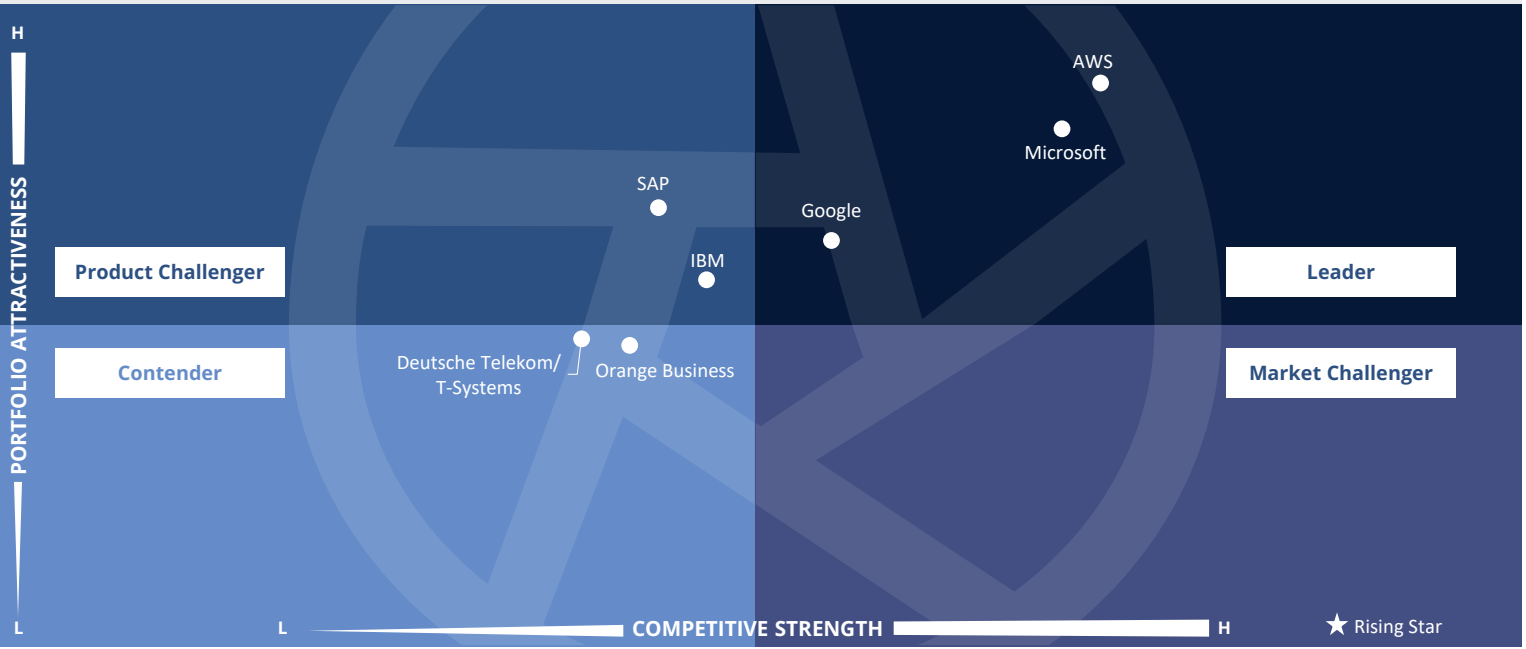
ISG Provider Lens®

Source: ISG RESEARCH

Multi Public Cloud Services
SAP HANA Infrastructure Services

Nordics 2025



This quadrant assesses **public cloud IaaS providers** delivering **SAP-certified**, **scalable platforms** for **S/4HANA and HANA workloads,** with **AI-driven automation** and **regional compliance** to support secure, optimized SAP operations.

Meenakshi Srivastava

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 t**hat 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

This quadrant reflects a maturing landscape of SAP-optimized public cloud IaaS providers, where hyperscalers and regional specialists are converging on AI-driven automation, certified infrastructure and compliance-centric architectures. Compared to 2024, providers such as AWS, Microsoft and Google have deepened their integration with SAP-native tooling and expanded their support for RISE with SAP, while enhancing AI-powered assistants for migration planning and cost simulation. IBM and SAP have reinforced their positions through strategic FinOps tooling and ecosystem partnerships, with IBM Cloudability recognized for its excellence. Notably, Deutsche Telekom/T-Systems and Orange Business have strengthened their regional compliance posture and data locality offerings, aligning with sector-specific mandates in finance and healthcare. M&A activity in 2024-2025 has been modest but targeted, with IBM and SAP pursuing selective acquisitions to bolster operational analytics and automation capabilities in the Nordics. The quadrant increasingly favors providers that combine SAP-certified memory-intensive VMs, automated lifecycle operations and flexible commercial models with structured migration methodologies, thereby positioning them to support high-growth SAP workloads across hybrid and sovereign cloud environments.

From the 52 companies assessed for this study, seven qualified for this quadrant, with three being Leaders.

AWS has expanded its vertical focus by introducing retail-specific SAP Cloud hosting and hybrid migration models, while SAP HANA Cloud enhancements align with SAP's new release cadence and AI-driven UX improvements.

Google

Google Cloud provides SAP-certified infrastructure with automation and best practices for scalable, resilient and disaster-ready SAP HANA deployments.

Microsoft

Microsoft Azure is the first hyperscaler to meet SAP's 99.95 percent SLA for RISE Private Cloud ERP, while integrating Joule with Microsoft 365 Copilot to deliver contextual SAP insights in workflows.

AWS

Leader

"AWS' Nitro System revolutionizes cloud security by ensuring near-total isolation of customer workloads. Coupled with the industry's broadest compliance coverage, this makes AWS the preferred choice for SAP in highly regulated sectors."

Meenakshi Srivastava

Overview

AWS is headquartered in Seattle and Arlington, U.S., and operates 38 dedicated AWS regions. In FY24, the company generated $107.6 billion in revenue. It has a widespread global footprint of 120 AWS Availability Zones, numerous AWS Local Zones and AWS Wavelength Zones for ultra-low latency applications, Points of Presence and the recently announced AWS European Sovereign Cloud. AWS partners closely with SAP and with the success of SAP HANA on AWS Graviton, SAP has moved additional applications to AWS Graviton, including SAP DataSphere, SAP Analytics Cloud and SAP Cloud ALM. In the Nordics, AWS offers one Region and three Availability Zones that can host SAP HANA, SAP RISE and other SAP ERP workloads.

Strengths

Security and compliance at scale: AWS delivers the most advanced security and compliance framework for SAP workloads, with more than 460 features and 143 certifications. Its Nitro System architecture, independently validated for eliminating operator access, provides a unique safeguard for customer workloads. These strengths have made AWS the preferred choice for highly regulated industries, including healthcare, financial services and defense.

Comprehensive SAP tooling: AWS has developed purpose-built tools that address the full SAP lifecycle, from migration to management and innovation, more extensively than any other provider. The AWS SDK for SAP ABAP, Launch Wizard, Migration Hub Orchestrator and additional solutions empower businesses to modernize SAP operations by leveraging integration with more than 200 AWS services and broader business technology platform (BTP) offerings.

GenAI leadership with SAP: The AI co-innovation program, jointly driven by AWS and SAP, empowers clients and partners to design and deploy GenAI solutions that address real-time ERP challenges. By building solutions leveraging Amazon Bedrock within SAP BTP, the program unites specialized experts and dedicated resources to accelerate intelligent application development and cross-industry innovation.

Caution

AWS is advised to accelerate the expansion of full multizone regions in Norway, Denmark and Finland to strengthen its competitive position and address customers' data sovereignty, regulatory compliance and local high availability needs in the Nordics.

ISG Provider Lens™

Multi Public Cloud Services

A research report comparing provider strengths, challenges and competitive differentiators

QUADRANT REPORT | DECEMBER 2025 | SWITZERLAND

Who Should Read This Section

This report is valuable for service providers offering **SAP HANA infrastructure services** in **Switzerland** 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

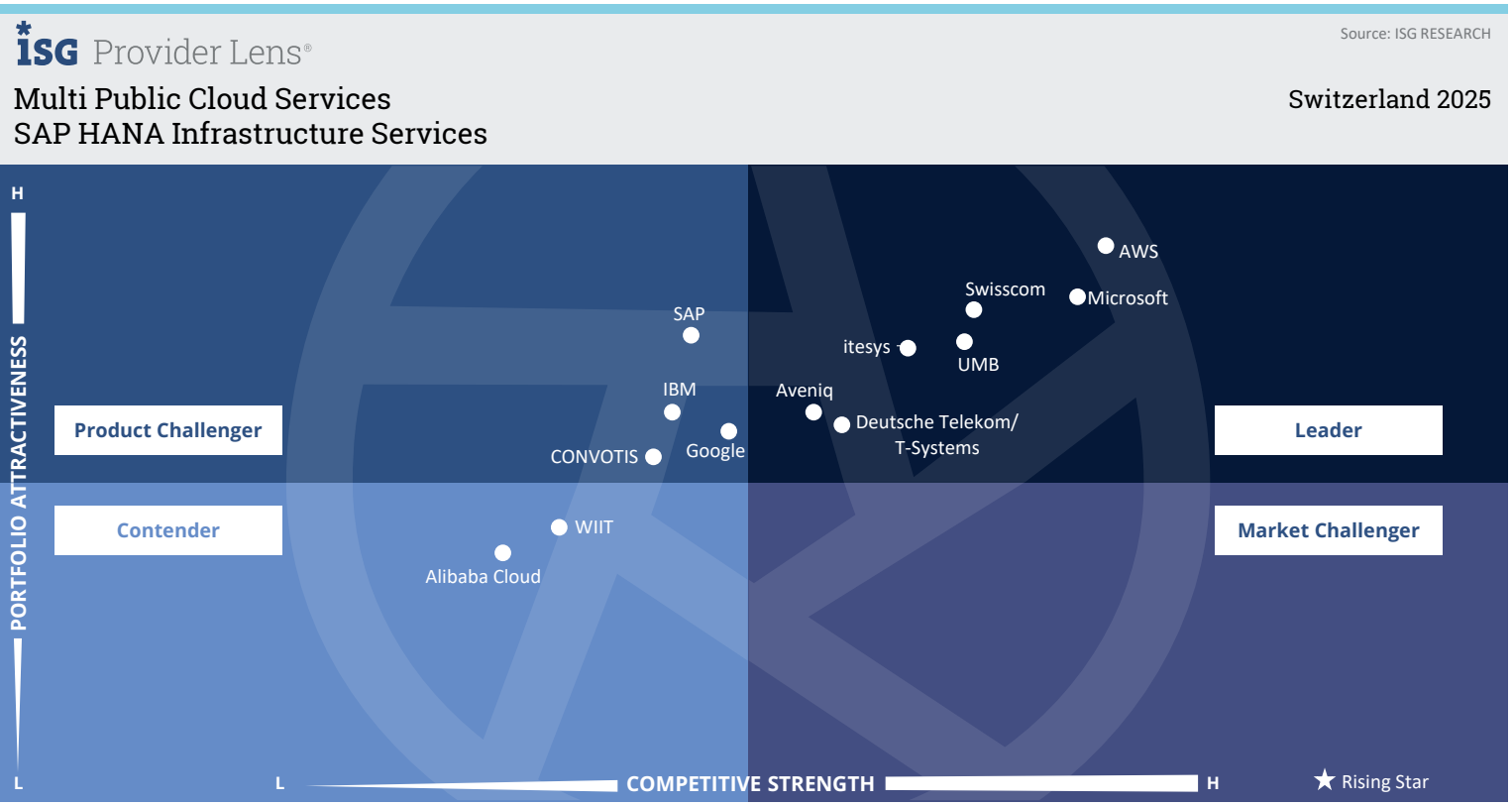
Should read this report to analyze modernization and service capabilities of SAP HANA infrastructure service providers and the market advancements that impact public cloud strategies. Understanding these market advancements is critical for IT executives to develop effective, future-proof public cloud strategies and ensure their organizations maintain competitive agility and resilience.

Software development and technology leaders

Should read this report to understand providers' positioning and offerings, and their impact on the ongoing infrastructure transformation initiatives. This knowledge empowers them to align their internal software development and technology road maps with external expertise, driving efficient and impactful digital transformation.

Sourcing, procurement and vendor management professionals

Should read this report to better understand the current landscape and partner ecosystem of SAP HANA infrastructure service providers in Switzerland. A deeper insight into 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 providers that offer SAP Basis operations and are certified by SAP. The **transformation of SAP S/4HANA** to the cloud requires a comprehensive portfolio and **secure operations in highly secure data centers.**

Wolfgang Heinhaus

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
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- 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
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8. Enable **AI-driven monitoring**, resource **optimization** and operational **analytics**

Observations

After some initial hesitation, the adoption of SAP systems in the cloud has become a crucial component of the digital transformation for many companies in Switzerland. The migration of SAP S/4HANA to the cloud has increased rapidly; around 40 percent of companies from all industries and size classes have ongoing projects, a significant jump compared with the previous year's figure of around 20 percent. According to the DSAG (German speaking SAP user group), the decision to adopt a cloud strategy (private or public cloud) has increased significantly, from 13 percent in the previous year to 38 percent in the current year. Many customers use one of the major public cloud providers, such as AWS, Microsoft or Google, for their SAP Basis operations. Increasingly, companies in Switzerland are opting for the RISE with SAP cloud solution to modernize their SAP landscapes; here, too, operations are carried out by one of the three major hyperscalers. Cloud providers offer powerful, scalable and flexible SAP-certified platforms, working closely with SAP to implement improvements and enhancements. The services ensure secure operation and compliance with regulations, which is hardly possible in a company's own data center. Customers who are reluctant to switch to an international public cloud provider have the option in Switzerland to switch to a sovereign cloud with one of the local providers that offer comparable services and guarantee that their data will remain within Switzerland. These include Aveniq, itesys, Swisscom, UMB and Deutsche Telekom/T-Systems.

Of the 65 companies assessed, 13 qualified for this quadrant, including seven Leaders.

AVENIQ

Aveniq offers a comprehensive range of SAP Basis services, securely hosted in four highly secure data centers in Switzerland. Hyperscalers and on-premises solutions enable the development and operation of hybrid or multicloud architectures.

aws

AWS is a leading SAP Basis operations service provider worldwide, offering one of the most comprehensive services, features and security.

itesys

itesys is further expanding its SAP service offering and providing customers with significant added value. The acquisitions of nexQuent and Hosting Solutions in Germany are a smart move.

Microsoft

Microsoft is a long-standing SAP Basis operations service provider worldwide and in Switzerland. Customers highly value its comprehensive service offering.

swisscom

Swisscom offers extensive SAP Basis operation options that can be operated in a secure private or public cloud, as well as on premises in the customer's own data center.

T Systems

Deutsche Telekom/T-Systems offers a broad SAP Basis operations portfolio in the private cloud, which also includes RISE with SAP, a unique offering in Europe.

UMB

UMB offers an excellent SAP Basis operations portfolio that numerous customers of all sizes utilize. Its security offering is exemplary.

AWS

Leader

"AWS is a long-standing SAP service provider that prioritizes customer satisfaction and security. Companies looking to transfer their SAP environment to the cloud have come to the right place with the provider."

Wolfgang Heinhaus

Overview

AWS is headquartered in Seattle and Arlington, U.S., and operates 38 dedicated AWS regions. It maintains 120 Availability Zones worldwide. In FY24, it generated revenue of $107.6 billion. AWS is one of the leading hyperscalers for SAP HANA workloads in the public cloud and has been offering locally available, SAP-certified infrastructures in Switzerland since 2022, with its Zurich region. AWS is an official SAP technology partner and offers comprehensive tools, architectures and co-innovations, particularly in the field of artificial intelligence (GenAI), which play a differentiating role in transformations to RISE with SAP or the S/4HANA Cloud.

Strengths

Comprehensive service offering: The portfolio consists of more than 200 services for optimal operation, including services for connecting, integrating and securing SAP systems, as well as extensive support for RISE with SAP and GROW with SAP, and for user-defined SAP hosting models, including consulting services for the coexistence of SAP and non-SAP workloads in a hybrid cloud environment.

Highly secure data centers in Switzerland: AWS provides AWS Europe with three Availability Zones (data centers) in the Zurich area, offering increased security and low latency, a crucial aspect for Swiss customers who place great importance on having their sensitive data processed and hosted within the country. This has won AWS many SAP customers, and the number is constantly growing. The company will invest CHF 5.9 billion in Switzerland over the next few years to provide the best possible service to its more than 10,000 customers.

Simplifying complex transformations with AI: In collaboration with SAP, AWS is developing the AWS SAP AI Co-Innovation Program to support companies seeking to transform their complex business processes with the aid of GenAI. The software offers structured guidance from ideation to full deployment and supports Amazon Bedrock in SAP BTP.

Caution

AWS serves more than 10,000 customers in Switzerland. It should be noted that Switzerland is a typical midsize economy, which requires proactive management for consulting on its complex service portfolio and acquiring new customers.

ISG Provider Lens™

Multi Public Cloud Services

A research report comparing provider strengths, challenges and competitive differentiators

QUADRANT REPORT | DECEMBER 2025 | U.K.

Who Should Read This Section

This report is valuable for providers offering **SAP HANA infrastructure services** in the **UK** 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 and the market advancements that impact public cloud strategies. Understanding these market advancements is critical for IT executives to develop 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 understand providers' positioning and offerings, and their impact on the ongoing infrastructure transformation initiatives. This knowledge empowers them to align their internal software development and technology road maps with external expertise, driving efficient and impactful digital transformation.

Sourcing, procurement and vendor management professionals

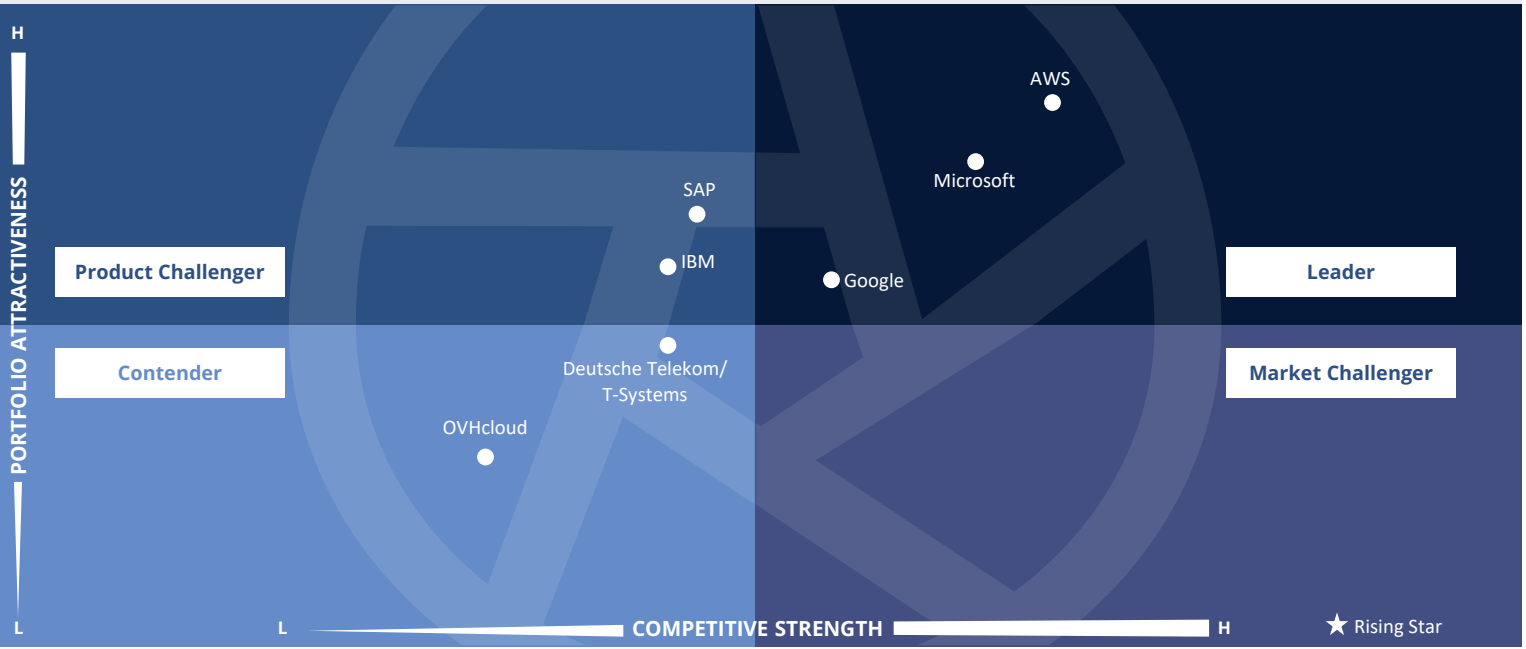
Should read this report to better understand the current landscape and partner ecosystem of SAP HANA infrastructure service providers in the UK. A deeper understanding of provider competencies, differentiation and market presence supports informed vendor selection and negotiation strategies, ensuring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

ISG Provider Lens®

Source: ISG RESEARCH

Multi Public Cloud Services
SAP HANA Infrastructure Services

U.K. 2025



This quadrant assesses **public cloud IaaS providers** delivering **SAP-certified, scalable platforms** for **S/4HANA and HANA workloads**, with **AI-driven automation** and **regional compliance** to support secure, optimised SAP operations.

Meenakshi Srivastava

Definition

This quadrant evaluates public cloud IaaS providers — both global hyperscalers and regional infrastructure specialists — that offer certified, scalable and SAP-optimised 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.

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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 **optimisation** and operational **analytics**

Observations

This quadrant reflects a maturing landscape of public cloud IaaS providers that are increasingly aligning with SAP's certified infrastructure and AI-driven operational standards. This year's quadrant underscores a strategic pivot among hyperscalers and regional specialists towards stronger SAP workload optimisation, cost transparency and lifecycle automation. Compared to 2024, providers such as AWS, Microsoft and Google have expanded their SAP-certified virtual machine (VM) portfolios and enhanced AI-powered tooling for migration planning and dynamic configuration, reinforcing their leadership in scalable SAP hosting. IBM and SAP have strengthened their FinOps capabilities through tighter integration with SAP-native tooling and structured migration frameworks, while OVHcloud and T-Systems have strengthened their regional compliance posture and disaster recovery architectures to meet UK-specific regulatory demands. Notably, 2024-2025 saw targeted M&A activities, with IBM acquiring UK-based FinOps analytics startups to bolster its Cloudability suite, and T-Systems expanding its SAP services footprint through strategic partnerships. These shifts reflect a quadrant-wide emphasis on cost accountability, AI-enabled operations and hybrid SAP hosting models, positioning providers to support both RISE with SAP and bespoke transformation journeys across regulated UK sectors.

From the 61 companies assessed for this study, seven qualified for this quadrant, with three being Leaders.

aws

AWS launched SAP Sovereign Cloud capabilities in the UK in 2024, supporting SAP Business Technology Platform and SAP Cloud ERP in compliance with local data residency and sovereignty regulations.

Google

Google Cloud has partnered with SAP to bring AI-managed operations for RISE with SAP S/4HANA Cloud Private Edition, focusing on AI-driven orchestration and automated lifecycle management for SAP workloads.

Microsoft

Microsoft expanded SAP capabilities with the Business Suite Acceleration Program for streamlined ERP migrations and introduced SAP-certified M-series VMs supporting scale-out SAP HANA deployments over 6 TB with standby nodes and dynamic tiering.

Leader

"AWS showcases its strength by merging extensive service expertise, cutting-edge security architecture and a long-established partnership with SAP to support enterprises in running mission-critical workloads with reliability and scalability."

Meenakshi Srivastava

AWS

Overview

AWS is headquartered in Seattle and Arlington, US., and operates 38 dedicated AWS regions. In FY24, the company generated $107.6 billion in revenue. It has a widespread global footprint of 120 AWS Availability Zones, numerous AWS Local Zones and AWS Wavelength Zones for ultra-low latency applications, Points of Presenceand the recently announced AWS European Sovereign Cloud. AWS is a long-time SAP partner and it enables business transformation for enterprises by offering purpose-built infrastructure, expert teams and over 200 fully featured services to enhance SAP operations. AWS offers one Region and three Availability Zones in the UK to host SAP HANA, SAP RISE and other SAP ERP workloads.

Strengths

Seasoned ProServe expertise: AWS ProServe for SAP combines years of collective expertise with SAP-on-AWS experience, delivering best practice-driven packaged offerings and automation that reduce operational costs by up to 60 percent. The practice collaborates closely with customers and partners, maintaining a consistently high CSAT score and contributing to project success through shared methodologies.

Comprehensive security model: AWS delivers the most advanced security and compliance capabilities for SAP in the cloud, with 464 features and 143 certifications. Built on the unique AWS Nitro System, its cloud architecture eliminates operator access to customer workloads, a validated differentiator in enterprise data protection. Customers in regulated industries such as healthcare, finance and public sector consistently choose AWS for mission-critical SAP workloads.

GenAI-led innovation: Through a joint AI co-innovation program, AWS and SAP enable clients and partners to build and deploy GenAI solutions that address real-time ERP challenges. The initiative builds solutions leveraging Amazon Bedrock support within SAP BTP, combining expert guidance and dedicated resources to accelerate intelligent application development and industry-wide innovation.

Caution

AWS offers a sophisticated but often complex pricing model that can be difficult for clients to navigate. More transparent, region-specific pricing models, supported by tailored cost calculators and ROI scenarios, would help streamline evaluations and improve customer confidence.

Appendix

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 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,

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

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 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.

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 August 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 divided into 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 & use cases
4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)
5. Use of Star of Excellence CX-Data
6. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
7. Use of the following key evaluation criteria:
   * Strategy & vision
   * Tech Innovation
   * Brand awareness and presence in the market
   * Sales and partner landscape
   * Breadth and depth of portfolio of services offered
   * CX and Recommendation

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Shashank Rajmane

Manager and Principal Analyst

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

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

Author

Pedro L. Bicudo Maschio

Lead Analyst

Distinguished analyst and author, Pedro Maschio brings extensive experience in the research of the SEMEA (Southern Europe Middle East and Africa) and the Americas service markets. With more than 30 years of experience in sourcing, he has developed vendor assessments plus contract restructuring, services scope and IT benchmarking programs for diverse vertical markets in the Americas and APAC.

Before joining ISG, Pedro was a partner of TGT Consult and managing vice president at Gartner Inc., responsible for the consulting business in APAC and Latin America.

Author

Manoj M
Senior Research Analyst

Manoj is a research analyst at ISG and supports ISG Provider Lens® studies on Private/Hybrid Cloud — Data Center Services, Mainframes and Public Cloud Data Center Solutions and Services. He also supports the lead analysts of multiple regions in the research process. Prior to this role, Manoj supported the ROI process in the sales intelligence platform and was an individual contributor in handling research requirements for advanced technologies in different sectors. He has considerable expertise in predicting the impact of automation by considering certain parameters such as productivity, efficiency and time reduction. At ISG, he has supported research authors and authored Enterprise Context and Global Summary reports with market trends and insights.

Author

Wolfgang Heinhaus
Lead Analyst

Wolfgang Heinhaus has over 25 years Experience in IT infrastructure and was in a leading position in a global food companies active. He has more than 8 years Extensive research experience in the areas of colocation services, IT infrastructure, IT security and cloud Computing. He has conducted several IPL studies for the German and Swiss markets and also advises customers on these topics.

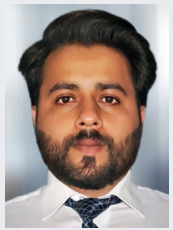
Author

Meenakshi Srivastava
Lead Analyst

Meenakshi Srivastava has nearly eight years of expertise and knowledge in IT infrastructure and analysis and insight generation. At ISG, Meenakshi is a lead analyst for ISG Provider Lens®, leading research activities and benchmarking exercises on the regional adoption of digital infrastructure such as private and hybrid cloud.

She holds a bachelor's degree from Mumbai University in electronics engineering and an MBA degree in marketing from the Indian Institute of Management, Jammu (IIM Jammu).

Research Analyst and Co-Author



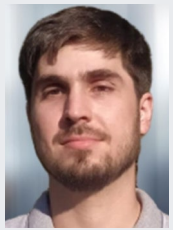
Yatharth Bharti
Senior Research Analyst

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 5 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.

Enterprise Context and Overview Analyst



Gabriel Sobanski
Research Analyst

Gabriel Sobanski is a research analyst at ISG and is responsible for supporting and co-authoring Provider Lens® studies on ServiceNow Ecosystem, Salesforce Ecosystem, Microsoft Ecosystem, Cybersecurity Solutions and Services, SAP Ecosystem, Public Cloud, Private Hybrid Cloud Data Center Services, Future of Work, AWS Ecosystem and Oracle Ecosystem. He supports the lead analysts in the research process and co-authors the global summary report with market trends and insights.

Gabriel also develops content from an enterprise perspective. Gabriel has helmed his current role since 2021. Prior to this role, he has worked as an IT consultant, where he acquired experience and technical capabilities in collecting, analyzing and presenting quantitative and qualitative data. His area of expertise includes industry, logistics and market research.

Research Analyst and Co-Author

Arpita Choudhury
Senior Research Analyst

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

Arpita comes with an experience of over 4.5 years in research. She has led and supported ad-hoc research requests in investment banking, healthcare, energy, and information and communication technology. During this period, she has also spent a significant time enabling technology sales in pre-sales research teams. Arpita is skilled in insights generation, market sizing and forecasting, storyboarding, design thinking, financial analysis, go-to-market strategies, competitive intelligence, and benchmarking. Her areas of interest broadly are- technology, finance, and business strategy.

Study Sponsor

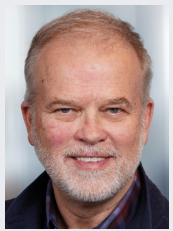
Heiko Henkes

Director and Principal Analyst

Heiko Henkes serves as Managing Director and Principal Analyst at ISG, where he oversees the Global ISG Provider Lens® (IPL) Program for all IT Outsourcing (ITO) studies alongside his pivotal role in the global IPL division as strategic program manager and thought leader for IPL Lead Analysts. Additionally, Henkes heads the 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 renowned for his contributions as a keynote speaker on digital innovation, where he shares insights on leveraging technology for business growth and transformation.

IPL Product Owner



Jan Erik Aase

Partner and Global Head – ISG Provider Lens®

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

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

ISG Provider Lens®

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

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ISG

ISG (Information Services Group) (Nasdaq: III) is a leading global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth.

The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.

For more information, visit isg-one.com.

ISG Provider Lens™

DECEMBER, 2025

REPORT: MULTI PUBLIC CLOUD SERVICES