

Multi Public Cloud Solutions

A research report comparing vendor strengths,
challenges and competitive differentiators



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Enterprises are swiftly embracing cloud-native technologies and advanced tools across hybrid cloud environments, including on-premises, multicloud, hybrid, and edge solutions. This strategic approach ensures consistent performance, scalability, and security, optimizing resource utilization and cost efficiency. By enhancing operational agility and innovation, organizations are transforming cloud-native application development, deployment, and management.

In the evolving IT landscape, multicloud observability and security solutions are essential for monitoring and safeguarding applications within microservices architectures. These tools offer comprehensive visibility, security, and control across infrastructure layers. Advanced analytics and automated responses detect anomalies, manage dependencies, improve application efficiency, and address real-time threats, maximizing reliability and protection for modern distributed applications.

Generative AI (GenAI) is gaining traction within cloud-native infrastructure and microservices as enterprises leverage its capabilities to boost productivity, streamline operations, and unlock

innovation. Businesses anticipate seamless integration of GenAI and security into their systems, becoming intrinsic to their operational frameworks. AI integration aims to complement cloud-native technologies, driving operational efficiency and business growth.

Kubernetes has become a cornerstone of digital transformation initiatives as enterprises embrace containerization to drive agility, scalability, and faster software delivery. As workloads grow more complex across hybrid and multi-cloud environments, organizations are increasingly turning to dedicated Kubernetes management solutions to simplify operations, ensure security, and optimize resource utilization.

Enterprises are adopting cloud cost management-focused FinOps strategies to optimize cloud investments. FinOps promotes financial accountability and operational efficiency by enabling real-time monitoring and control of cloud expenditures. This planned approach enhances resource allocation and aligns cloud usage with business goals, fostering cost-effective and scalable cloud operations.



This study focuses on what ISG perceives as the most critical for **multicloud** functionalities and **FinOps** strategies in 2025.

Simplified Illustration Source: ISG 2025

Multicloud FinOps Platforms

Multicloud Observability Platforms

Multicloud Security Platforms

Kubernetes Management Platforms

The ISG Provider Lens™ Multi Public Cloud Solutions 2025 study offers the following to business and IT decision makers:

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

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



Multicloud FinOps Platforms

Definition

This quadrant assesses ISVs that offer dedicated/proprietary platforms for cloud financial management across multiple public clouds. These platforms recommend engineering changes to provide value and continuously assess effective cloud service use to meet client budgets and business objectives. They enable cross-functional teams, including business, IT and finance, to maintain financial accountability by clearly defining and managing shared cost responsibilities.

Cloud FinOps experts manage variable costs and usage of cloud services, requiring platforms to report cost and usage, allocate costs to stakeholders/users and optimize usage and pricing models. This quadrant assesses vendors' cloud FinOps as standalone solutions sold as licenses or standard pricing models. Vendors can leverage AI and ML technologies to analyze usage patterns, forecast consumption trends and recommend optimal public cloud resources for cost optimization.

Eligibility Criteria

1. **Report** and **optimize** cloud costs tailored to the needs of various units, such as finance, IT and business, based on similar data sources and through a **single console**
2. Offer a **single interface** for multiple public cloud infrastructure providers and other tools to **collaborate** and combine data via **APIs**
3. **Search** and **identify** irregularities and **eliminate** underutilized services
4. Allocate **shared costs** for shared resources, functions or services and **track** them to create a business case with actionable financial insights
5. Offer **predictive forecasting** and trend analysis to guide future consumption planning, budget adherence and purchase commitment simulations
6. Present a **centralized** and **commitment-based** cloud infrastructure buying process and ensure **transparency** in **reporting** and optimizing costs
7. Offer FinOps **support** for **multicloud** environments
8. Possess influential FinOps Foundation accreditation



Multicloud Observability Platforms

Definition

This quadrant assesses vendors providing dedicated platforms for multicloud observability (logging, tracing, measuring) of containerized applications and infrastructure. These platforms provide proactive insights for capacity planning and root cause analysis (RCA), aligning with modern DevOps, site reliability engineering (SRE) and platform engineering practices. Vendors help enterprises predict application performance by comprehensively monitoring containerized infrastructure, microservices and business services via dashboards and alerts. They also leverage AI and ML technologies to help predict and proactively resolve future incidents. Observability complexity has increased with multicloud and hybrid environments and requires analysis of telemetry data for meaningful insights.

Traditional monitoring tools, built for static environments, often fall short in dynamic multicloud setups. IT teams must ensure high observability, interpreting data flows and logs to help developers understand how containerized applications and services behave and interact.

Eligibility Criteria

1. Offer a **unified observability platform** capable of collecting and correlating telemetry (logs, metrics, traces) across infrastructure and applications in hybrid and multicloud environments
2. Provide dedicated tools for **observability**, specifically **multicontainer** applications, supporting highly granular **microservices architecture** and applications comprising a small number of complex services
3. Possess the capability to work **across multiple infrastructure** environments under a **hybrid cloud** model
4. Establish a **strong connection** between the solution's **business model** and enterprise **outcomes** such as financial and performance benefits
5. Support **observability pipelines** to route, process and enrich data across multiple backends and destinations, such as security information and event management (SIEM) and data lakes
6. Demonstrate **current or planned use of AI** to reduce alert noise, detect anomalies and accelerate RCA by applying contextual and significance-based filtering



Multicloud Security Platforms

Definition

This quadrant assesses ISVs providing dedicated platforms for securing infrastructure and applications in multicloud environments — from application development to production and runtime. Designed for dynamic, distributed, multicloud and hybrid settings, traditional security tools fall short due to elasticity and distribution. Modern application development, often distributed across multicloud and hybrid environments, demands unified observability platforms that provide deep visibility into orchestration layers and container networks.

This unified approach ensures consistent performance, faster troubleshooting and streamlined management across complex deployments. Cloud security platforms' key capabilities include vulnerability scanning, anomaly and misconfiguration detection, AI-enabled risk assessments, topology mapping, micro-segmentation, network policy

generation, regulatory compliance monitoring and identity management. With the integration of security solutions into DevOps workflows throughout the CI/CD lifecycle, these AI- and ML-driven platforms automate threat mitigation, analyzing and prioritizing security alerts by severity and impact.

Eligibility Criteria

1. Offer a **unified platform** covering infrastructure and applications compatible with **multi** and **hybrid cloud** environments
2. **Integrate third-party** data sources and open source cloud-native **security** software
3. Offer unified **visibility** for **DevSecOps**, including intelligent container image **screening** integrated into CI/CD pipelines
4. Block **unscanned** or **vulnerable** images
5. Adopt AI and ML for various functions such as intelligent discovery of container topology and automated remediation and identify potential security breaches while monitoring network traffic in real time
6. Enable robust **IAM** features, including automated least privilege management and network policies, password management and **zero trust** boundaries
7. Demonstrate compliance with key cloud security and data protection standards such as SOC 2 and ISO/IEC 27001 and support for frameworks such as NIST CSF, CIS benchmarks and industry-specific mandates (e.g., HIPAA, GDPR)
8. Showcase validated integrations with Cloud Native Computing Foundation (CNCF) projects (e.g., Kubernetes, Falco, OPA), support microservices architecture and actively participate in cloud-native security ecosystems



Kubernetes Management Platforms

Definition

Kubernetes continues to solidify its place as a cornerstone of enterprises' digital transformation initiatives. However, managing it at scale continues to be a major challenge. This quadrant assesses a mix of vendors offering infrastructure-centric Kubernetes management platforms designed to provision, automate and scale clusters and streamline post-deployment operations. Included are Day 0/1 capabilities covering cluster lifecycle automation (provisioning, upgrades, autoscaling) and Day 2 operations (security, cost tracking, drift detection), often enhanced by AI-driven RCA, cost optimization and predictive monitoring.

Given the growing reliance on Kubernetes to orchestrate modern applications, these platforms are expected to work seamlessly across hybrid and multicloud infrastructure, on-premises data centers and edge locations. This consistency is vital for engineering teams aiming to maintain governance, reliability and performance at scale.

Eligibility Criteria

The platform must:

1. Offer **Kubernetes infrastructure-centric platforms** that support either cluster provisioning/automation (Day 0 and Day 1) or post-deployment management functions (Day 2)
2. Support **hybrid** infrastructure, including integration with at least one leading hyperscaler such as AWS, Azure or GCP
3. Demonstrate active enterprise engagement through established partnerships or showcase growing adoption backed by documented case studies and client references
4. Demonstrate a **certain level of AI maturity or plans to leverage AI across** at least one business use case (not restricted to anomaly detection, generating remediation guidelines, intelligent resource management, intelligent noise reductions, RCA, cost optimizations and drift management)
5. Detect issues within **K8s cluster(s)** to ensure its higher uptime
6. Provide an integrated view of performance metrics across clusters and workloads
7. Support a catalog of integrations to extend platform capabilities



Quadrants by Region

As a part of this ISG Provider Lens™ quadrant study, we are introducing the following four quadrants in the Multi Public Cloud Solutions 2025 report:

Quadrant	Global
Multicloud FinOps Platforms	✓
Multicloud Observability Platforms	✓
Multicloud Security Platforms	✓
Kubernetes Management Platforms	✓



The research phase falls in the period between June and July 2025, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in October 2025.

Milestones	Beginning	End
Survey Launch	June 09, 2025	
Survey Phase	June 09, 2025	July 04, 2025
Sneak Preview	October 2025	November 2025
Press Release & Publication	December 2025	

Please refer to the [ISG Provider Lens™ 2025 research](#) agenda to view and download the list of other studies conducted by ISG Provider Lens™.

Access to Online Portal

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

Buyers Guide

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

In the course of the Multi Public Cloud Solutions IPL launch, we want to take advantage of the opportunity to draw your attention to related research and insights that ISG Research will publish in 2025. For more information, refer to the [Buyers Guide research schedule](#).

Research Production Disclaimer:

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



ISG Star of Excellence™ – Call for nominations

The Star of Excellence™ is an independent recognition of excellent service delivery based on the concept of “Voice of the Customer.”

The Star of Excellence™ is a program, designed by ISG, to collect client feedback about service providers’ success in demonstrating the highest standards of client service excellence and customer centricity.

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

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

It is our vision that the Star of Excellence™ will be recognized as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments.

To ensure your selected clients complete the feedback for your nominated engagement please use the Client nomination section on the Star of Excellence™ [website](#).

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

Here is the email address:

star@cx.isg-one.com



ISG Star of Excellence



The ISG Provider Lens 2025 – Multi Public Cloud Solutions research study analyzes the relevant software vendors/service providers in the global 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 study will include data from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. ISG recognizes the time lapse and possible market developments between research and publishing, in terms of mergers and acquisitions, and acknowledges that those changes will not reflect in the reports for this study.

All revenue references are in U.S. dollars (\$US) unless noted.



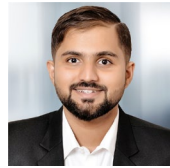
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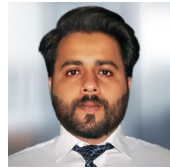
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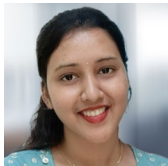
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Lakshmikavya
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ISG Provider Lens Advisors Involvement Program

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

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

The QCRT advisors:

- Help define and validate quadrants and questionnaires,
- Advise on service provider inclusion, participate in briefing calls,
- Give their perspectives on service provider ratings and review report drafts.

ISG Advisors to this study



Anay
Nawathe

Director



Invited Companies

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

Accuknox	Corestack	Harness	Mirantis
Anodot	Crayon	HCLSoftware	Neos
Apptio (Cloudability)	Crowdstrike	Honeycomb	Netapp
Aqua Security	Datadog	HPE	Newrelic
Canonical	Densify	IBM	Nirmata
Cast AI	DoiT	Infracost	Nutanix
Centilytics	Dynatrace	Komodor	Orca Securtiy
Check Point	Economize Cloud	Kubecost	Palo Alto Networks
Chronosphere	Elastic	KuberMatic	Pier Cloud
Cisco	Facets.Cloud	KubeSphere	Portainer
Clockwork.io	Fairwinds	Kyndryl	ProsperOps
CloudBolt	Finout	LogicMonitor	Qualys
CloudVane	Flexera	Logz.io	Rafay
Cloudzero	Fortinet	ManageEngine	Rancher
Coralogix	Grafana	MeshIQ	Semaphore



Invited Companies

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Sentinel One

Service Now

Skyhigh Security

Snyk (Fugue)

SoftwareOne

Solar Winds

Solvd's Kublr

Sophos

Spectro Cloud

Splunk

Sumologic

Sysdig

Tenable

Ternary

Tigera

Trend Micro

Uptycs

Upwinds

Vantage

Vega Cloud

Virtasant

VMware

Wiz

YotaScale

Zscaler



iSG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens™ research, please visit this [webpage](#).

iSG Research™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

ISG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: [Public Sector](#).

For more information about ISG Research™ subscriptions, please email contact@isg-one.com, call +1.203.454.3900, or visit research.isg-one.com.

iSG

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

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

For more information, visit isg-one.com.





JUNE, 2025

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