

Multi Public Cloud Services

A report comparing provider strengths, challenges and differentiators across AI-optimized cloud solutions



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AI is reshaping enterprise cloud strategies, driving access to models and computing capacity to succeed. Enterprises need multiple public cloud environments that are scalable, secure, cost-transparent, compliant and operationally mature. This study evaluates providers across the multi public cloud value chain, covering consulting and transformation services, managed services, hyperscale infrastructure and platform services, SAP Cloud Infrastructure and Platform Services, secure enterprise filesharing services and sovereign cloud infrastructure services.

Enterprises are increasingly using multiple cloud platforms to support AI innovation, regulatory compliance, sustainability goals, resilient operations and business agility. This shift requires stronger workload placement strategies, cloud-native engineering capabilities, integrated operations and governance models that work across providers, regions and regulatory requirements.

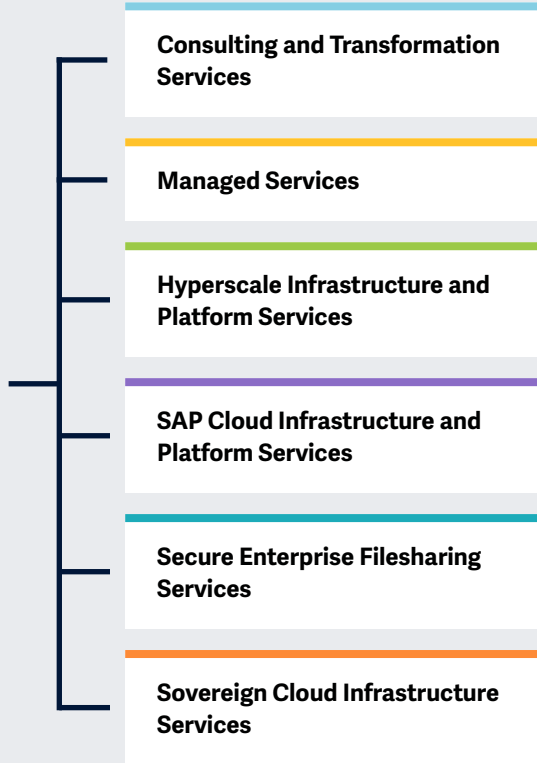
As AI is intensifying these requirements, GenAI and emerging agentic AI workloads are increasing the demand for automation, data readiness, security, observability, performance management and consumption-based cost control. Managed services must include stronger FinOps capabilities, especially where AI workloads create variable costs.

Enterprises are reassessing the running of critical workloads and data. While SAP Cloud Infrastructure and Platform Services remain central for business-critical landscapes, secure enterprise filesharing supports controlled collaboration and sovereign cloud infrastructure addresses jurisdiction-aware delivery, customer-controlled encryption options such as hold your own key (HYOK) and workload portability. Providers that combine technical depth, regulatory awareness, automation maturity and enterprise-grade delivery capabilities are best positioned to support secure, efficient and AI-ready multi public cloud environments.



This study focuses on what ISG perceives as the most critical aspects of **multi public cloud services** in 2026.

Simplified Illustration Source: ISG 2026



The ISG Provider Lens® Multi Public Cloud Services 2026 study offers the following to business and IT decision makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments on their competitive strengths and portfolio attractiveness
- Focus on different markets, including the APAC, Brazil, the EU, France, Germany, the Nordics, Switzerland, the U.K., the U.S. and the U.S. Public Sector.

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



Definition

This quadrant evaluates consulting and transformation service providers that help enterprises plan, design and execute modernization programs across multiple public cloud environments. Providers support cloud strategy, migration planning, operating model design, application modernization, AI enablement and transformation governance across hyperscaler and sovereign cloud platforms. Their services include workload assessment, dependency mapping, target architecture design, migration roadmaps, cloud-native engineering and change enablement. Leading providers embed FinOps-by-design, AIOps, automation and GenAI-assisted methods into transformation programs to improve speed, cost transparency, repeatability and business alignment. Buyers use these providers to reduce transformation risk, define scalable multicloud operating models and prepare application and data landscapes for AI-enabled business processes.

Eligibility Criteria

1. Demonstrate end-to-end **multicloud consulting and transformation** experience, including **migration, modernization** and operating model design
2. Provide certified delivery capabilities across **at least two major public cloud platforms** such as AWS, Microsoft Azure, Google Cloud and OCI
3. Design cloud- and **AI-ready** target **architectures** using containers, APIs, serverless services, automation and security-by-design principles
4. Embed **FinOps-by-design** capabilities, including cost modeling, tagging, forecasting, governance and business-case validation during transformation
5. Use structured **assessment** and **planning** methods, including application discovery, dependency mapping, workload placement and migration wave planning
6. Provide **reusable frameworks**, accelerators and **automation** toolchains for migration, modernization, testing, documentation and knowledge transfer
7. Demonstrate **governance** capabilities, covering **compliance, responsible AI**, financial control, risk management and transformation performance tracking
8. Demonstrate **sovereign cloud** consulting and implementation capabilities (for select geographies), including compliance with regional data residency, digital sovereignty regulations and localized governance frameworks across relevant platforms



Definition

This quadrant evaluates managed service providers that operate, secure and continuously optimize complex environments across multiple public cloud platforms. Providers deliver day-to-day cloud operations, service governance, incident and problem management, automation, site reliability engineering (SRE) practices, AIOps, FinOps and security integration across hyperscaler and sovereign cloud environments. Their services help enterprises improve resilience, cost transparency, performance, compliance and operational scalability while reducing manual effort. Leading providers increasingly use AIOps, GenAI and agentic AI capabilities to correlate events, accelerate root cause analysis (RCA), recommend or trigger remediation, optimize resource consumption and improve service desk productivity. Buyers use these providers to manage multicloud complexity, control variable service consumption costs and establish a reliable operating model for AI-ready enterprise cloud services.

Eligibility Criteria

1. **Manage complex multicloud environments** across at least two major public cloud platforms and ensure interoperability across tools, processes and operating models
2. **Provide certified managed service capabilities** and recognized partnerships with top hyperscalers
3. **Deliver 24/7 cloud operations**, including SRE, incident, problem and change management, service governance, SLA reporting and continuous service improvement
4. **Embed FinOps into managed operations**, including cost optimization for AI and cloud workloads
5. **Use AIOps, automation and AI-assisted or agentic capabilities** for monitoring, event correlation, RCA, remediation recommendations, workflow orchestration and performance improvement
6. **Provide integrated cloud security, compliance and data governance**
7. **Support cloud-native operations** for containers, serverless environments, APIs, IaC and DevOps pipelines
8. **Offer industry-aligned managed service models** for regulated environments, including data locality, compliance reporting, resilience requirements and operational risk controls
9. **Demonstrate measurable operational outcomes**, such as improved availability, reduced incident resolution times and optimized consumption costs



Definition

This quadrant evaluates hyperscale cloud providers that deliver enterprise-grade IaaS and PaaS platforms as the foundation for cloud-native and AI-first digital operations. Providers offer scalable global and regional infrastructure, including compute, storage, networking, databases, containers, serverless services, DevOps tooling, backup and disaster recovery, data platforms and AI services. Their platforms enable enterprises to build, modernize, deploy and operate applications, data environments, GenAI solutions and emerging agentic AI workloads at scale. Leading providers combine AI-optimized infrastructure, integrated model services, orchestration frameworks, developer ecosystems, security controls, compliance capabilities and marketplace access. Buyers use these platforms to accelerate innovation while maintaining resilience, cost visibility, data residency, sustainability, interoperability and operational control across distributed cloud environments.

Eligibility Criteria

- 1. Deliver enterprise IaaS/PaaS** across compute, storage, networking, databases, containers, serverless, backup/DR, data services and automated provisioning
- 2. Provide AI-optimized infrastructure**, including GPU/TPU or specialized silicon, HPC clusters, high-bandwidth networking and low-latency architectures
- 3. Offer integrated AI solutions** for foundation models, fine-tuning, inferencing, multi-modal GenAI, model hosting, MLOps and vector/RAG data services
- 4. Support AI and agentic orchestration** across regions and hybrid or multicloud environments, including event triggering, policy automation and failover
- 5. Ensure security, compliance and sovereignty** through identity access management (IAM), encryption/key management, auditability, data residency and certifications such as ISO, SOC, GDPR and C5
- 6. Provide transparent commercial models**, including flexible pricing, and cost visibility for consumption of AI, data and cloud workloads
- 7. Demonstrate ecosystem maturity** through marketplaces, partner programs, third-party AI tools, agents, data services and industry solutions
- 8. Support portability and sustainability** through APIs, IaC, open standards, hybrid deployment, efficient infrastructure and emissions transparency



Definition

This quadrant evaluates providers delivering cloud infrastructure and platform services for SAP deployment, operation, modernization and optimization. These providers enable enterprises to run and transform SAP environments, including SAP S/4HANA, SAP Business Technology Platform (BTP), SAP Business Data Cloud, SAP Analytics Cloud, AI services and other SAP solutions.

Leading providers deliver scalable, secure and compliant cloud platforms while supporting migration, modernization and lifecycle management across hybrid and multicloud environments. They differentiate through AI and automation embedded throughout the SAP lifecycle, leveraging GenAI for migration and code modernization, AI-powered assistants for landscape planning and optimization, and agentic AI for autonomous monitoring, remediation and operational intelligence.

Providers are assessed on their ability to combine SAP ecosystem expertise, cloud platform capabilities, AI-driven innovation and operational excellence to support long-term business transformation and continuous optimization.

Eligibility Criteria

1. Offer **SAP-certified infrastructure and platform** services that support SAP S/4HANA, SAP HANA, SAP BTP and other SAP cloud solutions
2. Demonstrate **expertise** across the broader **SAP ecosystem**, including SAP Business Data Cloud, Datasphere, SAP Analytics Cloud, SuccessFactors, Ariba, CX and Integration Suite
3. Support **RISE with SAP, GROW with SAP and hybrid SAP** deployment models. Provide **scalable, secure and compliant cloud** architectures with regional and global delivery capabilities
4. Provide **AI-driven tools** for SAP landscape **assessment, sizing, architecture planning and modernization**
5. Provide **agentic AI** services that enhance monitoring, anomaly detection, root cause analysis and automated remediation
6. Offer **tooling for automated lifecycle management**, including provisioning, patching, backup, recovery and disaster recovery
7. Support **integration** for **SAP Business AI, Joule, AI Foundation and related SAP AI services**
8. Provide tools that support **AI-driven performance**, resource and **cost optimization** across SAP environments
9. Demonstrate structured **migration methodologies, accelerators** and SAP-certified frameworks
10. Integrate with **SAP-native management** and operations tools, including SAP Cloud ALM and SAP Landscape Management (LaMa)



Secure Enterprise Filesharing Services

Definition

This quadrant evaluates SaaS vendors and enterprise file collaboration platforms that provide secure filesharing, synchronization, data room, and controlled external exchange capabilities for organizations in Germany. These platforms enable users to store, access, co-edit, govern and share business-critical documents across devices, locations and organizational boundaries while meeting enterprise security, compliance and sovereignty requirements. Providers differentiate through encryption, key management, identity integration, granular access policies, audit trails, versioning, recovery, workflow support and administrative transparency. Leading platforms also support German or EU data residency, secure email or large-file exchange, data loss prevention (DLP), content classification, AI-assisted governance and integration with productivity, collaboration and enterprise content ecosystems. Buyers use these solutions to enable productive collaboration while controlling data location, access rights, regulatory evidence and exposure risk.

Eligibility Criteria

- 1. Provide enterprise filesharing and synchronization**, including secure storage, cross-device access, offline support, versioning, recovery and controlled file exchange
- 2. Enable secure collaboration and data rooms** for internal users, external partners and regulated multi-user scenarios, including role-based access and workflow support
- 3. Offer administrative governance**, including unified dashboards, sharing policies, user and group management, activity tracking, reporting, retention and audit trails
- 4. Deliver strong access and data security**, including multi-factor authentication (MFA), identity integration, zero-trust controls, encryption during data processing at rest and in transit, malware protection and DLP
- 5. Support advanced encryption and key control**, including end-to-end or client-side encryption, secure key management and optional customer-controlled keys
- 6. Demonstrate German/EU compliance readiness**, including GDPR, NIS2, KRITIS, DORA, ISO 27001, ISO 27018, BSI C5, TÜV IT Level 4 or equivalent standards
- 7. Support data residency and sovereignty**, including hosting or processing options in Germany or the EU and transparent operational, contractual and jurisdictional controls
- 8. Facilitate secure external exchange**, including secure email transmission, large file transfer, guest access, download controls, expiry rules and evidence of receipt or access
- 9. Integrate with enterprise ecosystems**, including office suites, email systems, collaboration tools, operating systems, APIs, add-ons and enterprise content platforms
- 10. Provide automation or AI-assisted governance**, such as content classification, anomaly detection, risk scoring, policy recommendations and workflow automation



Definition

This quadrant evaluates cloud infrastructure providers in the EU and APAC delivering enterprise-grade sovereign IaaS for regulated and public sector organizations. Providers offer regional, dedicated or partner-led environments for compute, storage, networking, backup, disaster recovery (DR), containers and automation while governing the location and access paths of data, metadata, workloads, encryption keys, support activity and control planes. In the EU, minimum viable sovereignty requires legal, operational and technical separation from non-EU jurisdictional exposure, local personnel, customer-controlled keys, auditability and compliance with GDPR, NIS2, DORA, BSI C5, SecNumCloud, ISO standards and emerging EU sovereignty expectations. In APAC, providers must meet equivalent national residency, security and public sector assurance frameworks. Buyers use these services for sensitive workloads, AI systems and data platforms requiring resilience, portability and commercial viability.

Eligibility Criteria

- 1. Operate in-region sovereign data centers or zones** with enforceable data, metadata, workload and key residency
- 2. Provide enterprise-grade IaaS**, including compute, storage, networking, backup, DR, containers, automation and reserved capacity
- 3. Prove evidence of EU compliance readiness** for GDPR, NIS2, DORA, BSI C5, SecNumCloud, ISO standards and emerging EU cloud sovereignty expectations, **or APAC equivalents** such as IRAP, MTCS, ISMAP and MeitY
- 4. Enforce local operational control** through resident support, privileged-access governance, audit logs and separation from non-sovereign operations
- 5. Enable customer-controlled encryption**, including customer-managed key (CMK), hold your own key (HYOK) or comparable models, to limit unauthorized provider, third-party or foreign access
- 6. Support resilient sovereign architectures** with regional redundancy, replication, recovery testing and policy-based workload placement
- 7. Provide sovereign AI and data infrastructure**, including GPU or accelerated compute, within the evaluated jurisdiction
- 8. Demonstrate openness, portability, transparent pricing and sustainability evidence** through APIs, Kubernetes, Terraform/OpenStack or comparable standards, exit support, energy-efficiency and emissions reporting



Quadrants by Regions

As a part of this ISG Provider Lens® quadrant study, we are introducing the following six quadrants in the Multi Public Cloud Services 2026 report:

Quadrant	Brazil	France	Germany	Nordics	Switzerland	U.K.	U.S.	U.S. Public Sector	EU	APAC
Consulting and Transformation Services	✓	✓	✓	✓	✓	✓	✓	✓		
Managed Services	✓	✓	✓	✓	✓	✓	✓	✓		
Hyperscale Infrastructure and Platform Services	✓	✓	✓	✓	✓	✓	✓	✓		
SAP Cloud Infrastructure and Platform Services	✓	✓	✓	✓	✓	✓	✓	✓		
Secure Enterprise Filesharing Services			✓							
Sovereign Cloud Infrastructure Services									✓	✓



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

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

Please refer to the [ISG Provider Lens® 2026](#) 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 Services IPL launch, we want to take advantage of the opportunity to draw your attention to related research and insights that ISG Research will publish in 2026. For more information, refer to the [Buyers Guide research schedule](#).

Research Production Disclaimer:

ISG collects data for the purposes of 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® 2026 – Multi Public Cloud Services 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.



Contacts For This Study

Study Sponsor



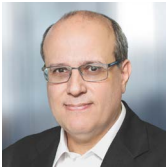
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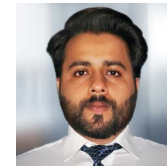
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Global Project
Manager



ISG Provider Lens® Advisors Involvement Program

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

In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three 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.

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**Principal Consultant
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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.

7P	ANS Group	BIP	Capgemini
Abraxas	Apalia	Birlasoft	Capita
Accenture	Apexon	BitHawk	CDW
act digital	Arribatec	BJSS	CenterDevice
Adacor	Arvato Systems	Bleu	Centron
Adelius	Atea	BlueShift	Certsys
adesso SE	Atos	Box	CGI
adlon	Aveniq	Brainloop	China Telecom
Advania	avvale	Brillio	CI&T
AI/R	AWS	BRQ	Cirion Technologies
Alibaba Cloud	Axians	BT	Citrix
All for One Group	Baggenstos	BTC	Claranet
AllCloud	BearingPoint	BySeven	Claro Empresas
Altimetrik	Bechtle	Bytes Software	Clever Cloud
Amanox Solutions	Bell Integration	CANCOM	Cloud Temple



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Cloud4C	Dedalus	Eficode	General Dynamics
CloudKeeper	Dell Technologies	ELCA/EveryWare	GFT
Cloudside	Deloitte	Ensono	Giant Swarm
CloudSigma	Deutsche Telekom (T Business)	ESX	GleSys
CloudThat	Deutsche Telekom/T-Systems	Euvic	Globant
Coforge	Devoteam	Exoscale	Gofore
Cognizant	DigitalOcean	Extreme Group	Google
Computacenter	DoiT	EY	Grass-Merkur
CONVOTIS	doubleSlash	FCamara	Grid Dynamics
Crayon	DRACoon	FPT Software	Grupo GBI
CTERA Networks	Dropbox	FPTSoftware	Gwcloud
Data One	DXC Technology	FTAPI	Hardis Group
DataEnv	Econis	Fujitsu	HARMAN
DATAGROUP	Ecritel	Fururice	HCLTech
Deal	ECS	G&P	Hepta



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Hexaware	Innova Solutions	I-TRACING	Lumen Technologies
HighQ	Innovation Process Technology (IPT)	Kaartech	Lumini IT
Hitachi Digital Services	innoverdigital.com	Kainos	Magalu Cloud
HPE	INS Systems	Keeggo	MaibornWolff
Huawei	Insight	Knowit	Marlabs
IBM	Intuitive.Cloud	KPMG	Materna
idgard	inventx	Kyndryl	MG Info
Igeeks	IONOS	Lanlink	MHP
Indium	IOS Informática	Leega	Microland
Inetum	Ippon	leitzcloud	Microsoft
Infinite Computer Solutions	IT Global	Lemongrass	Mindworks
infomaniak	Itera	Lenovo	Minsait
Infosys	itesys	Littlefish	Mphasis
Ingram Micro	itm8	Logicalis	msg services
Inmetrics	ITpoint Systems	LTIMindtree	MSRCosmos



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MTF	OPSIO	Public Cloud Group	ScaleUp Technologies
Netcloud	Oracle	PwC	Scaleway
netfiles	Orange Business	Pythian	SCC
Nextcloud	Orion Innovation	q.beyond	SEIDOR
Nine Internet Solutions	OUTSCALE	Quantiphi	Senacor
N-iX	OVHcloud	Rackspace Technology	Sentia
noris network	ownCloud	Randstad Digital	SIEVERS GROUP
Noventiq	oXya	RapidScale	Sigma
NTT DATA	Persistent Systems	ratiokontakt	Siili Solutions
Oi Soluções	Pier Cloud	Red River	Skaylink
Ollion (2nd Watch)	plusserver	Reply	Skyone
OneAdvanced	Proact	S3NS	Slalom
Onepoint (Stack Labs)	ProCloud	SAP	SLK Software
Open	Provectio	Sauter	SmartIT Services
OpenText	Proximus Group	ScaleSquad	Softcat PLC



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SoftServe	Sutherland Global	Timspirit	Vivicta
Softtek	Swisscom	TIVIT	VSHN
SoftwareOne (Crayon)	Syntax	TO THE NEW	VVDN Technologies
Solita	SysGroup	Trianz	WAGNER
Solo Network	TCS	UMB	Wevy
Solteq oy	TeamDrive	Unisys	WIIT
Somnitec	TeamWork	UST	Wipro
Sonata Software	Tech Mahindra	V8.Tech	Xebia
Sonda	TechWave	valantic	Zensar Technologies
Sopra Steria	Telefonica Tech	Valcann	Zones
SOU.cloud	Teltec	Venha Pra Nuvem	
ST IT	Tencent Cloud	Vericode	
Stack Labs	Think IT	Version 1	
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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](#).

Research™

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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, 2026



BROCHURE: MULTI PUBLIC CLOUD SERVICES