

Multi Public Cloud Services

A research report comparing provider strengths,
challenges and competitive differentiators





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This study evaluates providers in the public cloud and AI services ecosystem that deliver consulting, transformation, managed services, FinOps, sovereign infrastructure, cloud-native platforms and SAP-centric capabilities designed to meet the distinct needs of U.S. public sector organizations, including state, local and educational (SLED) agencies. These providers enable SLED institutions to modernize legacy systems, ensure compliance, enhance operational resilience and scale secure multicloud and AI-native environments through automation, GenAI and advanced optimization frameworks.

In the public sector, cloud adoption in the SLED space is essential. Beyond cost efficiency and scalability, public agencies embrace cloud and AI to drive innovation in citizen services, improve sustainability outcomes and enforce strict regulatory and data sovereignty mandates.

The demand for FinOps governance, AI orchestration and secure hybrid cloud models is rising. As intelligent automation reshapes operational workflows, SLED organizations are shifting from reactive IT management to proactive and AI-augmented service delivery. Priorities such as sovereignty, sustainability, workload portability and encryption frameworks such as hold your own key (HYOK) are foundational for secure and jurisdiction-compliant operations.

SLED agencies are increasingly leveraging GenAI and agentic AI to boost staff productivity, enhance educational outcomes and create responsive digital services for citizens. To succeed in this highly regulated and mission-driven environment, providers must combine strong technical expertise with public sector acumen and a clear commitment to compliance, resilience and long-term value.



This study focuses on what ISG perceives as the most critical **multipublic cloud services for U.S. public sector** clients in 2025.

Simplified Illustration Source: ISG 2025

Consulting and Transformation Services

Managed Services

FinOps Services and AI-driven Optimization

Hyperscale Infrastructure and Platform Services

SAP HANA Infrastructure Services

Definition

The ISG Provider Lens™ Multi Public Cloud Services 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 based on their competitive strengths and portfolio attractiveness
- Focus on the U.S. public sector 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.



Definition

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

Top providers deliver the following:

- **Consulting services**

- Transformation road maps, business case development and workload modernization
- Cloud-native strategy design (including APIs, containers and serverless computing)

- **Transformation services**

- Design, migration and configuration of cloud-native and AI-native architectures
- Integration of DevSecOps, AIOps, GenAI and FinOps capabilities

- **Compliance and governance services**

- Establishing policy frameworks aligned with federal, state and education regulations (e.g., CJIS, FedRAMP, FERPA)
- Creating essential guardrails such as HYOK and role-based encryption to implement GenAI solutions by adhering to sovereignty and security requirements

Eligibility Criteria

1. Demonstrated business in planning and delivering multicloud services for public sector clients, especially in SLED agencies, including compliance with sector-specific regulations
2. Ability to design and implement cloud transformation strategies that integrate cloud-native services (containers, APIs, serverless), GenAI, AIOps, FinOps and sovereignty-aware models
3. Proven experience in conducting environment assessments and optimizing legacy systems to prevent technical debt and support long-term agility
4. Expertise in cloud application migration using automation engines, preconfigured templates and public sector-compliant blueprints
5. **Certified delivery capabilities across at least two major hyperscalers** (e.g., AWS GovCloud, Microsoft Azure Government, Google Cloud, Oracle Cloud)
6. Experience with GenAI-powered services for automation, documentation, chatbots and knowledge retrieval tailored for public services
7. **Utilization of AI-native toolsets**, pretrained models or domain-specific agents for assessment and planning (preferred)
8. Development or adoption of public sector-ready AI assets, responsible AI frameworks or regulatory-compliant design accelerators (preferred)



Managed Services

Definition

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

For SLED clients, these services increasingly align with mission-driven outcomes such as improved citizen services, digital equity, sustainability, and operational resilience.

Services typically include the following:

- AI-native management platforms supporting GenAI workloads and AI-driven observability
- Advanced FinOps integration, including dynamic workload placement, autonomous rightsizing and outcome-linked financial optimization

- Real-time multicloud monitoring, cloud sovereignty control and predictive analytics to ensure compliance, performance and sustainability
- Automated provisioning, DevOps pipeline implementation, container and serverless orchestration and cloud-native security integration

Eligibility Criteria

1. Proven **track record of delivering managed public cloud services** to state, local and/or education (SLED) clients, including regulated and grant-funded entities
2. Expertise in **sovereign operations**, including encryption key control (e.g., HYOK), data residency enforcement and jurisdictional compliance
3. Support **GenAI, AIOps and SRE practices** tailored to the operational and resilience needs of mission-critical workloads
4. Showcase FinOps maturity, including **AI-assisted cost modeling, scenario planning and prompt-based financial control tools**
5. Demonstrated ability to **integrate legacy and cloud-native systems** using secure APIs, IaC patterns and reusable compliance modules
6. Verified partnerships and certifications with **at least two hyperscalers** and a clear understanding of their public sector solutions (e.g., AWS GovCloud, Azure Government)
7. Delivery of **secure-by-design cloud operations**, including model-level AI security, differential privacy and trust-based access control
8. Deliver **contextualized managed services**, including sector-specific KPIs, reporting dashboards and citizen-centric outcome frameworks
9. Use **AI agents or copilots** to drive automation of FinOps, compliance reporting and incident response aligned to public mandates (optional)



FinOps Services and AI-driven Optimization

Definition

This quadrant assesses providers delivering intelligent, automated and predictive cloud cost optimization across multipublic clouds. These providers help public sector organizations improve budget visibility, fiscal control and funding alignment by embedding FinOps principles with GenAI, LLMs and automation.

FinOps services in the public sector are mission-aligned and compliance-driven, supporting cloud spend optimization across grant, appropriation and annual budget cycles.

Leading providers deliver FinOps services through:

- AI-native platforms with telemetry, forecasting and outcome metrics
- Large language model (LLM)-based automation for budget and policy enforcement and anomaly detection
- Predictive engines for usage trends and budget-linked scaling
- Autonomous remediation via explainable alerts and sustainability insights
- Chargeback/showback tied to agency or program-level accountability
- Policy governance covering tagging, guardrails and approvals
- Operational change management (OCM) and capability building for FinOps adoption in federated settings

Eligibility Criteria

1. **Demonstrated FinOps delivery** for public sector clients with measurable optimization outcomes across at least three hyperscalers
2. **FinOps-certified experts** covering all three pillars — inform, optimize and operate, aligned with budgetary and funding models
3. **AI- or LLM-based orchestration** of real-time financial controls beyond traditional dashboarding
4. Proven capabilities in prompt-based cost insights, explainability, tagging compliance and policy-driven guardrails
5. Support SLA-backed cost targets, adaptive budgets and sustainability-linked optimization models
6. Implement FinOps CoEs, training and **change management** in federated or cross-agency IT environments
7. Experience in chargeback/showback for departmental or program-level financial transparency



Hyperscale Infrastructure and Platform Services

Definition

This quadrant evaluates hyperscalers offering infrastructure-as-a-service (IaaS) and platform-as-a-service (PaaS) capabilities for public sector needs, particularly for SLED organizations. These providers enable secure, scalable and AI-native platforms that support digital transformation, GenAI workloads and modern application development within regulated environments.

Leading hyperscalers' capabilities include:

- Self-service IaaS for compute, storage, networking, HPC and ML/GenAI acceleration
- Modern PaaS for containerized, event-driven and microservice-based workloads
- Integrated AI platforms offering access to LLMs, tuning pipelines and RAG frameworks
- Developer-ready software development kits (SDKs) for cloud-native, edge-aware and agent-centric apps
- Marketplaces with curated third-party tools and SLED-specific blueprints
- Sovereign-by-design infrastructure for data residency, encryption and compliance
- Sustainable cloud operations with clean energy commitments
- High-bandwidth and globally scalable cloud zones supporting mission resilience

Eligibility Criteria

1. Offer a comprehensive IaaS portfolio, including **ML-** and **HPC-optimized** compute instances, container services, serverless platforms, backup solutions, storage tiering and network orchestration optimized for public sector clients
2. Showcase **dedicated infrastructure for AI and ML**, including specialized silicon, GPU/TPU clusters, access to foundational LLMs and managed AI infrastructure services
3. Expertise in orchestrating **agent-based computing** across cloud regions, supporting real-time, autonomous workloads
4. Offer **low-latency, high-bandwidth** and **sovereign** environments to orchestrate agents across public cloud environments for SLED agencies
5. Offer transparent and flexible **billing models**, including on-demand, reserved, spot and sustainable pricing tiers with public pricing disclosures
6. Sovereign environments with encryption control, data locality guarantees and compliance with FedRAMP, StateRAMP, CJIS, ISO 27001, etc
7. Have an **extensive partner ecosystem**, offering training, developer enablement, certification programs and coinnovation initiatives to accelerate cloud adoption and enhance maturity
8. Offer **clean energy** and **carbon-reduction** programs
9. Provide support for IaC and **serverless computing** with **automated provisioning**, event triggering and failover



Definition

This quadrant evaluates public cloud IaaS providers that offer certified, scalable and SAP-optimized platforms for public sector organizations to host SAP S/4HANA and 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 for SLED agencies.

Providers' key service capabilities include:

- 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
- Partner ecosystems, encompassing certified SAP service providers
- SAP-certified infrastructure components encompassing memory-intensive virtual machines (VMs) with over 6 TB capacity, flexible storage tiers, high-throughput networking and disaster recovery architecture across multiple regions and availability zones
- AI-powered assistants for SAP landscape sizing, architecture design, cost simulation, migration planning and dynamic configuration recommendations

Eligibility Criteria

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



Quadrants by Region

This ISG Provider Lens™ quadrant study includes the following five quadrants:

Quadrant	U.S. Public Sector
Consulting and Transformation Services	✓
Managed Services	✓
FinOps Services and AI-driven Optimization	✓
Hyperscale Infrastructure and Platform Services	✓
SAP HANA Infrastructure Services	✓



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

Milestones	Beginning	End
Survey Launch	June 09, 2025	
Survey Phase	June 09, 2025	July 07, 2025
Sneak Preview	October 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 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 2024. 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 Services research study analyzes the relevant software vendors/service providers in the U.S. Public Sector 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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Study Sponsor



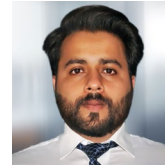
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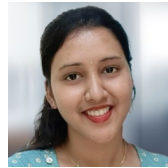
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ISG Provider Lens Advisors Involvement Program

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



Alex
Perry

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.

Accenture	General Dynamics Information Technology	Rackspace Technology
Atos	Google	Red River
AWS	HCLTech	SAP
Capgemini	HPE	TCS
CDW	IBM	Tech Mahindra
CGI	Infosys	Unisys
Coforge	KPMG	UST
Cognizant	Kyndryl	Wipro
Deloitte	Microsoft	Zensar Technologies
DigitalOcean	Mphasis	Zones
DXC Technology	NTT DATA	
ECS	Ollion (2nd Watch)	
Ensono	Oracle	
EY	OVHcloud	
Fujitsu	PwC	



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.





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