Cloud Platforms Buyers Guide

Software Provider and Product Assessment

ISG Research

Cloud Platforms

Cloud Platform software stands at the forefront of complex digital transformations in enterprise. Each cloud model presents unique benefits and challenges, enabling enterprises to tailor their IT strategies to align with specific business needs. This Buyers Guide explores the nuances of each cloud model, highlighting the essential functionality and trends that enterprises must heed to make informed decisions in this ever-changing environment.

ISG Research defines Cloud Platform software as the confluence of Public Cloud, Private Cloud, Hybrid Cloud and Sovereign Cloud, offering enterprises a spectrum of options for resource deployment and management. Each cloud model serves distinct segments of industries, addressing specific challenges. For example, the Public Cloud supports startups with cost-effective solutions, whereas the Private Cloud caters to enterprises with heightened security needs. Hybrid Cloud solutions find favor among enterprises seeking flexibility, while Sovereign Cloud options help those navigating stringent local compliance requirements.

ISG asserts that through 2027, over 90% of enterprise organizations will operate hybrid and multi-cloud deployments to distribute cloud-native workloads for resilience, compliance and operational agility.

The journey of Cloud Platform software has evolved significantly over the past two decades. The Public Cloud gained prominence with early innovators offering cloud services, transitioning from a niche offering to a cornerstone of modern enterprise infrastructure. Private Cloud solutions emerged in response to demands for stricter data control, while Hybrid Cloud strategies arose from the recognition that enterprises can maximize efficiency by blending both models. In recent years, the Sovereign Cloud concept has gained traction amidst increasing data protection regulations, requiring enterprises to adhere to local compliance standards.

Cloud computing has transformed the way businesses operate since its inception in the late 2000s, evolving from a niche concept into a vital component of modern IT strategy. The Public Cloud has emerged as a game-changer for enterprises looking to harness the power of scalable resources while minimizing costs. By leveraging third-party services accessible via the internet, enterprises can focus on innovation rather than infrastructure, facilitating a rapid deployment of applications and services. However, as appealing as the cost efficiencies may be, IT leaders must tread carefully, balancing the advantages of shared resources with the paramount concerns of data security and regulatory compliance. As the adoption of Public

Cloud services continues to rise, understanding its implications for governance and risk management becomes crucial for decision-makers.

For enterprises that prioritize security and compliance, Private Cloud represents a robust solution tailored to meet stringent regulatory demands. Offering exclusive control over data and applications, this model empowers IT leaders to implement sophisticated security protocols without sacrificing performance. Whether hosted on-premises or through a trusted third-party provider, the Private Cloud allows for customized configurations that align with an enterprise's specific needs. As the landscape of data privacy regulations becomes increasingly complex, businesses that leverage Private Cloud solutions can confidently navigate compliance challenges while fostering an atmosphere of trust and security.

Hybrid Cloud is rapidly becoming the preferred strategy for enterprises seeking to optimize their IT infrastructure by blending the strengths of both Public and Private Cloud models. This versatile approach enables enterprises to harness the scalability of Public Cloud while maintaining the security and control of Private Cloud for sensitive workloads. By strategically distributing resources across different environments, IT leaders can enhance agility and performance, responding swiftly to evolving business needs. As enterprises become more sophisticated in their cloud strategies, the Hybrid Cloud has emerged as a crucial enabler for balancing operational efficiency with security and compliance.

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Sovereign Cloud stands out where data privacy and local compliance are gaining unprecedented importance as a tailor-made solution for enterprises navigating complex regulatory landscapes. By ensuring that sensitive data remains within geographic boundaries and is controlled by trusted providers, Sovereign Cloud models empower enterprises to uphold jurisdiction-specific laws and governance practices. This focus on local compliance not only mitigates risks associated with cross-border data transfers but also solidifies an enterprise's commitment to data sovereignty. Adopting Sovereign Cloud strategies becomes imperative for preserving enterprise reputations and building consumer trust while business leaders grapple with the implications of global data regulations.

To make informed buying decisions regarding Cloud Platform software, enterprises should prioritize an understanding of their specific business requirements and the potential implications of each cloud model. Evaluating security and compliance features offered by providers, understanding total cost of ownership and assessing integration capabilities with existing systems are critical

steps in this process. Engaging key stakeholders in discussions, focusing on long-term goals and conducting thorough provider assessments ensures that enterprises select solutions that best fit their strategic objectives.

Successful Cloud Platform software must offer scalability, flexibility and robust security features to effectively support enterprise demands. In Public Cloud environments, it is fundamental to provide reliable service delivery and comprehensive customer support. For Private Cloud solutions, customization options and compliance with industry-specific regulations are paramount. Hybrid Cloud systems should enable seamless integration and dynamic workload management, while Sovereign Cloud solutions must prioritize local compliance and data sovereignty while ensuring strong data governance practices.

Cloud platforms leverage artificial intelligence (AI) and machine learning (ML) functionalities to enhance their services and streamline operations. One of the key innovations is AI/ML-as-a-Service, which provides essential resources for model training, enabling organizations to develop sophisticated algorithms without the burden of managing complex infrastructure. Generative AI (GenAI) tools are emerging to support IT teams in creating comprehensive documentation that covers cloud integration and operational procedures with existing enterprise systems. Looking ahead, the anticipated arrival of agentic AI within the next couple of years promises to revolutionize cloud management by automating and orchestrating administrative tasks. Together, these advancements demonstrate how Cloud Platforms are harnessing AI and ML to enhance efficiency, improve collaboration and optimize resource management.

Enterprises considering Cloud Platform software providers should emphasize evaluating security and compliance features, scalability and flexibility of service offerings, cost structures and integration capabilities with existing enterprise systems. Fostering a multi-cloud strategy can further mitigate provider lock-in risks while enhancing operational efficiency.

The ISG Buyers Guide™ for Cloud Platform software evaluates software providers and products in key areas that include Infrastructure-as-a-Service (IaaS), Platform-as-a-Service (PaaS), Software-as-a-Service (SaaS), Public Cloud, Private Cloud, Hybrid Cloud, Sovereign Cloud, AI/ML-as-a-Service, Compute-as-a-Service, Data-Platform-as-a-Service, Function-as-a-Service, Networking-as-a-Service, Storage-as-a-Service, GenAI and Agentic AI, Cloud Application Marketplace, Global Reach and investments in capabilities. By focusing on these essential dimensions, the guide equips enterprises with the insights needed to make informed purchasing decisions that align with their strategic business objectives.

This research evaluates the following eight software providers that offer products that address key elements of Cloud Platforms as we define it: AWS, Google Cloud, IONOS, Microsoft, Oracle, OVHcloud, Scaleway and T-Systems.

Buyers Guide Overview

For over two decades, ISG Research has conducted market research in a spectrum of areas across business applications, tools and technologies. We have designed the Buyers Guide to provide a balanced perspective of software providers and products that is rooted in an understanding of the business requirements in any enterprise. Utilization of our research methodology and decades of experience enables our Buyers Guide to be an effective method to assess and select software providers and products. The findings of this research undertaking contribute to our comprehensive approach to rating software providers in a manner that is based on the assessments completed by an enterprise.

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The ISG Buyers Guide™ for Cloud Platforms is the distillation of over a year of market and product research efforts. It is an assessment of how well software providers' offerings address enterprises' requirements for Cloud Platform software. The index is structured to support a request for information (RFI) that could be used in the request for proposal (RFP) process by incorporating all criteria needed to evaluate, select, utilize and maintain relationships with software providers. An effective product and customer experience with a provider can ensure the best long-term relationship and value achieved from a resource and financial investment.

In this Buyers Guide, ISG Research evaluates the software in seven key categories that are weighted to reflect buyers' needs based on our expertise and research. Five are product-experience related: Adaptability, Capability, Manageability, Reliability, and Usability. In addition, we consider two customer-experience categories: Validation, and Total Cost of Ownership/Return on Investment (TCO/ROI). To assess functionality, one of the components of Capability, we applied the ISG Research Value Index methodology and blueprint, which links the personas and processes for Cloud Platforms to an enterprise's requirements.

The structure of the research reflects our understanding that the effective evaluation of software providers and products involves far more than just examining product features, potential revenue or customers generated from a provider's marketing and sales efforts. We believe it is important to take a comprehensive, research-based approach, since making the wrong choice of Cloud Platform technology can raise the total cost of ownership, lower the return on investment and hamper an enterprise's ability to reach its full performance potential. In addition, this approach can reduce the project's development and deployment

time and eliminate the risk of relying on a short list of software providers that does not represent a best fit for your enterprise.

ISG Research believes that an objective review of software providers and products is a critical business strategy for the adoption and implementation of Cloud Platform software and applications. An enterprise's review should include a thorough analysis of both what is possible and what is relevant. We urge enterprises to do a thorough job of evaluating Cloud Platform systems and tools and offer this Buyers Guide as both the results of our in-depth analysis of these providers and as an evaluation methodology.

Key Takeaways

Cloud Platforms have become the backbone of enterprise IT, shifting from niche infrastructure options to essential enablers of digital transformation. Public, Private, Hybrid and Sovereign models each bring distinct advantages, but most organizations are now combining them to maximize agility, security and compliance. Enterprises expect seamless interoperability across environments along with AI- and ML-powered services that reduce operational burden. Providers that deliver scalability, governance and explainable AI will enable enterprises to accelerate innovation while maintaining trust and resilience.

Software Provider Summary

The research identifies Microsoft, Oracle and Google Cloud as overall leaders, with Microsoft ranked highest across multiple categories. Classification placed AWS, Google Cloud, Microsoft and Oracle in the Exemplary quadrant, while IONOS, OVHcloud, Scaleway and T-Systems were categorized as Merit. No providers were placed in the Assurance or Innovative quadrants. The research assessed providers on Product Experience and Customer Experience to highlight strengths and areas for improvement.

Product Experience Insights

Product Experience represented 80% of the overall evaluation, weighted across Capability, Usability, Reliability, Adaptability and Manageability. Microsoft, Google Cloud and Oracle led in overall Product Experience. In Capability, Microsoft, Google Cloud and AWS excelled, while Google Cloud, AWS and Oracle led in Reliability. Google Cloud, Oracle and AWS distinguished themselves in Usability, while Oracle, Google Cloud and AWS led in Adaptability. Microsoft, Oracle and Google Cloud were strongest in Manageability. Leaders demonstrated breadth of functionality, integration of advanced services and operational resilience, making them best suited for enterprises.

Customer Experience Value

Customer Experience accounted for 20% of the overall evaluation, focused on Validation and TCO/ROI. Oracle, AWS and Google Cloud led in Customer Experience by demonstrating strong commitment, proven success cases and lifecycle support. In TCO/ROI, Oracle, Google Cloud and Microsoft performed best, showcasing clear value frameworks and alignment to enterprise goals. Providers that fell short often lacked sufficient customer references, clarity in their CX or tools to demonstrate ROI, which may limit enterprise confidence in adoption.

Strategic Recommendations

Enterprises should treat Cloud Platforms as strategic investments that unify compliance, usability and governance with intelligent services. Buyers should prioritize providers that combine strong security, multi-cloud interoperability and transparent AI with measurable cost and value frameworks. Platforms that deliver audit-ready compliance, automation that reduces operational burden and clear ROI evidence will inspire greater confidence and adoption. Using this framework, enterprises can align providers with organizational needs, digital resilience and long-term business priorities.

How To Use This Buyers Guide

Evaluating Software Providers: The Process

We recommend using the Buyers Guide to assess and evaluate new or existing software providers for your enterprise. The market research can be used as an evaluation framework to establish a formal request for information from providers on products and customer experience and will shorten the cycle time when creating an RFI. The steps listed below provide a process that can facilitate best possible outcomes.

1. Define the business case and goals.

   Define the mission and business case for investment and the expected outcomes from your organizational and technological efforts.
2. Specify the business needs.

   Defining the business requirements helps identify what specific capabilities are required with respect to people, processes, information and technology.
3. Assess the required roles and responsibilities.

   Identify the individuals required for success at every level of the enterprise from executives to frontline workers and determine the needs of each.
4. Outline the project's critical path.

   What needs to be done, in what order and who will do it? This outline should make clear the prior dependencies at each step of the project plan.
5. Ascertain the technology approach.

   Determine the business and technology approach that most closely aligns to your enterprise's requirements.
6. Establish software provider evaluation criteria.

   Utilize the product experience: Adaptability, Capability, Manageability, Reliability and Usability, and the customer experience in TCO/ROI and Validation.
7. Evaluate and select the technology properly.

   Weight the categories in the technology evaluation criteria to reflect your enterprise's priorities to determine the short list of software providers and products.
8. Establish the business initiative team to start the project.

   Identify who will lead the project and the members of the team needed to plan and execute it with timelines, priorities and resources.

The Findings

All of the products we evaluated are feature-rich, but not all the capabilities offered by a software provider are equally valuable to types of workers or support everything needed to manage products on a continuous basis. Moreover, the existence of too many capabilities may be a negative factor for an enterprise if it introduces unnecessary complexity. Nonetheless, you may decide that a larger number of features in the product is a plus, especially if some of them match your enterprise's established practices or support an initiative that is driving the purchase of new software.

Factors beyond features and functions or software provider assessments may become a deciding factor. For example, an enterprise may face budget constraints such that the TCO evaluation can tip the balance to one provider or another. This is where the Value Index methodology and the appropriate category weighting can be applied to determine the best fit of software providers and products to your specific needs.

Overall Scoring of Software Providers Across Categories

The research finds Microsoft atop the list, followed by Oracle and Google Cloud. Providers that place in the top three of a category earn the designation of Leader. Oracle and Google Cloud have done so in six categories; AWS in five; and Microsoft in four categories.

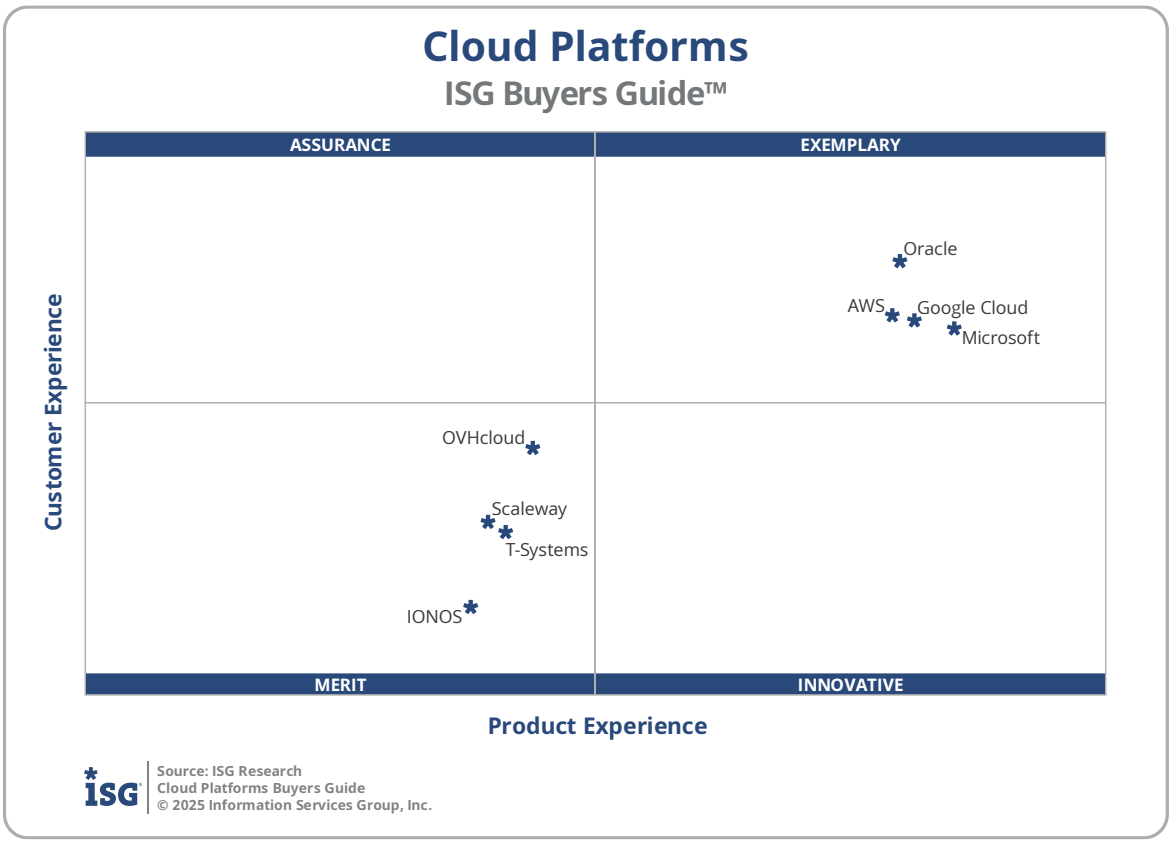
The overall representation of the research below places the rating of the Product Experience and Customer Experience on the *x* and *y* axes, respectively, to provide a visual representation and classification of the software providers. Those providers whose Product Experience have a higher weighted performance to the axis in aggregate of the five product categories place farther to the right, while the performance and weighting for the two Customer Experience categories determines placement on the vertical axis. In short, software providers that place closer to the upper-right on this chart performed better than those closer to the lower-left.

Cloud Platforms
Overall

Providers	Grade	Performance
Microsoft	A-	*Leader* 82.5%
Oracle	B++	*Leader* 80.4%
Google Cloud	B++	*Leader* 79.9%
AWS	B++	79.1%
OVHcloud	B-	60.6%
Scaleway	B-	57.7%
T-Systems	B-	56.7%
IONOS	C++	54.7%

Source: ISG Research
Cloud Platforms Buyers Guide

The research places software providers into one of four overall categories: Assurance, Exemplary, Merit or Innovative. This representation classifies providers' overall weighted performance.



Exemplary: The categorization and placement of software providers in Exemplary (upper right) represent those that performed the best in meeting the overall Product and Customer Experience requirements. The providers rated Exemplary are: AWS, Google Cloud, Microsoft and Oracle.

Innovative: The categorization and placement of software providers in Innovative (lower right) represent those that performed the best in meeting the overall Product Experience requirements but did not achieve the highest levels of requirements in Customer Experience. No providers are rated Innovative.

Assurance: The categorization and placement of software providers in Assurance (upper left) represent those that achieved the highest levels in the overall Customer Experience requirements but did not achieve the highest levels of Product Experience. No providers are rated Assurance.

Merit: The categorization of software providers in Merit (lower left) represents those that did not surpass the thresholds for the Assurance, Exemplary or Innovative categories in Customer or Product Experience. The providers rated Merit are: IONOS, OVHcloud, Scaleway and T-Systems.

We warn that close provider placement proximity should not be taken to imply that the packages evaluated are functionally identical or equally well suited for use by every enterprise

or for a specific process. Although there is a high degree of commonality in how enterprises handle Cloud Platforms, there are many idiosyncrasies and differences in how they do these functions that can make one software provider's offering a better fit than another's for a particular enterprise's needs.

We advise enterprises to assess and evaluate software providers based on organizational requirements and use this research as a supplement to internal evaluation of a provider and products.

Product Experience

The process of researching products to address an enterprise's needs should be comprehensive. Our Value Index methodology examines Product Experience and how it aligns with an enterprise's life cycle of onboarding, configuration, operations, usage and maintenance. Too often, software providers are not evaluated for the entirety of the product; instead, they are evaluated on market execution and vision of the future, which are flawed since they do not represent an enterprise's requirements but how the provider operates. As more software providers orient to a complete product experience, evaluations will be more robust.

Cloud Platforms
Product Experience

Providers	Grade	Performance
Microsoft	A-	Leader 66.0%
Google Cloud	B++	Leader 64.0%
Oracle	B++	Leader 63.3%
AWS	B++	62.9%
OVHcloud	C++	44.8%
Scaleway	C++	43.4%
T-Systems	C++	42.7%
IONOS	C++	41.9%

Source: ISG Research
Cloud Platforms Buyers Guide

The research results in Product Experience are ranked at 80%, or four-fifths, of the overall rating using the specific underlying weighted category performance. Importance was placed on the categories as follows: Usability (15%), Capability (30%), Reliability (15%), Adaptability (10%) and Manageability (10%). This weighting impacted the resulting overall ratings in this research.

Microsoft, Google Cloud and Oracle were designated Product Experience Leaders. While not a Leader, AWS was also found to meet a broad range of enterprise product experience requirements.

Customer Experience

The importance of a customer relationship with a software provider is essential to the actual success of the products and technology. The advancement of the Customer Experience and the entire life cycle an enterprise has with its software provider is critical for ensuring satisfaction in working with that provider. Technology providers that have chief customer officers are more likely to have greater investments in the customer relationship and focus more on their success. These leaders also need to take responsibility for ensuring this commitment is made abundantly clear on the website and in the buying process and customer journey.

The research results in Customer Experience are ranked at 20%, or one-fifth, using the specific underlying weighted category performance as it relates to the framework of commitment and value to the software provider-customer relationship. The two evaluation categories are Validation (10%) and TCO/ROI (10%), which are weighted to represent their importance to the overall research.

Cloud Platforms
Customer Experience

Providers	Grade	Performance
Oracle	A	Leader 17.9%
AWS	A-	Leader 17.1%
Google Cloud	A-	Leader 17.0%
Microsoft	A-	16.9%
OVHcloud	B+	15.0%
T-Systems	B+	13.8%
Scaleway	B	13.7%
IONOS	B-	12.4%

Source: ISG Research
Cloud Platforms Buyers Guide

The software providers that evaluated the highest overall in the aggregated and weighted Customer Experience categories are Oracle, AWS and Google Cloud. These category Leaders best communicate commitment and dedication to customer needs. While not a Leader, Microsoft was also found to meet a broad range of enterprise customer experience requirements.

Software providers that did not perform well in this category were unable to provide sufficient customer case studies to demonstrate success or articulate their commitment to customer experience and an enterprise's journey. The selection of a software provider means a continuous investment by the enterprise, so a holistic evaluation must include examination of how they support their customer experience.

Appendix: Software Provider Inclusion

For inclusion in the ISG Buyers Guide™ for Cloud Platforms 2025, a provider must be in good standing financially and ethically and provide a product that offers a deployment model of IaaS, PaaS and/or SaaS, and cloud computing types of Public, Private, Hybrid and Sovereign.

Providers must also have at least $20 million in annual or projected software-related revenue and sell products and provide support in at least one country. The principal source of the relevant business unit's revenue must be software-related, and there must have been at least one major software release in the last 12 months.

The research is designed to be independent of the specifics of software provider packaging and pricing. To represent the real-world environment in which businesses operate, we include providers that offer suites or packages of products that may include relevant individual modules or applications. If a software provider is actively marketing, selling and developing a product for the general market and it is reflected on the provider's website that the product is within the scope of the research, that provider is automatically evaluated for inclusion.

All software providers that offer relevant Cloud Platform products and meet the inclusion requirements were invited to participate in the evaluation process at no cost to them.

Software providers that meet our inclusion criteria but did not completely participate in our Buyers Guide were assessed solely on publicly available information. As this could have a significant impact on classification and ratings, we recommend additional scrutiny when evaluating those providers.

Products Evaluated

Provider	Product Names	Version	Release Month/Year
AWS	AWS	N/A	June 2025
Google Cloud	Google Cloud	N/A	July 2025
IONOS	IONOS Cloud	1.48.0	June 2025
Microsoft	Azure	N/A	June 2025
Oracle	Oracle Cloud Infrastructure (OCI)	N/A	August 2025
OVHcloud	OVHcloud	N/A	April 2025
Scaleway	Scaleway	N/A	June 2025
T-Systems	T-Systems	N/A	July 2025

About ISG Software Research and Advisory

ISG Software Research and Advisory provides market research and coverage of the technology industry, informing enterprises, software and service providers, and investment firms. The ISG Buyers Guides provide insight on software categories and providers that can be used in the RFI/RFP process to assess, evaluate and select software providers.

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