Hybrid Cloud Platforms Buyers Guide

Software Provider and Product Assessment

ISG Research

Hybrid Cloud Platforms

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 emerges as a crucial enabler for balancing operational efficiency with security and compliance.

ISG Research defines Hybrid Cloud as a combination of elements from both Public and Private Cloud environments, enabling enterprises to optimize their IT strategies. This model facilitates the sharing of data and applications across different platforms, offering scalability and flexibility from the Public Cloud combined with the security and control of the Private Cloud.

ISG asserts that by 2027, 7 in 10 enterprises will embrace Hybrid Cloud approaches to blend the benefits of Public and Private Cloud while addressing global regulatory requirements.

Organizations in sectors such as manufacturing, retail and telecommunications are adopting Hybrid Cloud solutions to meet diverse business needs effectively. By balancing their workloads across both environments, enterprises can manage sensitive workloads with greater security while leveraging the Public Cloud for high-volume, less-sensitive data processing. The Hybrid Cloud model enables enterprises to innovate while ensuring they remain compliant with industry regulations, making it an ideal choice for enterprises seeking to maximize their IT investments and enhance operational agility.

The Hybrid Cloud model gained traction in the early 2010s, born from the recognition that a one-size-fits-all approach to cloud technology was inadequate for many enterprises. Businesses realized they could leverage the benefits of Public Cloud for scalability without compromising the data control and security they sought from the Private Cloud. This realization led to the development of hybrid solutions that allow seamless data and application flow across different cloud environments. ISG Market Lens data shows enterprise application adoption across both Public and Private Cloud configurations. Coupled with increased IT spending on cloud services over the past few years, it indicates strong demand for a Hybrid Cloud approach.

From an IT perspective, Hybrid Cloud has evolved into a strategic imperative for enterprises. As technologies like containerization and microservices architecture have matured, they have further enabled enterprises to maximize their investments across multiple cloud platforms. The Hybrid Cloud is now a framework that provides businesses with the agility to respond to market changes while ensuring optimal performance and fulfilling compliance requirements.

Enterprises need to approach the Hybrid Cloud selection process with an understanding of their operational needs and the capabilities of various cloud services. This involves identifying workloads suitable for Public Cloud versus those that require the security and control offered by Private Cloud infrastructures. Enterprises should conduct readiness assessments to analyze their existing applications and data to determine the best deployment strategies.

It is essential to evaluate the integration capabilities of potential Hybrid Cloud providers, as seamless data and application flow between environments is critical for optimizing performance and cost efficiency. Buyers should also seek providers that offer thorough monitoring and management tools, ensuring that they can maintain visibility and control over resources deployed across multiple cloud platforms. Engaging in multi-provider strategies while assessing the potential for provider lock-in will empower enterprises to create flexible and responsive IT ecosystems.

As enterprises operate within a multi-cloud ecosystem, a strong focus on compatibility with various providers' services and tools is crucial.

Successful Hybrid Cloud software must provide seamless interoperability between Public and Private Cloud environments. This demands innovative integration tools that facilitate smooth data exchange and application deployment across different platforms while allowing consistent security measures throughout. As enterprises operate within a multi-cloud ecosystem, a strong focus on compatibility with various providers' services and tools is crucial.

Successful Hybrid Cloud solutions should also incorporate advanced management and orchestration capabilities that empower IT teams to maintain visibility and control over their entire infrastructure, regardless of where workloads are deployed. This includes analytics tools that provide insights into resource usage, costs, and performance metrics. Security and compliance features tailored to the complexities of hybrid environments are also necessary to protect sensitive data and adhere to diverse regulatory requirements. By offering enterprises flexibility, control and comprehensive visibility, Hybrid Cloud solutions can effectively support modern enterprise agility and innovation.

In Hybrid Cloud contexts, generative artificial intelligence (GenAI) is effectively deployed for application development, enhanced customer experience and cross-platform data integration. Enterprises use GenAI tools to streamline software development processes by automating

code generation and testing, which leads to faster delivery of applications across both public and private environments. GenAI aids in personalizing customer interactions by analyzing user behavior data to create tailored recommendations in real time that is accessible through both cloud infrastructures.

One implementation already observed for agentic AI technology in Hybrid Cloud environments is in intelligent workload management and orchestration. By incorporating agentic AI, enterprises can automate the monitoring of resource usage, dynamic allocation of resources across Public and Private Clouds based on workload demands, predict failures and manage compliance and cost considerations. The use of agents could also optimize operations by utilizing AI-driven decision-making processes that predict usage patterns and adjust resource allocations, enhancing both efficiency and cost management. Agentic AI can also facilitate improved data governance by continuously monitoring data compliance across various environments, ensuring that data usage aligns with both security policies and regulatory requirements.

Enterprises exploring software providers for Hybrid Cloud solutions should focus on the integration capabilities and orchestration tools that facilitate the seamless flow of data and applications across multiple environments. It is essential to evaluate providers that offer management platforms that provide visibility and control over cloud resources, enabling enterprises to maintain performance and compliance. Companies should also consider the ease of transitioning between Public and Private Cloud resources to optimize workloads for cost-efficiency and security. Collaborating with internal IT teams and aligning cloud strategies with business goals will empower enterprises to leverage the full potential of Hybrid Cloud solutions in their digital transformation efforts.

The ISG Buyers Guide™ for Hybrid Cloud Platforms evaluates software providers and products in key areas. This includes Infrastructure-as-a-Service (IaaS), Platform-as-a-Service (PaaS), Software-as-a-Service (SaaS), Hybrid Cloud functionality, 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, Cloud Application Marketplace, GenAI and Agentic AI, Global Reach and investment in capabilities. Strategic insights from this guide equip enterprises with the necessary tools to navigate the complexities of Hybrid Cloud adoption and optimize their IT strategies for operational agility.

This research evaluates the following 18 software providers that offer products that address key elements of Hybrid Cloud platforms as we define it: Akamai, Alibaba Cloud, AWS, Baidu AI Cloud, Clever Cloud, DigitalOcean, Google Cloud, IBM, IONOS, Kingsoft, Leaseweb, Microsoft, OpenNebula, Oracle, OVHcloud, Scaleway, Schwarz Digits 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.

> **ISG Research has designed the Buyers Guide to provide a balanced perspective of software providers and products that is rooted in an understanding of business requirements in any enterprise.**

The ISG Buyers Guide™ for Hybrid 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 Hybrid Cloud platforms. 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 Hybrid 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 Hybrid Cloud platform 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 a Hybrid Cloud platform. 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 Hybrid Cloud platforms and offer this Buyers Guide as both the results of our in-depth analysis of these providers and as an evaluation methodology.

Key Takeaways

Hybrid Cloud Platforms have become the preferred strategy for enterprises seeking to balance agility, security and compliance. By combining the scalability of Public Cloud with the control of Private Cloud, organizations can optimize workloads across environments while meeting regulatory requirements. Adoption is growing in industries such as manufacturing, retail and telecommunications, with providers adding orchestration, containerization and governance features to support seamless workload distribution.

Software Provider Summary

The research identifies Microsoft, Google Cloud and AWS as overall leaders, with Microsoft ranked highest across multiple categories. Classification placed Akamai, Alibaba Cloud, AWS, Google Cloud, IBM, Microsoft, Oracle, OVHcloud, Scaleway and T-Systems in the Exemplary quadrant, while IONOS was categorized as Innovative. No providers were placed in the Assurance quadrant, while Baidu AI Cloud, Clever Cloud, DigitalOcean, Kingsoft, Leaseweb, OpenNebula and Schwarz Digits were categorized as Merit. 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 AWS 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 IBM were strongest in Manageability. Leaders demonstrated strength in delivering reliable architectures and usability features that support efficiency at enterprise scale.

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 IBM performed best, showcasing clear value frameworks and alignment to enterprise goals. Vendors outside the leadership group often struggled with weak ROI documentation or limited published customer case studies, reducing buyer confidence.

Strategic Recommendations

Enterprises should treat Hybrid Cloud Platforms as strategic investments that unify scalability, governance and compliance with integration and orchestration capabilities. Buyers should prioritize providers that combine strong workload management, containerization support and transparent AI-driven operations with measurable value frameworks. Platforms that deliver interoperability, audit-ready governance and ROI evidence will inspire greater confidence and adoption.

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 Google Cloud and AWS. Providers that place in the top three of a category earn the designation of Leader. Oracle has done so in six categories; AWS and Google Cloud in five; Microsoft in three; and IBM in two 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.

Hybrid Cloud Platforms
Overall

Providers	Grade	Performance
Microsoft	A-	Leader 82.9%
Google Cloud	A-	Leader 82.0%
AWS	B++	Leader 80.6%
Oracle	B++	79.6%
IBM	B++	78.8%
Alibaba Cloud	B	66.9%
OVHcloud	B-	59.4%
T-Systems	B-	57.4%
Scaleway	B-	57.2%
Akamai	C++	54.7%
IONOS	C++	54.0%
DigitalOcean	C++	52.3%
Leaseweb	C+	46.8%
Schwarz Digits	C+	45.6%
Kingsoft	C	42.7%
Clever Cloud	C	42.5%
OpenNebula	C	42.1%
Baidu AI Cloud	C	40.2%

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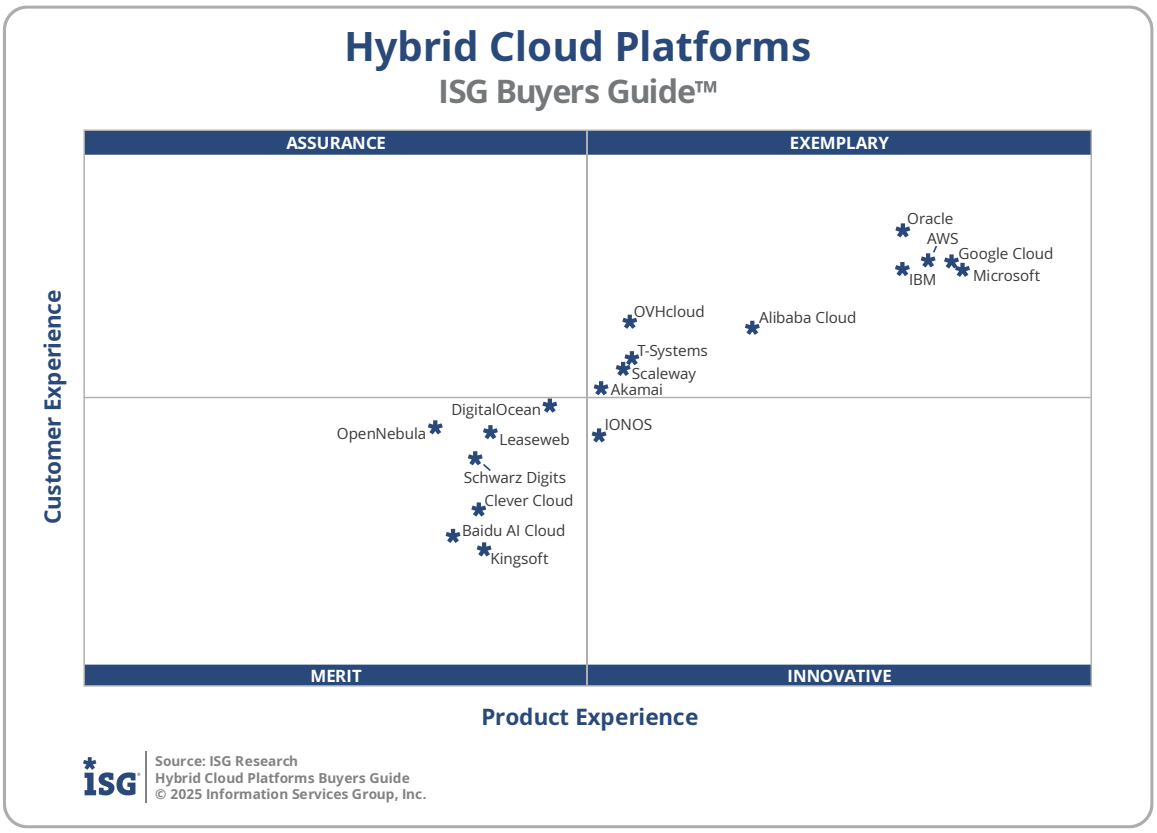
Source: ISG Research
Hybrid Cloud Platforms Buyers Guide

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: Akamai, Alibaba Cloud, AWS, Google Cloud, IBM, Microsoft, Oracle, OVHcloud, Scaleway and T-Systems.

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. The provider rated Innovative is: IONOS.

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: Baidu AI Cloud, Clever Cloud, DigitalOcean, Kingsoft, Leaseweb, OpenNebula and Schwarz Digits.

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 Hybrid 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 lifecycle 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.

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 AWS were designated Product Experience Leaders.

Hybrid Cloud Platforms

Product Experience

Providers	Grade	Performance
Microsoft	A-	*Leader* 66.5%
Google Cloud	A-	*Leader* 65.9%
AWS	B++	*Leader* 64.3%
Oracle	B++	62.5%
IBM	B++	62.5%
Alibaba Cloud	B	52.1%
OVHcloud	C++	43.6%
T-Systems	C++	43.4%
Scaleway	C++	42.9%
Akamai	C++	41.8%
IONOS	C++	41.3%
DigitalOcean	C+	38.2%
Leaseweb	C	34.0%
Kingsoft	C	33.7%
Clever Cloud	C	33.3%
Schwarz Digits	C	33.0%
Baidu AI Cloud	C	31.5%
OpenNebula	C	30.3%

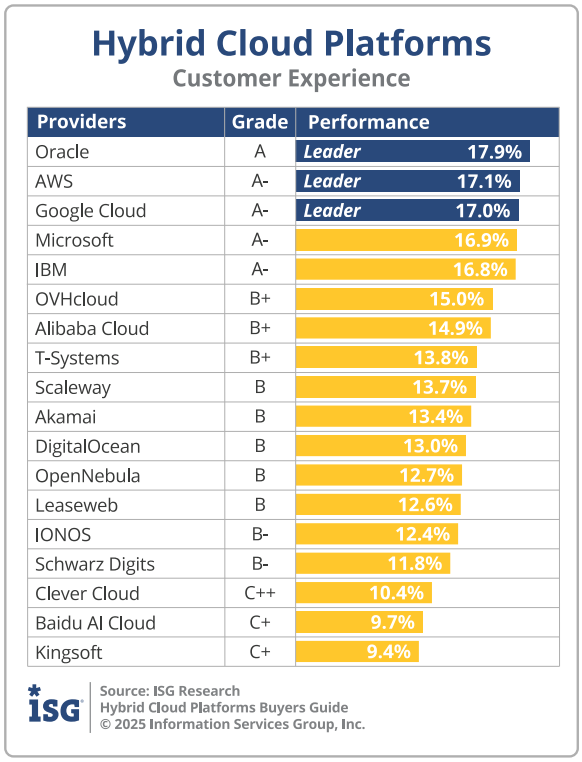
Source: ISG Research
Hybrid Cloud Platforms Buyers Guide

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 lifecycle 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.

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 Leaders, Microsoft and IBM were 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 Hybrid Cloud Platforms in 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 within a Hybrid Cloud type.

Providers must have at least $100 million in annual or projected software-related revenue and sell products and provide support on at least two continents. 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 Hybrid Cloud platforms 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
Akamai	Akamai Cloud	N/A	June 2025
Alibaba Cloud	Alibaba Cloud	N/A	June 2025
AWS	AWS	N/A	June 2025
Baidu AI Cloud	Baidu AI Cloud	N/A	June 2025
Clever Cloud	Clever Cloud	N/A	September 2025
DigitalOcean	DigitalOcean	N/A	January 2025
Google Cloud	Google Cloud	N/A	July 2025
IBM	IBM Cloud	1.54.0	July 2025
IONOS	IONOS Cloud	1.48.0	June 2025
Kingsoft	Kingsoft Cloud	N/A	April 2025
Leaseweb	Leaseweb	N/A	June 2025
Microsoft	Azure	N/A	June 2025
OpenNebula	OpenNebula	7.0.0	June 2025
Oracle	Oracle Cloud Infrastructure (OCI)	N/A	August 2025
OVHcloud	OVHcloud	N/A	April 2025
Scaleway	Scaleway	N/A	June 2025
Schwarz Digits	STACKIT	N/A	August 2025
T-Systems	T-Systems	N/A	July 2025

Providers of Promise

We did not include software providers that, as a result of our research and analysis, did not satisfy the criteria for inclusion in this Buyers Guide. These are listed below as "Providers of Promise."

Provider	Product	$100+ Million Revenue	Two Continents
China Unicom	Unicom Cloud	Yes	No
Euskaltel	Euskaltel	Yes	No

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.

About ISG Research

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About 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.