ISG Provider Lens®

Multi Public Cloud Services

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

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QUADRANT REPORT | DECEMBER 2025 | UK

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Report Author: Meenakshi Srivastava

Cloud transformation in the UK centres on automation, GenAI and jurisdictional control

The UK public cloud services market is entering a pivotal phase in 2025, shaped by the convergence of GenAI, sovereign infrastructure mandates and automation-first transformation strategies. Enterprises across sectors, especially finance, healthcare and manufacturing, are accelerating their shift towards AI-native, multicloud ecosystems to meet evolving performance, compliance and innovation goals. This transformation is not merely technical; it reflects a strategic reorientation towards agility, resilience and digital autonomy.

In the past year, macroeconomic pressures, regulatory tightening (including the EU AI Act alignment) and sustainability imperatives have intensified the need for scalable, secure and sovereign cloud platforms. Enterprises are increasingly prioritising rearchitecting initiatives that integrate GenAI, FinOps and agentic automation into their core IT environments. The strategic relevance of this market lies in its ability to support next-generation workloads, ranging from autonomous agents to predictive analytics, while ensuring jurisdictional control, cost transparency and ESG alignment.

The UK's regulatory landscape, combined with its mature enterprise base, makes it a bellwether for cloud innovation. Providers are responding with sovereign-by-design architectures, platform-agnostic delivery models and AI-native service portfolios that reflect the shift from infrastructure provisioning to strategic enablement.

As per the EMEA ISG Index™, the IT and business services market in the UK saw a notable decline in managed services in Q2 2025, with the ACV dropping by 41 percent year on year to $770 million. This dip caused the UK, traditionally Europe's largest sourcing market, to fall to the third position, behind the DACH region and France, in managed services ACV. The overall market is affected by limited discretionary spending amid economic and geopolitical concerns despite the strong growth in AI-driven cloud services across Europe.

Cloud transformation needs **sovereign** infrastructure, **GenAI** and **FinOps** for AI-native innovation.

Some of the key market highlights are as follows:

- Managed services ACV in the UK declined by 41 percent year on year to $770 million in Q2 2025.
- The UK slipped from the top spot to third place in Europe's managed services sourcing market.
- This decline contrasts with strong growth seen in other regions such as France (up by 142 percent) and the Nordics (up by 72 percent) in the same period.
- The reduction in managed service contracts indicates caution by enterprises in spending on discretionary projects amid ongoing macroeconomic uncertainties.
- AI-driven cloud services remain a growth driver in Europe; however, the UK's managed services sector shows contraction, reflecting tighter spending.

This data suggests that while the demand for AI and cloud adoption is accelerating in Europe, the UK market is facing relative challenges in managed services, possibly due to its internal economic and geopolitical environment.

Executive Priorities and Market Dynamics

In 2025, UK enterprises are focused on three interlinked priorities: governance, optimization and innovation. The demand for digital sovereignty is driving the adoption of Hold Your Own Key (HYOK) models, jurisdictional data controls and sovereign cloud zones. Simultaneously, the rise of GenAI and agentic automation is reshaping expectations around productivity, observability and operational resilience.

Buyers are increasingly seeking providers that offer contextualised, industry-specific solutions with embedded compliance and cost governance. Some of the key pain points include:

- Cloud cost unpredictability, especially in dynamic multicloud environments
- Integration complexity across legacy and cloud-native systems
- Regulatory compliance, particularly in sectors with strict data residency mandates
- Talent shortages in AI, FinOps and cloud architecture domains

Service providers face mounting pressure to deliver outcome-linked engagements, FinOps as a service and AI-native managed services. The market is shifting from transactional cloud operations to strategic partnerships that enable long-term agility and innovation.

Trends and Disruptive Forces

The UK cloud market has been reshaped by several disruptive forces in 2024-2025 that include the following:

- **Agentic AI and GenAI mainstreaming:** Enterprises are embedding autonomous agents into workflows, using GenAI for documentation, incident resolution and knowledge retrieval. Providers are responding with prompt-based orchestration, vector databases and retrieval-augmented generation (RAG) frameworks.
- **FinOps-led governance:** FinOps is evolving from a cost control function to a strategic discipline. Providers are offering SLA-backed cost optimisation, predictive budgeting and explainability frameworks to support financial accountability.
- **Sovereign infrastructure mandates:** Enterprises are enforcing jurisdictional boundaries, data residency controls and encryption key management. Providers are launching UK-specific cloud zones and aligning with local compliance frameworks.
- **Cross-industry convergence:** Shared transformation blueprints are emerging across finance, healthcare and manufacturing, with common themes of automation, compliance and AI-native modernisation.
- **Carbon-aware computing:** Sustainability is no longer optional. Providers are integrating ESG metrics into workload orchestration, offering carbon-aware scheduling and clean energy-backed infrastructure.

These trends are not isolated; they are converging to redefine how enterprises source, consume and govern cloud services. The competitive landscape is being reshaped by providers that can orchestrate these capabilities at scale with agility and compliance.

Provider Landscape and Competitive Dynamics

In 2025, the UK provider landscape is marked by intensified competition and strategic repositioning. Hyperscalers and regional specialists are differentiating themselves through sovereign capabilities, GenAI integration and FinOps maturity. Providers gaining traction are those that:

- Deliver certified multicloud transformation across at least two hyperscaler platforms (AWS, Azure, Google Cloud or OCI)
- Offer AI-native managed services, including GenAI observability, autonomous operations and prompt-based orchestration
- Provide sovereign-by-design architectures with granular data access controls and jurisdictional compliance
- Demonstrate FinOps-as-code capabilities, enabling dynamic workload placement and outcome-linked optimisation
- Align with RISE with SAP and offer certified SAP HANA infrastructure services with AI-powered migration tooling

Pricing models are evolving towards transparency, flexibility and sustainability. Providers are offering reserved, spot and carbon-aware tiers, with public disclosures and SLA-backed guarantees. Strengths and weaknesses are increasingly defined by the ability to integrate AI-native tooling, support regulated industries and deliver contextualised transformation at scale.

Use Cases and Business Outcomes

Transformation use cases span AI-native managed services, FinOps-driven optimisation and SAP modernisation. Enterprises report measurable outcomes such as SLA-backed cost savings, enhanced governance through HYOK models and accelerated migration timelines via AI-powered assistants. Common use cases include GenAI-enhanced productivity platforms, autonomous cloud operations and predictive cost governance. These are increasingly supported by providers offering prompt-based orchestration and contextual explainability frameworks.

Innovation, Readiness and Strategic Response

Providers are investing in sovereign-by-design architectures, agentic AI platforms and FinOps-as-code capabilities to meet UK enterprise demands. Strategic responses include the launch of regional data centres, alignment with UK-specific compliance mandates and coinnovation programs with industry clients. Readiness is assessed through AI-native tooling, certified frameworks for regulated sectors and integration of sustainability metrics into cloud operations. Providers demonstrating proactive innovation in GenAI, automation and ESG alignment are emerging as strategic partners.

Outlook and Analyst Recommendations

The UK public cloud market in 2025 is poised for accelerated transformation, with GenAI, FinOps and sovereignty shaping enterprise priorities. Buyers should prioritise providers with proven capabilities in agentic automation, sovereign infrastructure and contextualised service delivery. Providers must strengthen their strategic positioning by investing in AI-native platforms, compliance-aligned architectures and outcome-driven engagement models. The path forward demands a shift from transactional cloud sourcing to strategic, innovation-led partnerships.

Enterprises in the UK are adopting AI-native, scalable multicloud environments for agility, compliance and cost transparency. Despite economic pressures, the demand for AI-driven managed services and sovereign infrastructure is growing, with providers standing out via platform-agnostic delivery, AI observability and outcome-based engagements.

Provider Positioning

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	Consulting and Transformation Services — Large Accounts	Consulting and Transformation Services — Midmarket	Managed Services — Large Accounts	Managed Services — Midmarket	FinOps Services and AI-driven Optimization	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
Accenture	Leader	Not In	Leader	Not In	Leader	Not In	Not In
Alibaba Cloud	Not In	Not In	Not In	Not In	Not In	Contender	Not In
ANS Group	Not In	Not In	Not In	Contender	Not In	Not In	Not In
Atos	Product Challenger	Not In	Market Challenger	Not In	Product Challenger	Not In	Not In
AWS	Not In	Not In	Not In	Not In	Not In	Leader	Leader
Bell Integration	Not In	Product Challenger	Not In	Contender	Not In	Not In	Not In
Birlasoft	Not In	Not In	Not In	Product Challenger	Not In	Not In	Not In
Brillio	Not In	Product Challenger	Not In	Product Challenger	Not In	Not In	Not In
Capgemini	Leader	Not In	Leader	Not In	Leader	Not In	Not In

Provider Positioning

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	Consulting and Transformation Services — Large Accounts	Consulting and Transformation Services — Midmarket	Managed Services — Large Accounts	Managed Services — Midmarket	FinOps Services and AI-driven Optimization	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
CGI	Contender	Not In	Contender	Not In	Not In	Not In	Not In
Claranet	Market Challenger	Leader	Market Challenger	Leader	Not In	Not In	Not In
Coforge	Not In	Leader	Product Challenger	Leader	Contender	Not In	Not In
Cognizant	Leader	Not In	Leader	Not In	Product Challenger	Not In	Not In
Computacenter	Leader	Leader	Leader	Leader	Product Challenger	Not In	Not In
Deloitte	Product Challenger	Not In	Not In	Not In	Product Challenger	Not In	Not In
Deutsche Telekom/ T-Systems	Contender	Not In	Contender	Contender	Contender	Not In	Contender
DigitalOcean	Not In	Not In	Not In	Not In	Not In	Contender	Not In
DXC Technology	Product Challenger	Not In	Leader	Not In	Leader	Not In	Not In

Provider Positioning

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Ensono	Contender	Product Challenger	Product Challenger	Market Challenger	Not In	Not In	Not In
Fujitsu	Product Challenger	Not In	Contender	Not In	Not In	Not In	Not In
Google	Not In	Not In	Not In	Not In	Not In	Leader	Leader
HCLTech	Leader	Not In	Leader	Not In	Leader	Not In	Not In
Hexaware	Rising Star ★	Leader	Product Challenger	Leader	Product Challenger	Not In	Not In
Hitachi Digital Services	Not In	Product Challenger	Not In	Product Challenger	Not In	Not In	Not In
IBM	Leader	Not In	Not In	Not In	Leader	Product Challenger	Product Challenger
Infosys	Leader	Not In	Leader	Not In	Leader	Not In	Not In
IONOS	Not In	Not In	Not In	Not In	Not In	Contender	Not In

Provider Positioning

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	Consulting and Transformation Services — Large Accounts	Consulting and Transformation Services — Midmarket	Managed Services — Large Accounts	Managed Services — Midmarket	FinOps Services and AI-driven Optimization	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
Kainos	Not In	Product Challenger	Not In	Rising Star ★	Contender	Not In	Not In
Kyndryl	Product Challenger	Not In	Leader	Not In	Leader	Not In	Not In
Lemongrass	Not In	Market Challenger	Not In	Not In	Not In	Not In	Not In
Littlefish	Not In	Contender	Not In	Contender	Not In	Not In	Not In
Logicalis	Product Challenger	Contender	Not In	Market Challenger	Not In	Not In	Not In
LTIMindtree	Leader	Leader	Rising Star ★	Leader	Product Challenger	Not In	Not In
Microland	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Contender	Not In	Not In
Microsoft	Not In	Not In	Not In	Not In	Not In	Leader	Leader
Mphasis	Market Challenger	Rising Star ★	Product Challenger	Product Challenger	Product Challenger	Not In	Not In

Provider Positioning

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	Consulting and Transformation Services — Large Accounts	Consulting and Transformation Services — Midmarket	Managed Services — Large Accounts	Managed Services — Midmarket	FinOps Services and AI-driven Optimization	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
N-iX	Not In	Product Challenger	Not In	Not In	Not In	Not In	Not In
NTT DATA	Product Challenger	Not In	Not In	Not In	Not In	Not In	Not In
OneAdvanced	Not In	Not In	Not In	Contender	Not In	Not In	Not In
Oracle	Not In	Not In	Not In	Not In	Not In	Product Challenger	Not In
OUTSCALE	Not In	Not In	Not In	Not In	Not In	Contender	Not In
OVHcloud	Not In	Not In	Not In	Not In	Not In	Product Challenger	Contender
Persistent Systems	Not In	Contender	Not In	Product Challenger	Contender	Not In	Not In
Rackspace Technology	Product Challenger	Leader	Leader	Leader	Leader	Not In	Not In
SAP	Not In	Not In	Not In	Not In	Not In	Not In	Product Challenger

Provider Positioning

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	Consulting and Transformation Services — Large Accounts	Consulting and Transformation Services — Midmarket	Managed Services — Large Accounts	Managed Services — Midmarket	FinOps Services and AI-driven Optimization	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
Scaleway	Not In	Not In	Not In	Not In	Not In	Contender	Not In
SCC	Not In	Not In	Not In	Market Challenger	Not In	Not In	Not In
Slalom	Not In	Contender	Not In	Contender	Not In	Not In	Not In
Softcat PLC	Not In	Not In	Not In	Contender	Not In	Not In	Not In
Sopra Steria	Product Challenger	Not In	Product Challenger	Product Challenger	Not In	Not In	Not In
SysGroup	Not In	Not In	Contender	Not In	Not In	Not In	Not In
TCS	Leader	Not In	Leader	Not In	Rising Star ★	Not In	Not In
Tech Mahindra	Contender	Leader	Product Challenger	Leader	Product Challenger	Not In	Not In
Telefonica Tech	Not In	Leader	Product Challenger	Product Challenger	Not In	Not In	Not In

Provider Positioning

	Consulting and Transformation Services — Large Accounts	Consulting and Transformation Services — Midmarket	Managed Services — Large Accounts	Managed Services — Midmarket	FinOps Services and AI-driven Optimization	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
Unisys	Not In	Leader	Product Challenger	Leader	Product Challenger	Not In	Not In
UST	Contender	Not In	Not In	Not In	Contender	Not In	Not In
Version 1	Not In	Not In	Contender	Not In	Not In	Not In	Not In
Virtusa	Not In	Product Challenger	Not In	Product Challenger	Not In	Not In	Not In
Visionet	Not In	Contender	Not In	Contender	Not In	Not In	Not In
Wipro	Leader	Not In	Leader	Not In	Leader	Not In	Not In
Zensar Technologies	Not In	Product Challenger	Not In	Product Challenger	Product Challenger	Not In	Not In

This study focusses on what ISG perceives as most critical in 2025 for **multi public cloud services.**

- Consulting and Transformation Services — Large Accounts
- Consulting and Transformation Services — Midmarket
- Managed Services — Large Accounts
- Managed Services — Midmarket
- FinOps Services and AI-driven Optimization
- Hyperscale Infrastructure and Platform Services
- SAP HANA Infrastructure Services

Simplified Illustration Source: ISG 2025

Definition

This study evaluates providers within the public cloud and AI value chain, offering consulting and transformation solutions, managed services, FinOps, sovereign infrastructure, cloud-native platforms and SAP-focussed solutions. These providers enable enterprises to modernise, secure, manage and scale multicloud and AI-native environments using automation, GenAI and advanced optimization frameworks.

Cloud adoption is accelerating not only for scalability or cost efficiency but also for fostering AI innovation, driving sustainability and ensuring regulatory compliance. Enterprises demand dynamic, composable cloud solutions that integrate intelligent operations, FinOps governance and AI orchestration across public and sovereign infrastructures. The widespread adoption of intelligent automation tools further streamlines data management processes and allows businesses to prioritise innovation over mundane tasks, driving demand for rearchitecting strategies and cloud-native solution expertise.

Providers that support agentic AI, hybrid FinOps-AIOps models and transformation road maps tailored to cloud-native development are well positioned to lead. Sovereignty, sustainability and interoperability are no longer optional; enterprises expect secure, jurisdiction-compliant infrastructure, workload portability and customer-controlled encryption models such as Hold Your Own Key (HYOK).

Enterprises aim to leverage agentic AI and GenAI to enhance productivity, streamline operations and foster innovation. To stay relevant, providers must demonstrate technical expertise, regulatory awareness and the ability to embed AI technologies into their service architectures. This study highlights those shaping the future of the public cloud through next-generation platforms and transformation services.

Scope of the Report

This ISG Provider Lens® quadrant report covers the following seven quadrants for services/ solutions: Consulting and Transformation Services — Large Accounts, Consulting and Transformation Services — Midmarket, Managed Services — Large Accounts, Managed Services — Midmarket, FinOps Services and AI-driven Optimization, Hyperscale Infrastructure and Platform Services and SAP HANA Infrastructure Services.

This ISG Provider Lens® 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 (quadrants).
- Focus on the regional market.

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

Provider Classifications

The provider position reflects the suitability of providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the service requirements from enterprise customers differ and the spectrum of providers operating in the local market is sufficiently wide, a further differentiation of the providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between $20 million and $999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above $1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens® quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens® quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

- **Number of providers in each quadrant:** ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

Provider Classifications: Quadrant Key

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/services and follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not in means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

Consulting and Transformation Services — Large Accounts

This report is valuable for service providers offering **consulting and transformation services** in the **UK** to understand their market position and for large enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

IT and infrastructure leaders

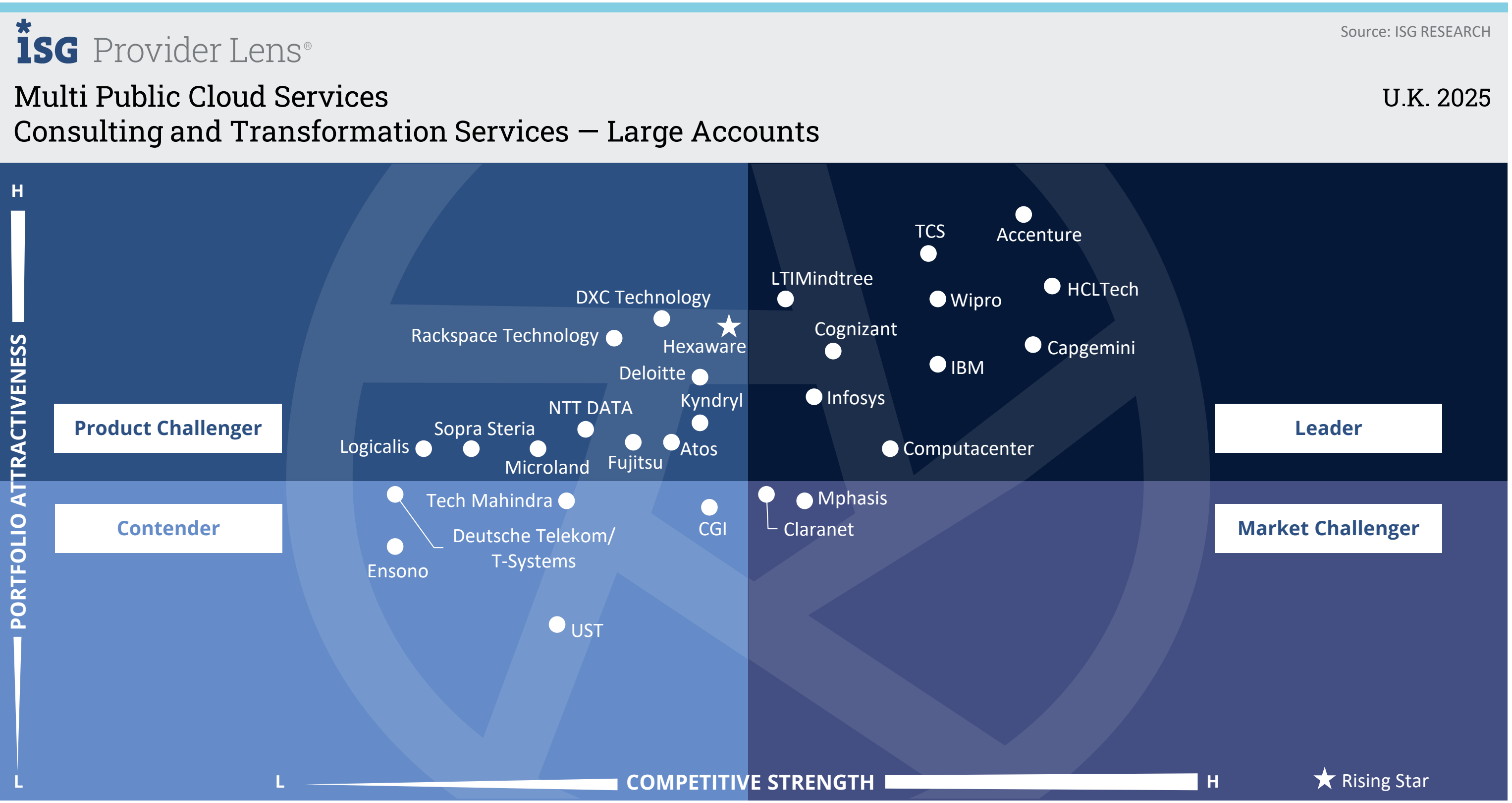
Should read this report to analyze consulting and transformation service providers' modernization and service capabilities and to assess which providers offer innovative solutions aligned with evolving technology trends. Understanding these market advancements is critical for IT executives to develop effective, future-proof public cloud strategies and ensure their organizations maintain competitive agility and resilience.

Software development and technology leaders

Should read this report to gain insights into providers' strategic positioning, technological expertise and innovation in infrastructure transformation initiatives. This knowledge enables them to align their internal software development and technology road maps with external expertise, driving efficient and impactful digital transformation.

Sourcing, procurement and vendor management professionals

Should read this report to better understand the current landscape and partner ecosystem of consulting and transformation service providers in the UK. A deeper understanding of provider competencies, differentiation and market presence supports informed vendor selection and negotiation strategies, ensuring optimal partnerships that deliver both immediate value and sustainable long-term benefits.



This quadrant assesses providers that deliver **consulting**, **modernisation** and **governance** services to enable cloud-driven transformation, helping large enterprises navigate **multicloud**, **AI** and **FinOps** complexities to build scalable and compliant IT environments.

Meenakshi Srivastava

Definition

This quadrant evaluates providers that offer consulting and technical support services to modernise, optimise 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** such as:
  - Transformation road maps, business case development and workload modernization
  - Cloud-native strategy design (including APIs, containers and serverless computing)
  - Governance and financial planning aligned with FinOps and hybrid cloud models
- **Transformation services** such as:
  - Design, migration and configuration of cloud-native and AI-native architectures
  - Integration of DevSecOps, AIOps, GenAI and FinOps capabilities
- **Compliance and governance services** include:
  - Establishing policy frameworks and ensuring alignment with ESG standards
  - Creating essential guardrails to implement GenAI solutions by adhering to aligning with sovereignty and security requirements

Providers are assessed based on their ability to drive scalable, intelligent and sustainable cloud transformations through proprietary frameworks, AI-powered toolsets and vendor-agnostic architectures.

Eligibility Criteria

1. Have experience in multicloud transformation across **major industries**, including regulated sectors such as finance, healthcare and manufacturing
2. Design and implement cloud transformation strategies that integrate **cloud-native services** (for example, containers, serverless computing and APIs), **AIOps, FinOps and GenAI** services
3. Demonstrate **proven methodologies** for analysing and optimising complex IT environments, preventing technical debt and enabling long-term agility
4. Possess expertise in cloud application migration, using **automation engines, templates, data conversion frameworks** and **well-architected blueprints**
5. Demonstrate **certified delivery capabilities** across at least two hyperscaler platforms (for example AWS, Microsoft Azure, Google Cloud and OCI)
6. Leverage **GenAI-powered** services for **automation**, **documentation**, **knowledge retrieval**, **chatbot integration** and **incident resolution** (preferred)
7. Use **AI-native** toolsets or **agents** for **assessment** and **planning** (preferred)
8. Develop and utilise **AI assets**, **pretrained models**, **ready-to-use industry solutions** or **responsible design** frameworks for improving overall efficiency (preferred)

Observations

This quadrant continues to reflect a dynamic and maturing landscape where providers are increasingly focused on delivering scalable, intelligent and sustainable cloud transformations. In 2024 and 2025, the quadrant has seen a marked shift towards AI-native architectures, FinOps maturity and GenAI integration, with leading firms leveraging proprietary frameworks and vendor-agnostic toolsets to meet complex enterprise demands.

Hexaware rose as a Rising Star with growing enterprise traction. Microland advanced from Contender to Product Challenger, showing stronger capabilities than last year. Computacenter made the biggest leap, moving to Leader for its consistent large-scale transformation delivery. Providers such as Accenture, IBM and Capgemini have strengthened their multicloud capabilities across regulated sectors, while Infosys, TCS and Wipro have expanded their certified delivery across hyperscalers, integrating GenAI-powered services for automation and incident resolution. Notably, M&A activities have reshaped the quadrant's competitive contours — LTIMindtree's consolidation efforts and Kyndryl's strategic alliances have bolstered their UK presence, while DXC Technology and Atos have undergone restructuring to streamline cloud transformation portfolios. Firms such as Deloitte and Cognizant have invested in ESG-aligned governance frameworks and AI-native planning tools, reflecting the quadrant's emphasis on responsible innovation. Overall, the quadrant showcases a blend of strategic consulting, technical depth and regulatory alignment, positioning UK-based providers as pivotal enablers of enterprise agility and digital resilience.

From the 61 companies assessed for this study, 28 qualified for this quadrant, with 10 being Leaders and one Rising Star.

Accenture has been recognised for certified delivery across AWS, Azure and Google Cloud, regularly updating its certifications and ecosystem partnerships through its Reinvention Services business unit.

Capgemini is emphasising GenAI-powered automation, knowledge retrieval and incident management, combining GenAI models with automation and documentation frameworks in new delivery models.

Cognizant launched a global FinOps CoE with IBM, leveraging IBM Apptio and Turbonomic for AI-native cost governance and architecture modernisation, actively tackling technical debt and optimising complex IT landscapes.

Computacenter's Modern Cloud Platform can integrate cloud-native services such as containers, APIs and serverless computing. It supports dynamic infrastructure and avoids vendor lock-in.

HCLTech's AI-native ADvantage tool supports architecture planning and technical debt reduction, while its AI Force platform drives automation and efficiency across software development and IT operations.

IBM's *Hybrid by Design* approach uses cloud-native tech and AI automation for agile hybrid clouds. Its AI-driven Cloud Migration Factory speeds up migration and modernisation while reducing technical debt.

Infosys launched Agentic AI Foundry in 2025 to accelerate scalable, reliable AI agent deployment for automation and knowledge tasks, significantly boosting productivity and operational efficiency with seamless ecosystem integration.

LTIMindtree delivers cloud transformation for financial services using Microsoft Azure, including hosting, migration and managed services, with modernisation via cloud-native technologies such as containers and APIs.

TCS emphasises the evolution from early cloud adoption (Cloud 1.0) and cloud-native full operating model transformation (Cloud 2.0) to AI at core with Cloud 3.0, future-proofing AI for business with multicloud integration, agentic architectures and rapid value delivery.

Wipro's Cloud Application Modernization service in the UK adopts cloud-native strategies such as microservices refactoring, container platforms and automation with AI-based cloud readiness assessments, migration road maps and DevSecOps automation.

Hexaware's (Rising Star) major UK client projects include the modernisation of legacy applications with containerisation and microservices architecture, database migration to cloud-native managed services and automated DevOps pipelines for rapid cloud deployment on Azure and AWS.

Consulting and Transformation Services — Midmarket

Who Should Read This Section

This report is valuable for providers offering **consulting and transformation services** in the **UK** to understand their market position and for midsize enterprises seeking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

IT and infrastructure leaders

Should read this report to analyze consulting and transformation service providers' modernization and service capabilities and to assess which providers offer innovative solutions aligned with evolving technology trends. Understanding these market advancements is critical for IT executives to develop effective, future-proof public cloud strategies and ensure their organizations maintain competitive agility and resilience.

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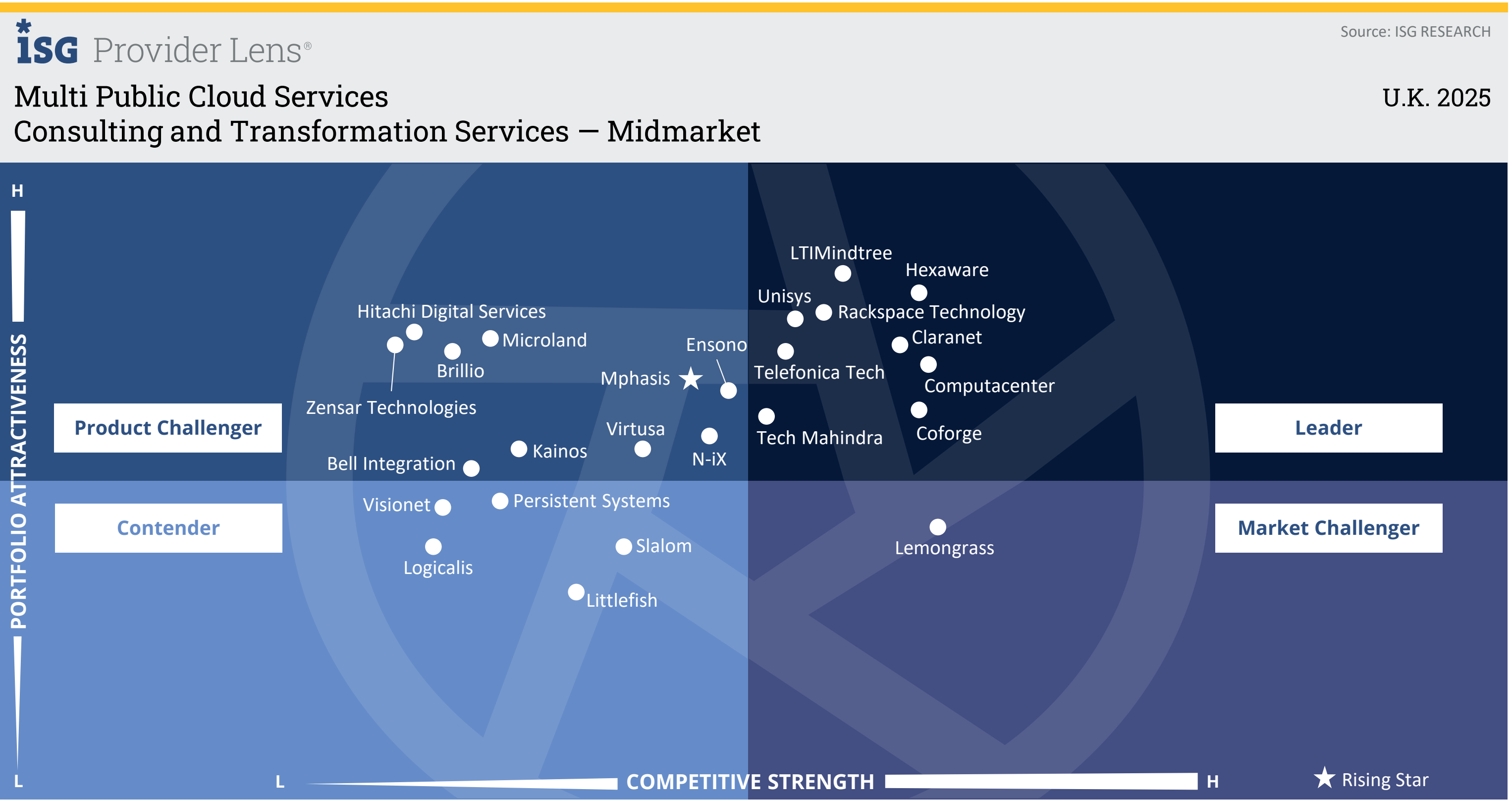

This midmarket quadrant assesses providers that enable **cloud modernisation** and transformation for midsize enterprises by integrating multicloud, AI and FinOps strategies to enhance **agility**, **cost efficiency** and **compliance** across environments.

Meenakshi Srivastava

Definition

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3. Demonstrate **proven methodologies** for analysing and optimising complex IT environments, preventing technical debt and enabling long-term agility
4. Possess expertise in cloud application migration, using **automation engines, templates, data conversion frameworks** and **well-architected blueprints**
5. Demonstrate **certified delivery capabilities** across at least two hyperscaler platforms (for example, AWS, Microsoft Azure, Google Cloud and OCI)
6. Leverage **GenAI-powered** services for **automation**, **documentation**, **knowledge retrieval**, **chatbot integration** and **incident resolution** (preferred)
7. Use **AI-native** toolsets or **agents** for **assessment** and **planning** (preferred)
8. Develop and utilise **AI assets**, **pretrained models**, **ready-to-use industry solutions** or **responsible design** frameworks for improving overall efficiency (preferred)

Observations

This quadrant reflects a maturing landscape where providers are increasingly differentiated by their ability to deliver scalable, AI-native and multicloud transformation strategies across regulated sectors. With cloud and platform services capturing over 28 percent of the UK IT services market share, the demand for consultative depth and technical agility has intensified, especially in financial services, healthcare and manufacturing.

Coforge has risen from a Market Challenger to Leader, while Kainos and Virtusa have progressed from Contenders to Product Challengers. Persistent Systems has recorded positive momentum, and Mphasis has been named a Rising Star. New additions to the quadrant include Bell Integration, Visionet and Hitachi Digital Services, expanding the competitive landscape. Providers such as Accenture, IBM and Infosys have expanded their AI-native capabilities through strategic acquisitions — Accenture has added Halfspace and Award Solutions to bolster GenAI and training services, while IBM has acquired Hakkoda to strengthen its data and AI consulting portfolio. CGI and Deloitte have also remained active, with CGI executing four data and digital engineering deals. Compared to last year, several mid-tier players such as Hexaware, LTIMindtree and Mphasis have sharpened their FinOps and DevSecOps integration offerings, while UK-centric firms such as Claranet and Computacenter have reinforced their sovereign cloud positioning to meet ESG and security mandates. The quadrant favours providers with certified delivery across hyperscalers, proprietary AI toolsets and industry-specific blueprints, especially those aligned with G-Cloud 14 and the UK's AI Growth Zones. As the market pivots towards intelligent transformation, vendor-agnostic architectures and GenAI guardrails have become critical differentiators.

From the 61 companies assessed for this study, 25 qualified for this quadrant, with nine being Leaders and one Rising Star.

claranet

Claranet emphasises digital sovereignty through cloud-agnostic services across private, public, hybrid and multicloud environments, focussing on security, compliance by design and portability to avoid vendor lock-in.

Coforge

Coforge has developed AI-native platforms such as Quasar AI Studio that host AI accelerators, model lifecycle services and benchmarking tools for AI governance, compliance and responsible AI.

Computacenter

Computacenter's Cloud v2 framework represents a second-generation cloud transformation approach aiming to move beyond simple lift-and-shift to modernised, cloud-native and automated platforms with embedded orchestration, security and continuous delivery.

HEXAWARE

Hexaware's AIOps solutions enable AI-led preventive operations automation, full-stack observability, dynamic thresholding and self-healing cloud lifecycle management to improve efficiency, reduce incidents and enhance system availability.

LTIMindtree

LTIMindtree's Canvas (an AIOps platform), GenAI-enabled automation and chatbot enhancements improve operational efficiency, incident resolution and CX.

rackspace technology

Rackspace Technology actively advances AI-driven innovation with offerings such as FAIR AI lifecycle management, AI security engineering and automation platforms, accelerating enterprise cloud adoption and operational efficiencies.

Tech Mahindra has strengthened its UK presence through strategic cloud and AI initiatives, including an Azure-based cloud transformation for a major food chain and a partnership with TOTSCo to deliver a secure, scalable cloud-native messaging platform for broadband switching.

Telefónica Tech

Telefónica Tech in the UK offers robust cloud transformation consulting, leveraging proven methodologies, including its Propel methodology for rapid cloud-native application prototyping and modernisation.

Unisys integrates AI and automation into its cloud and hybrid cloud managed services, especially through its intelligent operations platform.

Mphasis

Mphasis (Rising Star) has established a London innovation hub as a CoE for cutting-edge quantum computing, quantum cryptography and AI solutions while also delivering AI-augmented multicloud transformation across hyperscalers with cloud-native services.

Leader

"Unisys is strengthening its transformation portfolio through expanded assessment capabilities, data governance-led transformations, private AI enablement and robust hyperscaler partnerships."

Meenakshi Srivastava

Unisys

Overview

Unisys is headquartered in Pennsylvania, US. It has more than 15,900 employees across 20 countries. In FY24, the company generated $2.0 billion in revenue, with Enterprise Computing Solutions as its largest segment. Unisys delivers tailored cloud advisory, architecture design, migration, modernisation and security services for public sector and regulated commercial clients in the UK. Using its Cloud IT frameworks, Unisys enables efficient and secure multicloud and hybrid cloud adoption. The UK contributed 12.1 percent, or $241.1 million, to Unisys' revenue in FY24. It has one office in the UK, located in Milton Keynes.

Strengths

Public sector expertise: Unisys's strong foothold in the public sector and other highly regulated industries positions it as a trusted transformation partner. Its focus on delivering ultra-secure, automated and multicloud solutions, combined with a client-aligned and trust-based approach, differentiates the company in complex regulatory environments.

AI-driven innovation: With a companywide foundation in AI training, Unisys has adopted an AI-first and AI-infused approach across its transformation portfolio. Its structured innovation workshops, spanning cloud, applications, security and outcome-focused analytics, help clients identify actionable opportunities and accelerate value creation.

Robust partner ecosystem: Leveraging a mix of large strategic partners and a dynamic startup ecosystem, Unisys delivers disciplined advisory, migration and operations services. Joint solutions with partners such as Rubrik, along with growing cloud marketplace offerings across Azure and AWS, enable seamless, app-centric and cloud-native transformations for enterprise and midmarket clients across multiple regions, enhancing scalability and execution efficiency.

Caution

Unisys should focus on strengthening its regional presence and advancing self-sufficiency within the UK. Prioritizing compliance with domestic sovereignty requirements would help enable more secure and trusted operations.

Managed Services – Large Accounts

This report is valuable for providers offering **managed services** in the **UK** to understand their market position and for large enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

IT and infrastructure leaders

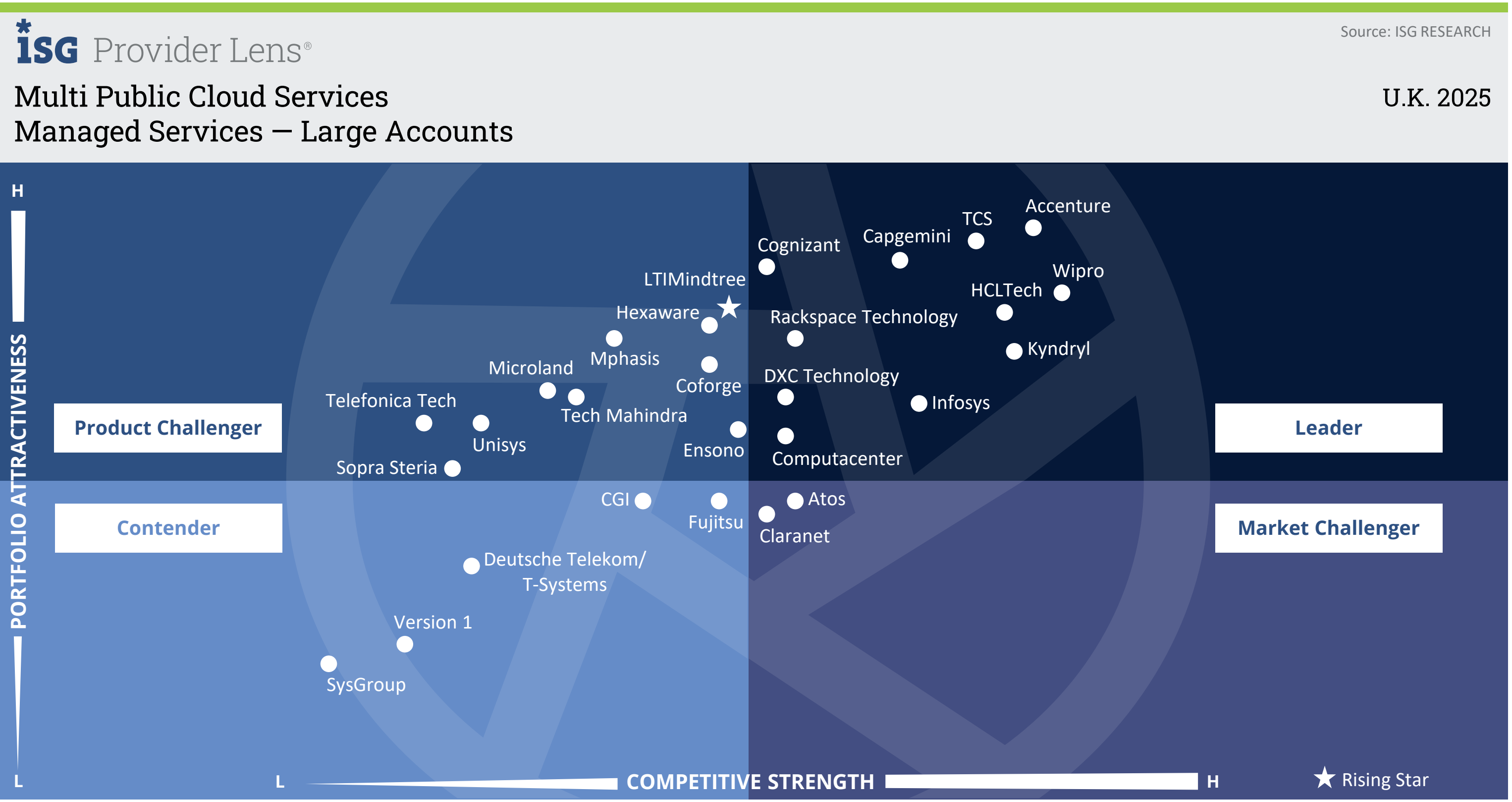
Should read this report to analyze managed service providers' modernization and service capabilities and to assess which providers offer innovative solutions aligned with evolving technology trends. Understanding these market advancements is critical for IT executives to develop effective, future-proof public cloud strategies and ensure their organizations maintain competitive agility and resilience.

Software development and technology leaders

Should read this report to gain insights into providers' strategic positioning, technological expertise and innovation in infrastructure transformation initiatives. This knowledge empowers them to align their internal software development and technology road maps with external expertise, driving efficient and impactful digital transformation.

Sourcing, procurement and vendor management professionals

Should use this report to better understand the current landscape and partner ecosystem of managed service providers in the UK. A deeper understanding of provider competencies, differentiation and market presence supports informed vendor selection and negotiation strategies, ensuring optimal partnerships that deliver both immediate value and sustainable long-term benefits.



For large enterprises, this quadrant assesses a provider's ability to deliver **AI-native**, automation-first managed services that ensure **resilient**, **sovereign** and **cost-optimised** multicloud operations with integrated **GenAI** and **FinOps-as-code** capabilities.

Meenakshi Srivastava

Definition

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

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 optimisation
- 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
- Self-service and no-code/low-code platforms embedded with governance features, allowing users to easily access managed services
- Edge-to-cloud and IoT integration for distributed intelligence and latency-sensitive use cases
- Industry-specific service blueprints and support for regulated environments with tailored compliance and data locality strategies

Eligibility Criteria

1. Manage **complex multicloud** environments and ensure **interoperability** across hyperscaler platforms
2. Possess expertise in **agentic AI**, **SRE** and **AIOps** practices for autonomous operations and resilience engineering
3. Demonstrate strong **FinOps** and **cost governance** capabilities, preferably enabled via prompt-based orchestration or AI assistants
4. Have in-depth experience in integrating both **cloud-native** and **legacy systems** using open APIs and infrastructure-as-code
5. Demonstrate recognised **certifications** and **partnerships** with AWS, Microsoft Azure, Google Cloud and other public cloud providers
6. Offer advanced **cloud security** and **data governance** features, including AI model security, privacy-preserving analytics and sovereign cloud capabilities
7. Showcase expertise in **contextualised** service delivery and business-aligned cloud transformation across industries
8. Offer expertise in **prompt-based agent orchestration** to **automate** FinOps and incident response (preferred)

Observations

This quadrant has evolved into a high-performance arena where providers are increasingly distinguished by their AI-native platforms, FinOps-as-code capabilities and automation-first service delivery. In 2024 and 2025, the quadrant pivots from traditional cloud operations to intelligent orchestration across hybrid and multicloud environments.

Computacenter has made a significant leap from Product Challenger to Leader. Microland and Mphasis have advanced from Contenders to Product Challengers, while LTIMindtree has been recognised as a Rising Star, reflecting its growing market presence. Leaders such as Accenture, Infosys and TCS have expanded their GenAI observability and agentic automation capabilities, while Kyndryl and Wipro have deepened their FinOps integration through prompt-based orchestration and autonomous rightsizing. M&A activities have reshaped the quadrant's contours — LTIMindtree's consolidation and DXC Technology's divestitures have streamlined their managed services portfolios, while Rackspace Technology and Atos have restructured UK operations to focus on sovereign cloud and ESG-aligned delivery. Providers such as Capgemini and Cognizant have introduced carbon-aware computing strategies and no-code platforms, enabling contextualised service delivery across regulated sectors. Telefonica Tech and Deutsche Telekom/T-Systems have strengthened edge-to-cloud integration and data locality frameworks, reinforcing their relevance in latency-sensitive and compliance-driven use cases. Overall, the quadrant showcases a shift towards resilient, intelligent and sustainable managed services, with UK providers aligning deeply with industry-specific needs and AI-powered governance.

From the 61 companies assessed for this study, 28 qualified for this quadrant, with 11 being Leaders and one Rising Star.

accenture

Accenture's global and UK teams have integrated GenAI for automation, documentation and intelligent chatbots, leveraging ServiceNow and custom GenAI components for knowledge retrieval and incident resolution in cloud operations.

Capgemini

Capgemini is advancing expertise in prompt-based AI agent orchestration to automate FinOps functions and incident management as part of its AI-powered integration strategy.

cognizant

Cognizant partnered with IBM to launch a FinOps CoE, leveraging IBM's Apptio and Turbonomic tools and Cognizant's cloud platform, emphasising AI-driven FinOps and automation to manage hybrid multicloud spending.

Computacenter

Computacenter has renewed its growth momentum due to effective regional strategies and diversified service offerings, offsetting challenges in other markets such as Germany and France.

DXC TECHNOLOGY

DXC Technology has invested in agentic AI, site reliability engineering (SRE) and AIOps practices through its partnership with 7AI to launch the DXC Agentic Security Operations Center (SOC), integrating fully autonomous AI agents for alert triage, investigation and remediation.

HCLTech drives industry-specific cloud transformations with a focus on business-aligned delivery across sectors, including energy, automotive and consumer goods. Its approach includes upskilling teams and delivering cloud-ready operating models for agility and innovation.

Infosys offers advanced governance, risk and compliance (GRC) services, underpinned by top-tier cybersecurity frameworks and AI and ML advancements.

Kyndryl integrates GenAI capabilities into its Kyndryl Bridge platform and AIOps offerings, employing NVIDIA technology for enhanced failure prediction, analysis and network management.

Rackspace Technology assists the UK public sector and regulated industries with cloud-native and legacy system integration, emphasising open API use and infrastructure automation to support interoperability and modernisation.

TCS' UK Pace Port innovation hub fosters collaboration and accelerates AI-driven digital transformation across industries, as showcased by its partnership with Co-op UK that advances agile, sustainable and efficient cloud transformation.

Wipro excels in managing complex multicloud environments with seamless interoperability across leading cloud platforms. It leverages cloud-native and legacy system integration, supported by standardised frameworks and automation.

LTIMindtree (Rising Star) has expertise in agentic AI, AI-driven automation and AIOps. Its AI-native BlueVerse platform and partnerships help deliver autonomous, context-aware AI agents for operational efficiency, customer engagement and cloud adoption.

Managed Services — Midmarket

This report is valuable for providers offering **managed services** in the **UK** to understand their market position and for midsize enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

IT and infrastructure leaders

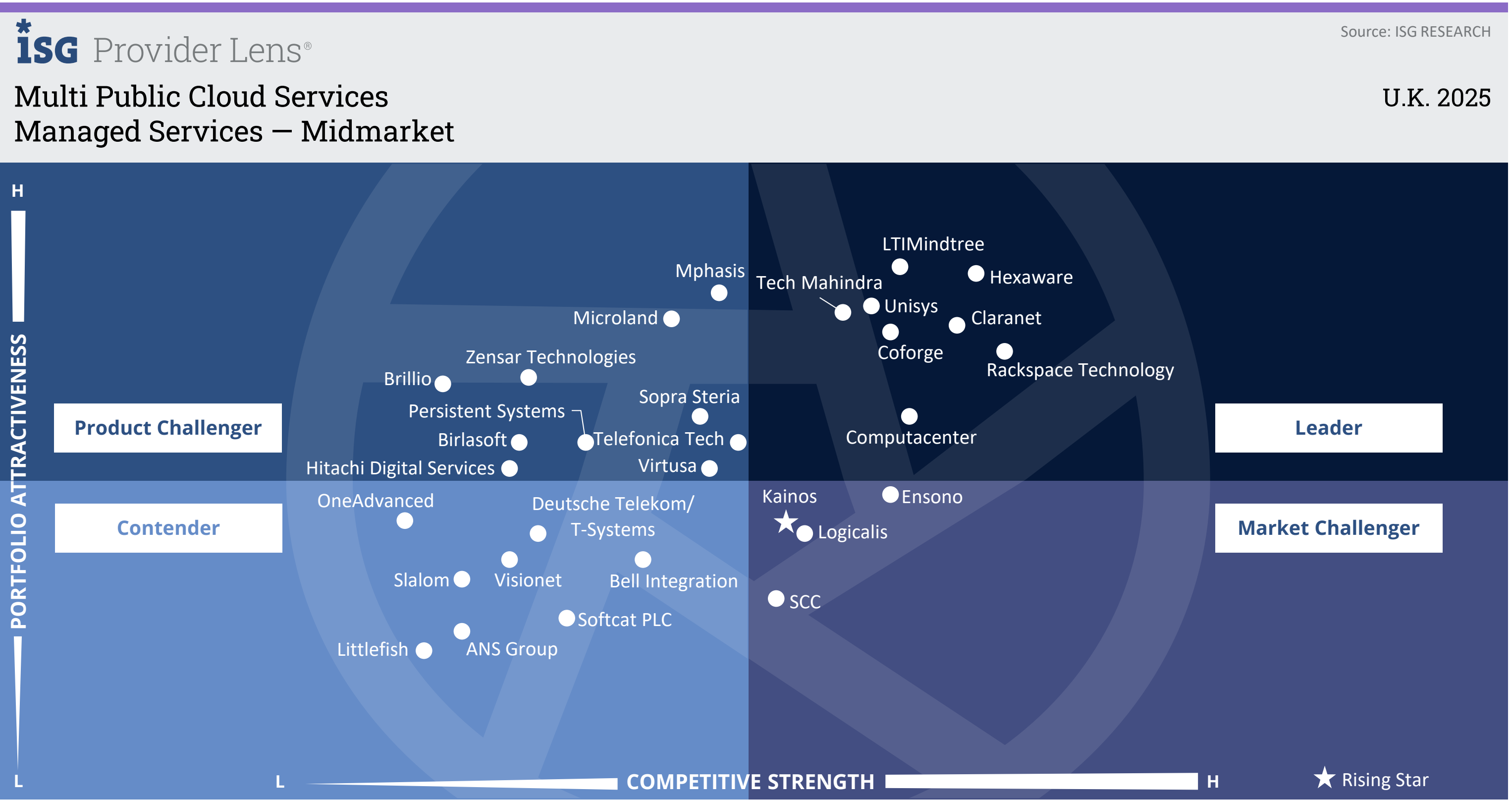
Should read this report to analyze managed service providers' modernization and service capabilities and to assess which providers offer innovative solutions aligned with evolving technology trends. Understanding these market advancements is critical for IT executives to develop effective, future-proof public cloud strategies and ensure their organizations maintain competitive agility and resilience.

Software development and technology leaders

Should read this report to gain insights into providers' strategic positioning, technological expertise and innovation in infrastructure transformation initiatives. This knowledge empowers them to align their internal software development and technology road maps with external expertise, driving efficient and impactful digital transformation.

Sourcing, procurement and vendor management professionals

Should read this report to better understand the current landscape and partner ecosystem of managed service providers in the UK. A deeper understanding of provider competencies, differentiation and market presence supports informed vendor selection and negotiation strategies, ensuring optimal partnerships that deliver both immediate value and sustainable long-term benefits.



This quadrant evaluates how effectively providers simplify and automate multicloud management using **AIOps**, **no-code platforms** and **agentic automation** for midmarket enterprises to achieve cost efficiency, agility and intelligent governance at scale.

Meenakshi Srivastava

Definition

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

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 optimisation
- 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
- Self-service and no-code/low-code platforms embedded with governance features, allowing users to easily access managed services
- Edge-to-cloud and IoT integration for distributed intelligence and latency-sensitive use cases
- Industry-specific service blueprints and support for regulated environments with tailored compliance and data locality strategies.

Eligibility Criteria

1. Manage **complex multicloud** environments and ensure **interoperability** across hyperscaler platforms
2. Possess expertise in **agentic AI**, **SRE** and **AIOps** practices for autonomous operations and resilience engineering
3. Demonstrate strong **FinOps** and **cost governance** capabilities, preferably enabled via prompt-based orchestration or AI assistants
4. Have in-depth experience in integrating both **cloud-native** and **legacy systems** using open APIs and infrastructure-as-code
5. Demonstrate recognised **certifications** and **partnerships** with AWS, Microsoft Azure, Google Cloud and other public cloud providers
6. Offer advanced **cloud security** and **data governance** features, including AI model security, privacy-preserving analytics and sovereign cloud capabilities
7. Showcase expertise in **contextualised** service delivery and business-aligned cloud transformation across industries
8. Offer expertise in **prompt-based agent orchestration** to **automate** FinOps and incident response (preferred)

Observations

This quadrant continues to evolve as providers recalibrate their offerings to meet rising enterprise demand for AI-native, automation-first cloud operations. This segment is defined by its ability to orchestrate secure, compliant and cost-optimised multicloud ecosystems increasingly infused with GenAI, agentic automation and FinOps-as-code capabilities. Compared to last year, several providers have strengthened their specialisation in GenAI workload orchestration, AI-driven observability and sovereign cloud controls, aligning with the quadrant's emphasis on contextualised, industry-specific service delivery. Notably, firms such as Claranet, Littlefish and Softcat have expanded their AI-native management platforms and FinOps integration, while global players such as LTIMindtree, Tech Mahindra and Hexaware have strengthened their UK footprint through enhanced partnerships and certifications with hyperscalers. Birlasoft and Virtusa have made positive strides, advancing from Contender to Product Challenger status, while Kainos emerged as a Rising Star, signalling strong growth potential. New additions to the quadrant include Bell Integration, Visionet and Hitachi Digital Services, expanding the competitive landscape with fresh capabilities and differentiated offerings.

M&A activities remained cautious yet strategic, shaped by macroeconomic headwinds and political uncertainties. While the midmarket deal volume in the UK has been steady YoY, providers in this quadrant are pursuing targeted bolt-on acquisitions to scale capabilities in cybersecurity, cloud-native DevOps and regulated industry compliance. For instance, Rackspace Technology and Ensono focussed on expanding their edge-to-cloud and IoT integration portfolios, while firms such as Coforge and Virtusa explored inorganic growth to bolster their AI model security and privacy-preserving analytics offerings. With renewed interest in private equity and valuation gaps narrowing, 2025 is poised to see deliberate consolidation, especially among providers seeking to differentiate through prompt-based agent orchestration and autonomous FinOps delivery.

From the 61 companies assessed for this study, 30 qualified for this quadrant, with eight being Leaders and one Rising Star.

claranet

Claranet secured a place on the UK government's G-Cloud 14 framework, confirming its trusted cloud services for public sector clients. It also holds Fortinet MSSP expert status in SD-WAN, SASE and SecOps.

Coforge

Coforge delivers enterprise-grade cloud security and sovereign cloud solutions tailored for the UK. Its approach is built on zero trust principles, ensuring compliance with industry standards such as UK GDPR and providing advanced data governance and threat protection.

Computacenter

Computacenter actively integrates AI and GenAI capabilities into cloud and application services, including data platforms for AI adoption, automation to augment staff productivity and developer enablement with low-code/no-code tooling.

HEXAWARE

Hexaware offers a mature cloud FinOps framework via its Tensai® Cloud FinOps platform, enabling cost transparency, intelligent resource optimisation and governance across multiple cloud providers with automation and AI-driven FinOps orchestration.

LTIMindtree is building expertise in prompt-based agent orchestration demonstrated through integration with Boomi Agentstudio, enabling automated FinOps and incident response workflows.

Rackspace Technology's Sovereign Services deliver fully UK-sovereign cloud solutions compliant with government standards such as the Government Security Classifications Policy and NHS England Class V. The services include secure cloud hosting, 24 by 7 governance, NHS-grade cybersecurity and data sovereignty.

Tech Mahindra has strong contextualised service delivery with business-aligned cloud transformation, focussing on UK BFSI and telecom sectors through executive engagements and tailored cloud strategies.

Unisys offers advanced cloud security and data governance features, including AI model security, privacy-preserving analytics and support for sovereign cloud capabilities, that are increasingly relevant in regulated UK sectors.

Kainos (Rising Star) launched a Microsoft AI CoE in the UK to help clients design, deploy and scale AI solutions built on Microsoft's technologies, driven by leaders experienced in complex regulated environments.

Unisys

Leader

"Unisys is embedding hyperautomation, AIOps and agentic AI across its portfolio to transform cloud operations into predictive, secure and autonomous environments that deliver measurable efficiency, cost optimization and resilience at enterprise scale."

Meenakshi Srivastava

Overview

Unisys is headquartered in Pennsylvania, U.S. It has more than 15,900 employees across 20 countries. In FY24, the company generated $2.0 billion in revenue, with Enterprise Computing Solutions as its largest segment. Unisys offers managed cloud services with easy scaling, regular backups and constant monitoring in the UK. It serves enterprises and government clients, offering higher security, flexible scaling and compliance-focused solutions. The UK is an important market for Unisys. It contributed 12.1 percent, or $241.1 million, to Unisys' revenue in FY24. It has one office in the UK, located in Milton Keynes.

Strengths

Tailored engagements for business outcomes: Unisys differentiates through its client-centric and right-sized engagement model, designed to meet enterprises at their pace of transformation. By embedding FinOps, AIOps and governance into its IT frameworks, the company simplifies cloud complexity while driving measurable business value.

Automation-led ZeroOps transformation: Unisys showcases strong differentiation with its focus on AI-powered automation and ZeroOps delivery. By integrating AI-driven automation, hyperautomation and embedded security, it enables enterprises to accelerate migration, streamline operations and achieve cost efficiency at scale.

Proven strength in regulated industries: A significant strength of Unisys lies in its heritage of serving public sector and regulated industries, where compliance, security and resilience are critical. The company brings proven expertise in delivering secure and governance-led transformations across hybrid and multicloud ecosystems, making it a reliable partner for clients navigating complex regulatory landscapes. Its ability to combine security leadership with transformation execution demonstrates a strong positioning in mission-critical environments where operational resilience can not be compromised.

Caution

By offering AI-powered security models with adjustable guardrails, explainability and compliance alignment (e.g., NIST, FedRAMP), Unisys can set a benchmark for secure AI deployments. Anchoring these with sovereign compliance will strengthen trust for mission-critical and government workloads.

FinOps Services and AI-driven Optimization

Who Should Read This Section

This report is valuable for providers offering **FinOps services and AI-driven optimization** in the **UK** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

IT and Infrastructure Leaders

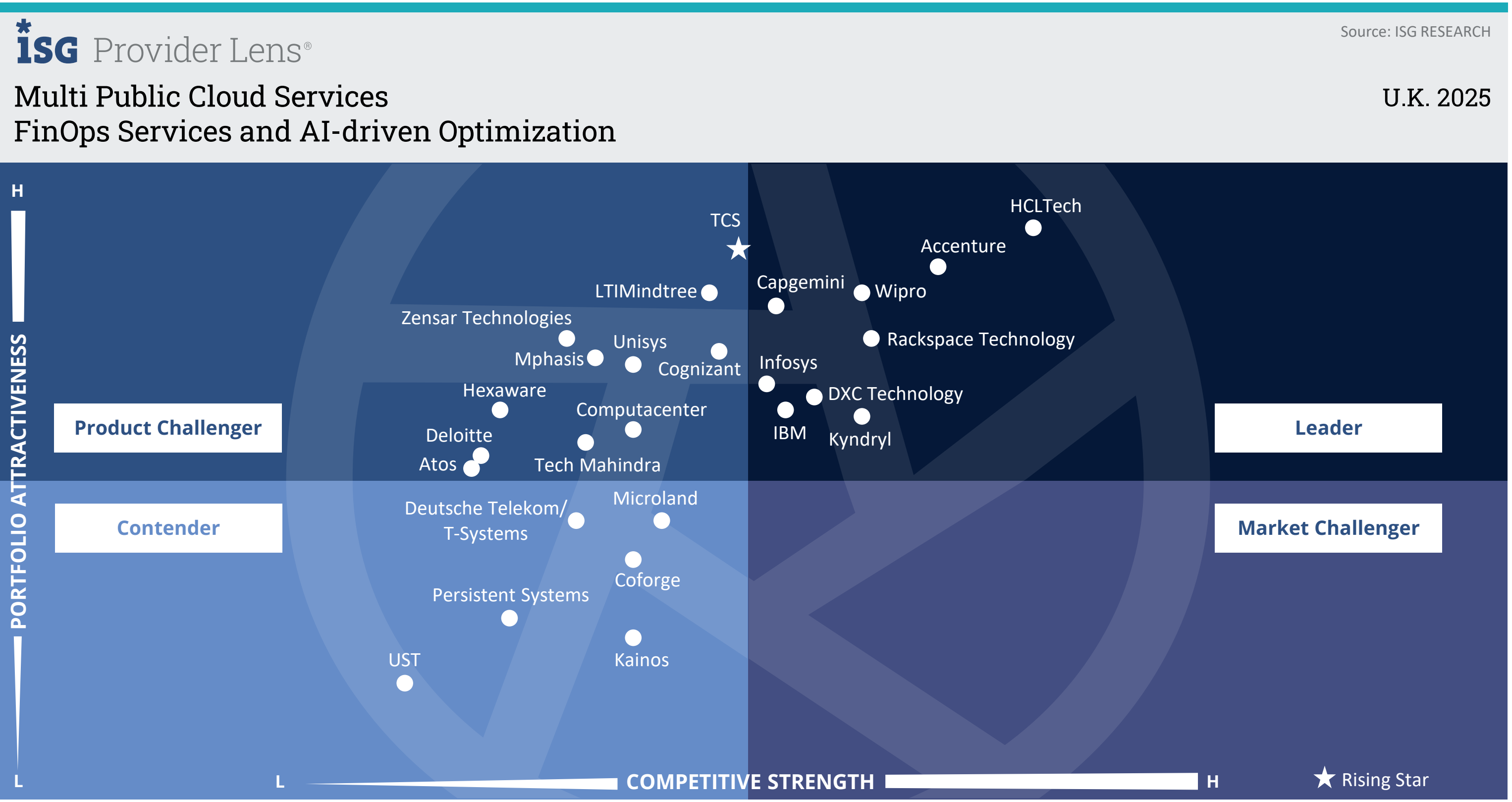
Should read this report to understand the relative strengths and weaknesses of FinOps and AI-driven optimization service providers and how their market approaches influence enterprises' adoption of cloud-native technologies. Understanding these market advancements is critical for IT executives to develop effective, future-proof public cloud strategies and ensure their organizations maintain competitive agility and resilience.

Software development and technology leaders

Should read this report to gain insights into providers' strategic positioning, technological expertise, and innovation in infrastructure transformation initiatives. This knowledge empowers them to align internal software development and technology road maps with external expertise, driving efficient and impactful digital transformation.

Sourcing, procurement and vendor management professionals

Should use this report to better understand the current landscape and partner ecosystem of FinOps and AI-driven optimization service providers in the UK. A deeper understanding of provider competencies, differentiation and market presence supports informed vendor selection and negotiation strategies, ensuring optimal partnerships that deliver both immediate value and sustainable long-term benefits.



This quadrant evaluates providers delivering **AI-driven FinOps** across multicloud using **predictive analytics**, **automation** and **real-time governance** to ensure cost transparency, accountability and business value beyond savings.

Meenakshi Srivastava

Definition

This quadrant assesses providers that specialise in enabling intelligent, automated and predictive cost optimisation and governance across multiple public cloud environments by leveraging FinOps frameworks and principles, along with AI technologies. These providers use LLMs, AI agents and predictive analytics to orchestrate cloud financial optimisation in real time, delivering tangible business value beyond simple cost savings. Leading providers deliver FinOps services through the following:

- AI-native FinOps portals that integrate usage and pricing telemetry, GenAI-based cost forecasting and business-aligned reporting
- LLM-orchestrated automation for budget enforcement, anomaly detection, policy-based approvals and dynamic allocation
- Predictive optimisation engines to forecast cloud usage trends, rightsize resource portfolios and simulate cost impacts of workload scaling
- Autonomous remediation of inefficiencies through prompt-based spend insights, explainability frameworks and bias detection in optimisation decisions
- Integrated chargeback/showback strategies that empower business units with cost transparency and accountability
- FinOps policy governance, covering tagging compliance, approval workflows, access policies and sustainability-aware budget recommendations
- Organisational change management (OCM), including FinOps capability building, federated governance models and cross-functional operating models to sustain financial discipline

Eligibility Criteria

1. Showcase measurable outcomes from **AI-enhanced FinOps** optimisation across at least three major hyperscalers (AWS, Microsoft Azure, Google Cloud and OCI)
2. Have **FinOps-certified practitioners** with experience deploying and operating across all three pillars of the FinOps framework — inform, optimise and operate
3. Possess expertise in **agentic AI** or **LLM-based orchestration** to drive near real-time cost governance actions, not limited to dashboarding
4. Support **prompt-based spend insights** with contextual explainability and policy-driven financial controls
5. Support **SLA-backed cost-saving targets**, **dynamic budgeting** and **adaptive FinOps**
6. Integrate FinOps practices within client organisations through **training, change management** and **internal cloud centre of excellence (CoE)**
7. Demonstrate **case-based evidence** of **financial outcomes** and optimisation beyond traditional reporting capabilities
8. Empower clients with OCM for **sustainable FinOps** practices (preferred)

Observations

This quadrant reflects a maturing landscape where cost governance has evolved from reactive reporting to proactive orchestration, driven by AI-native platforms and LLM-based automation. Providers in this quadrant are no longer merely optimising cloud spend; they are embedding FinOps as a strategic capability across multicloud environments, aligning financial operations with business outcomes. Compared to 2024, several vendors have augmented their AI integration, expanded GenAI forecasting capabilities and strengthened policy-driven financial controls. Notably, firms such as Accenture, Infosys and Wipro have scaled their FinOps-certified talent pools and demonstrated measurable outcomes across AWS, Azure and Google Cloud, meeting the eligibility threshold for intelligent, SLA-backed cost governance. Deloitte and Capgemini have absorbed niche FinOps consultancies to bolster their federated governance models, while Computacenter and DXC Technology have restructured cloud portfolios post acquisition to support dynamic budgeting and autonomous remediation.

Amid a broader uptick in UK M&A volumes in 2024 and early 2025, FinOps-focussed transactions signal a strategic pivot where financial discipline, explainability and sustainability-aware optimisation are becoming core differentiators in cloud transformation programs. TCS emerges as a Rising Star in UK AI-driven FinOps, while Computacenter and Infosys show strong upward momentum — Computacenter advancing to Product Challenger and Infosys to Leader. Kainos and Coforge make notable debuts in the quadrant.

From the 61 companies assessed for this study, 26 qualified for this quadrant, with nine being Leaders and one Rising Star.

Accenture actively incorporates ethical AI risk management, explainability frameworks and sustainability-aware budget recommendations in its AI-enabled FinOps solutions, addressing organisational governance and compliance needs critical for adoption in regulated markets.

Capgemini emphasises AI and automation in cloud FinOps teams, deploying AI algorithms for anomaly detection, forecasting, billing error detection and dynamic budget enforcement.

DXC Technology develops and promotes Cloud FinOps services, especially for Microsoft Azure, showcasing strong expertise in enabling financial accountability, cost transparency and optimisation through people, processes and tailored tooling.

HCLTech collaborates with IBM to integrate its hybrid FinOps with IBM Cloudability, enhancing AI-driven cloud cost management, automated cost allocation (chargeback/showback) and SLA-backed optimisation.

IBM has expanded its FinOps capabilities across multicloud environments with AI-enhanced predictive optimisation and automated cloud cost governance tools.

Infosys' FinOps consulting engagements for UK clients have shown measurable AI-enhanced outcomes, including multimillion-dollar cloud spend savings through governance model implementation, resource rightsizing and proactive budget enforcement.

Kyndryl has deployed predictive optimisation engines to simulate workload scaling and forecast cloud usage trends, helping UK clients rightsize portfolios and meet SLA-backed cost targets.

Rackspace Technology's Optimizer+ and Modern Operations services embed AI agents for budget enforcement, anomaly detection and policy-based approvals. These tools automate cost governance actions across AWS, Azure and Google Cloud.

Wipro's FinOps tool, Wipro SLICE, and cloud cost optimization accelerators deployed across AWS and Azure environments provide automated workload rightsizing, idle resource detection and cost avoidance without service impact, delivering measurable savings in large engagements.

TCS (Rising Star) has developed AI-native assessment tools and collaborates with partners such as Dell to enable FinOps in GenAI deployments, helping clients manage cost, workload placement and infrastructure sizing.

Hyperscale Infrastructure and Platform Services

Who Should Read This Section

This report is valuable for providers offering **hyperscale infrastructure and platform services** in the **UK** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

IT and infrastructure leaders

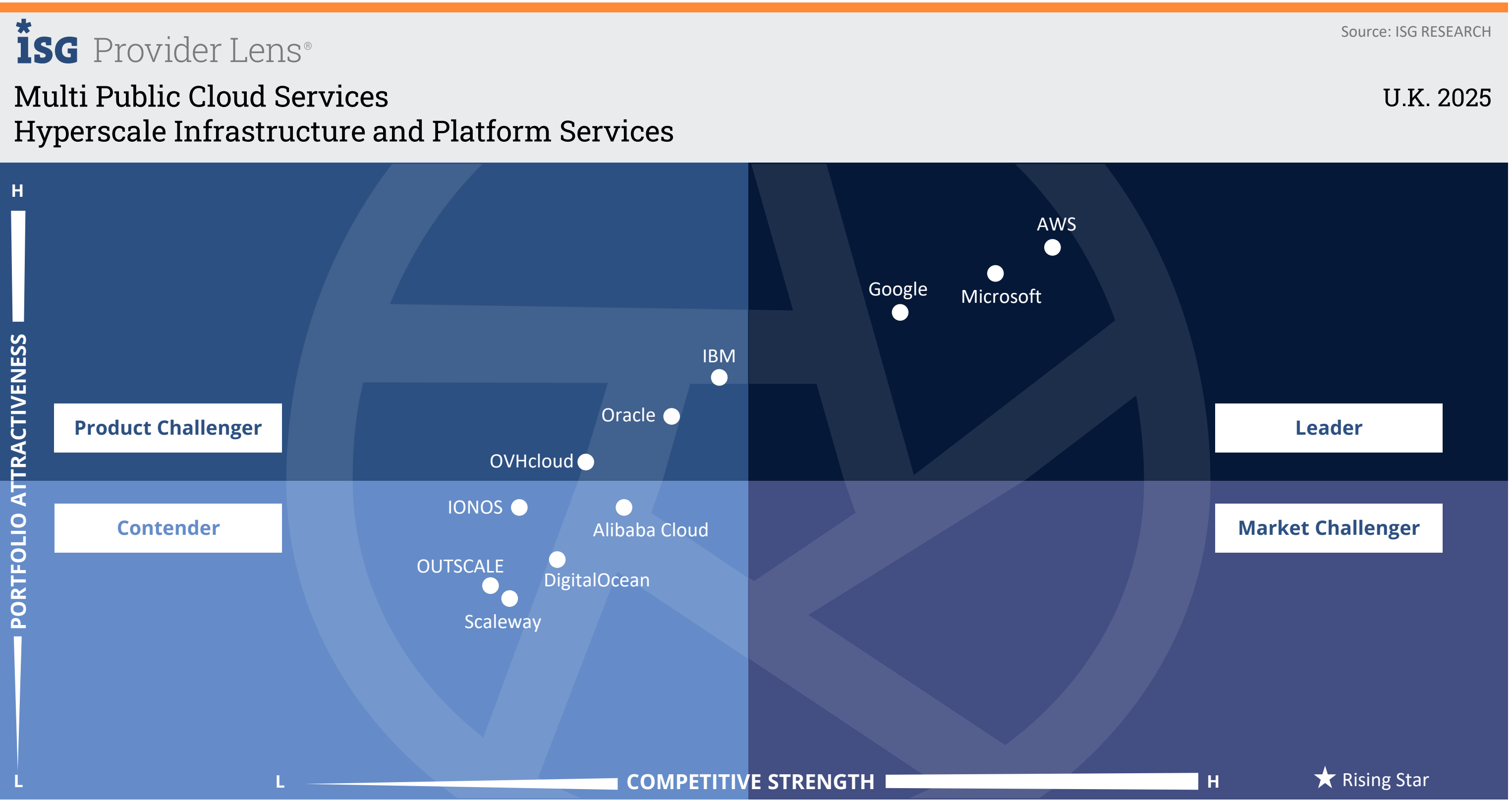
Should read this report to analyze hyperscale infrastructure and platform service providers' modernization and service capabilities and the market advancements that impact public cloud strategies. Understanding these market advancements is critical for IT executives to develop effective, future-proof public cloud strategies and ensure their organizations maintain competitive agility and resilience.

Software development and technology leaders

Should examine this report to gain insights into providers' strategic positioning, technological expertise and innovation in infrastructure transformation initiatives. This knowledge empowers them to align their internal software development and technology road maps with external expertise, driving efficient and impactful digital transformation.

Sourcing, procurement and vendor management professionals

Should read this report to better understand the current landscape and partner ecosystem of hyperscale infrastructure and platform service providers in the UK. A deeper understanding of provider competencies, differentiation and market presence supports informed vendor selection and negotiation strategies, ensuring optimal partnerships that deliver both immediate value and sustainable long-term benefits.



This quadrant evaluates public cloud infrastructure and platform providers in the UK that support a significant number of clients by delivering **shared-, AI- and HPC-optimised infrastructure** through a **pay-as-you-go model.**

Meenakshi Srivastava

Definition

This quadrant evaluates hyperscale cloud providers that deliver enterprise-grade IaaS and PaaS capabilities through scalable, resilient and AI-native cloud platforms. These providers are foundational enablers of digital transformation and modern application development, offering infrastructure and platform services designed to support high-performance computing, GenAI workloads and multiagent system orchestration at a global scale. Leading hyperscalers deliver extensive cloud capabilities through the following:

- Self-service IaaS platforms for compute, memory, storage, networking and high-throughput processing, including HPC clusters, ML-optimised instances and GPU/TPU acceleration
- Modern PaaS environments supporting containerisation, event-driven functions, databases, DevOps pipelines, backup and DR automation and orchestration of AI and ML tools and microservices
- AI-native cloud platforms with integrated access to foundational models, fine-tuning pipelines, multimodal GenAI tools and open model registries (LLMs, vector DBs and RAG frameworks)
- Runtime environments and SDKs for creating cloud-native, edge-aware and agent-centric applications, including support for infrastructure-as-code (IaC) practices, serverless computing and autonomous software agents across hybrid/multicloud deployment.
- Integrated marketplaces with curated third-party applications, GenAI agents, data services and industry-specific blueprints
- Sovereign-by-design architecture, providing granular data access control, encryption and compliance with local data residency laws, along with support for regulated industries
- Sustainable cloud infrastructure, backed by clean energy commitments and carbon-reduction targets
- Global scalability, featuring high-bandwidth connectivity and extensive availability zones

Eligibility Criteria

1. Offer a comprehensive IaaS portfolio, including **ML-** and **HPC-optimised** compute instances, container services, serverless platforms, backup solutions, storage tiering and network orchestration
2. Showcase **dedicated infrastructure for AI and ML**, including specialised silicon, GPU/TPU clusters, access to foundational LLMs and managed AI infrastructure services
3. Have 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
5. Offer transparent and flexible **billing models**, including on-demand, reserved, spot and sustainable pricing tiers with public pricing disclosures
6. Ensure compliance with global and regional **certification standards** such as ISO, SOC, GDPR and C5 and implement advanced cloud security controls
7. Have **an extensive partner ecosystem**, offering training, developer enablement, certification programmes and co-innovation initiatives to accelerate cloud adoption and enhance maturity
8. Offer **clean energy** and **carbon-reduction** programmes
9. Provide support for IaC and **serverless computing** in combination with **automated provisioning**, event triggering and failover

Observations

The UK hyperscale cloud market is growing, fuelled by the demand for AI-native infrastructure and sovereign and sustainable cloud platforms. The three leading hyperscalers — AWS, Microsoft Azure and Google Cloud — are driving the demand with record investments aimed at supporting GenAI and HPC workloads. These include Microsoft's £30 billion investment to build a 23,000-GPU supercomputer, Google's £5 billion Waltham Cross facility and AWS' £8 billion expansion in the country. These moves align with the UK's ambition to become a global AI hub, reinforced by government-backed AI growth zones and critical infrastructure status for data centres.

GPU as a service (GPUaaS) is emerging as a key growth driver, enabling enterprises to access high-performance GPUs on-demand for AI training, inference and high-performance computing without heavy capital outlay. Hyperscalers are expanding GPUaaS offerings with NVIDIA H100 and A100 clusters, while neocloud providers intensify competition with specialised AI-optimised environments.

AI and agentic AI computing are dominating enterprise strategies, with hyperscalers embedding advanced PaaS capabilities such as container orchestration, serverless platforms and integrated GenAI toolchains to enable multiagent orchestration and multicloud portability.

AI and Agentic AI computing are dominating enterprise strategies, with hyperscalers embedding advanced PaaS capabilities such as container orchestration, serverless platforms and integrated GenAI toolchains to enable multi-agent orchestration and multi cloud portability.

Sustainability remains a differentiator as providers accelerate carbon-neutral commitments through renewable energy sourcing, immersion cooling and green design standards to offset the energy intensity of AI clusters.

With sovereign-by-design architectures, expanded availability zones and GPUaaS adoption, the UK market is poised for growth, powering next-generation digital transformation.

From the 61 companies assessed for this study, 11 qualified for this quadrant, with three being Leaders.

AWS is expanding its UK ecosystem through stronger collaborations with fintech and healthcare sectors, launching AI competency programs for partners and enhancing its marketplace with industry-specific blueprints. Its focus on developer enablement accelerates cloud-native adoption.

Google

Google is investing £5 billion over two years in the UK AI infrastructure by opening a data centre at Waltham Cross and expanding DeepMind research. The initiative supports AI-driven services, promotes cybersecurity and job creation.

Microsoft

Microsoft Azure is driving innovation in the UK via coinnovation hubs and partnerships with universities for AI research. Its plan to invest £30 billion to build AI infrastructure in the UK will strengthen its footprint in the region.

SAP HANA Infrastructure Services

This report is valuable for providers offering **SAP HANA infrastructure services** in the **UK** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

IT and infrastructure leaders

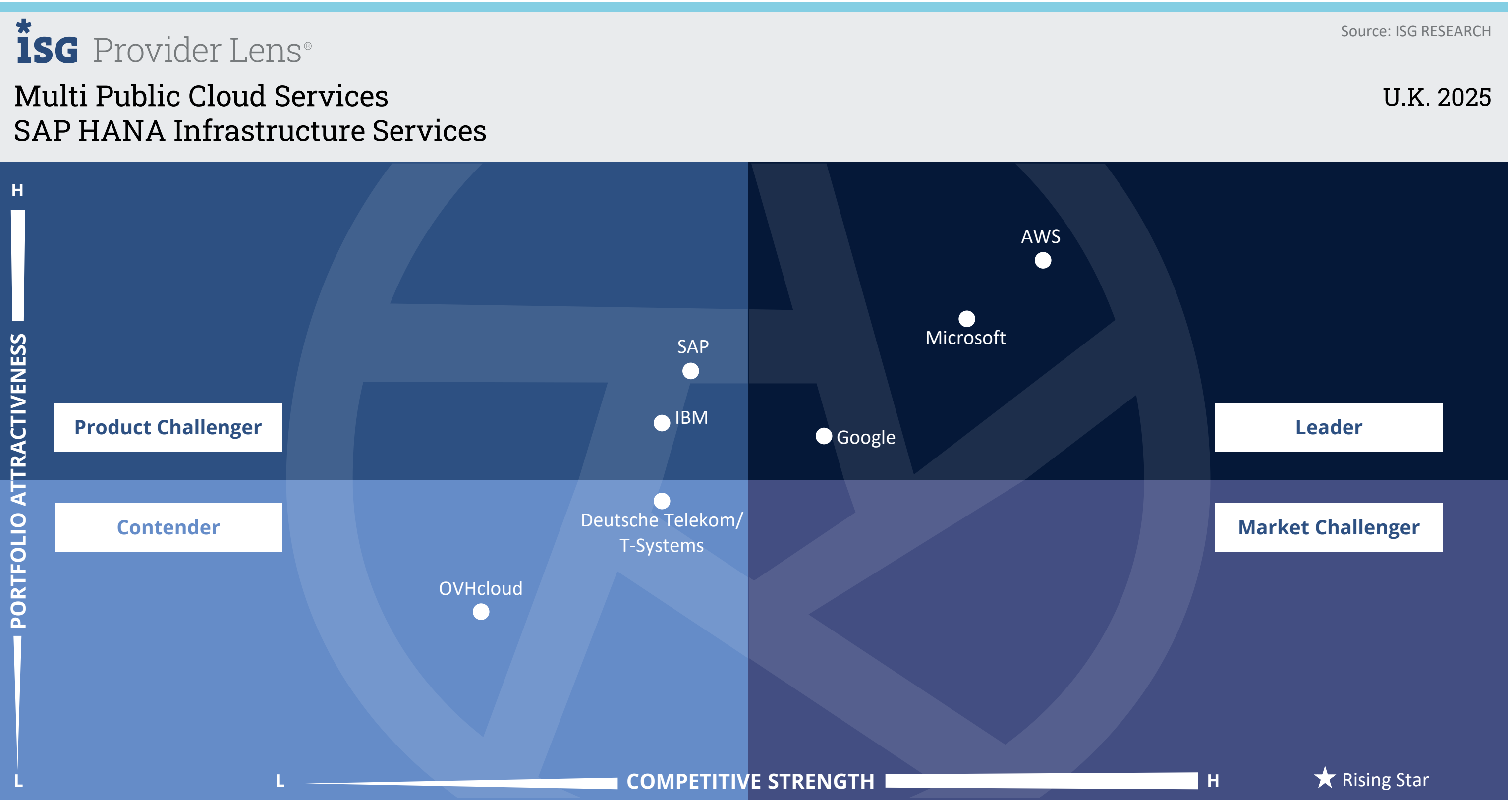
Should read this report to analyze SAP HANA infrastructure service providers' modernization and service capabilities and the market advancements that impact public cloud strategies. Understanding these market advancements is critical for IT executives to develop effective, future-proof public cloud strategies and ensure their organizations maintain competitive agility and resilience.

Software development and technology leaders

Should read this report to understand providers' positioning and offerings, and their impact on the ongoing infrastructure transformation initiatives. This knowledge empowers them to align their internal software development and technology road maps with external expertise, driving efficient and impactful digital transformation.

Sourcing, procurement and vendor management professionals

Should read this report to better understand the current landscape and partner ecosystem of SAP HANA infrastructure service providers in the UK. A deeper understanding of provider competencies, differentiation and market presence supports informed vendor selection and negotiation strategies, ensuring optimal partnerships that deliver both immediate value and sustainable long-term benefits.



This quadrant assesses **public cloud IaaS providers** delivering **SAP-certified, scalable platforms** for **S/4HANA and HANA workloads**, with **AI-driven automation** and **regional compliance** to support secure, optimised SAP operations.

Meenakshi Srivastava

Definition

This quadrant evaluates public cloud IaaS providers — both global hyperscalers and regional infrastructure specialists — that offer certified, scalable and SAP-optimised platforms for hosting SAP S/4HANA, 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, streamline operations and enhance lifecycle management.

Key service capabilities include the following:

- SAP-certified infrastructure components, encompassing memory-intensive VMs with over 6 TB of capacity, flexible storage tiers, high-throughput networking and disaster recovery architectures across multiple regions or availability zones
- AI-powered assistants for SAP landscape sizing, architecture design, cost simulation, migration planning and dynamic configuration recommendations
- Automated operations, including provisioning, service orchestration, backup/restore, patching and performance optimisation
- 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, including advisory services for coexistence, hybrid cloud strategies and SAP licensing optimisation
- Partner ecosystems, encompassing certified SAP service providers, enabling end-to-end transformation, including migration, application modernisation and platform operation

Eligibility Criteria

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

Observations

This quadrant reflects a maturing landscape of public cloud IaaS providers that are increasingly aligning with SAP's certified infrastructure and AI-driven operational standards. This year's quadrant underscores a strategic pivot among hyperscalers and regional specialists towards stronger SAP workload optimisation, cost transparency and lifecycle automation. Compared to 2024, providers such as AWS, Microsoft and Google have expanded their SAP-certified virtual machine (VM) portfolios and enhanced AI-powered tooling for migration planning and dynamic configuration, reinforcing their leadership in scalable SAP hosting. IBM and SAP have strengthened their FinOps capabilities through tighter integration with SAP-native tooling and structured migration frameworks, while OVHcloud and T-Systems have strengthened their regional compliance posture and disaster recovery architectures to meet UK-specific regulatory demands. Notably, 2024-2025 saw targeted M&A activities, with IBM acquiring UK-based FinOps analytics startups to bolster its Cloudability suite, and T-Systems expanding its SAP services footprint through strategic partnerships. These shifts reflect a quadrant-wide emphasis on cost accountability, AI-enabled operations and hybrid SAP hosting models, positioning providers to support both RISE with SAP and bespoke transformation journeys across regulated UK sectors.

From the 61 companies assessed for this study, seven qualified for this quadrant, with three being Leaders.

AWS launched SAP Sovereign Cloud capabilities in the UK in 2024, supporting SAP Business Technology Platform and SAP Cloud ERP in compliance with local data residency and sovereignty regulations.

Google

Google Cloud has partnered with SAP to bring AI-managed operations for RISE with SAP S/4HANA Cloud Private Edition, focusing on AI-driven orchestration and automated lifecycle management for SAP workloads.

Microsoft

Microsoft expanded SAP capabilities with the Business Suite Acceleration Program for streamlined ERP migrations and introduced SAP-certified M-series VMs supporting scale-out SAP HANA deployments over 6 TB with standby nodes and dynamic tiering.

Appendix

The ISG Provider Lens® – 2025 Multi Public Cloud Services study analyzes the relevant software vendors/service providers in the UK 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 report includes research 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. The data collected for this report represent information that ISG believes to be current as of November 2025 for providers that actively participated and for providers that did not. ISG recognizes that many mergers and acquisitions may have occurred since then, but this report does not reflect these changes.

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

The study was conducted in the following steps:

1. Definition of Multi Public Cloud Services market
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities and use cases
4. Leverage ISG's internal databases and advisor knowledge & experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts & figures received from providers and other sources.
6. Use of the following key evaluation criteria:
   * Strategy and vision
   * Innovation
   * Brand awareness and presence in the market
   * Sales and partner landscape
   * Breadth and depth of portfolio of services offered
   * Technology advancements

Author

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Lead Analyst

Meenakshi Srivastava has nearly eight years of expertise and knowledge in IT infrastructure and analysis and insight generation. At ISG, Meenakshi is a lead analyst for ISG Provider Lens®, leading research activities and benchmarking exercises on the regional adoption of digital infrastructure such as private and hybrid cloud.

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She has led and supported ad-hoc research requests in investment banking, healthcare, energy and information and communication technology. During this period, she has also spent significant time enabling technology sales in pre-sales research teams. Arpita is skilled in insights generation, market sizing and forecasting, storyboarding, design thinking, financial analysis, go-to-market strategies, competitive intelligence and benchmarking. Her areas of interest broadly are- technology, finance and business strategy.

Study Sponsor

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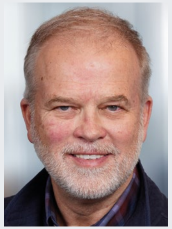
Heiko Henkes serves as Managing Director and Principal Analyst at ISG, overseeing the Global ISG Provider Lens® (IPL) Program for all ITO studies, alongside his pivotal role in the global IPL division as a strategic program manager and thought leader for IPL lead analysts.

Henkes heads Star of Excellence, ISG's global CX initiative, steering program design and its integration with IPL and ISG's sourcing practice. His expertise lies in guiding companies through IT-based business model transformations, leveraging his deep understanding of continuous transformation, IT competencies, sustainable business strategies and change management in a cloud-AI-driven business landscape. Henkes is known for his contributions as a keynote speaker on digital innovation, sharing insights on using technology for business growth and transformation.

IPL Product Owner



Jan Erik Aase
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Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor.

Now as a research director, principal analyst and global head of ISG Provider Lens®, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

About Our Company & Research

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. 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.

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ISG (Information Services Group) (Nasdaq: III) is a leading 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.

DECEMBER, 2025

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