Hybrid Cloud Middle East and Pakistan Survey Results

August 2025

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Executive Summary

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Omdia's key message for Huawei is that while Huawei faces strong competition from AWS and Microsoft in the Middle East and Pakistan, it has performed with outstanding customer support and market survey results, as well as strong showing for technology innovation, giving it a leader ranking in our Market Radar and overall joint highest scoring CSP (with AWS). Omdia's SWOT analysis on Huawei (see next slide) provides guidance on next steps for Huawei.

Huawei can take satisfaction that it emerged the overall joint top ranked vendor in the survey, including top position in two sub-categories:
• Brand recognition and customer support.

• Compliance: Compliance with local regulations such as sovereign cloud.

Huawei also came top in key questions in the survey, including in sub-categories:
• Reliability and availability:
  – Low frequency of raising tickets and the issue is to do with CSP solution and not on your side
  – Meet Recovery Time Objective = 0 and Recovery Point Objective = 0

• AI:
  – Suitability for your AI inferencing workloads in the on-premises environment

Huawei SWOT analysis for the hybrid cloud survey: Middle East and Pakistan

Strengths

- Overall Huawei achieved a leader rating in our Market Radar analysis, with the highest score for Customer Service & Market Execution.

- Huawei was ahead of nearest Chinese competitor Alibaba, and significantly it was rated ahead of Google Cloud and VMware.

- Customer service is a very strong rating for Huawei.

- Huawei has demonstrated a strong position in the Middle East & Pakistan market and a basis for gaining further market share.

Weaknesses

- Huawei ranked in the leadership group but there is room for improvement within that group where in technology innovation Huawei scored below AWS and Microsoft.

- Huawei was ranked third for reliability and availability, it does represent a strong base for improving its position.

Opportunities

- VMware represents the biggest opportunity for Huawei to increase market share. In this survey VMware was positioned next to and below Huawei. Omdia hears dissatisfaction by VMware customers at recent price increases following the Broadcom acquisition, and there is a flow of customers away from VMware. Therefore, Huawei should provide a clear migration path for VMware customers to move to Huawei hybrid cloud solutions.

Threats

- The other leaders in this survey, AWS and Microsoft, have a strong presence in this region and pose a challenge for Huawei to take market share.

- While Omdia believes VMware is less a threat and more an opportunity, Huawei needs to heed the growth of Google in this region, which is rated a challenger to Huawei in our Market Radar.

Hybrid cloud Middle East market overview

Hybrid cloud adoption is accelerating across the Middle East and is driven by the need for flexibility, cost optimization, data sovereignty, and artificial intelligence (AI) capabilities. Key sectors, including government, finance, telecom carriers, and large enterprises, are at the forefront of this shift, gradually migrating their core applications from traditional infrastructure to the cloud. However, because of concerns about data sovereignty and security, many of these organizations are opting for on-premises / private cloud solutions as part of their cloud strategy.

As a result, the use of on-premises cloud solutions, which allow enterprises to maintain control over sensitive data and still benefit from the flexibility and scale of the public cloud, is increasing in the Middle East. In this intelligent era, when application modernization and cloud-native technologies are essential, organizations are seeking cloud solutions that offer innovation, scalability, AI capabilities, and effective cost management.

Huawei has become a key player in this space, delivering robust hybrid cloud solutions tailored to the region's specific requirements. Its solutions, featuring a unified architecture, management, and ecosystem, provide enterprises with the flexibility to seamlessly manage both on-premises and cloud environments, supporting their growth and modernization in a highly secure and scalable manner.

On the strength of this survey and a previous Omdia analysis on the telco market in which Huawei emerged as the leader in business performance thanks to its high revenue share and number of deals, Omdia believes Huawei deserves its leader ranking for hybrid cloud in the Middle East.

Key drivers of hybrid cloud in the Middle East
- AI is a key innovation driver disrupting industries. Training and inferencing AI applications are driving demand for cloud compute. This, in turn, drives data center expansion in the Middle East.

- The application modernization of legacy applications and adoption of cloud-native architecture is driving demand for cloud compute and investments in data centers.

- Data sovereignty and regulation are driving demand for local data centers and growth in private clouds.

- A hybrid cloud strategy allows organizations to balance costs with greater efficiency of workloads between private and public clouds.

A hybrid cloud solution with a unified architecture, unified management, and unified ecosystem will give organizations the capacity, flexibility, and efficiency to progress and be part of the digital transformation taking place worldwide.

Huawei has become a key player in the CSP space, providing robust hybrid cloud solutions tailored to regional requirements. In *Omdia Universe: Cloud Container Management & Services, 2024–25*, Huawei was rated a leader for the strength of its solution and execution in the market. Containers are a key technology element in cloud-native applications and the choice for running applications in the cloud.

Omdia Market Radar: Hybrid cloud market in the Middle East and Pakistan, 2025

Introduction to the Omdia Market Radar

- The Omdia Market Radar provides a visual display of how well the CSPs have been ranked in the survey by respondents.

- The categories defined in the survey (see slide 25) have been aggregated into two scores that are displayed in a 2D Market Radar chart – see the next slide:
  – For the Market Radar X-axis, we use the technology innovation score, which comprises four subcategories, each with several questions.
  – For the Market Radar Y-axis, we combine the category-level scores for customer service and market. There are in total three combined subcategories.

- The resulting Market Radar shows Huawei in the leadership position with AWS and Microsoft, achieving the highest Y-axis position. In the challenger category, Huawei's closest competitors are VMware and Google, and it also outperforms challengers Alibaba and Oracle. The third category of prospects has one CSP, Nutanix.
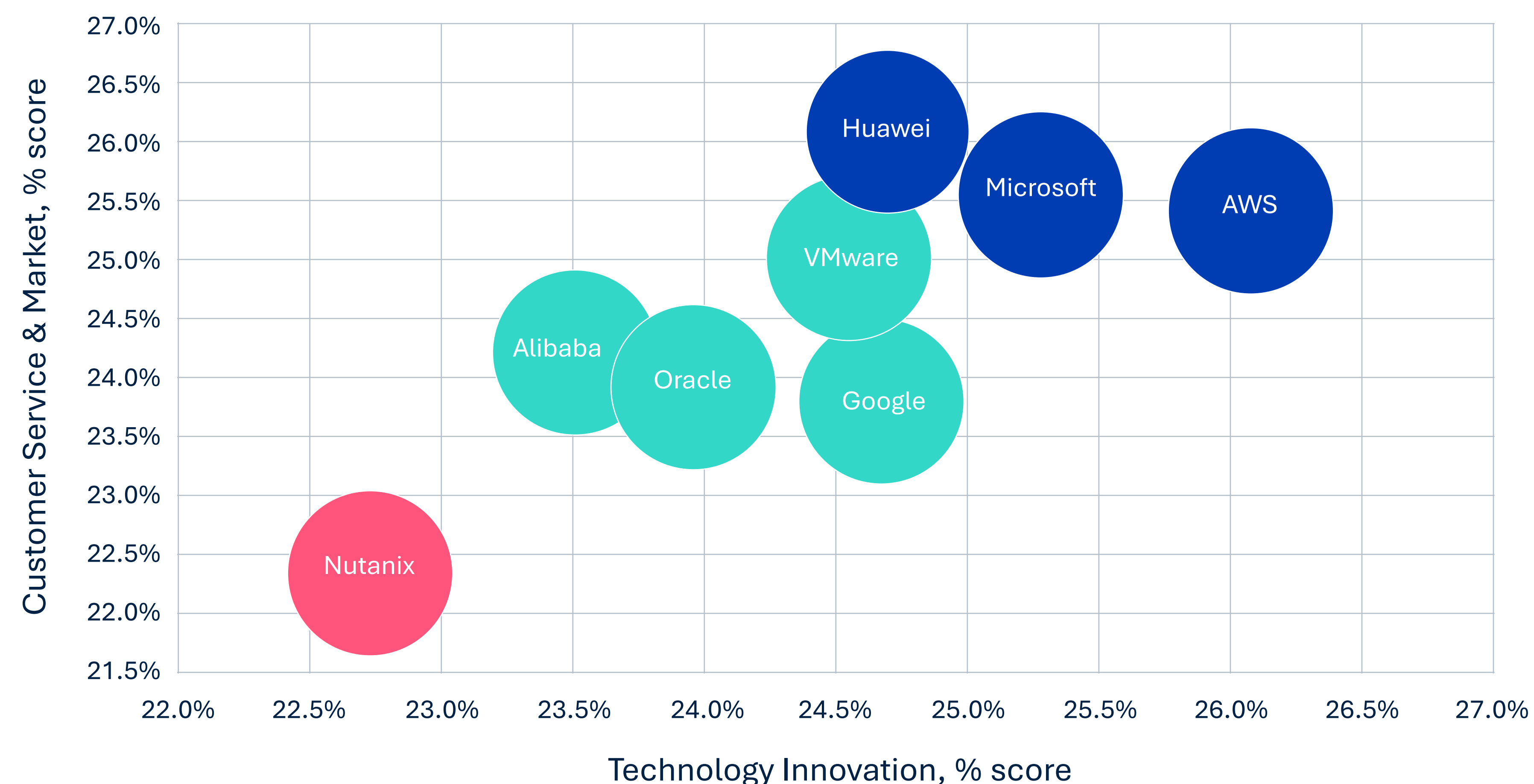
Omdia Market Radar for the Hybrid Cloud Survey: Middle East & Pakistan, 2025

The survey results have been scored in two dimensions:
• X-axis: Technology innovation
• Y-axis: Combined scores for customer service and for market

Omdia's CSP ranking

Omdia Market Radar rating	CSP
Leader	AWS
	Huawei
	Microsoft
Challenger	Alibaba
	Google
	Oracle
	VMware
Prospect	Nutanix

Omdia Market Radar: Hybrid Cloud in the Middle East and Pakistan, 2025

SOURCE: OMDIA

Omdia Market Radar for the Hybrid Cloud Survey: Middle East & Pakistan, 2025: Leader ranking

Analysis summary by vendor: Leaders

- **AWS**
  – AWS has a strong presence in the region, and its continual release of features gives it the best score across a broad set of survey questions about technology innovation. A third position for customer service and market scoring secured its ranking as a leader.

- **Huawei**
  – Huawei achieved its best results in the customer service and market segments of the survey, ahead of the other CSPs, and was third in technology innovation, giving it an overall ranking of leader.

- **Microsoft**
  – Microsoft sits between Huawei and AWS in our survey results within the leader group. Microsoft has been eating into AWS's market share and has a strong enterprise focus.

Methodology

Methodology

- Omdia developed, programmed, and fielded a custom, online survey that explored organizations' experiences and ratings of eight different hybrid cloud providers, including Huawei, across Pakistan and seven countries in the Middle East.

- Omdia focused on three key verticals: government/ public sector, telecommunications, and energy and utilities.

- Omdia deployed a "double-blind" survey approach: the respondents did not know who was sponsoring the study, and Omdia did not receive any personally identifiable information about the respondents.

- Screening criteria and weightings were put in place to ensure that the ratings of the vendors was consistent across the core capabilities identified by Omdia as key for any hybrid cloud solution.

100
respondents from
Middle East and Pakistan

Cloud service providers (CSPs) and countries surveyed

The eight key CSPs surveyed were

- Alibaba

- Amazon Web Services (AWS)

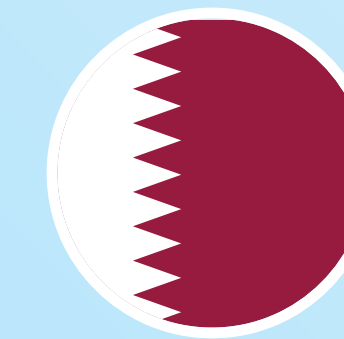- Google

- Huawei

- Microsoft
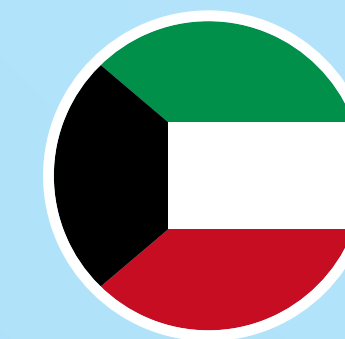
- Nutanix

- Oracle

- VMware

The eight countries surveyed were
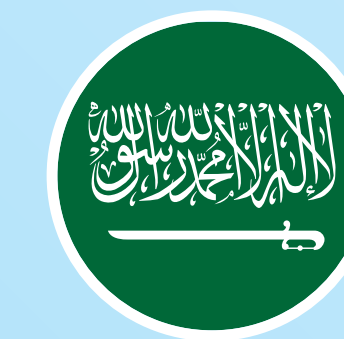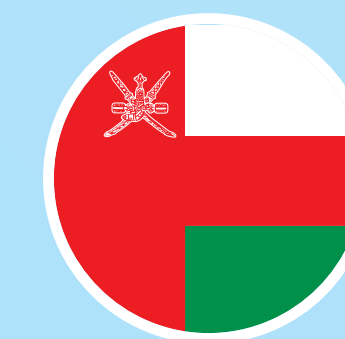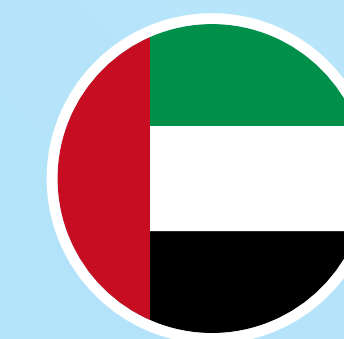
Bahrain

Pakistan

Iraq

Qatar

Kuwait

Saudi Arabia

Oman

The United Arab Emirates (UAE)

Hybrid cloud definition

Hybrid cloud definition

For the purposes of the hybrid cloud survey the following definitions were used:

• This hybrid cloud survey focuses on cloud-based products and platform software and excludes pure virtualization deployment, hyperconverged infrastructure products, and pure public cloud.

• Hybrid cloud connects public cloud, private cloud, and marginal cloud via a virtual network, combining the advantages of flexibility of public cloud and security of private cloud to provide a portfolio of resources and services.

Hybrid cloud

Hybrid cloud

Public cloud

Private cloud

Traditional infrastructure
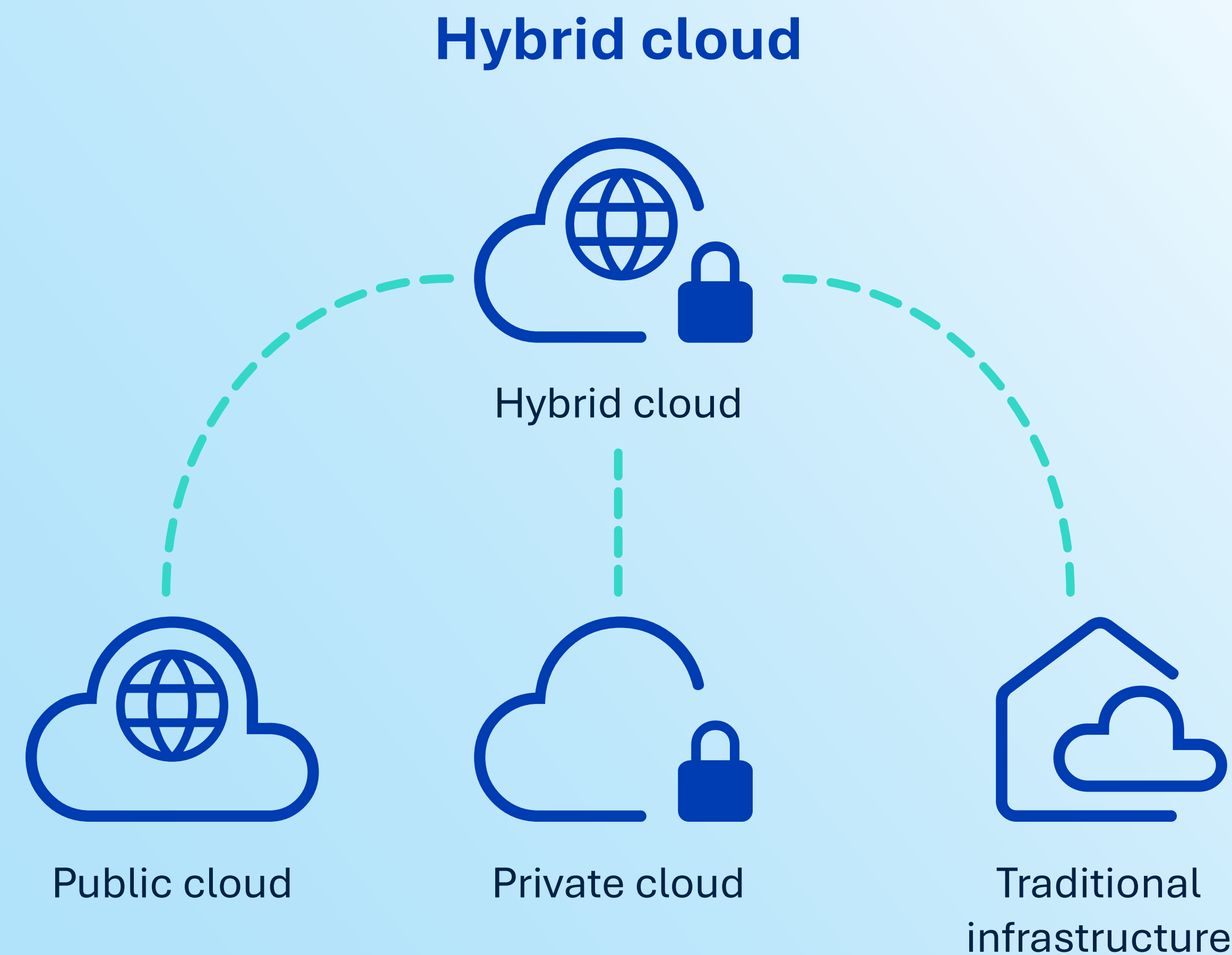
SOURCE: OMDIA

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The hybrid cloud provides a consistent platform across the IT ecosystem and cloud services layer, and an easy quick definition is as follows:

Hybrid cloud: A cloud solution that combines on-premises compute infrastructure and public cloud.

Key takeaways

Overall scores

- TWhen all the category scores are combined into a single score, Huawei is positioned in the leadership group along with AWS and Microsoft.
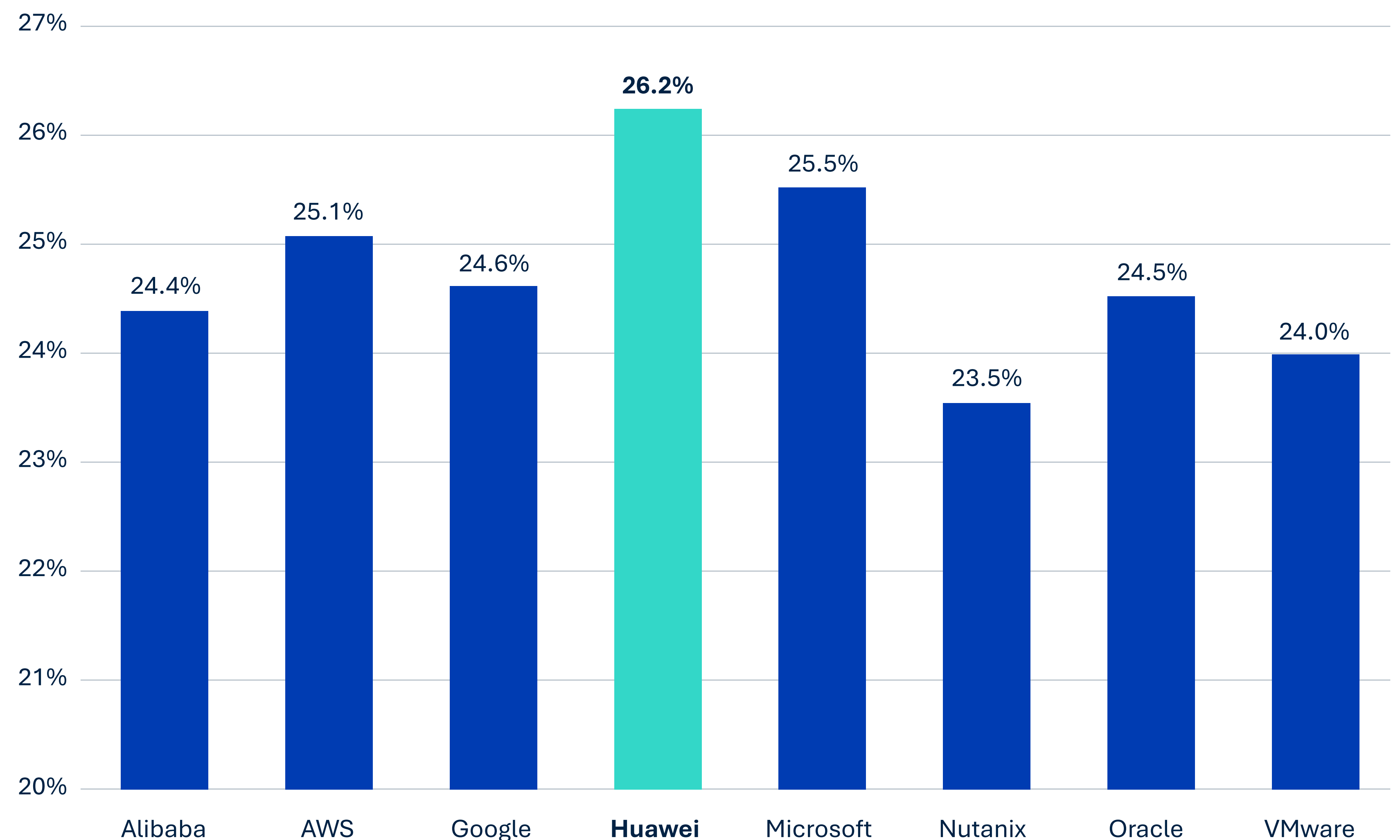
Overall score
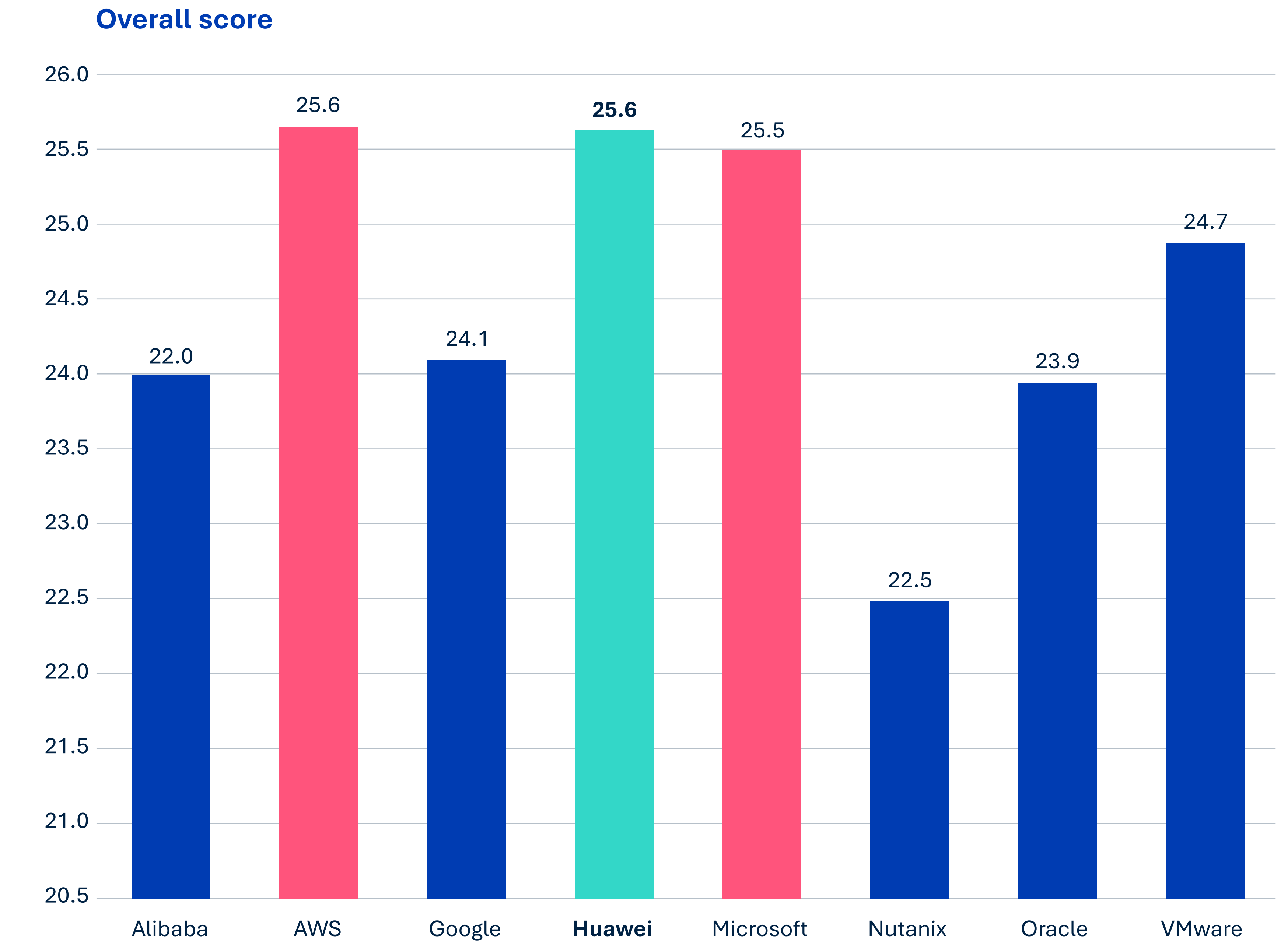
SOURCE: OMDIA

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Key takeaways: Huawei is rated the top vendor for customer support and brand recognition

- Within the customer service category, Huawei came top in the subcategory "customer support and brand recognition."

- In this subcategory there are two outstanding features in which Huawei achieves top scores:
  – Brand that you trust
  – Response times from customer support, e.g., time to resolve requests on average

- In the third feature in this subcategory (quality of customer support, e.g., proactive to solve the problem), Huawei achieved the second best score to give it the overall best score in the subcategory.

- Omdia rates this subcategory as an important feature set for attracting new clients and retaining existing clients.

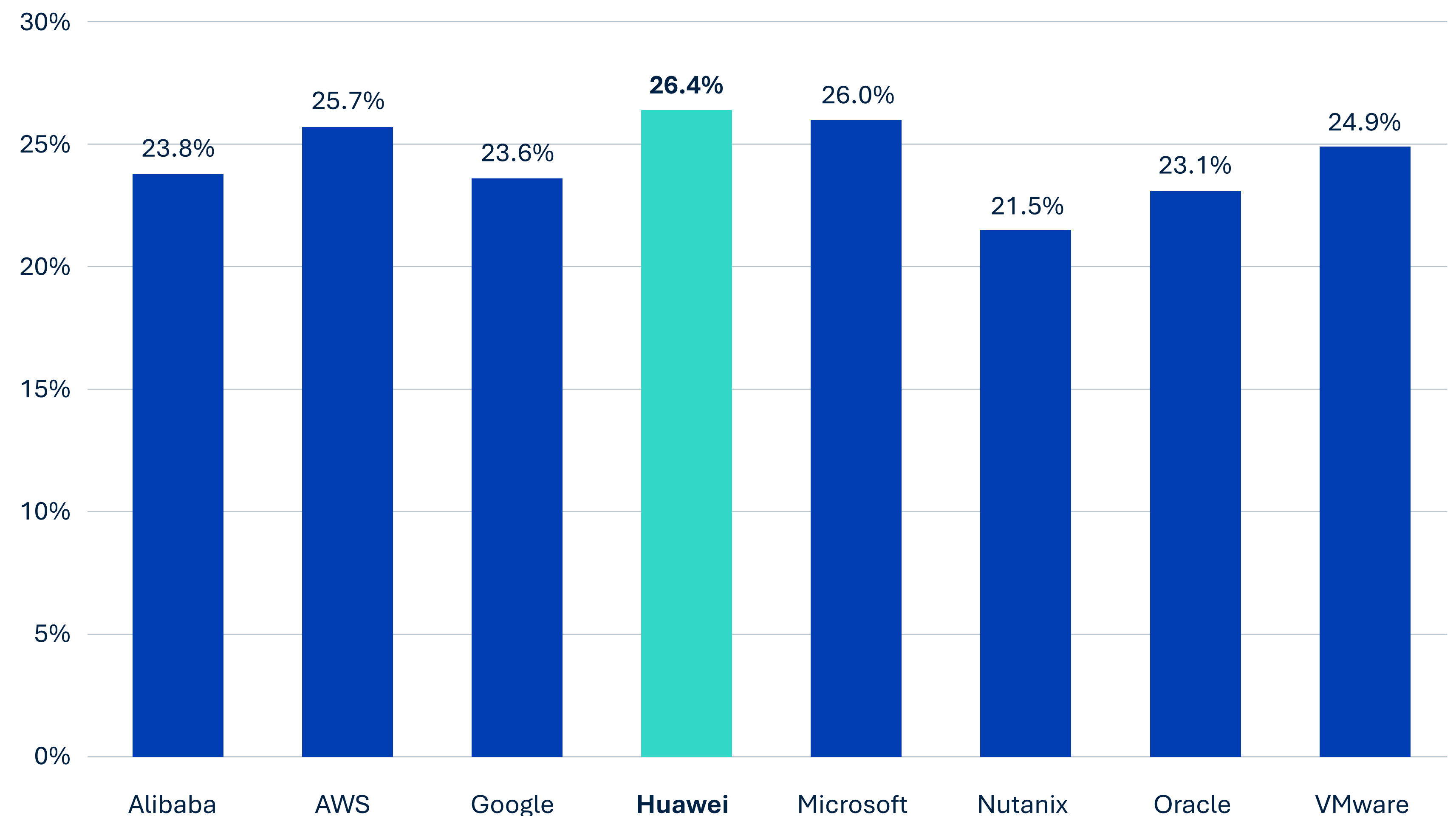**Q2B: Customer support and brand recognition scores**

Vendor	Score
Alibaba	24.4%
AWS	25.1%
Google	24.6%
Huawei	26.2%
Microsoft	25.5%
Nutanix	23.5%
Oracle	24.5%
VMware	24.0%

SOURCE: OMDIA

Key takeaways: Huawei is rated the top vendor for compliance with local regulations such as sovereign cloud

- In the market category, Huawei came top in compliance, ahead of AWS and Microsoft in a tightly contested subcategory.

- Sovereign cloud is an increasingly important requirement for government and public sector clients, and in Omdia's opinion this result positions Huawei strongly to compete in this customer category.

Q4A: Compliance scores

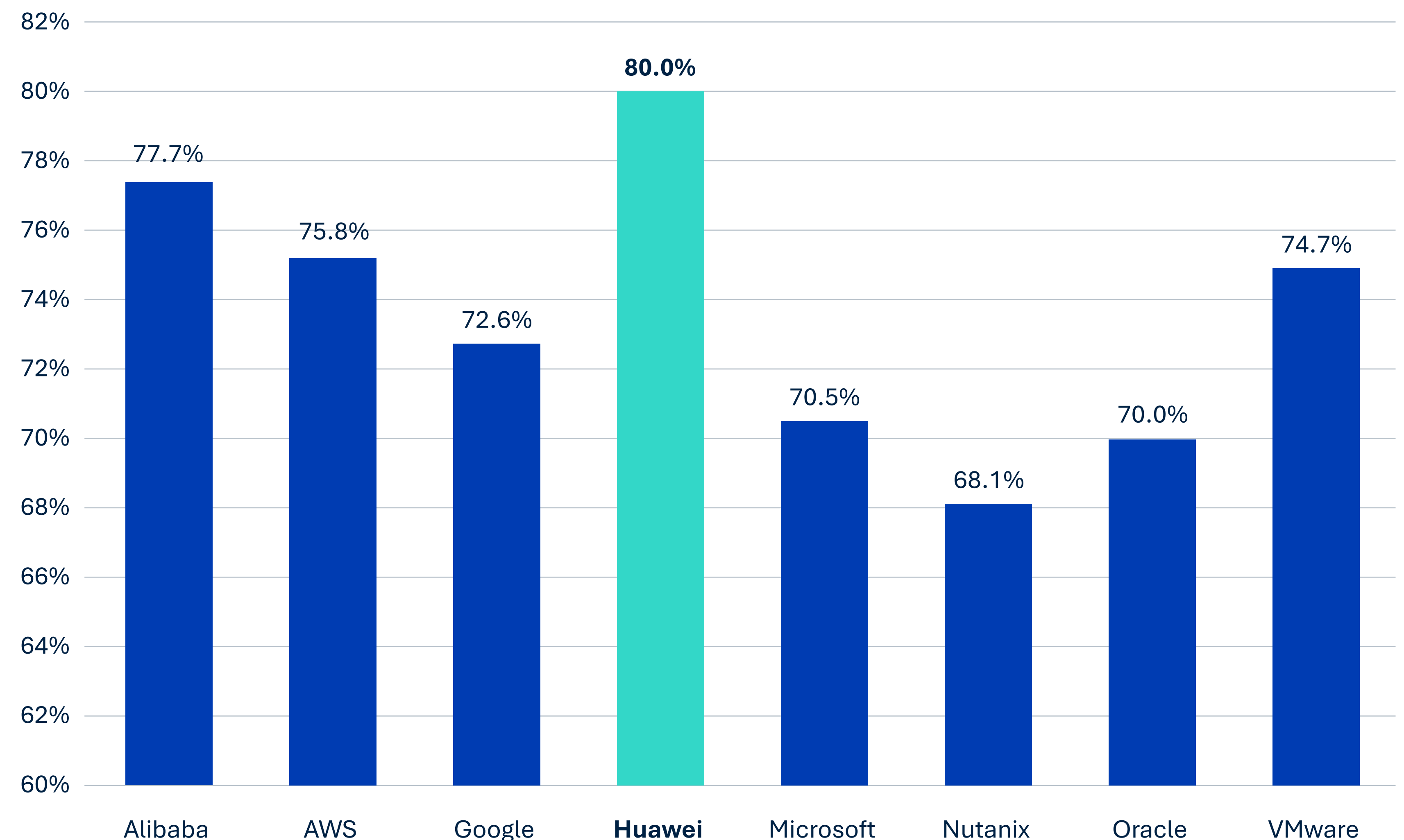| Vendor	Score
Alibaba	23.8%
AWS	25.7%
Google	23.6%
Huawei	26.4%
Microsoft	26.0%
Nutanix	21.5%
Oracle	23.1%
VMware	24.9%

SOURCE: OMDIA

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Key takeaways: Huawei is rated the top vendor for AI inferencing workloads in the on-premises environment

- Given the tremendous interest in AI arising from the latest advances in generative AI and large language models (LLMs), there is a groundswell of demand for running AI applications.

- Huawei was rated the top vendor for inferencing AI workloads on-premises, providing the right infrastructure for running trained models. Running data passes through the model at scale for many users, especially with LLM-based AI models that can run into billions of artificial neurons, places a significant demand on the cloud infrastructure

Q1F: Suitability for AI inferencing workloads in the on-premises environment

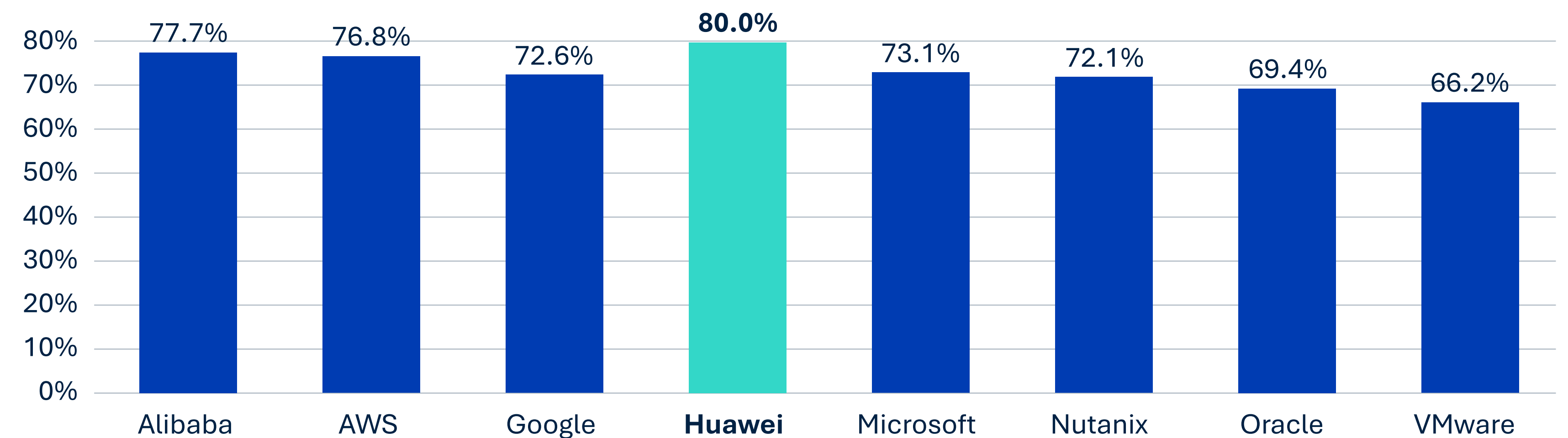| Vendor	Value
Alibaba	77.7%
AWS	75.8%
Google	72.6%
Huawei	80.0%
Microsoft	70.5%
Nutanix	68.1%
Oracle	70.0%
VMware	74.7%

SOURCE: OMDIA

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Key takeaways: Huawei is rated the top vendor in features for reliability and availability

- Within the reliability and availability subcategory of the technology innovation category (Q1G), Huawei came top in two features:
  - Low frequency of raising tickets when the issue is to do with CSP solution and not on your side
  - Meets recovery time objective = 0 and recovery point objective = 0

- These results demonstrate customers' recognition of the strong reliability and availability of the Huawei hybrid cloud solution.
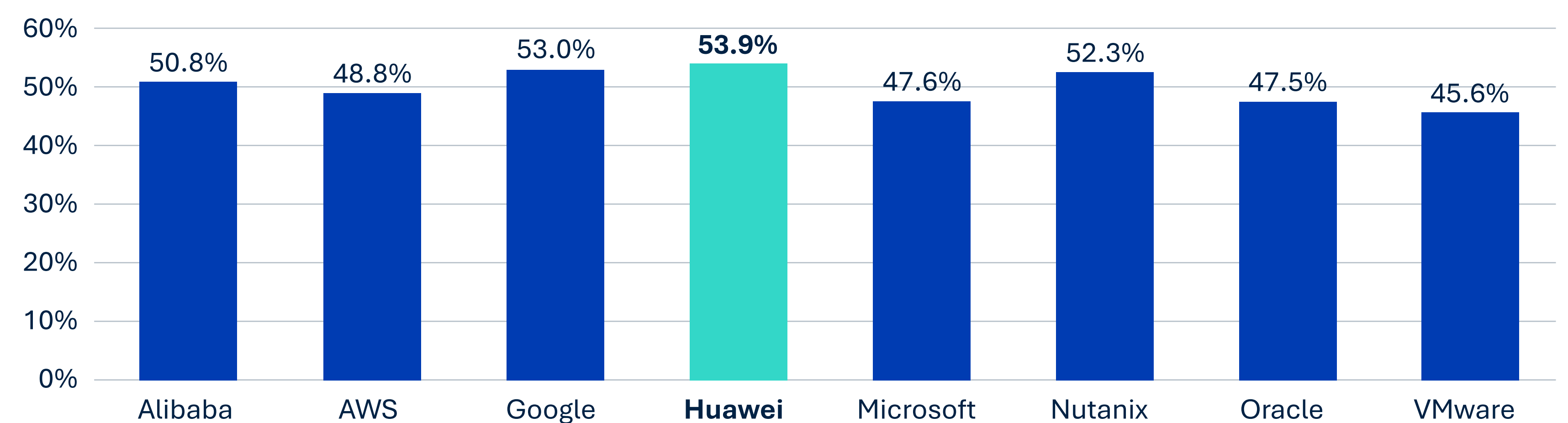
Q1G: Low frequency of raising tickets when the issue is to do with the CSP solution

Alibaba	AWS	Google	**Huawei**	Microsoft	Nutanix	Oracle	VMware
77.7%	76.8%	72.6%	**80.0%**	73.1%	72.1%	69.4%	66.2%

SOURCE: OMDIA

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Q1G: Meets recovery time objective = 0 and recovery point objective = 0

Alibaba	AWS	Google	**Huawei**	Microsoft	Nutanix	Oracle	VMware
50.8%	48.8%	53.0%	**53.9%**	47.6%	52.3%	47.5%	45.6%

SOURCE: OMDIA

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Survey analysis

Survey categories

The survey comprised the following categories and subcategories. The following slides provide a graphical view of the subcategory survey results.

- Technology innovation (shown as the X-axis in the Omdia Market Radar)
  – (Q1C)
  – Software and application service (Q1E)
  – Artificial intelligence (Q1F)
  – Reliability and availability (Q1G)

- Customer service (included in the Y-axis in the Omdia Market Radar)
  – Brand recognition and customer support (Q2B)
  – Service price (Q2C)

- Market (included in the Y-axis in the Omdia Market Radar)
  – Compliance (Q4A)
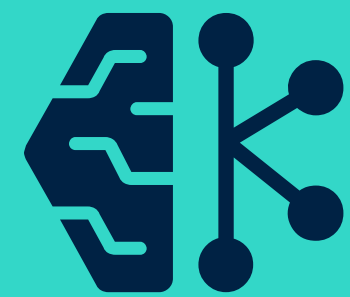
Category results

Category score: Technology innovation (Q1)

- Huawei is positioned third of the eight CSPs, behind the other leadership vendors AWS and Microsoft.

Q1: Technology innovation

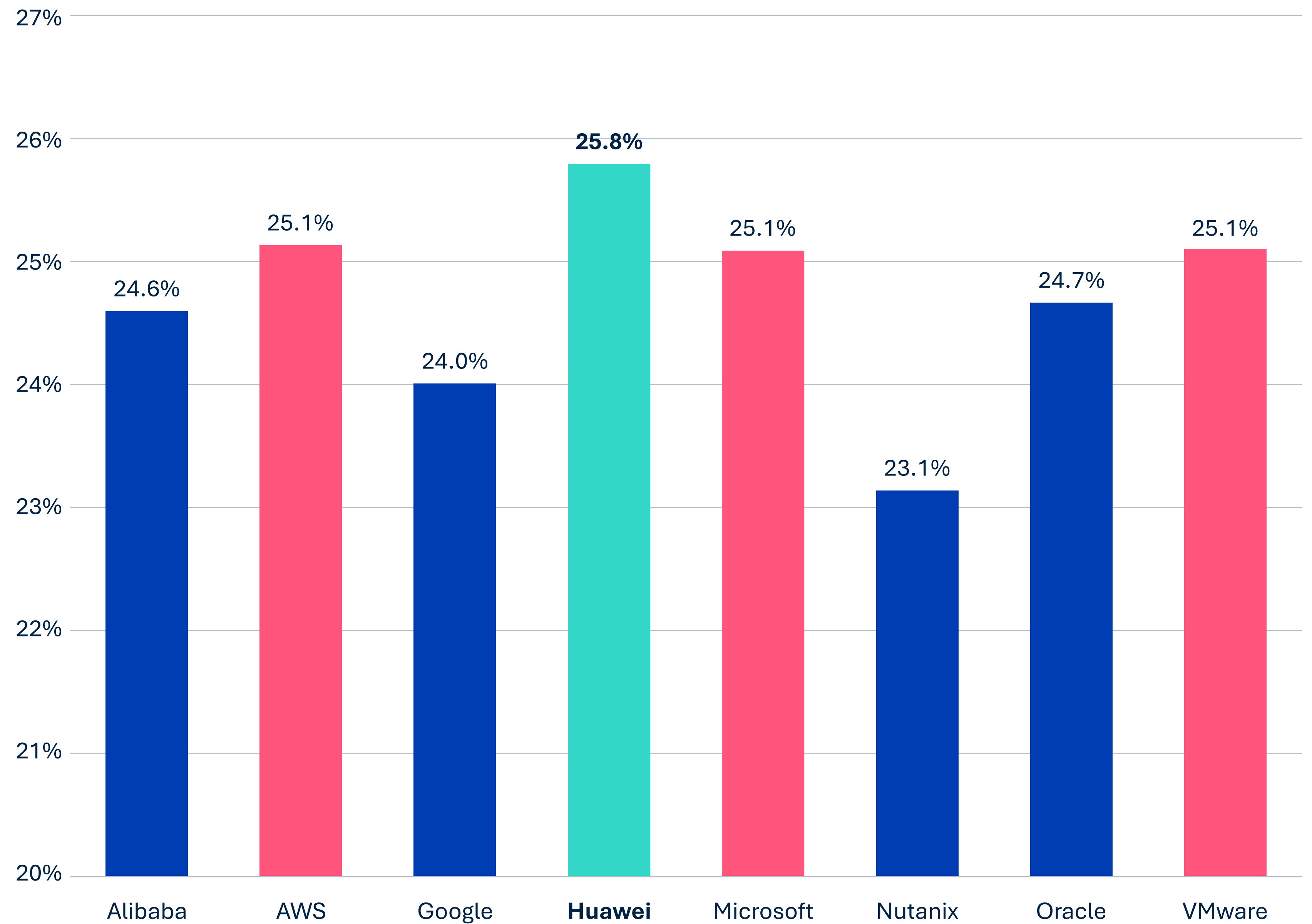| Vendor	Score
Alibaba	23.5%
AWS	26.1%
Google	24.7%
Huawei	**24.7%**
Microsoft	25.3%
Nutanix	22.7%
Oracle	24.0%
VMware	24.5%
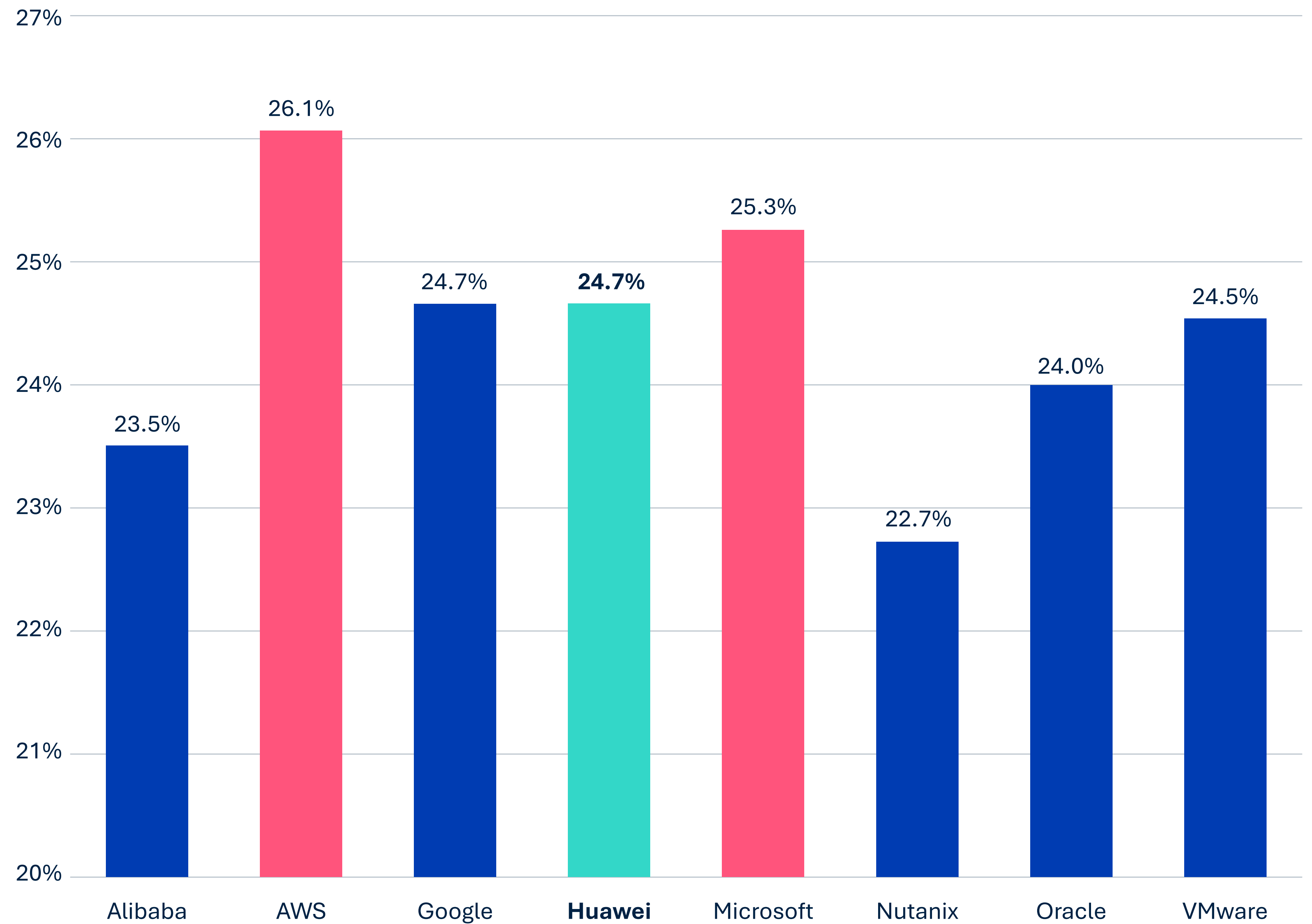
SOURCE: OMDIA

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Category score: Customer service (Q2)

- Huawei is positioned first of the eight CSPs, ahead of nearest rivals AWS, Microsoft, and VMware.

Q2: Customer service

Company	Score
Alibaba	24.6%
AWS	25.1%
Google	24.0%
Huawei	**25.8%**
Microsoft	25.1%
Nutanix	23.1%
Oracle	24.7%
VMware	25.1%

Category score: Market (Q4)

- Huawei is positioned first ahead of nearest rivals AWS and Microsoft in the leadership group of CSPs.

Q4: Market

Bar chart — Q4: Market (percentage values):
- Alibaba: 24.0%
- AWS: 25.6%
- Google: 24.1%
- **Huawei: 25.6%**
- Microsoft: 25.4%
- Nutanix: 22.5%
- Oracle: 23.9%
- VMware: 24.9%
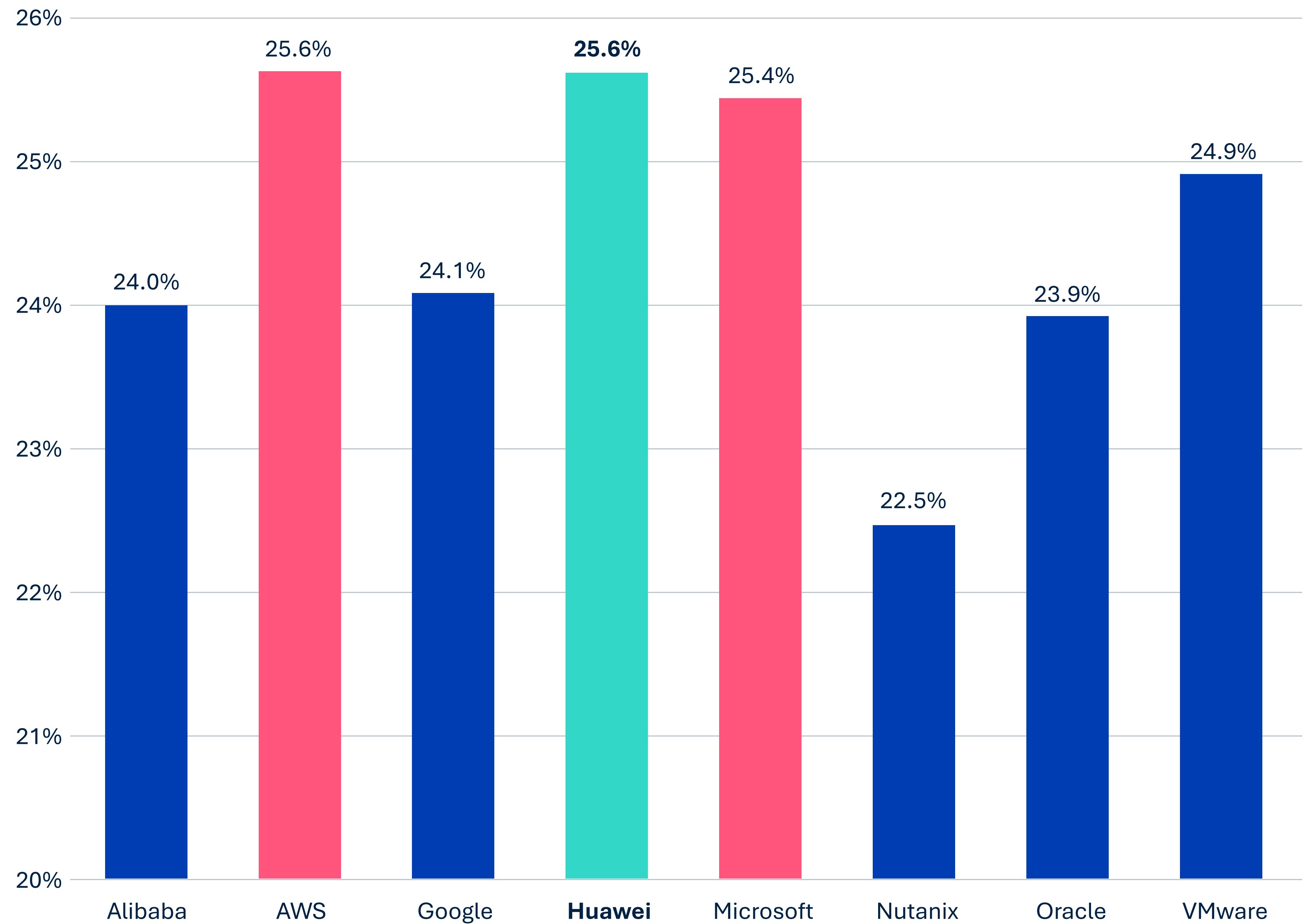
SOURCE: OMDIA

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Subcategory results

Technology innovation: Infrastructure as a service (Q1C)

- Huawei is positioned fourth of the eight CSPs. There is an 8.2% score difference between leader AWS and Huawei.
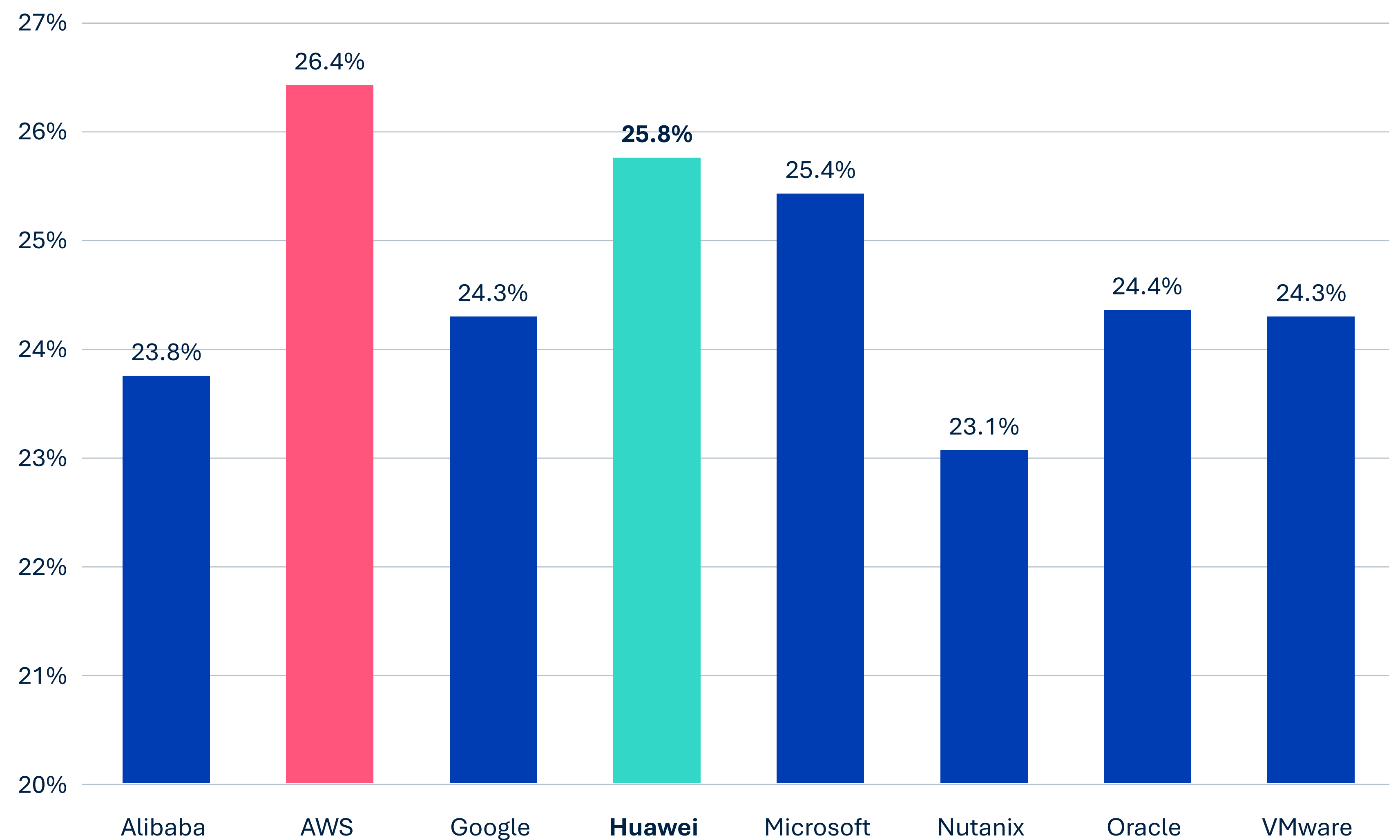
Q1C: Infrastructure as a service

Company	Score
Alibaba	23.4%
AWS	26.5%
Google	25.1%
Huawei	24.3%
Microsoft	25.0%
Nutanix	22.4%
Oracle	23.5%
VMware	24.3%
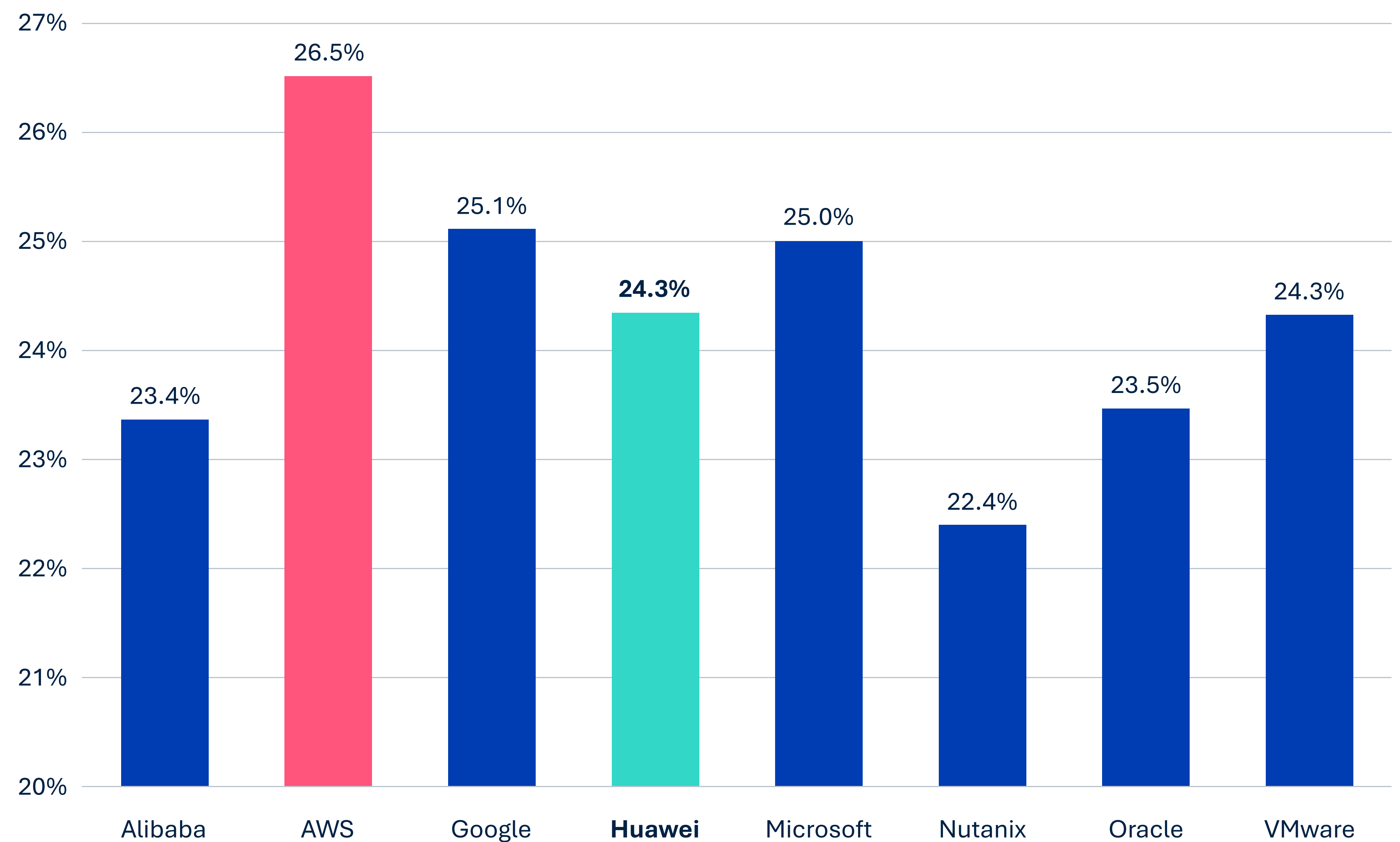
SOURCE: OMDIA

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Technology innovation:
Software and application service (Q1E)

- Huawei is positioned second out of the eight CSPs. There is a 2.4% score difference between leader AWS and Huawei.
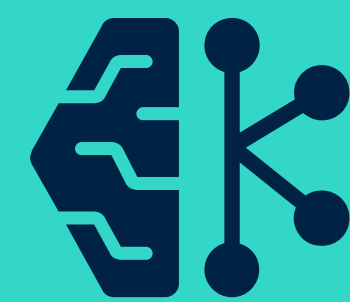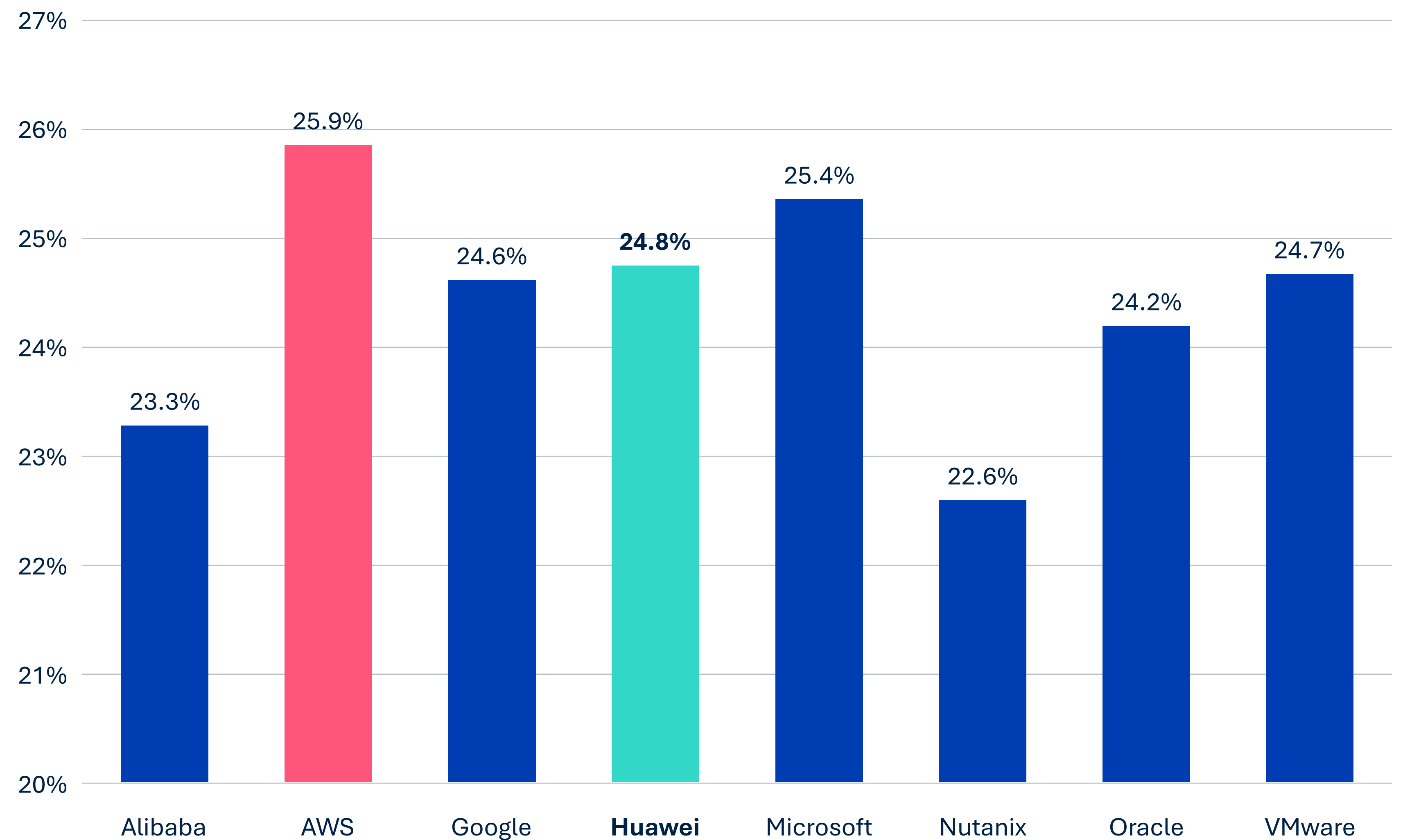
Q1E: Software and application service

Alibaba	AWS	Google	Huawei	Microsoft	Nutanix	Oracle	VMware
23.8%	26.4%	24.3%	25.8%	25.4%	23.1%	24.4%	24.3%

SOURCE: OMDIA

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Technology innovation: Artificial intelligence (Q1F)

- Huawei is positioned third out of the eight CSPs. There is a 4.3% score difference between leader AWS and Huawei.
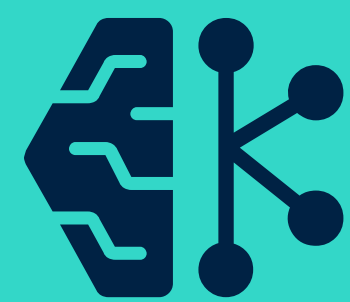
Q1F: Artificial intelligence

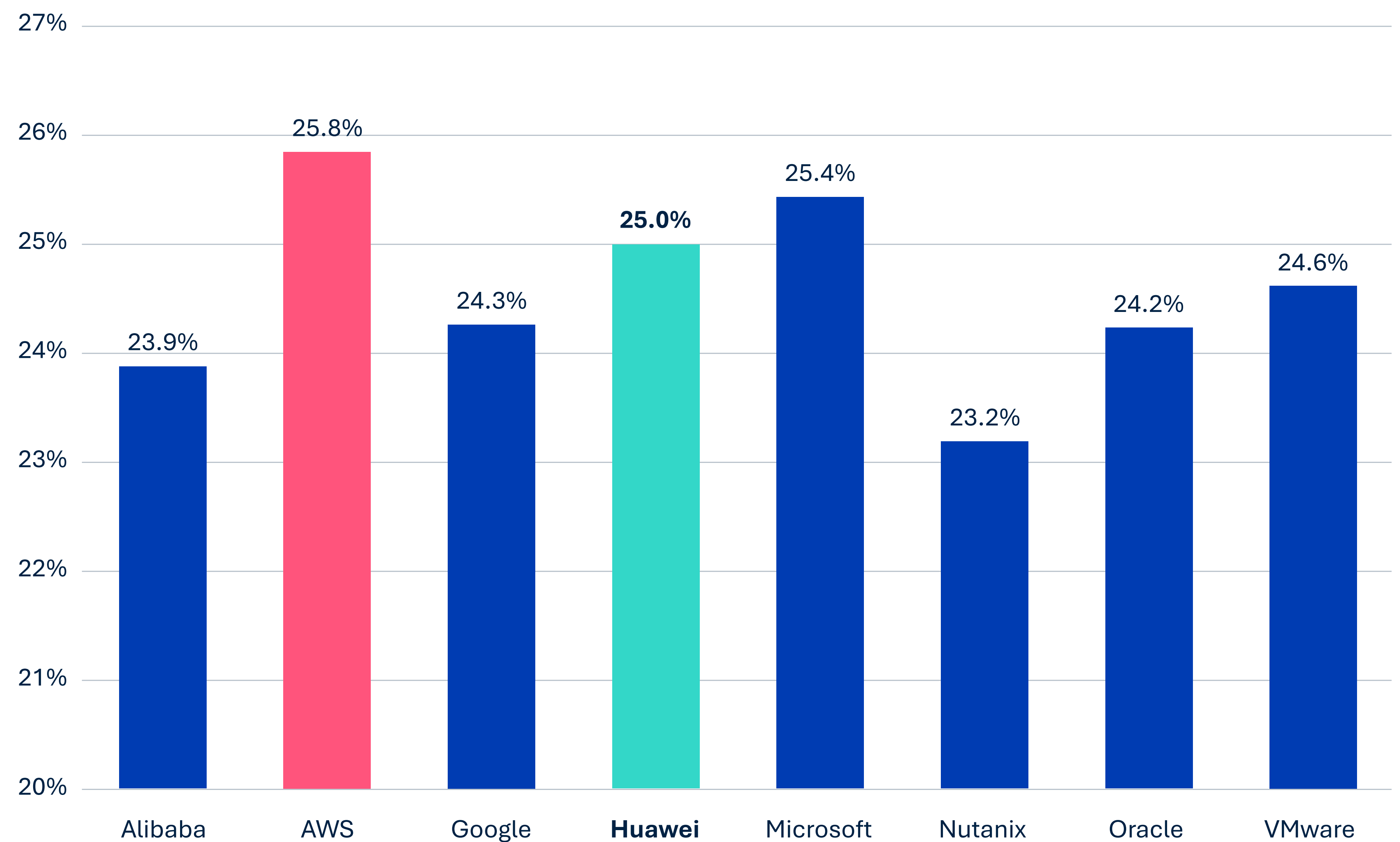| Company	Score
Alibaba	23.3%
AWS	25.9%
Google	24.6%
Huawei	**24.8%**
Microsoft	25.4%
Nutanix	22.6%
Oracle	24.2%
VMware	24.7%

SOURCE: OMDIA

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Technology innovation:
Reliability and availability (Q1G)

- Huawei is positioned third out of the eight CSPs. There is a 3.3% score difference between leader AWS and Huawei.
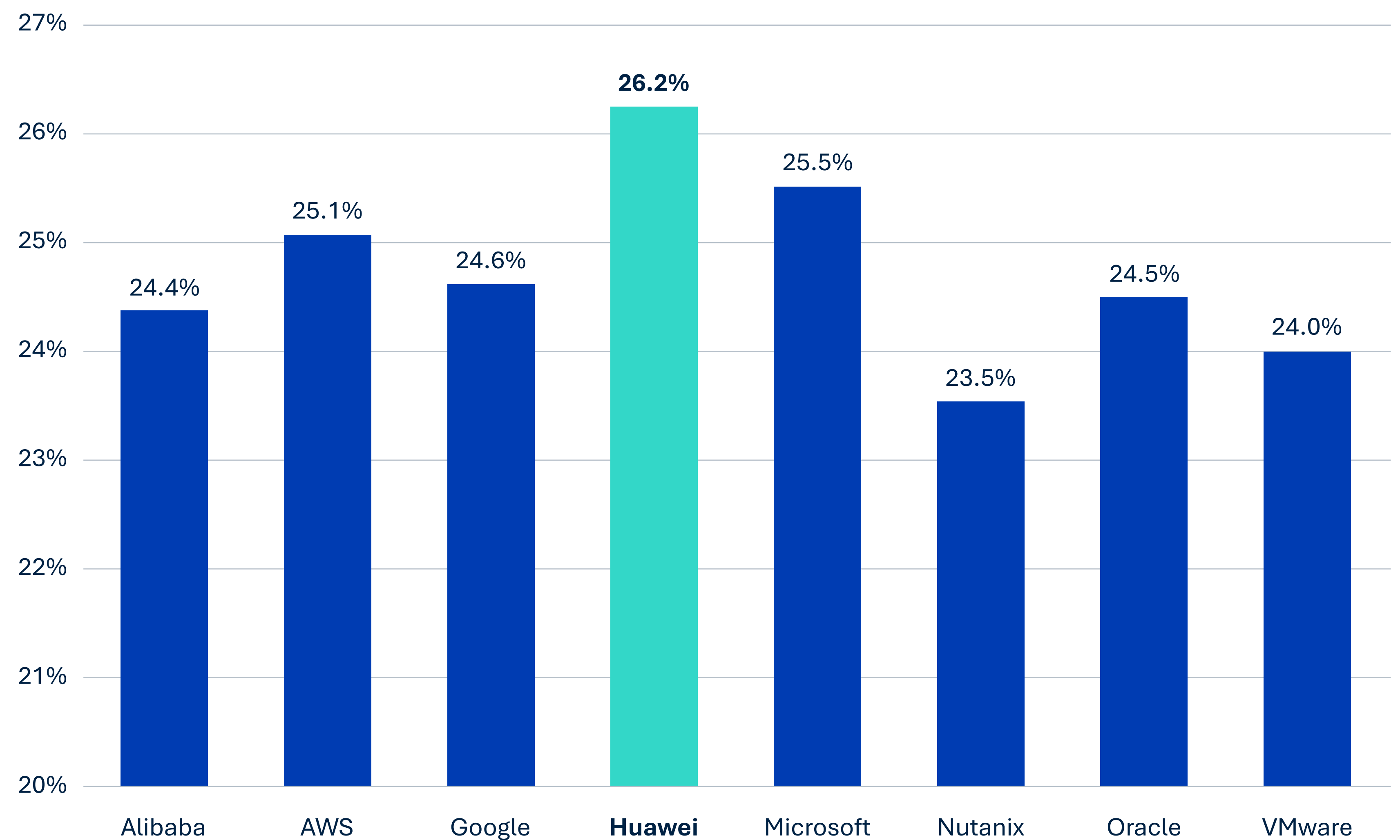
Q1G: Reliability and availability

Company	Score
Alibaba	23.9%
AWS	25.8%
Google	24.3%
Huawei	**25.0%**
Microsoft	25.4%
Nutanix	23.2%
Oracle	24.2%
VMware	24.6%

SOURCE: OMDIA

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Customer service:
Brand recognition and customer support (Q2B)

- Huawei is positioned first of the eight CSPs. See slide 19 for further comments.
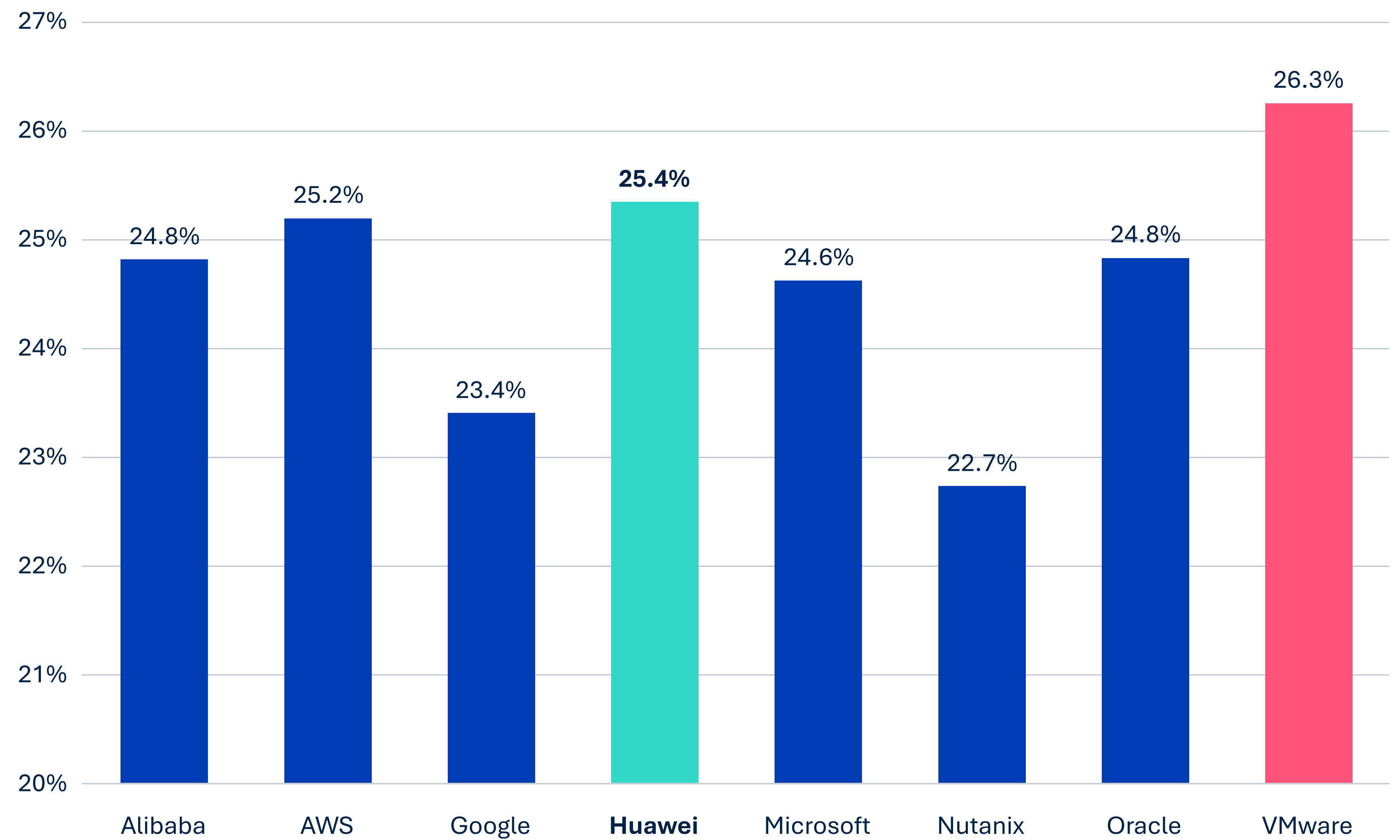
Q2B: Brand recognition and customer support

Company	Value
Alibaba	24.4%
AWS	25.1%
Google	24.6%
Huawei	**26.2%**
Microsoft	25.5%
Nutanix	23.5%
Oracle	24.5%
VMware	24.0%

SOURCE: OMDIA

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Customer service: Service price (Q2C)

- Huawei is positioned second of the eight CSPs. There is a 3.5% score difference between leader VMware and Huawei.

Q2C: Service price

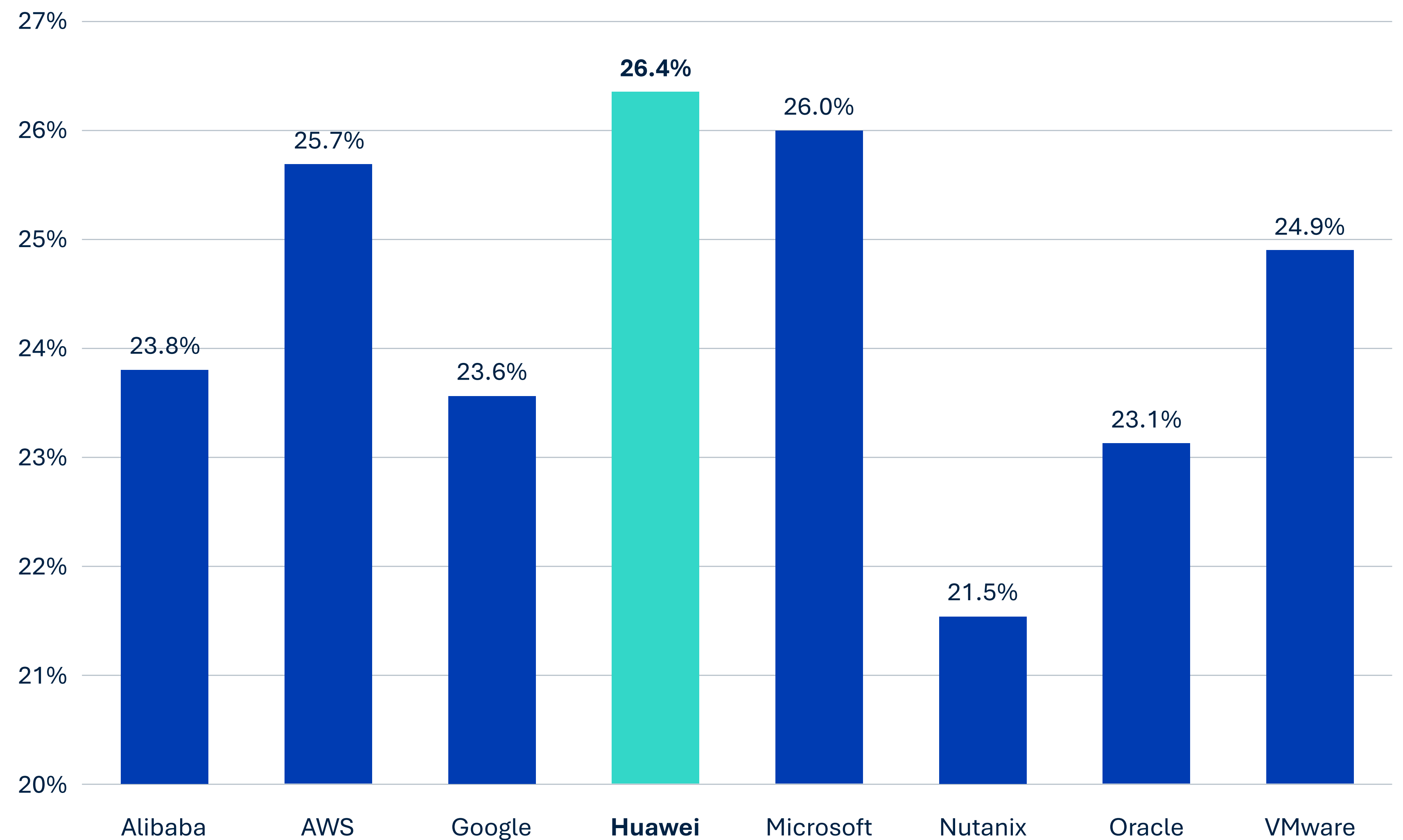| Company	Value
Alibaba	24.8%
AWS	25.2%
Google	23.4%
Huawei	**25.4%**
Microsoft	24.6%
Nutanix	22.7%
Oracle	24.8%
VMware	26.3%

SOURCE: OMDIA

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Market: Compliance (Q4A)

- Huawei is positioned first of the eight CSPs. There is a 1.4% score difference between Huawei and second-placed Microsoft. See slide 19 for further comments.

Q4A: Compliance

Company	Score
Alibaba	23.8%
AWS	25.7%
Google	23.6%
Huawei	**26.4%**
Microsoft	26.0%
Nutanix	21.5%
Oracle	23.1%
VMware	24.9%

Performance questions

Number of its public cloud facilities in your country/region

- The typical number of public cloud facilities used was one. Some countries/regions use 9–15 clouds from AWS and Microsoft.

Q4C: What is the number if its public cloud facilities in your country/region?

	0 to 1	2 to 4	5 to 8	9 to 15
AWS	48%	32%	15%	5%
Microsoft	54%	24%	20%	2%
Google	51%	33%	16%	
Huawei	**64%**	**23%**	**14%**	
Alibaba	60%	26%	14%	
VMware	55%	34%	11%	
Oracle	53%	26%	21%	
Nutanix	65%	19%	15%	

Legend: ■ 0 to 1 ■ 2 to 4 ■ 5 to 8 ■ 9 to 15 ■ Over 15
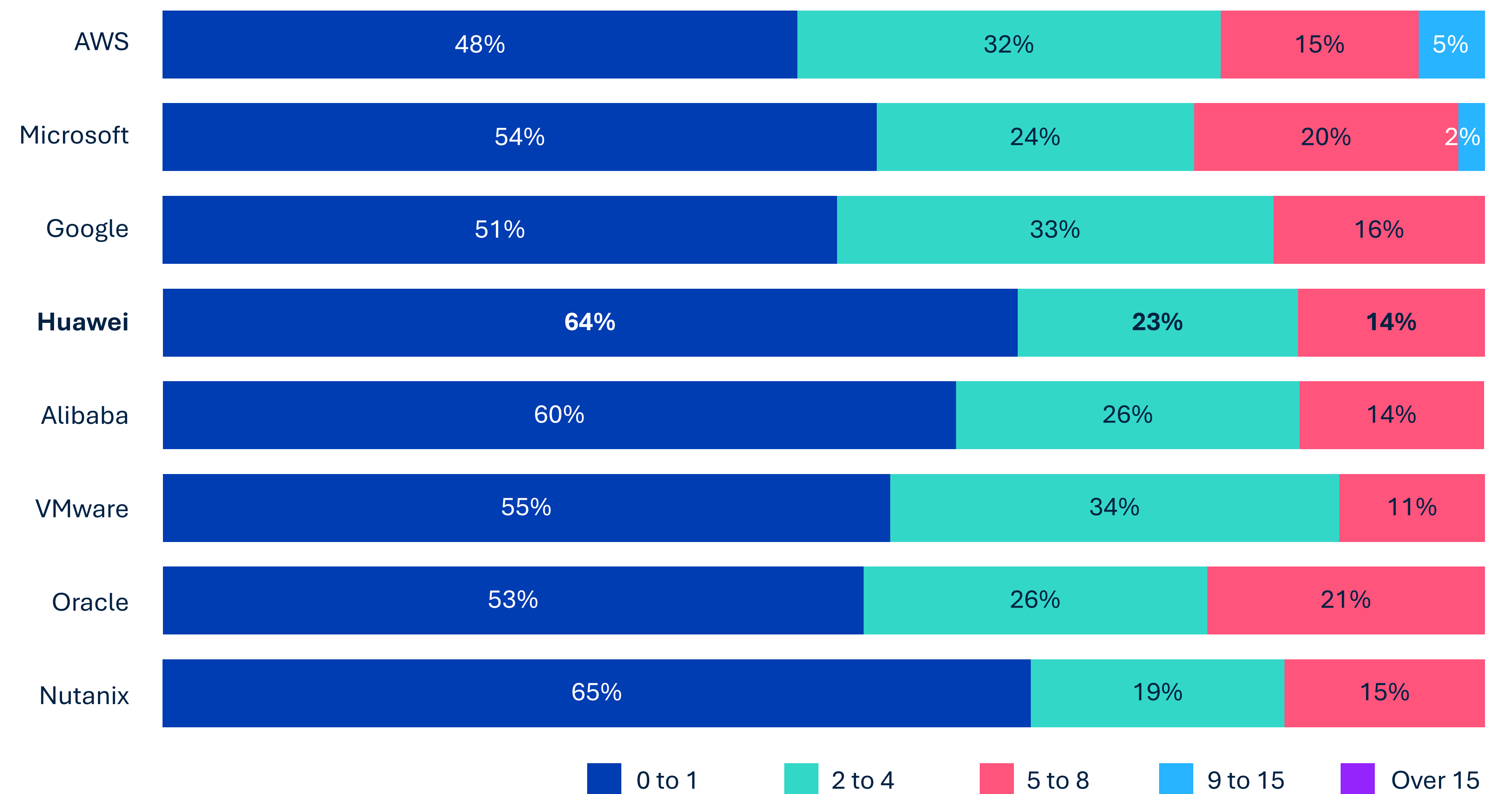
SOURCE: OMDIA

Number of cloud services used

- The typical number of services used was in the 6–20 range; the next most popular range was 21–50. AWS and VMware users reached more than 100 services used.

Q4C_2: How many types of cloud services are used?

Provider	0 to 5	6 to 20	21 to 50	51 to 100	Over 100
AWS	5%	29%	40%	24%	2%
Microsoft	6%	42%	32%	20%	
Google	12%	37%	42%	9%	
Huawei	**23%**	**45%**	**32%**		
Alibaba	17%	37%	37%	9%	
VMware	18%	39%	34%	5%	3%
Oracle	24%	47%	26%	3%	
Nutanix	31%	46%	19%	4%	

Legend: 0 to 5 · 6 to 20 · 21 to 50 · 51 to 100 · Over 100
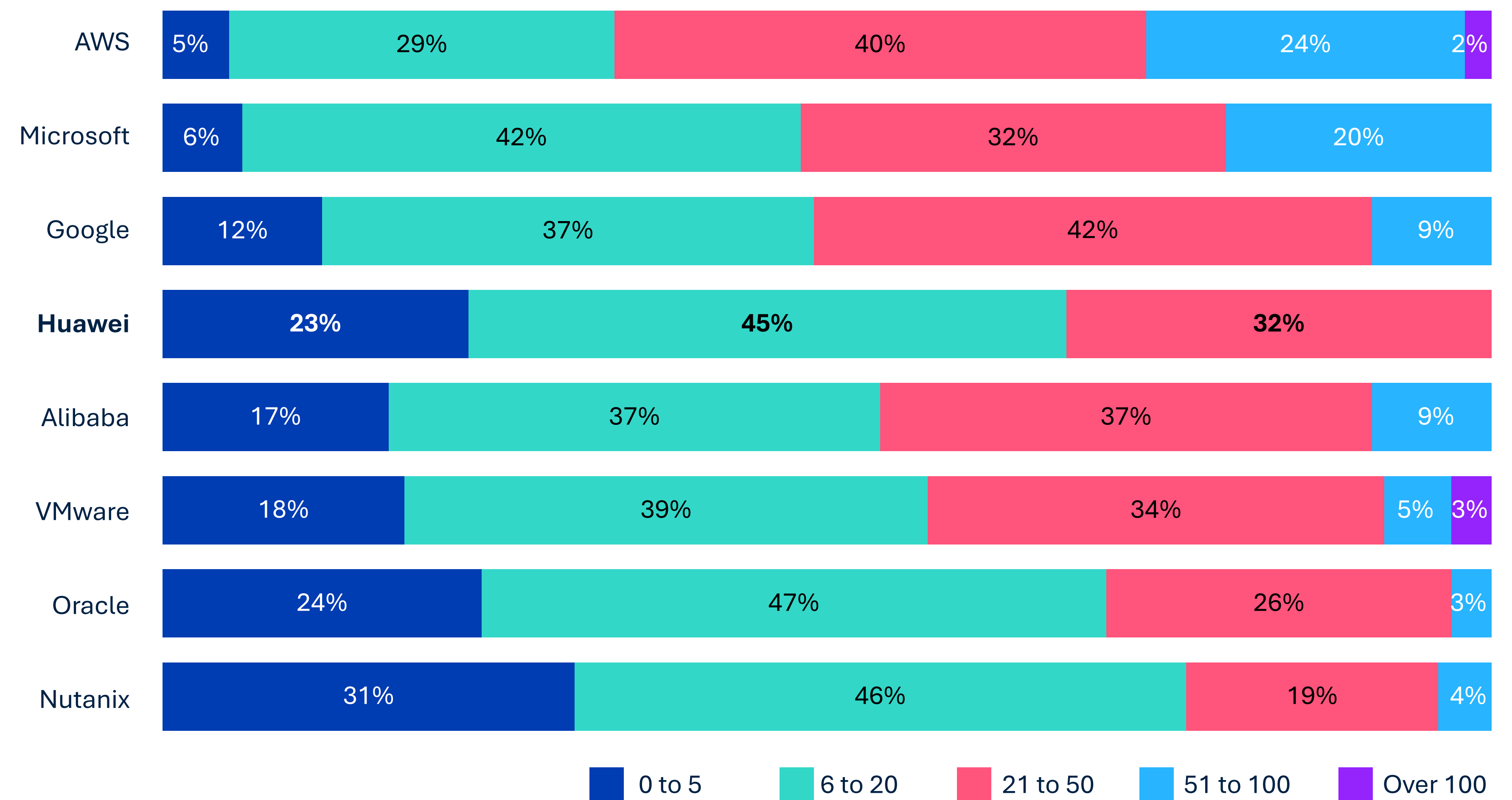
Number of on-premises cloud servers used

- The typical number of servers used was in the 21–100 range. There were some AWS, Microsoft, and Google users with more than 1,000 servers used.

Q4C_3: What is the number of non-premises cloud servers in your enterprise?

Company	0 to 5	6 to 20	21 to 50	51 to 100	Over 100
AWS	24%	35%	31%	8%	2%
Microsoft	26%	48%	20%	4%	2%
Google	21%	42%	23%	12%	2%
Huawei	**18%**	**45%**	**32%**	**5%**	
Alibaba	17%	51%	29%	3%	
VMware	63%	26%	8%	3%	
Oracle	56%	21%	18%	6%	
Nutanix	54%	27%	15%	4%	

Legend: ■ 0 to 5 ■ 6 to 20 ■ 21 to 50 ■ 51 to 100 ■ Over 100
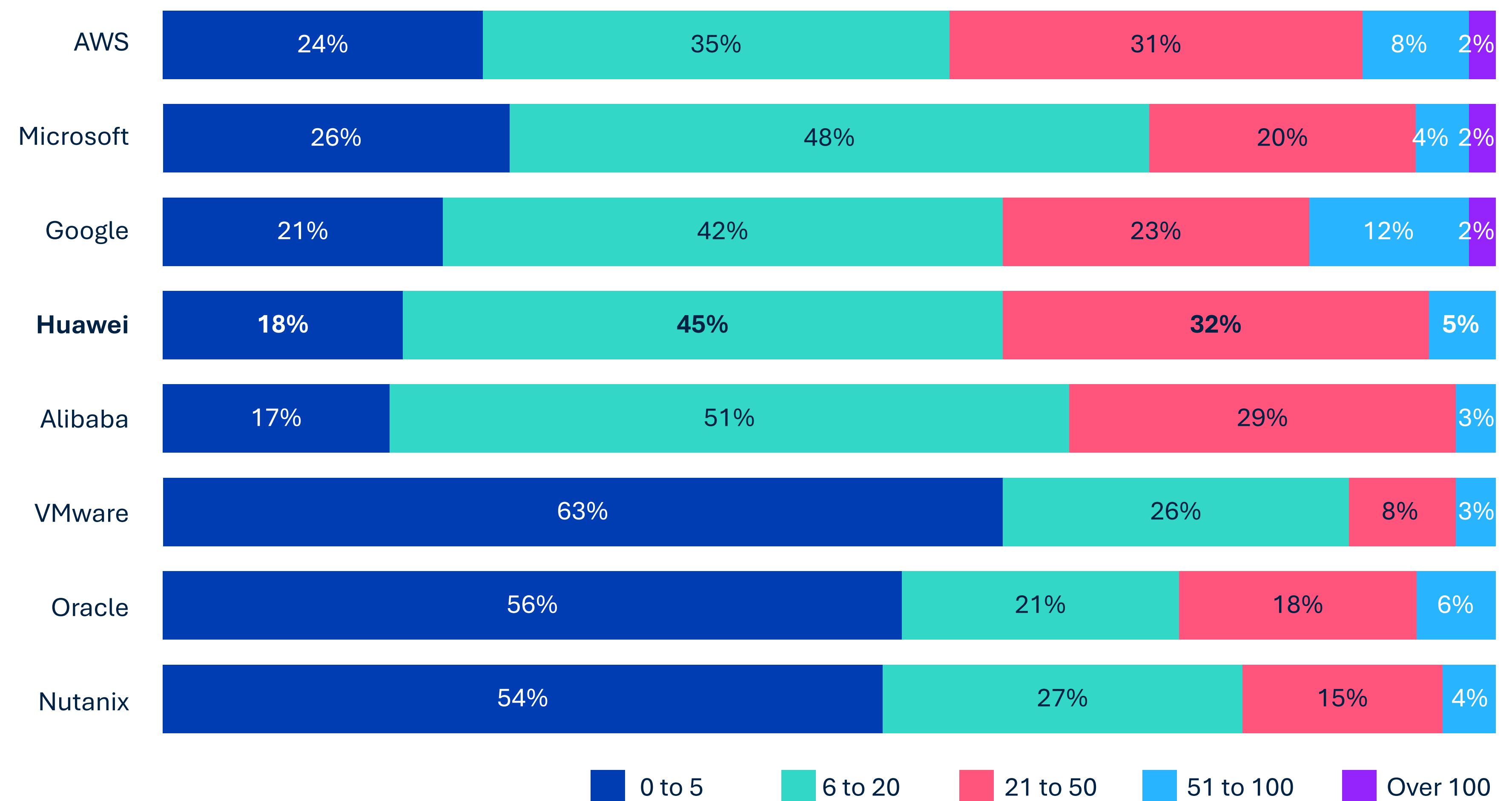
Appendix:
Screener questions

Survey respondents

- We reached out to decision makers across the government, energy and utilities, and telecommunications verticals in the Middle East and Pakistan.

- The proportion of respondents from each country ranged between 9% and 14%.

- All respondents worked in a technical, IT-focused role, and their organizations operated a data center (26% colocated).

- Respondents were approximately evenly distributed from companies across the spectrum of annual revenue from less than $250m to over $1bn.

Distribution by country

14% UAE
13% Iraq
12% Saudi Arabia
13% Oman
9% Pakistan
12% Bahrain
13% Kuwait
14% Qatar

NOTE: n=100
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Distribution by industry

30% Telecommunications
29% Government (including education and nonprofit
41% Energy and utilities
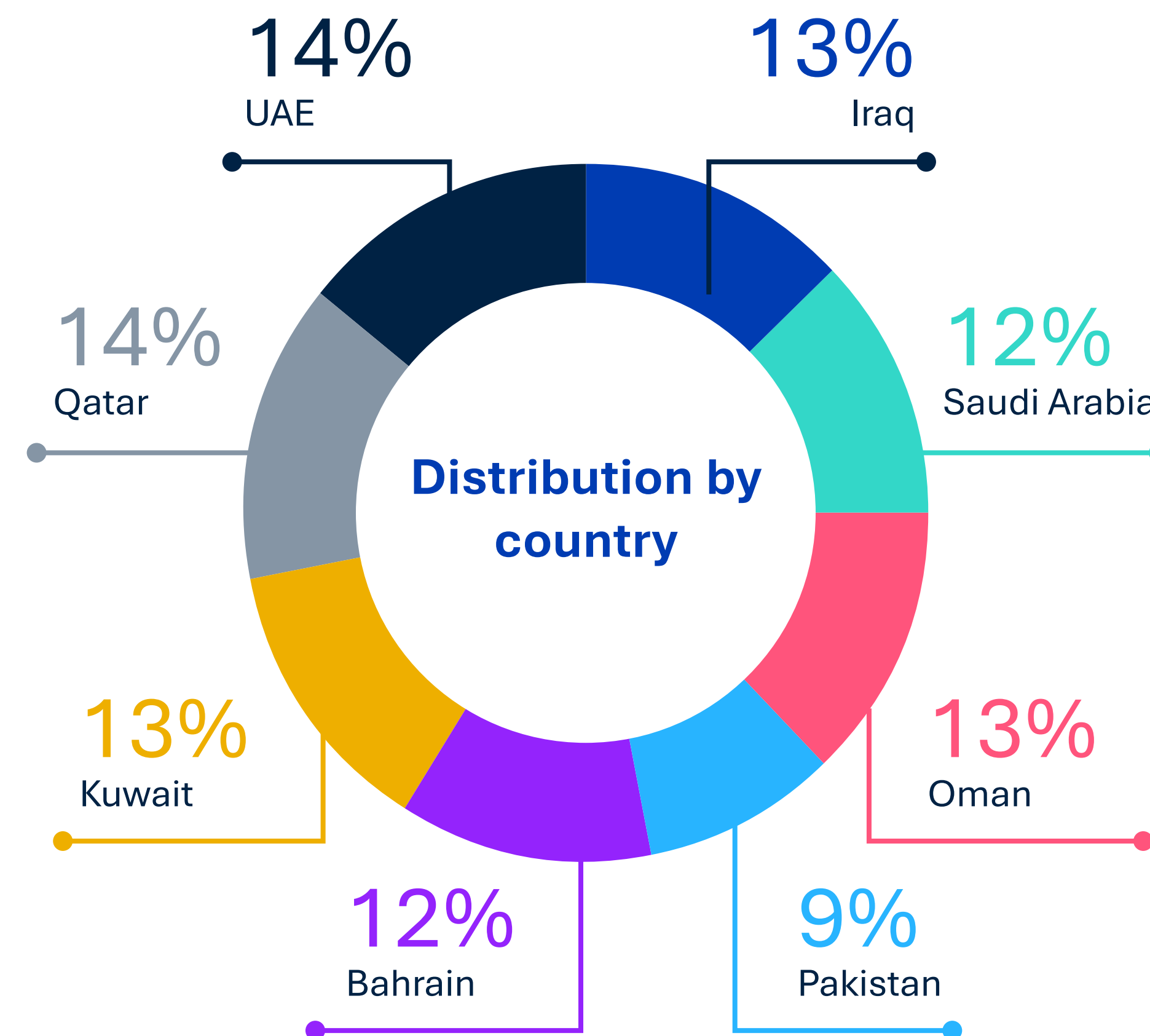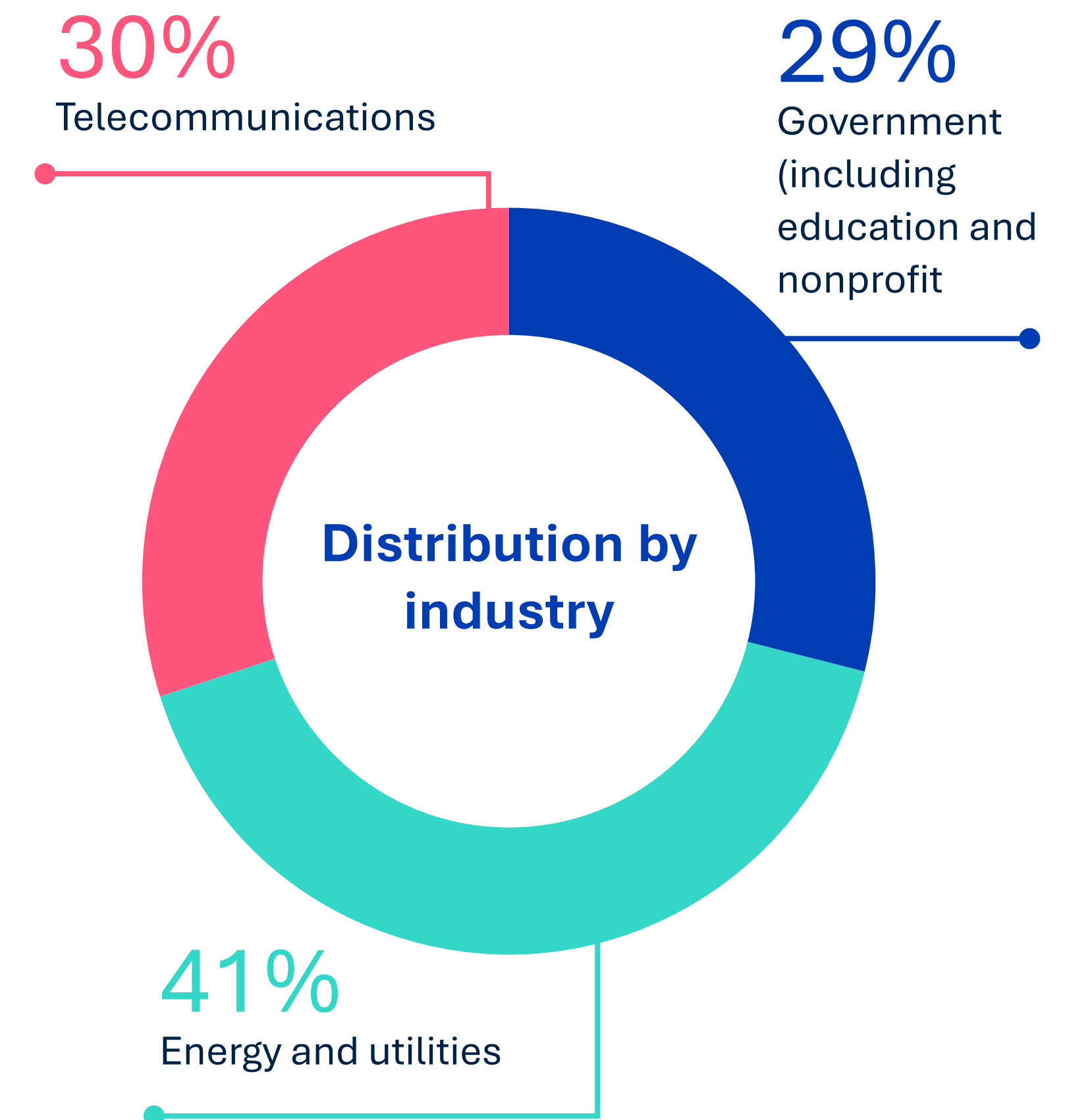
NOTE: n=100
SOURCE: OMDIA
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Omdia recommends this slide be used to explain the sample of respondents quickly to readers of the presentation and the paper

Note on number of respondents and solutions used

- The total survey sample size was 100.

- The number of respondents who used Huawei's solutions was 22.

Cloud solutions your organization uses for your private cloud

Solution	%
AWS (AWS Outpost)	56%
Microsoft (Azure Stack)	42%
Google (Google Distributed Cloud)	36%
Huawei (Huawei Cloud Stack)	22%
Nutanix	26%
Oracle (Oracle Private Cloud Appliance)	15%
VMware	17%
Don't know / not sure	0%
None – my organization does not use hybrid cloud	0%
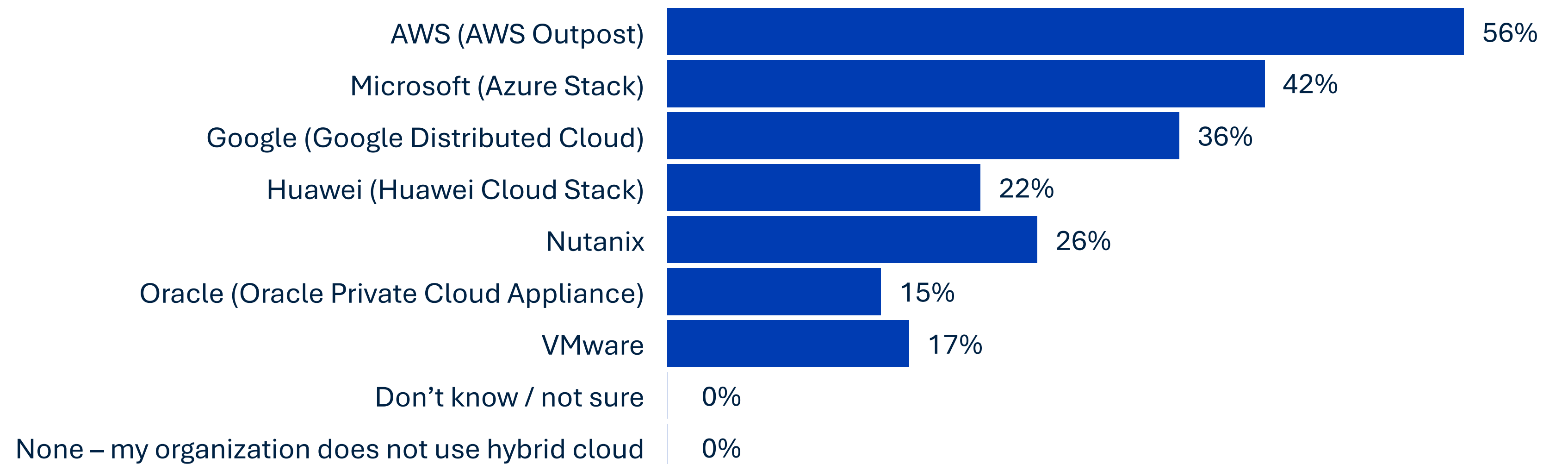
NOTE: n=100
SOURCE: OMDIA

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Cloud solutions your organization uses for your public cloud

Solution	%
AWS	50%
Microsoft (Azure Cloud)	44%
Google (Google Cloud Platform)	38%
Huawei (Huawei Cloud)	22%
Alibaba (Alibaba Cloud)	35%
VMware (VMware on Public Cloud)	27%
Oracle (Oracle Cloud Infrastructure)	20%
Don't know / not sure	0%
None – my organization does not use hybrid cloud	0%

NOTE: n=100
SOURCE: OMDIA

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