

BUSINESS TECHNOLOGY AND SERVICES PLATFORMS

BUSINESS TECHNOLOGY AND SERVICES PLATFORMS TOP 20:

	Brand Value (US\$M)
MICROSOFT	\$1,111,788
NVIDIA	\$814,906
AMAZON WEB SERVICES	\$591,372
ORACLE	\$235,838
GOOGLE CLOUD	\$184,156
IBM	\$150,760
SAP	\$98,183
CLAUDE	\$96,577
AMD	\$91,089
CISCO	\$90,483
VMWARE	\$84,311
INTEL	\$69,108
SIEMENS*	\$61,126
SALESFORCE	\$56,110
INTUIT	\$55,516
ADP	\$55,505
TEXAS INSTRUMENTS	\$54,924
SNAPDRAGON	\$51,053
ADOBE	\$50,511
SERVICENOW	\$49,457

DEFINITION:

The Business Technology and Services Platforms category includes brands that provide (i) IT systems and software infrastructure, including software, middleware, and cloud computing, components for manufacturing of smart/IoT devices (ii) Software and applications for design, publishing, and digital media; and business processes like accounting, finance, productivity, sales, teamworking or messaging (iii) IT consulting/outsourcing for business.

NEXT-LEVEL GROWTH/ THE RACE TO BRAND AI HEATS UP

Category Brand Value
Year-on-Year Change

25%

Business Technology and Services
Platforms Top 20 Total Brand Value

\$4,052,773 M

* Technology Conglomerate
Source: Kantar/Kantar BrandZ (including data from S&P Capital IQ)

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The category grew 25% this year. Results were strong, if uneven. Advanced AI tools cut demand for some legacy software products while boosting names like Microsoft, NVIDIA, and category newcomer Claude.

Top players in B2B have long been willing to upend the category's status quo to unlock growth. AI is no exception, and the gains so far have been staggering.

Some estimates say as much as half of US GDP growth last year came from AI. This includes breakneck investments in new data centres and microchips, as well as wealth effects from Americans fortunate enough (for now) to own stock in AI companies.

Still, success for top AI brands has come with reputational risks – not to mention tougher regulations at home and abroad. To manage these brands will need country-by-country playbooks to safeguard trust.

India, for example, has an exceptionally AI-friendly consumer base. (So much so that OpenAI's ChatGPT introduced special plans and price tiers there.) But, employment anxiety runs high among the Indian middle class, leading to fears that AI will decimate entry-level job prospects for the country's top graduates. That makes B2B AI marketing in India more fraught.

Brands operating in China must navigate similar anxieties around employment, while also manoeuvring around this decade's volatile great-power tensions.

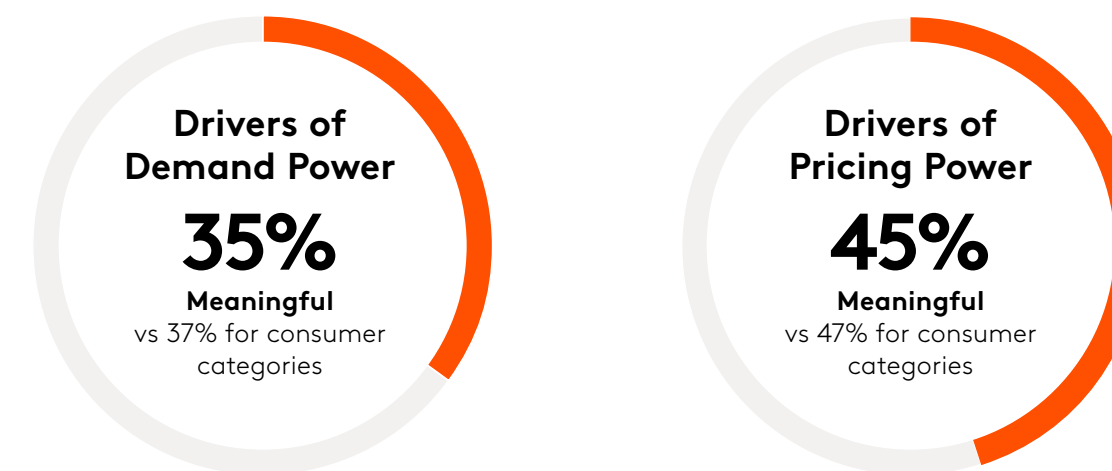
All of this calls for smarter marketing. Performance metrics alone will not determine which AI chatbots and agents win the day. Human preferences may well prove to be the determining factor, based on dimensions like values, personality, ease – and especially trust.

Accordingly, we are now seeing the first attempts at more deliberate AI monitoring of brand building and brand equity. The best AI platform ads go beyond now-standard concepts like 'making a cinematically photoreal ad in-engine'. For example, a recent spot for the AI Assistant in Adobe Express assumes the point of view of a designer generating animated social media assets for a beverage brand. Why is this smart? Because it empathetically centres a real-world use case.

More generally, brand building is about defining yourself and others before they define you. Not all brands will opt for the confrontational tone struck by some high-profile CEOs. But they'll need to show real personality going forward, with the aim of building Meaningful Difference. Whilst the pursuit of Difference is paramount. Being Meaningful also matters as just as much for B2B brands as B2C. Legacy brands such as Microsoft, IBM and Intel already excel at this. Can the start ups?

Being Meaningful matters just as much for B2B brands

All business categories



Source: Kantar BrandZ, Business all categories, 2023-25 (74 categories)



Biswapriya Bhattacharjee
 Director, B2B & Technology,
 Kantar
 biswapriya.bhattacharjee@kantar.com

Invisible inputs, visible power

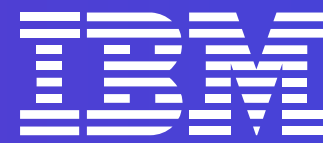
The global technology landscape in 2026 is being reshaped by an unprecedented convergence of geopolitical tension, AI acceleration, and supply chain fragility – nowhere is this more visible than in semiconductors and rare earth materials. Control over these input materials has become a decisive strategic differentiator for technology companies, with early signs already visible in how geopolitical forces are influencing manufacturing and sourcing decisions.

The surge in AI adoption has amplified semiconductor demand across categories – from cloud and edge computing to mobility and industrial automation. Selected manufacturing clusters have reported record semiconductor exports, reflecting both heightened global dependency and the economic sensitivity of chip supply. This shift places immense pressure on brands such as Nvidia, Samsung, and TSMC to build resilient, geographically diversified supply chains while continuing to drive innovative technology and business leadership. In this context, semiconductor brands must invest in strong, differentiated equity to navigate an increasingly competitive and highly regulated space.

For corporates and brands beyond the tech sector, this environment elevates semiconductors and rare earths from background enablers to boardroom-level priorities. Their availability now directly influences product roadmaps, Pricing Power, and the ability to deliver Meaningful, differentiated experiences.

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BRAND SPOTLIGHT



2026 BRAND VALUE

\$150,760 M

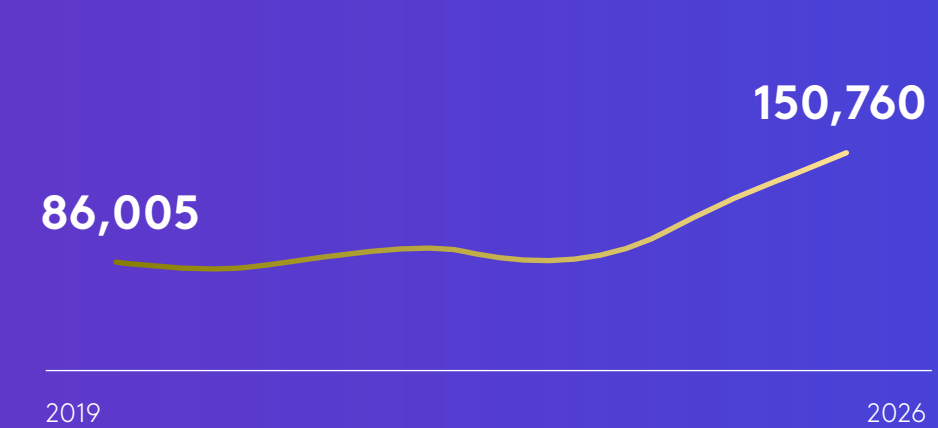
+20% vs 2025

IBM was founded in 1911, making it one of the oldest Business Technology brands in the ranking.

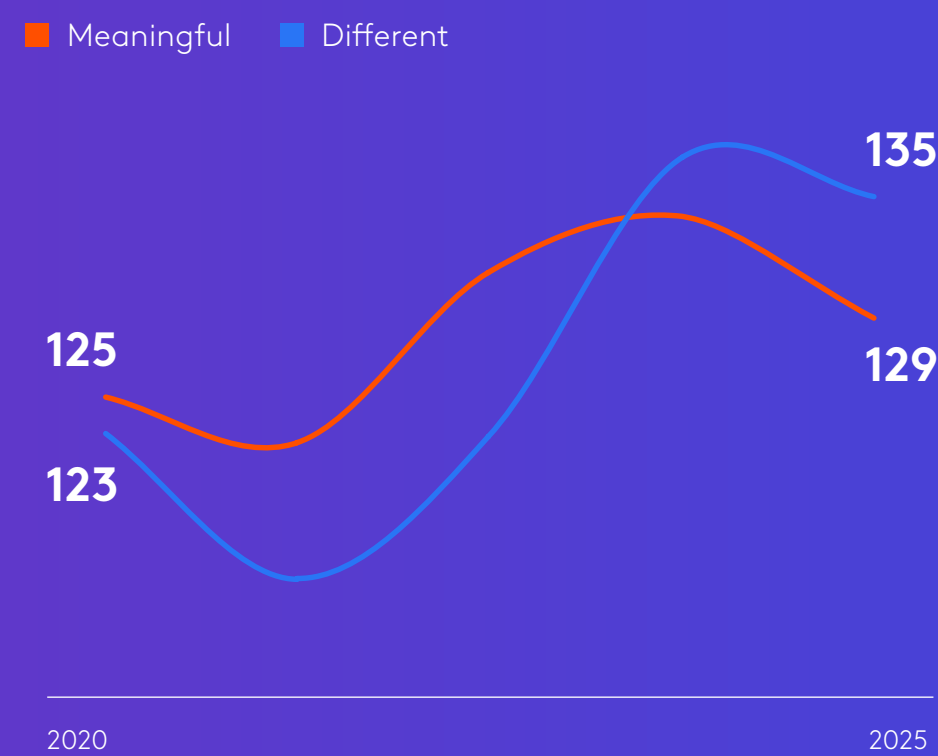
It is highly trusted. IBM's long-standing relationships with many of its biggest enterprise customers has earned it the right to handle the hardest, riskiest problems in business. Its blue-chip consulting practice reinforces its technology business in this respect. IBM's path to AI-driven brand value growth runs directly through this 'trusted' brand identity: its watsonx platform helps businesses use AI in a safe, practical way by keeping control in the customer's hands. By fitting into existing systems and cloud setups, watsonx delivers real business value without adding risk or complexity.

All this means that in recent years IBM's Meaningful Difference among its business audience has gone from strength to strength helping to secure volume and margin.

Brand Value (US\$M)



US brand equity growth



Source: Kantar BrandZ, US, Business IT Systems and Cloud Computing; Business IT Consulting and Outsourcing, 2020-25

BRAND TO WATCH

Coforge

Coforge made its debut in Kantar BrandZ's Most Valuable Indian Brands ranking in 2025 at #64. The brand is growing faster than its peers by focusing on AI solutions for complex sectors like financial services, insurance, and travel.



Source: Kantar BrandZ, US, Business IT Consulting and Outsourcing, 2025

IMPLICATIONS

01

EMBRACE BEING MEANINGFUL

Meaningful connections help business brands as much they help consumer-facing brands. B2B marketers' are thus long overdue for a shift from reach-led activity to relationship-led engagement. Clients expect empathy and value at every touchpoint. This means better understanding clients' needs, pain points, and buying contexts – and then using content, channels, and experiences to support clients' decision making.

02

TRUST IS AS IMPORTANT AS EVER

In a period of rapid technological change and rising scepticism, trust remains essential for driving demand. B2B marketers need to show credibility through transparency, proof of expertise, and consistent delivery. Clear communication around data use, AI, and security is essential. Once it's lost, trust is very hard to rebuild. That makes it a strategic asset, not a soft metric.