ISG Provider Lens®

AWS Ecosystem Partners

AWS Managed Services

A study assessing AWS partners' capabilities to support evolving business and technology needs



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DXC

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Sustained advantage in the AWS ecosystem now rests on production discipline and measurable outcomes

The AWS Ecosystem Partners 2026 study evaluates how service providers help U.S. enterprises transform cloud environments into scalable platforms for modernization, data-driven decision-making and AI-powered business execution. The study evaluates provider capabilities across the AWS Professional Services, AWS Managed Services, AWS Data Lifecycle Management Services and AI-Powered Business Transformation with AWS quadrants, reflecting the end-to-end lifecycle of enterprise transformation from strategy and implementation to optimization and ongoing operations.

The U.S. AWS ecosystem has entered a new stage of maturity. Cloud migration is no longer the primary objective. Enterprises are increasingly focused on modernizing applications, operationalizing AI, establishing trusted data ecosystems and creating operating models capable of delivering measurable business outcomes. AWS's investments in agentic AI, advanced AI infrastructure, sovereign cloud initiatives, industry-focused innovation and its Partner-Led Forward Deployed Engineering (FDE) program are reshaping how organizations approach transformation and how providers deliver value.

Market Context: The forces reshaping the U.S. ecosystem

Agentic AI is becoming an enterprise architecture priority

The U.S. AWS ecosystem is evolving beyond foundational generative AI capabilities toward agentic and autonomous systems that can reason, orchestrate workflows and execute business processes under defined controls. AWS's continued expansion of services that support agent development, orchestration and deployment is accelerating enterprise interest in production-oriented AI systems that move beyond productivity enhancement toward autonomous operational execution.

U.S. AWS partners **industrialize agentic AI** through governed delivery models.

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AI infrastructure is changing cloud consumption patterns

The growth in AI-intensive workloads is reshaping enterprise infrastructure priorities. Demand for model training, inference, real-time analytics and large-scale data processing is increasing adoption of specialized compute architectures, modern silicon platforms and AI-optimized cloud environments. Consumption patterns increasingly reflect continuous operational demand rather than migration-related spikes.

Governance and sovereignty are influencing architecture decisions

As AI systems move closer to critical business processes, governance requirements have expanded significantly. Regulatory oversight, auditability expectations, data protection requirements and digital sovereignty considerations are becoming important components of cloud architecture design, particularly across heavily regulated U.S. sectors. Governance is evolving from a compliance function into a foundational architectural discipline.

Data platforms are evolving into intelligence platforms

The market is moving beyond traditional approaches to data lakes and warehouses. Enterprises are increasingly adopting unified data architectures incorporating data fabrics, lakehouse environments, semantic models, metadata management, observability and lineage. These capabilities are becoming essential components of environments designed to support analytics, automation and AI at scale.

Production engineering is accelerating AI adoption

The Partner-Led Forward Deployed Engineering introduction reflects a broader market transition toward accelerated AI system deployment and operationalization. Enterprises are increasingly seeking approaches that reduce the time required to move AI from experimentation into governed production environments while minimizing implementation complexity and delivery risk.

Infrastructure disruption

Changes to virtualization licensing following the Broadcom acquisition of VMware have forced large estates to revisit data center strategy, accelerating exits and reopening long-settled questions about where core workloads should run. Enterprises are increasingly consolidating these workloads onto AWS and other hyperscaler stacks, drawn by native migration paths that lift and shift VMware environments without re-architecture, funded modernization programs that offset exit costs, and the pull of running compute next to the AWS data and AI services where new value is being built.

Talent and trust constraints

Scarcity of AI-fluent engineering talent, alongside intensifying scrutiny of data residency, sovereignty, and responsible AI, is redefining the requirements that any credible delivery model must satisfy. Enterprises can no longer build and scale AI on general engineering headcount alone, and they now expect partners to bring proven, certified, AI-fluent talent as a baseline condition.

Enterprise Priorities: How U.S. enterprises are adapting and scaling

As the ecosystem evolves, enterprises are modifying investment priorities, sourcing expectations and operating models to capture value from AWS-enabled transformation initiatives, which are summarized below.

Scale AI beyond experimentation

Organizations increasingly view proof-of-concept activity as insufficient. The focus has shifted toward embedding AI into business workflows, customer interactions, software engineering practices and operational decision-making processes. Enterprises are prioritizing initiatives that demonstrate measurable business value, operational efficiency improvements and scalable adoption models.

Build trusted data foundations before scaling AI

Enterprises recognize that successful AI adoption depends on data readiness. Many organizations are investing heavily in data modernization, governance, metadata management, lineage tracking, data quality

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controls and real-time processing capabilities. Data trust has emerged as a critical prerequisite for reliable AI outcomes and regulatory compliance.

Treat governance as an operational capability

Responsible AI, auditability, human oversight and lifecycle monitoring are becoming integral parts of enterprise AI programs. Organizations increasingly require governance frameworks that address regulatory obligations, model oversight, transparency requirements and operational accountability before expanding AI deployments broadly across the enterprise.

Manage cloud and AI economics together

Financial accountability is expanding beyond conventional cloud optimization. Enterprises are increasingly monitoring AI-related expenditures including model execution costs, GPU utilization, inference activity and token consumption. Cost transparency is becoming a critical input into decisions regarding AI scaling and long-term investment prioritization.

Prioritize industry-specific business outcomes

Organizations increasingly favor transformation approaches aligned to industry requirements, operational realities and regulatory obligations. The favored capabilities vary by sector.

- **Financial Services:** Puts heavy focus on governance, resilience, compliance and risk management.
- **Healthcare and Life Sciences:** Prioritizes security, data governance, AI trust and regulated digital transformation.
- **Public Sector:** Emphasizes secure architecture, sovereignty requirements and controlled AI adoption.
- **Manufacturing and Industrial Sectors:** Focus on real-time analytics, operational intelligence and workflow automation.

Industry alignment is increasingly influencing provider selection and transformation investment decisions.

Enterprise buyers seek measurable value and governance-led transformation

Several shifts are becoming evident across the U.S. market:

- Enterprises increasingly expect measurable business outcomes rather than activity-based reporting.
- Outcome-based and value-linked engagement models are gaining momentum.
- Buyers favor service providers with reusable assets, accelerators and industrialized delivery frameworks.
- Co-creation and advisory-led transformation models are becoming common requirements.
- Governance maturity, AI readiness and operational accountability increasingly influence sourcing decisions.
- A growing number of enterprises expect the hyperscaler to co-invest and help select the delivery partner, reflecting a reverse procurement dynamic and an expectation of measurable commitment from both hyperscaler and integrator.

Key enterprise priorities shaping sourcing decisions

- Scaling production-grade AI and agentic AI initiatives
- Modernizing data environments to support analytics and AI
- Establishing governance frameworks before large-scale deployment
- Increasing visibility into cloud and AI economics
- Accelerating modernization while reducing transformation risk
- Selecting partners capable of demonstrating measurable business outcomes

Provider Dynamics: How supply is reorganizing to meet U.S. demand

Service providers are significantly repositioning portfolios, investments and operating approaches in response to evolving enterprise requirements.

Industry-focused AI assets continue to expand

Providers are building reusable agent libraries, industry-specific frameworks, AI accelerators, process blueprints and orchestration environments designed to shorten deployment cycles and improve business relevance.
Their emphasis is shifting toward operational AI solutions tailored to industry workflows rather than generalized AI experimentation.

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Co-innovation and forward deployed engineering gain visibility

Co-innovation is emerging as a central feature of the U.S. AWS ecosystem as enterprises seek to accelerate the transition from AI experimentation to production-scale deployment. Providers are increasingly combining AWS co-investment programs, strategic collaboration agreements, innovation centers, industry solution engineering and joint development initiatives to create repeatable transformation assets and deployment patterns. At the same time, AWS's Partner-Led Forward Deployed Engineering (FDE) motion is encouraging providers to establish dedicated AWS-aligned engineering teams capable of designing, deploying and operationalizing agentic AI systems in compressed timeframes. This shift moves provider involvement beyond traditional advisory and implementation services toward embedded engineering models focused on rapid execution, knowledge transfer, operational readiness and measurable business outcomes.

Governance-by-design becomes a core differentiator

Across leading providers, governance capabilities are being embedded directly into platforms, methodologies and operating models. Responsible AI frameworks, policy-driven controls, auditability mechanisms, observability platforms and compliance accelerators are increasingly being incorporated into transformation and operational services at the beginning of engagements rather than after deployment.

From cloud partners to AI transformation partners

Providers increasingly position cloud modernization within broader business transformation agendas. AI is being embedded throughout assessment, discovery, planning, code transformation, testing and migration processes. Modernization efforts are increasingly structured around preparing enterprises for sustained AI adoption and operational scale.

Productization of transformation delivery

Leading providers continue investing in proprietary platforms, migration factories, modernization frameworks, AI foundries, governance toolkits and engineering accelerators. These assets help standardize delivery, improve scalability, reduce project variability and accelerate time-to-value. Across leading providers, more and more differentiation is coming from repeatable intellectual property and industrialized delivery models rather than labor scale alone.

Managed services are evolving into intelligent operations

Managed services portfolios are moving well beyond infrastructure administration. Providers are investing in predictive observability, autonomous remediation, AI-powered service management, reliability engineering, platform engineering and operational intelligence capabilities. CloudOps, FinOps, AIOps, AgentOps and governance functions are increasingly converging within unified operating models.

Platform engineering emerges as a foundational model for AWS transformation

Providers are increasingly standardizing AWS delivery around platform engineering, cloud-native architectures and reusable operational foundations. Investments in infrastructure-as-code (IaC), automated landing zones, internal developer platforms, DevSecOps pipelines, site reliability engineering (SRE) and policy-driven governance are helping providers reduce implementation variability while improving scalability and operational consistency.
Rather than delivering isolated cloud projects, providers are building standardized platforms, golden paths and reusable engineering patterns that enable enterprises to accelerate modernization, support continuous innovation and maintain governance across complex AWS environments. The growing emphasis on platform-centric delivery reflects enterprise demand for scalable, repeatable and sustainable cloud operating models that extend beyond one-time transformation initiatives.

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Data modernization is converging with AI enablement

More providers are positioning data lifecycle management as a strategic enabler of enterprise AI programs. Their investments emphasize lineage, metadata management, governance automation, observability, semantic architectures, streaming platforms and automated engineering capabilities. The objective is to help enterprises establish trusted environments that support sustained analytics and AI adoption.

Dedicated AWS operating units

Partners are standing up dedicated AWS profit-and-loss units with aligned sales, delivery, and engineering, replacing scattered matrixed coverage. These units are reinforced with executive engagement and strategic collaboration agreements that lock in joint investment, signaling a shift from opportunistic partnering toward a structural commitment where AWS competency is owned, funded, and accountable inside the provider's core operating model.

Inorganic capability building

Where organic capability falls short, mergers, acquisitions, and acqui-hires are being used to add AWS-native engineering depth and vertical expertise at speed. The same deals widen follow-the-sun delivery coverage, letting providers close capability and geographic gaps faster than internal hiring and certification alone would allow.

Outlook (12-24 Months): what to expect and how to prepare

Over the next 12 to 24 months, the U.S. AWS ecosystem is expected to progress toward integrated operating models where AI, data, cloud operations and governance function as a unified environment rather than separate transformation initiatives. Competitive advantage will increasingly depend on disciplined execution, operational maturity and governance effectiveness.

Key market developments are likely to include:

- Agentic AI becoming a standard operating layer across enterprise workflows.
- Expanded autonomous cloud operations and intelligent service management models.
- Continued investment in AI-ready data ecosystems and decision intelligence platforms.
- Increased governance-led AI operating framework adoption.
- Greater emphasis on outcome-based transformation and managed services models.
- Expansion of platform-led transformation and AI factory models that standardize modernization, governance and AI adoption at scale.

Leading indicators to watch

- Growth in enterprise AgentOps and AI operations investments.
- Increased agentic AI solutions deployment in production environments.
- Expanding demand for AI-enabled managed services.
- Investment growth in governance, observability and compliance tooling.
- More outcome-linked commercial models being put into practice.

What enterprises should do now

- **Institutionalize governance early:** Establish governance mechanisms spanning cloud, data and AI operating environments before scaling adoption.
- **Prioritize data readiness:** Strengthen lineage, quality, metadata and trust mechanisms before expanding AI initiatives.
- **Define enterprise AI operating models:** Create clear frameworks for lifecycle management, accountability and operational oversight.
- **Align AI investments with business outcomes:** Measure initiatives using operational, financial and business performance indicators.
- **Expand financial governance:** Integrate AI economics and cloud economics into a unified value-management framework.
- **Adopt platform-centric operating models:** Invest in platform engineering, reusable foundations and standardized governance controls to support scalable cloud and AI adoption.

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What service providers should prioritize

- Embed governance-by-design across all AI and cloud engagements.
- Continue productizing accelerators, platforms and reusable intellectual property.
- Expand AgentOps, AI operations and lifecycle management capabilities.
- Demonstrate measurable business value through outcome-focused execution models.
- Strengthen industry-specific transformation frameworks, reusable AI assets and agentic solutions.
- Partners lacking genuine forward-deployed capability, agentic harnesses with feedback loops, and defensible AI economics will face the widest gaps. Investment in native depth, vertical IP, and demonstrable outcomes will separate durable leaders from challengers.

Conclusion

From Cloud Transformation to Governed AI Execution: The Next Phase of the U.S. AWS Ecosystem

The U.S. AWS ecosystem has evolved beyond migration-centric transformation toward a market defined by production-scale AI execution. Enterprises are placing more emphasis on measurable outcomes, trusted data foundations, governance maturity and operational scalability. Agentic AI, autonomous operations and AI-enabled modernization are no longer isolated initiatives; they are becoming interconnected elements of enterprise operating models.

Providers that combine industrialized delivery approaches, governance-by-design frameworks, reusable AI assets, data modernization capabilities and outcome-oriented engagement models will be best positioned to support the next phase of enterprise transformation. The competitive focus is shifting from cloud adoption to governed execution at scale, where sustained value depends on operational discipline as much as technological innovation. Segmentation will sharpen. Large providers with funded programs and broad competency coverage are positioned to lead complex modernization and enterprise-wide agentic programs, while smaller and specialist providers can lead where vertical depth, speed, and focused IP outweigh scale.

In 2026, the U.S. AWS ecosystem is entering a phase where enterprise value is increasingly tied to production-scale AI execution. Agentic AI, governed data ecosystems, autonomous operations and AI-aware financial governance are reshaping enterprise investment priorities and provider strategies.

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Provider Positioning

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	AWS Professional Services	AWS Managed Services	AWS Data Lifecycle Management Services	AI-Powered Business Transformation with AWS
Accenture	Leader	Leader	Leader	Leader
AllCloud	Contender	Contender	Product Challenger	Product Challenger
Apexon	Rising Star ★	Not In	Rising Star ★	Rising Star ★
Arvato Systems	Not In	Contender	Not In	Not In
Atos	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Birlasoft	Product Challenger	Product Challenger	Contender	Contender
Brillio	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Capgemini	Leader	Leader	Leader	Leader
CI&T	Product Challenger	Not In	Contender	Contender
Coforge	Leader	Rising Star ★	Product Challenger	Rising Star ★
Cognizant	Leader	Leader	Leader	Leader

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Provider Positioning

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	AWS Professional Services	AWS Managed Services	AWS Data Lifecycle Management Services	AI-Powered Business Transformation with AWS
Deloitte	Leader	Leader	Leader	Leader
DXC Technology	Leader	Leader	Leader	Leader
Fractal Analytics	Product Challenger	Contender	Product Challenger	Product Challenger
Genpact	Product Challenger	Product Challenger	Rising Star ★	Leader
HCLTech	Leader	Leader	Leader	Leader
Hexaware	Leader	Rising Star ★	Leader	Leader
Hitachi Digital Services	Product Challenger	Product Challenger	Product Challenger	Product Challenger
IBM	Not In	Not In	Market Challenger	Market Challenger
Infosys	Leader	Leader	Leader	Leader
ITC Infotech	Rising Star ★	Product Challenger	Product Challenger	Product Challenger
Kyndryl	Product Challenger	Product Challenger	Product Challenger	Product Challenger

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Provider Positioning

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	AWS Professional Services	AWS Managed Services	AWS Data Lifecycle Management Services	AI-Powered Business Transformation with AWS
LTM	Leader	Leader	Leader	Leader
Mastek	Product Challenger	Not In	Product Challenger	Product Challenger
Mphasis	Product Challenger	Product Challenger	Product Challenger	Product Challenger
N-iX	Contender	Not In	Contender	Contender
NTT DATA	Leader	Leader	Leader	Leader
Persistent Systems	Leader	Leader	Leader	Leader
PwC	Leader	Leader	Leader	Leader
Quantiphi	Product Challenger	Not In	Product Challenger	Product Challenger
Rackspace Technology	Leader	Leader	Leader	Leader
Sutherland	Product Challenger	Product Challenger	Not In	Product Challenger

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Provider Positioning

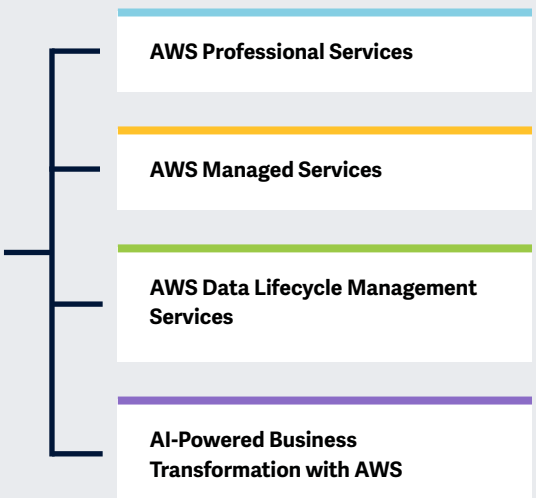
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	AWS Professional Services	AWS Managed Services	AWS Data Lifecycle Management Services	AI-Powered Business Transformation with AWS
Syntax	Product Challenger	Contender	Product Challenger	Product Challenger
TCS	Leader	Leader	Leader	Leader
Tech Mahindra	Product Challenger	Product Challenger	Product Challenger	Product Challenger
T-Systems	Product Challenger	Not In	Not In	Not In
Version 1	Contender	Contender	Contender	Product Challenger
Virtusa	Not In	Product Challenger	Contender	Product Challenger
Visionet	Contender	Not In	Product Challenger	Contender
Wipro	Leader	Leader	Leader	Leader
YASH Technologies	Contender	Product Challenger	Contender	Contender
Zensar Technologies	Product Challenger	Product Challenger	Contender	Contender

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Key focus areas of the **AWS Ecosystem Partners** 2026 study.

Simplified Illustration Source: ISG 2026



Definition

In 2026, the AWS partner ecosystem is entering a new phase of maturity defined by the operationalization of advanced AI and deeper partner-led innovation. AWS is evolving beyond foundational GenAI capabilities toward agentic and autonomous AI systems, enabling partners to design, deploy and manage intelligent workflows at scale. Building on momentum from re:Invent 2025, AWS has further advanced its GenAI and agentic AI portfolio through enhancements to Amazon Bedrock, the launch of Bedrock AgentCore, Nova models and agentic AI development services, such as Kiro, enabling partners to deliver differentiated solutions at scale.

AWS continues to expand its next-generation silicon innovations, including Graviton5 and Trainium3, designed to support demanding AI and data-intensive workloads. Additionally, large-scale investments in new regions and expanded infrastructure footprints across key markets are creating a strong foundation for partners to support high-performance, resilient workloads. AWS is also strengthening its industry cloud approach, helping partners deliver tailored solutions embedding industry logic, data models, and compliance controls.

AI governance and digital sovereignty have emerged as critical priorities, with AWS strengthening its focus on helping customers meet stringent regulatory and data residency requirements. Through sovereign cloud initiatives, AWS enables partners to deliver solutions that align with regional compliance mandates. re:invent announcements have created a well-funded, incentive-backed environment where partners who double down on agentic AI, managed services, and AI-powered modernization can deliver sustained top-line growth at scale.

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Scope of the Report

This ISG Provider Lens® quadrant report covers the following four quadrants for services/solutions: AWS Managed Services, AWS Professional Services, AWS Data Lifecycle Management Services, AI-Powered Business Transformation with AWS.

This ISG Provider Lens® study offers 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).

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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.

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AWS Managed Services

Who Should Read This Section

This report is valuable for providers offering **AWS managed services** in the **U.S.** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights providers' positioning based on their service depth and market presence. The report highlights the evolution toward AI-driven and autonomous cloud operations, emphasizing FinOps maturity, sustainability, security and governance in increasingly complex hybrid cloud and multicloud environments.

Strategy professionals

Should read this report to identify AWS managed service providers that align cloud operations with enterprise business objectives. It highlights providers' ability to optimize cost structures through mature FinOps practices, ensure regulatory compliance and build resilient and scalable operating models. The report also provides insights into how providers enable AI-driven operational frameworks and long-term cloud value realization.

Digital professionals

Should read this report to evaluate how AWS managed service providers support and accelerate digital transformation initiatives. It examines providers' use of cloud management platforms, automation frameworks and integration of capabilities such as AIOps, MLOps and DataOps. These insights help ensure that managed cloud environments effectively support innovation, scalable application delivery and evolving digital business models.

Technology professionals

Should read this report to assess providers' technical strengths in operating secure and resilient AWS environments. Key evaluation areas include autonomous operations, AI-assisted remediation, orchestration across hybrid cloud and multicloud infrastructures and adherence to SRE-based practices. The report also highlights providers' expertise in ensuring security, compliance and performance at scale.

Procurement professionals

Should read this report to compare AWS managed service providers based on service capabilities, certifications, delivery frameworks and pricing structures. It supports informed vendor selection by providing detailed insights into providers' SLAs, value propositions and operational maturity. This enables procurement teams to negotiate effectively and select partners aligned with long-term business and operational goals.

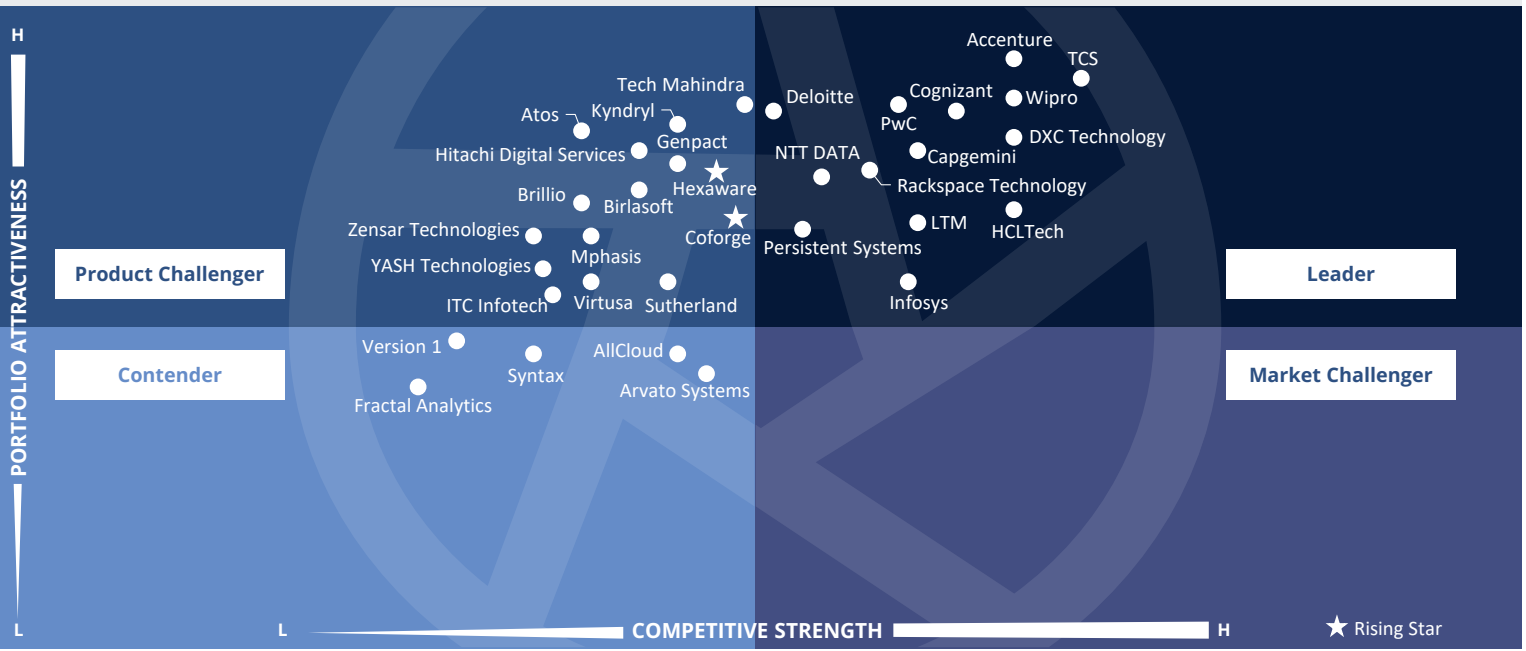
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ISG Provider Lens®

Source: ISG RESEARCH

AWS Ecosystem Partners
AWS Managed Services

U.S. 2026



This quadrant assesses providers' ability to deliver **AI-enabled cloud operations** across AWS environments in the U.S. It emphasizes **predictive automation, governance, observability and value optimization** to improve resilience, performance and cost control.

Sameen Mohammed Siddique

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Definition

This quadrant covers MSPs offering professional services that encompass orchestrating, provisioning, monitoring, managing and optimizing operations of a customer's public cloud and multicloud environment. The services include IaaS and PaaS hyperscale platforms for public clouds provided by third-party service providers. In this quadrant, the study aims to optimize performance in the cloud, reduce costs and ensure compliance and security. Providers typically use developed or licensed cloud management platforms (CMPs) and tools to deliver customers with the highest level of automation and necessary transparency over the managed cloud resource pool in terms of capacity utilization, costs and independent management.

These providers proactively integrate DataOps, MLOps, AIOps, Platform Reliability Engineering (PRE), AgentOps, and LLMOps, coupled with innovative intellectual property such as FinOps methodologies and automated security frameworks, to build resilient, compliant and well-governed cloud environments.

Eligibility Criteria

1. Obtain AWS Managed Service Program **certification**
2. Demonstrate expertise in autonomous **AI-driven orchestration, configuration and management** of platforms and systems including AIOps, AgentOps, and LLMOps
3. Design, **build and manage** public and multicloud environments
4. **Support** big data and multiple database solutions and analytics
5. Engineer **DevOps and platform engineering solutions**, incorporating CI/CD and Platform Reliability Engineering (PRE) practices.
6. Provide **security** resources and services with scope and availability
7. Ability to **measure and optimize cloud-related carbon** emissions on AWS is advantageous
8. Apply AWS' operational best practices, including those aligned **with site reliability engineering (SRE) principles**
9. Experience in **solutions architecture** and **cost optimization (FinOps)**
10. **Migrate servers** and manage resource availability

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Observations

The U.S. AWS Managed Services paradigm is shifting from infrastructure management to intelligent cloud operations. Providers position AWS Managed Services as a strategic operating layer combining cloud operations, platform engineering, governance, security and financial accountability. The focus has moved beyond running workloads to optimizing performance, resilience, compliance and business value across complex AWS and multicloud environments.

Predictive AIOps, autonomous remediation and agent-driven service management are leading managed services, with providers embedding AI across observability, incident management, root cause analysis (RCA) and decision-making to reduce manual effort and improve reliability. Managed services are shifting from reactive support to self-healing, context-aware frameworks that anticipate issues, automate fixes and scale resilience.

Providers standardize cloud operations via platform-led delivery models merging IaC, SRE practices, unified observability and policy-driven governance. Centralized orchestration layers offer cross-domain visibility to meet enterprise demands for consistent governance, operational transparency and scalable hybrid and multicloud management.

Cost management has matured from focusing on spend reduction to broader value governance. Providers integrate FinOps, operational intelligence, workload performance and AI consumption governance to drive business outcomes. As AI expands, financial management covers model operations and token consumption to measure managed services by business value realization rather than mere operational efficiency.

From the 42 companies assessed for this study, 34 qualified for this quadrant, with 14 being Leaders and two Rising Stars.

accenture

Accenture is repositioning AWS Managed Services around an AI-first operating model. It combines its AIOps Agent Studio and governed automation to accelerate operational efficiency and service resilience.

Capgemini

Capgemini's AWS Managed Services extend beyond migration into continuous optimization and operational management. Its methodologies help organizations align performance, cost and operational objectives.

cognizant

Cognizant has established a comprehensive AWS Managed Services portfolio anchored by its Neuro® IT Operations platform. Its autonomous operations strategy combines AIOps, observability, remediation and resilience capabilities to improve operational performance at scale.

Deloitte.

Deloitte is increasingly aligning AWS Managed Services with AI-led operations. Investments spanning Amazon Bedrock, Amazon SageMaker and its proprietary AI-focused assets connect cloud management with enterprise-scale data and AI initiatives.

DXC

DXC Technology combines intelligent operations, FinOps, security automation and IaC governance within its AWS Managed Services portfolio, helping enterprises optimize cloud performance, compliance and operational costs.

HCLTech

HCLTech has aligned its managed services strategy with agentic operations by integrating Amazon Bedrock AgentCore, Amazon Quick and more than 150 AI agents. This enables enterprises to advance from reactive support models toward predictive and autonomous operations.

Infosys

Infosys emphasizes automation-led cloud operations through AWS CloudOps services. AI- and ML-enabled monitoring, governance, compliance and financial management capabilities support ongoing optimization across AWS estates.

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LTM delivers AWS Managed Services through a platform-led operating model combining its CloudXperienz platform, TechFinOps and BlueVerse. This approach strengthens operational resilience, governance and continuous cloud optimization across enterprise environments.

NTT DATA's AWS Managed Services strategy combines the One NTT platform, AIOps and self-healing automation to deliver unified operations across AWS and hybrid cloud environments.

Persistent Systems' managed services portfolio is evolving toward AgentOps and AI-enabled operations. Its investments in observability, agent governance, operational intelligence and its Cost of Intelligence framework reflect an expanding focus on AI-centric cloud environments.

PwC is aligning managed services with AI-enabled operations, leveraging agentic AI, automated reasoning and operational automation capabilities. This reflects a growing focus on intelligent management for AWS environments rather than traditional support models alone.

Rackspace Technology's AWS Managed Services strategy emphasizes lifecycle support across migration, modernization, optimization and operations. This approach allows customers to access transformation and cloud management capabilities through a coordinated delivery model.

TCS leverages its Machine First Delivery Model™ (MFDM™), Cloud Exponence platform and AWS-native automation services to provide a scalable managed services foundation. This helps enterprises accelerate operational maturity while supporting modernization and innovation.

Wipro is evolving AWS Managed Services toward an AI-native operating model through the WINGS platform, combining autonomous operations, AIOps, observability and agentic service management to improve operational resilience and efficiency.

Coforge (Rising Star) is positioned as a focused AWS Managed Services provider with strong operational maturity. Its EvolveOps.AI platform combines observability, automation and proactive operations to improve resilience while simplifying cloud management.

Hexaware's (Rising Star) focus on Cognitive CloudOps, cloud cost governance, security and automation reflects a broad managed services strategy. The approach spans cloud operations, performance optimization and continuous operational improvement.

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Leader

"DXC Technology strengthens AWS Managed Services with its OASIS platform, delivering agentic AI-driven operations, platform engineering and governed multicloud orchestration for resilient, high-efficiency enterprise environments."

Sameen Mohammed Siddique

DXC Technology

Overview

DXC Technology is headquartered in Virginia, U.S. It has more than 115,000 employees across over 70 countries. In FY26, the company generated $12.6 billion in revenue. DXC delivers AWS Managed Services through an AI-first, platform-led approach powered by its OASIS intelligent orchestration platform that combines agentic AI with IT operations. The service emphasizes platform engineering, automation and multicloud governance to transform operations into a managed utility model. Through AI-driven observability, FinOps and IaC, DXC delivers predictive operations, continuous optimization, compliance and operational resilience across complex enterprise environments.

Strengths

Agentic AI-powered operations platform: DXC's OASIS platform combines agentic AI with AWS services, including Amazon Bedrock and Claude models, to streamline IT operations. It connects infrastructure, applications and tools through a unified orchestration layer while embedding governance, security and observability. Persona-based agents drive contextual automation and decision-making to improve operational efficiency, reducing manual effort and ensuring enterprise-grade compliance.

Platform engineering and automation at scale: DXC's platform engineering approach standardizes development and operations through reusable services, automated pipelines and IaC. DXC OASIS with its cloud service orchestration and FinOps solutions, delivers consistent governance, accelerated delivery, AI-assisted development and cost optimization across hybrid and multicloud environments.

Integrated FinOps capabilities: DXC incorporates FinOps across modernization and managed services engagements through its Total FinOps approach, GenAI-based cost modeling and optimization frameworks. The company combines native AWS capabilities, Amazon QuickSight and ecosystem tooling to improve cost visibility, support financial governance and optimize cloud consumption throughout the operational lifecycle.

Caution

As an open orchestration layer, OASIS carries a growing integration surface across client, hyperscaler and third-party estates. Formalizing standardized, reusable integration patterns would help enterprises contain maintenance overhead and sustain consistency as the connected tool landscape scales.

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Appendix

The ISG Provider Lens® 2026 – AWS Ecosystem Partners study analyzes the relevant software vendors/service providers in the U.S. 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 September 2026 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 AWS Ecosystem Partners 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

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Lead Analyst and Research Partner

Dr. Tapati Bandopadhyay has been an inventor, builder, practitioner and researcher in AI, intelligent automation and related domains, for 27+ years. She has been a global practice leader and executive-level advisor & consultant in AI-automation-cloud and services management, covering MLOps, AIOps, CloudOps, DataOps, ModelOps & DevOps metrics-driven practices and data and AI story-building and story-telling practices and tools. As an ISG Lead Analyst on AWS and in AI-ML, consulting & managed services, she is responsible for defining and leading the ISG Provider Lens branded research projects for the US market. With more than 25 years of experience focused on AI, ML, data sciences and intelligent automation technology development, strategy and adoption practices across key industries, including BFSI, manufacturing & FMCG, retail, media, hi-tech & telco's, governments and healthcare services.



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Lead Analyst

Sameen is a Lead Analyst at ISG, focusing on market and industry research across emerging technologies. She authors Provider Lens® studies covering areas such as intelligent automation, AWS, Google Cloud, Microsoft Cloud and AI ecosystem, and mainframes. In addition to these studies, she contributes to research articles exploring evolving technology landscapes. Her core areas of expertise include automation, the hyperscalers ecosystem, telecommunications, and retail.

Sameen has managed diverse technology, business, and consumer research teams, transforming market data into actionable insights and intelligence reports for several leading firms. In her prior roles, she has worked on competitive intelligence, market feasibility and SWOT assessment, GTM strategy, customer satisfaction and brand health studies. Her expertise synthesizes advanced technological understanding for competitive positioning and emerging innovation trajectories for global and regional markets.

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Viraj Narvekar

Research Specialist

Viraj Narvekar is a Research Specialist at ISG, supporting research and advisory initiatives across AWS, Google Cloud and Microsoft-focused Provider Lens® studies. He specializes in market and competitive research, industry analysis and data-driven insights to help organizations navigate the evolving cloud services landscape.

Working with lead analysts, Viraj aids provider evaluations, market trend assessments and report development. In his current role, he supports cloud ecosystem research via data analysis, provider assessments and insight generation.

In his earlier role, he focused on competitive intelligence and market feasibility studies, helping organizations identify growth opportunities and make informed strategic decisions. He ensures research accuracy and delivers high-quality analysis to aid strategic decisions for enterprises and technology providers.

Study Sponsor



Heiko Henkes

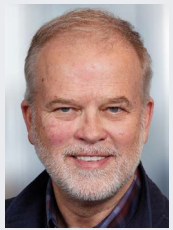
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Heiko Henkes serves as Managing Director and Principal Analyst at ISG, where he oversees the Global ISG Provider Lens® (IPL) Program for all IT Outsourcing (ITO) studies alongside his pivotal role in the global IPL division as strategic program manager and thought leader for IPL Lead Analysts. Additionally, Henkes heads the Star of Excellence, ISG's global customer experience 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 renowned for his contributions as a keynote speaker on digital innovation, where he shares insights on leveraging technology for business growth and transformation.

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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.

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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.

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OCTOBER, 2026

REPORT: AWS ECOSYSTEM PARTNERS

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