ISG Provider Lens®

AWS Ecosystem Partners

AWS Professional 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

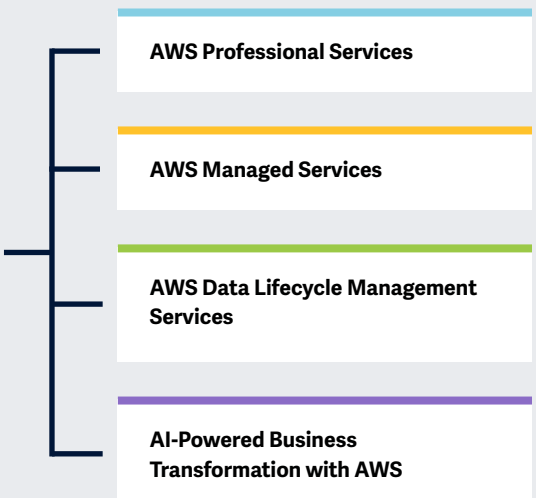
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	AWS Professional Services	AWS Managed Services	AWS Data Lifecycle Management Services	AI-Powered Business Transformation with AWS
Syntax	Product Challenger	Contender	Product Challenger	Product Challenger
TCS	Leader	Leader	Leader	Leader
Tech Mahindra	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 Professional Services

Who Should Read This Section

This report is valuable for providers offering **AWS professional services** in the **U.S.** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights providers' market positioning based on the breadth of their consulting and migration capabilities and market presence. It reflects the growing shift toward AI-enabled cloud transformation, including the adoption of GenAI, agentic systems and governed cloud architectures, emphasizing providers' ability to deliver scalable, secure and compliant enterprise platforms.

Strategy professionals

Should read this report to understand how AWS professional services providers enable large-scale enterprise transformation in the U.S. It provides insights into providers' ability to define cloud and AI strategies, build business cases aligned with measurable outcomes and integrates governance, ESG and regulatory requirements. The report also highlights how providers are evolving toward supporting AI-led operating models and sovereign cloud considerations.

Digital professionals

Should read this report to evaluate how AWS partners accelerate digital transformation initiatives through migration, modernization and cloud-native development. It covers providers' capabilities in leveraging automation and AWS-native services to build scalable, resilient solutions. The report also highlights the increasing role of GenAI and agentic AI in enabling intelligent applications and enhancing digital customer experiences.

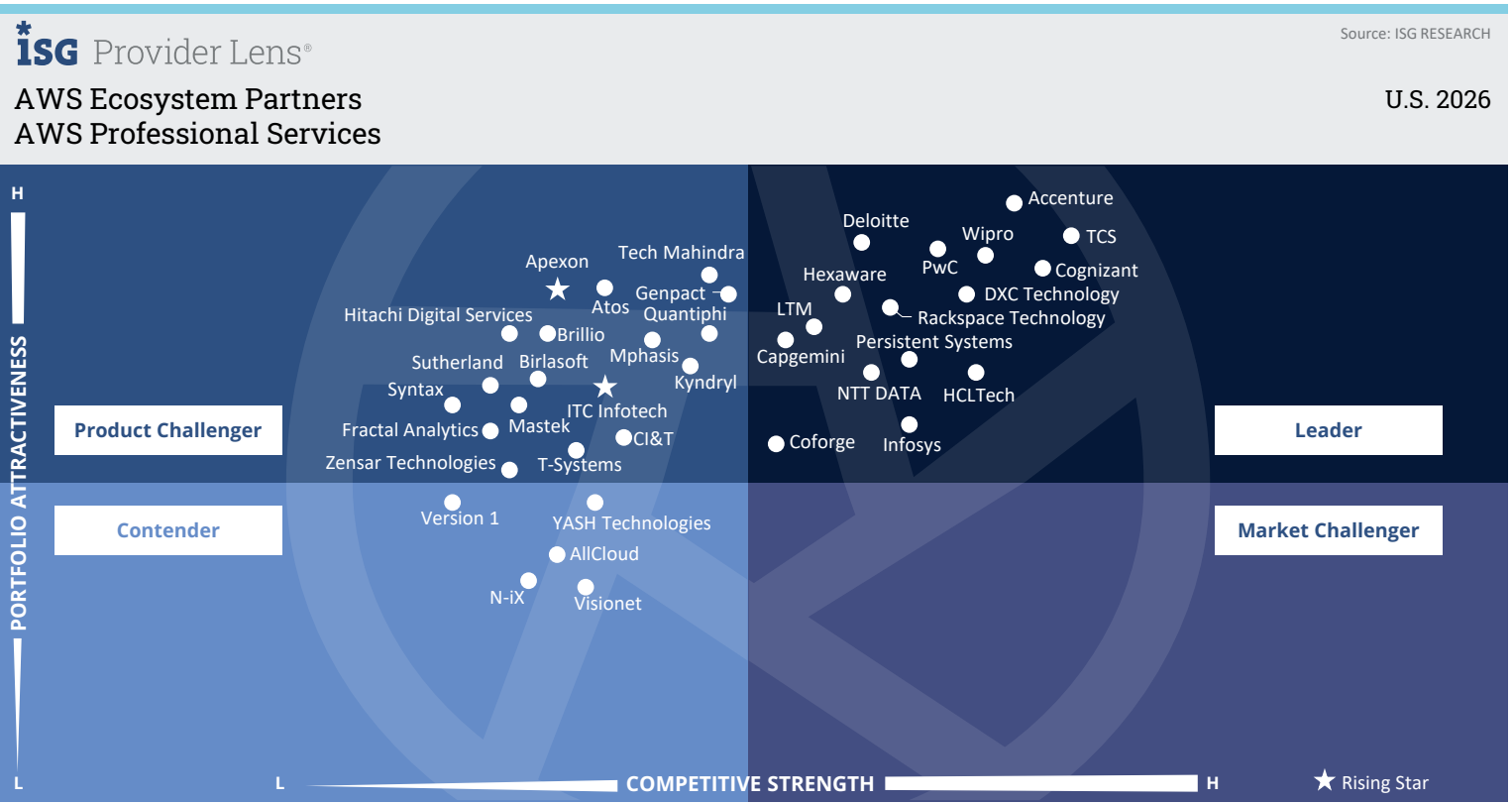
Technology professionals

Should use this report to assess the technical depth of AWS professional services providers. It evaluates their expertise in architecting, building and modernizing complex cloud environments, including hybrid cloud and multicloud ecosystems. It covers key areas including security, compliance, application modernization and the integration of AI, ML and GenAI workloads, along with the ability to operationalize these capabilities at scale.

Procurement professionals

Should read this report to compare AWS professional services providers based on their capabilities, certifications, delivery models and track record in delivering measurable business outcomes. It supports vendor shortlisting, partner selection and contract negotiations by providing a clear view of providers' competitive positioning, value propositions and alignment with enterprise requirements.

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This quadrant evaluates providers' capabilities to lead **business-aligned cloud transformation** on AWS in the U.S. It focuses on **AI-enabled modernization, cloud-native engineering and structured migration delivery** that support scalable business outcomes.

Sameen Mohammed Siddique

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Definition

This quadrant evaluates providers offering a robust suite of consulting and migration services to guide and support businesses through their AWS cloud journeys. These providers deliver a wide range of services tailored to meet diverse business and IT needs, including business and technology consulting, migration and modernization. The offerings encompass cloud strategy formulation, compelling business case development and support for ESG and governance, risk and compliance (GRC) needs.

Providers should offer advanced technologies and solutions tailored to architecture, security and specific industry needs. Migration involves automated testing, thorough planning, execution, deployment strategies and change management to ensure smooth transitions. AWS partners possess extensive expertise in software architecture, software development (including DevOps principles), application migration and modernization, enabling them to architect, deploy and manage scalable, resilient applications and services in the cloud environment.

Eligibility Criteria

1. Offer a wide range of **AWS competencies** and service delivery offerings and related certifications with consulting and migration expertise
2. Develop an AWS-focused consulting **road map and innovations** (current and planned)
3. Deploy and manage **hybrid and multicloud environments**, ensuring seamless integration and operational consistency
4. Demonstrate **value for clients** through perceptible business outcomes or other measurable improvements driving business-technology transformation
5. Offer **ESG and GRC guidance**, tools, technologies and services
6. Migrate **business-critical applications** for customers using AWS
7. Design, build and modernize **integrated cloud architecture** to lead migration and multicloud integration
8. Being part of the AWS **Migration Acceleration Program** (MAP) is advantageous
9. Deliver **industry-specific solutions** and **accelerators** aligned with AWS Industry Cloud offerings
10. Demonstrate rigorous **AWS security capabilities**, including advanced threat protection and compliance framework implementation
11. Showcase a strong portfolio of AI- and ML-driven innovations, including expertise in deploying **GenAI and modernizing enterprise workloads** for operational efficiency
12. Support for **sovereign cloud solutions, especially in Europe**

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Observations

AWS Professional Services in the U.S. have evolved beyond standalone cloud migration. Providers now frame AWS engagements as business transformation that unites strategic advisory, modernization, operating model redesign and AI adoption. They pair consulting with structured methodologies, cloud factories and proprietary frameworks to link cloud investments to measurable business outcomes. Migration is now the foundation for AI readiness, resilience, cost optimization and long-term business reinvention.

Service providers are demonstrating a strong shift toward AI-enabled modernization by embedding GenAI and agentic AI into services for assessment, discovery, dependency mapping, code transformation, testing and migration planning. Instead of applying AI post-migration, providers use it upfront to improve transformation speed, decision-making and delivery quality and establish AI-ready cloud foundations from the start of enterprise AWS journeys.

Cloud-native engineering has become a core pillar of AWS modernization. Providers now standardize infrastructure as code (IaC), platform engineering, automated landing zones and policy-driven governance to enhance scalability and operational consistency. Industry-specific modernization approaches are also growing as enterprises align cloud strategies with their regulatory, business and operational priorities.

Providers increasingly rely on proprietary platforms, migration factories and reusable accelerators to standardize cloud journeys for clients. Automating assessments, roadmaps, governance and modernization results in faster delivery, lower migration risk and more predictable business.

From the 42 companies assessed for this study, 39 qualified for this quadrant, with 16 being Leaders and two Rising Stars.

accenture

Accenture differentiates its AWS services through proprietary assets such as myNav, Momentum, Launchpad, AWS Secure Cloud Foundation and AAMP. These capabilities support structured planning, governance, migration execution and modernization programs at enterprise scale.

Capgemini

Capgemini differentiates its AWS approach through proprietary assets such as eAPM and the DevSecOps acceleration platform. These capabilities help structure assessments, modernization initiatives and cloud adoption programs.

Coforge

Coforge leverages industry-specific expertise and AWS-validated competencies to deliver outcome-focused transformation programs. Its ability to combine domain knowledge with cloud and AI capabilities enhances relevance across diverse enterprise environments.

cognizant

Cognizant continues to strengthen its position in AWS Professional Services through an AI-native modernization strategy. Its Skygrade™ platform and Mobilize & Migrate framework help enterprises accelerate complex cloud transformation initiatives.

Deloitte.

Deloitte's AWS practice reflects a strong blend of business consulting and technology execution. Its capabilities span cloud strategy, application modernization, data transformation and managed operations across multiple industries.

DXC

DXC Technology strengthens its AWS Professional Services position through AdvisoryX and Precision Guided Modernization, combining senior-led consulting, AI-enabled governance and data-driven transformation methodologies to accelerate large-scale cloud modernization programs.

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HCLTech

HCLTech combines cloud factory services, automation-led delivery frameworks and reusable migration assets to support large-scale AWS transformation engagements. This approach enables clients to balance speed, governance and operational readiness across complex modernization programs.

HEXAWARE

Hexaware's AWS strategy emphasizes intelligent automation and operational efficiency. It integrates AI-driven capabilities to accelerate deployment cycles while enhancing agility, governance and cloud value realization.

Infosys

Infosys positions AWS transformation as a business and technology journey spanning strategy, migration, modernization and managed operations. Its AWS Professional Services portfolio is reinforced through Infosys Cobalt assets and broad AWS competency coverage.

LTM

LTM employs a platform-led AWS transformation strategy anchored by BlueVerse, NovaSphere, CloudXperienz and CloudElevate. This standardized delivery model helps enterprises accelerate modernization while improving governance, consistency and operational outcomes.

NTT DATA

NTT DATA integrates AI Studio, Amazon Bedrock, SageMaker, AWS Transform and proprietary assets such as LITRON and Tsuzumi to connect cloud modernization initiatives with AI-ready operating models.

Persistent

Persistent Systems differentiates its AWS consulting portfolio through proprietary platforms, including SASVA™, PiCAS, PiCloud and PiPOD. These assets support assessment, modernization, engineering automation and cloud-native transformation across the AWS lifecycle.

pwc

PwC differentiates through its ability to combine consulting, implementation and operational transformation activities within a unified AWS engagement model. This positions the firm to support large-scale modernization programs for regulated and industry-specific U.S. clients.

rackspace technology.

Rackspace Technology combines AWS consulting, migration, modernization and cloud operations capabilities within a single delivery framework. Its breadth of AWS competencies and certifications supports end-to-end transformation programs across complex enterprise environments.

TCS TATA CONSULTANCY SERVICES

TCS differentiates its AWS Professional Services through proprietary assets such as Cloud Counsel, iCMC and Modernization Propeller. These have capabilities to accelerate migration planning, modernization and cloud value realization across complex IT estates.

wipro

Wipro differentiates its AWS Professional Services portfolio through the WALT transformation framework, combining modernization, AI readiness, workforce transformation and cloud operations into a unified enterprise transformation model.

Apexon

Apexon's (Rising Star) AWS Professional Services portfolio is anchored by the POLARIS, TransformAlpha™ and CloudAlpha™ frameworks. They provide a structured foundation for consulting, modernization, governance and AI-led transformation programs.

ITC Infotech

ITC Infotech (Rising Star) has aligned its AWS Professional Services strategy around a unified cloud, data and AI organization. This model enables connected consulting, migration, modernization and AI transformation initiatives across the cloud lifecycle.

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Leader

"DXC Technology delivers AI-first AWS Professional Services through its AdvisoryX consulting model, modernization frameworks and GenAI-driven migration accelerators, enabling scalable, secure and outcome-focused enterprise cloud transformation."

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 offers AWS Professional Services through its AdvisoryX consulting model and Precision Guided Modernization framework, combining data-driven advisory, AI-enabled migration and multicloud architecture services. Supported by tools such as Modernization Director and the Data Aggregation Platform, DXC enables end-to-end transformation from planning to execution. Its approach emphasizes GenAI-powered decisioning and scalable migration programs while ensuring governance, compliance and operational continuity.

Strengths

AI-first advisory framework: DXC's AdvisoryX unifies business strategy, operating model transformation, financial management, cloud advisory and AI planning within a single consulting framework. Paired with the Precision Guided Modernization methodology, it combines the company's ClearFoundation advisory framework, business case development, application assessment and governance-driven planning to help enterprises align AWS modernization with business objectives while effectively managing risk, compliance and investment priorities.

Comprehensive modernization accelerators: DXC supports migration and modernization programs through assets such as Modernization Director, Data Aggregation Platform, Cloud Readiness Accelerator, Hypervisor Rapid Assessment and MILO AI assistant. These accelerators aggregate machine, human and business data to create data-driven migration recommendations and modern application roadmaps.

Sovereign and secure cloud enablement: DXC supports regulated and compliance-sensitive environments through sovereign-ready architectures, AWS GovCloud capabilities, policy-as-code controls, zero trust practices, agentic SOC capabilities and compliance alignment for industry and government requirements. Its roadmap also includes support for EU Sovereign Cloud environments and enhanced regulatory controls.

Caution

Although DXC Technology has embedded AI across its migration and modernization toolchain, its professional services narrative could more clearly articulate the measurable impact on delivery velocity, effort reduction and commercial outcomes, strengthening differentiation across the U.S. market.

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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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Dr. Tapati Bandopadhyay

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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.



Lead Author

Sameen Mohammed Siddique

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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Research Specialist



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

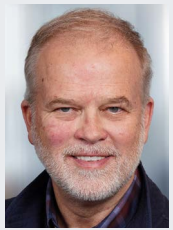
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Heiko Henkes serves as Managing Director and Principal Analyst at ISG, where he oversees the Global ISG Provider Lens® (IPL) Program for all IT Outsourcing (ITO) studies alongside his pivotal role in the global IPL division as strategic program manager 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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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.

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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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REPORT: AWS ECOSYSTEM PARTNERS

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