

AWS Ecosystem Partners

An analysis comparing the attractiveness of portfolios
and the competitive strengths of providers

Customized report courtesy of:

DXC TECHNOLOGY

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Report Author: Frank Heuer

AI is becoming increasingly indispensable for AWS transformation

Amazon Web Services (AWS) is the leading hyperscaler in Germany and worldwide, and is benefiting from the growing cloud-native market in this country. Although competitors are catching up, strong competition from other major hyperscalers, Microsoft Azure and Google Cloud, has not changed AWS' leading position. The increasingly critical view of US providers since the change of power in the White House in early 2025 with regard to digital and data sovereignty will not change much in the foreseeable future in terms of the dominance of AWS and other hyperscalers. Although European and German providers have made respectable progress, the advantages of hyperscalers are considered to outweigh any concerns.

Cloud-native solutions enable the creation and execution of scalable applications in cloud environments. The growth of the cloud-native

market offers ideal conditions for the growth of AWS partners' business in Germany. Large companies currently represent the most important and mature market segment in this country. Small and midsize enterprises still lag behind larger enterprises, making them a fast-growing and highly attractive market segment. Service providers that address both target groups have an advantage as they benefit from both large budgets and rapidly growing demand.

The flexibility and cost advantages of cloud solutions have led to this delivery model for IT applications and infrastructures becoming increasingly popular in recent years. As a result of the COVID-19 pandemic, the market penetration of cloud-based offerings accelerated due to their advantages and the short-term requirements of companies. At the beginning of this decade, for example, the rapid transition of many employees to working from home was possible with the help of cloud-based (collaboration) solutions. Crisis-related inflationary cost pressures and economic weaknesses are prompting many companies to transform their IT landscapes into needs-based and cost-flexible architectures.

The large AWS services market in Germany offers opportunities for users and AWS partners.



Executive Summary

Cloud hyperscalers continue to be the biggest beneficiaries of the growing demand for cloud solutions due to their distinct ability to scale quickly and operate flexibly. As one of the world's leading hyperscalers, AWS is benefiting from growing customer demand.

Due to its global significance, AWS is an attractive partner for service providers and technology providers and cooperates with many of these providers within the AWS Partner Network (APN). The AWS Partner Network is the global program for AWS partners. It helps them develop AWS-based businesses and solutions by providing business and technical support as well as sales and marketing support. With the rapidly growing importance of AWS as an IT provider, the AWS partner ecosystem is also becoming increasingly relevant. AWS partners are benefiting from the growing success of AWS.

In a highly dynamic market such as AWS-based solutions, it is becoming increasingly important to implement projects on time. Therefore, automation, often supported by AI, is becoming increasingly important in the implementation

of AWS solutions. Beyond the accelerated implementation of AWS projects, the upheavals in applications caused by GenAI and agentic AI are playing an increasingly prominent role. Agentic AI can support the modernization and transformation of legacy applications. Furthermore, the modernization of contact centers through the integration of chatbots and GenAI represents a transformative change in customer service technology. With Amazon Bedrock, Amazon Q, Titan and Nova, AWS offers the means to develop innovative solutions enabled by agentic AI and GenAI.

This gives AWS partners who have extensive expertise and certifications in AWS AI tools a competitive advantage. Furthermore, in light of increasing cyber threats, the relevance of partners' security competencies, such as AWS MSSP competency, is also growing to ensure clients receive the highest level of security for their cloud operations. In the wake of digital and data sovereignty discussions and customer trust enhancement, the AWS Digital Sovereignty Services Competency is gaining importance.

AWS Professional Services

The integration of AWS-related consulting and migration into a professional services offering is advantageous in terms of the seamless implementation of AWS projects. For this reason, the merging of the two AWS service components is becoming increasingly prevalent in the market. Accordingly, providers who not only offer AWS consulting and migration, but also specifically combine these two elements to the benefit of their clients, are particularly successful in the market and also in this analysis.

Interest in cloud platforms (AWS) is steadily growing; as a result, there is also an increasing need for guidance on the optimal entry into AWS. In contrast to innovators, most of today's interested parties and latecomers often require external consulting. Due to several crises, cost reduction opportunities through AWS solutions are currently a very relevant motive for interest in this offering. Consulting is a key issue for getting started with AWS solutions, which promises further follow-up business; the market

for professional services is correspondingly competitive.

The AWS partner network serves a dual purpose. This ecosystem is an important success factor for AWS. The more convincingly clients are advised by AWS partners, the better the development of AWS' business. At the same time, these partners can benefit from their clients' successful entry into the AWS world through follow-up business such as managed services. Service providers that also offer support in AWS operations, i.e., end-to-end services, have success prospects and have received good ratings in this study; these providers open up comprehensive development prospects for AWS solutions.

The implementation of AWS projects, the second component of professional services, has two objectives. AWS migration is central for applications newly introduced in the company. However, existing applications should also be migrated to the AWS Cloud (lift and shift). Improved business cases with the help of GenAI/agentic AI are playing an increasingly important role. AWS Professional



Services partners help clients transition to the AWS platform, taking all relevant aspects into account. In this report, service providers that offer a broad service portfolio and have mastered a wide range of AWS technologies have an advantage.

Technologies are developing rapidly in the cloud sector, especially in the AWS world. Considering the significance of time and the increasing competitive pressure on user companies, it is becoming increasingly important to implement AWS migration on time. For this reason, automation, often supported by AI, is used in the context of professional services. Accordingly, providers who can leverage such technologies benefit in this analysis.

AWS Managed Services

AWS solutions are becoming increasingly attractive to a wider range of users due to their advantages. Since ongoing handling can overwhelm or overburden many users, AWS-related managed services are increasingly becoming the focus of clients and interested parties.

Managed AWS services meet the requirements of the latest AWS prospects. As a result, interest in AWS managed service providers is growing. With the success of AWS solutions, more companies without experience, knowledge or resources are becoming interested in AWS solutions. This development is contributing to the increasing importance of external management of AWS solutions. However, the desire for greater professionalization is also an important driver as this is a demanding task.

This is demonstrated by the requirements and expectations of clients, which include mastery of (hybrid) multicloud landscapes, cost savings and efficient ticket management (through AI support), security and data protection, operational experience and end-to-end expertise.

In line with the above factors, service providers that cover the aforementioned range of services and technologies and can also provide references and case studies have a particular advantage. Lastly, providers that can offer operations in Germany, especially in data governance, can stand out. The security aspect

is also highly relevant in view of increasing cyberattacks.

AWS Enterprise Data Modernization and AI Services

Data modernization and AI are increasingly important topics for AWS partners in the consulting and implementation of AWS-related projects. Underlying data is growing rapidly, especially the data from IoT systems. It is often unstructured and exists in silos within companies, making it an untapped resource whose utilization can contribute to market success in an increasingly competitive environment.

Organizations that have experimented with GenAI often want to strategically enter GenAI and agentic AI projects. This market demand reinforces the focus on data modernization to enable AI at scale.

Due to this rapidly growing volume of data to be analyzed, many companies want or need to leverage the powerful capabilities of the public cloud for data processing. Due to the high complexity of integration with existing data storage infrastructure, they rely on AWS' strong

partner network for integration and service management.

Service providers offer support ranging from readiness checks and strategy consulting to technical implementation, integration and operation. A complete service portfolio is helpful in this aspect. Service providers that offer a broad range of services and address extensive AWS technologies benefit in this analysis. Proof of performance through AWS competencies and certifications is a plus. Strong consulting skills are particularly advantageous when it comes to AI.

AWS SAP workloads

While software as a service has already captured a considerable market share for numerous applications (e.g., CRM and unified communications and collaboration), this process is not yet advanced for SAP solutions in Germany. Many clients still have reservations, as SAP solutions often control fundamental, existentially important processes within a company. The above average concerns about cloud solutions in Germany have a particularly strong impact.



Executive Summary

For companies that have already taken the step of migrating SAP workloads to the cloud, AWS has become the preferred platform for operation. Since 2022, SAP has been focusing its business expectations and resources heavily on software delivery models based on cloud computing. Its RISE with SAP offering has also triggered cloud strategy discussions in companies that previously did not want to use AWS, which is an additional driver for the market.

With RISE with SAP, SAP is promoting the switch to the cloud and also offering to operate it. Although SAP is cooperating with partners in this area, this also means competition, especially for AWS partners that offer SAP hosting. Opportunities are increasing for partners that, for example, offer extensions in the AWS Cloud that SAP does not offer. Service providers that have a thorough command of the technological aspects and have strong business and industry expertise are well positioned.

AWS service providers that can demonstrate secure cloud management and digital sovereignty and address large and midsize clients have an advantage as they benefit from large budgets and rapidly growing demand.





Provider Positioning

Page 1 of 5

	AWS Professional Services	AWS Managed Services	AWS Enterprise Data Modernization and AI Services	AWS SAP Workloads
Accenture	Leader	Leader	Leader	Leader
adesso SE	Market Challenger	Contender	Product Challenger	Not In
AllCloud	Product Challenger	Product Challenger	Leader	Not In
Arvato Systems	Leader	Market Challenger	Contender	Leader
Atos	Leader	Product Challenger	Product Challenger	Product Challenger
Bechtle	Market Challenger	Contender	Not In	Product Challenger
BTC	Contender	Product Challenger	Product Challenger	Product Challenger
Capgemini	Leader	Leader	Leader	Leader
Claranet	Contender	Leader	Not In	Product Challenger
Cognizant	Leader	Leader	Leader	Product Challenger





Provider Positioning

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	AWS Professional Services	AWS Managed Services	AWS Enterprise Data Modernization and AI Services	AWS SAP Workloads
Computacenter	Market Challenger	Market Challenger	Not In	Not In
Crayon	Not In	Not In	Contender	Not In
Deloitte	Market Challenger	Product Challenger	Not In	Leader
DXC Technology	Leader	Leader	Leader	Leader
Fujitsu	Not In	Product Challenger	Not In	Not In
Genpact	Not In	Not In	Product Challenger	Not In
HCLTech	Leader	Leader	Leader	Leader
IBM	Product Challenger	Leader	Product Challenger	Leader
Infosys	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Kyndryl	Product Challenger	Leader	Product Challenger	Product Challenger





Provider Positioning

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	AWS Professional Services	AWS Managed Services	AWS Enterprise Data Modernization and AI Services	AWS SAP Workloads
Lemongrass Consulting	Not In	Not In	Not In	Product Challenger
LTIMindtree	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Materna	Market Challenger	Market Challenger	Leader	Not In
MHP	Market Challenger	Not In	Rising Star ★	Not In
Mphasis	Product Challenger	Not In	Product Challenger	Contender
msg systems	Not In	Not In	Not In	Product Challenger
Nordcloud	Product Challenger	Product Challenger	Not In	Not In
NTT DATA	Rising Star ★	Product Challenger	Not In	Leader
Orange Business	Contender	Not In	Market Challenger	Not In
Persistent Systems	Product Challenger	Product Challenger	Product Challenger	Not In





Provider Positioning

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	AWS Professional Services	AWS Managed Services	AWS Enterprise Data Modernization and AI Services	AWS SAP Workloads
Public Cloud Group	Product Challenger	Product Challenger	Product Challenger	Product Challenger
PwC	Not In	Not In	Leader	Rising Star ★
q.beyond	Not In	Not In	Not In	Contender
Rackspace Technology	Leader	Leader	Product Challenger	Not In
Reply	Product Challenger	Not In	Product Challenger	Not In
Skaylink	Product Challenger	Rising Star ★	Product Challenger	Not In
SoftwareOne	Not In	Not In	Not In	Product Challenger
SPIRIT/21	Not In	Contender	Not In	Contender
Syntax	Contender	Market Challenger	Product Challenger	Leader
TCS	Leader	Leader	Leader	Leader



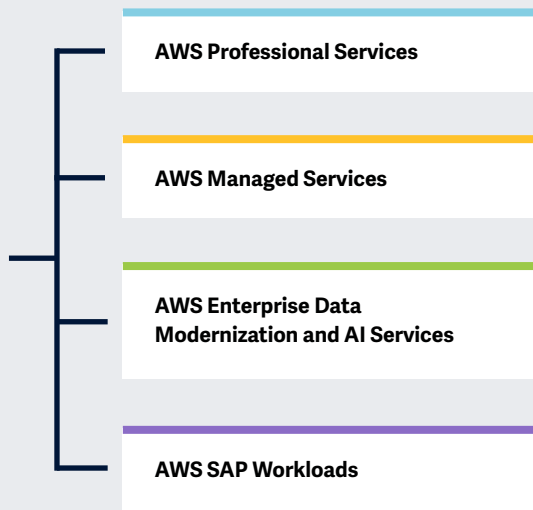


	AWS Professional Services	AWS Managed Services	AWS Enterprise Data Modernization and AI Services	AWS SAP Workloads
Tech Mahindra	Product Challenger	Product Challenger	Product Challenger	Product Challenger
tecRacer	Leader	Leader	Leader	Product Challenger
T-Systems	Leader	Leader	Not In	Leader
Virtusa	Not In	Not In	Contender	Not In
Wipro	Leader	Leader	Leader	Product Challenger
YASH Technologies	Not In	Product Challenger	Not In	Not In



Key focus areas for AWS Ecosystem Partners 2025 study.

Simplified Illustration Source: ISG 2025



Definition

In 2025, the AWS partner ecosystem is witnessing unprecedented growth driven by strategic investments and technological advancements. A key focus is democratizing AI and generative AI (GenAI), notably through Amazon Bedrock and Amazon Q. AWS has strengthened its relationship with AI innovators by introducing Nova foundation models and agentic AI builder services, enabling partners to deliver AI-powered solutions across industries. AWS empowers partners to develop industry-specific solutions using its robust platform.

Infrastructure investments to expand AWS' physical footprint enhance services, benefiting partners and enterprise clients. Investments in new Tranium chips and Graviton4 processors demonstrate AWS' commitment to providing the foundational resources necessary for high-performance computing and scalable applications, creating opportunities for partners specializing in data-intensive workloads and cloud-native development. Data-driven decision-making drives the adoption of advanced analytics and database services.

AWS enables partners to address key customer needs with a focus on security by introducing new specializations for building Zero Trust and compliance solutions. The company is also developing solutions to help customers meet stringent regulatory requirements, underscoring its commitment to delivering secure and compliant cloud environments globally. This evolution toward sovereign cloud offerings is crucial for organizations operating in regions with strict data protection laws and for firms in highly regulated industries such as defense. Expanded **Migration Acceleration Program** (MAP) incentives by AWS amplify these efforts to accelerate cloud modernization.



Scope of the Report

In this ISG Provider Lens® quadrant study, ISG examines the following four quadrants: AWS Professional Services, AWS Managed Services, AWS Enterprise Data Modernization and AI Services and AWS SAP Workloads.

This ISG Provider Lens® study offers IT-decision makers:

- A transparent presentation of the strengths and weaknesses of the relevant providers
- A differentiated positioning of providers by segments on their competitive strengths and portfolio attractiveness
- A focus on the German market

The study serves as a basis for important decisions regarding positioning, key relationships, and go-to-market considerations. ISG consultants and corporate clients also use the information from these reports to evaluate their existing vendor relationships and potential engagements.

Provider Classifications

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

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between \$20 million and \$999 million with central headquarters in the respective country, usually privately owned.

- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above \$1 billion, with activities worldwide and globally distributed decision-making structures.

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

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





Provider Classifications: Quadrant Key

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

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.

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.

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.





AWS Professional Services

Who Should Read This Section

This report is valuable for service providers offering **AWS professional services** in **Germany** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence. The report highlights the rapid evolution of the AWS cloud ecosystem, driven by the accelerated shift to cloud-native architectures, and emphasizes the increasing demand for GenAI expertise.

Digital professionals

Should read this report to understand AWS professional service providers' relative strengths and weaknesses, which can help them drive digital transformation within their enterprises. Key areas include their expertise in crafting, developing and modernizing intricate cloud architectures, such as hybrid and multicloud integrations, as well as AWS security, software development, application migration, and AI and ML deployments.

Technology professionals

Should read this report to understand AWS professional service providers' positions and their impact on enterprise transformations, alongside cloud migration benefits. The report details providers' skills in application migration and modernization, utilizing DevOps, and designing scalable, resilient cloud-native solutions. Assessing expertise in AWS technology, automated testing, deployment and change management is crucial.

Procurement professionals

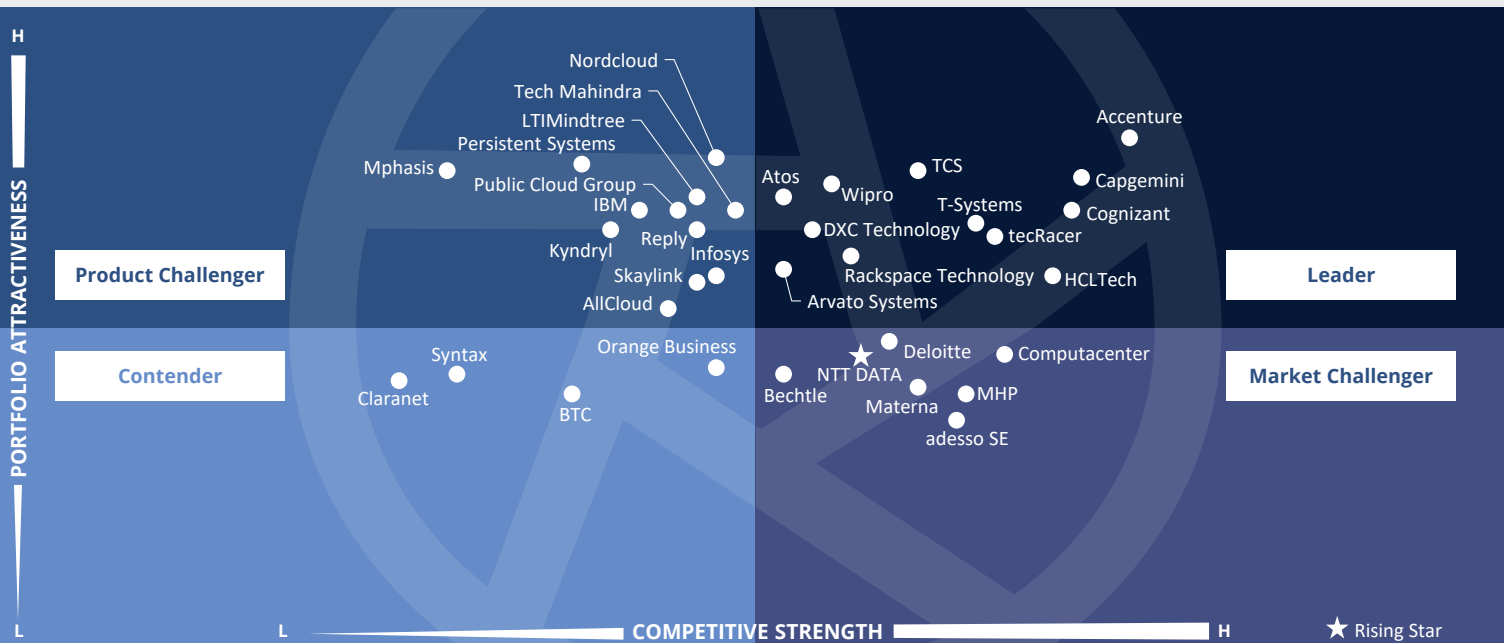
Should read this report to understand the current landscape of AWS professional service providers in GERMANY. This report enables procurement teams to effectively compare providers, evaluate potential partnerships and negotiate contracts with a clear understanding of the providers' market positions and capabilities.



ISG Provider Lens®
AWS Ecosystem Partners
AWS Professional Services

Source: ISG RESEARCH

Germany 2025



This quadrant ranks the most relevant providers of **AWS Professional Services** in Germany. They support clients with consulting services for the **orientation** and **implementation** of AWS solutions.

Frank Heuer



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 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. Demonstrate rigorous **AWS security capabilities**, including advanced threat protection and compliance framework implementation
10. Showcase a strong portfolio of AI- and ML-driven innovations, including expertise in deploying **GenAI and modernizing enterprise workloads** for operational efficiency
11. Support for **sovereign cloud solutions, especially in Europe**



Observations

The integration of AWS-related consulting and migration into a professional services offering is advantageous in terms of the seamless implementation of AWS projects.

With the growing interest in cloud platforms (AWS), there is an increasing need for guidance on the optimal way to get started with AWS. Due to the current crises, cost reduction opportunities through AWS solutions are a relevant motivator. Consulting plays a key role in adopting AWS solutions, making the professional services market highly competitive.

The AWS Partner Network is also an important success factor for AWS. Persuasive partner advice to clients will strengthen AWS' business growth. These partners can benefit from their clients' successful entry into the AWS world through follow-up business such as managed services. Service providers that offer support in AWS operations have good success prospects.

AWS migration is central for applications newly introduced in a company. However, existing applications should also be migrated to the AWS Cloud as part of modernization. Improved business cases with the help of GenAI/agentic AI play an increasingly important role.

AI is also increasingly being used to support service automation. Due to the increasing competitive pressure on clients, the timely implementation of AWS migration is becoming increasingly important.

NTT DATA is the new Rising Star. Bechtle has risen to the quadrant as a Market Challenger. Netlution is no longer represented in the quadrant.

Of the 46 companies evaluated for this study, 35 qualified for this quadrant, including 12 leaders and one rising star.

accenture

Accenture's extensive resources and expertise form the basis for its extremely strong leadership position in Germany as a provider of professional services on the AWS platform.



Arvato Systems has taken an important step toward expanding its partnership with AWS with its premium certification. The German service provider is making a name for itself with its AWS solution expertise for the media industry.

AtoS

Atos is making a name for itself as a high-performance service provider even under its renewed brand for AWS services in Germany with its industry expertise and ability to implement complex solutions.

Capgemini

Capgemini is expanding its comprehensive AWS consulting services, cooperating closely with AWS and consolidating its leading position as an AWS service provider in Germany.



Cognizant combines its technical AWS consulting competency with significant business expertise and strong industry knowledge in AWS professional services.

DXC TECHNOLOGY

DXC Technology works closely with AWS, can offer extensive AWS-related professional services and distinguishes itself with its application transformation.

HCLTech

HCLTech is enjoying increasing success in the German market for AWS-related professional services. Among other things, the provider owes this to its extensive, growing range of services.





Rackspace Technology combines in-depth expertise with a comprehensive range of AWS services for consulting and migration.

T Systems

T-Systems has a strong understanding of the large customer segment, offers its clients a comprehensive range of services and is expanding its AWS-related professional services in the German market.



TCS is expanding its position as a leading provider in the German market for AWS professional services through a comprehensive and growing range of services and close cooperation with AWS.

tecRacer

tecRacer is a special, highly qualified and innovative AWS partner in Germany and offers comprehensive AWS-based professional services. The provider is a pioneer for AWS solutions in Germany.



Wipro was one of the first five Premier Partners of AWS worldwide. It supports clients with a wide range of tools and a comprehensive service portfolio as part of its AWS-related professional services.



NTT DATA is the new Rising Star in the professional services segment for the AWS platform in Germany. The rise can be attributed to industry specializations, support for regulatory requirements and rapid project implementation.





"DXC Technology offers comprehensive AWS-related professional services and stands out with its application transformation."

Frank Heuer

DXC Technology

Overview

Headquartered in Virginia, U.S., DXC Technology employs more than 120,700 people in 70 countries, including 10,000 AWS-accredited professionals. In FY25, the company generated a revenue of \$12.9 billion, with Global Business Services as the largest segment. DXC Technology's services for AWS solutions range from consulting and migration to managed services. It is an AWS Premier Services Partner. Its German headquarters are located in Böblingen.

Strengths

Extensive application expertise: DXC Technology stands out in the market when it comes to application transformation. The provider helps its customers make informed decisions about how applications should be transformed to leverage the benefits of the AWS platform. This also includes options for workload optimization, taking into account IT trends, TCO and ROI calculations. DXC Technology underscores its expertise in application transformation with its certified AWS-SAP expertise, among other things.

Close cooperation with AWS: DXC Technology is a Premier Tier Services Partner of AWS and has numerous AWS certifications. It participates in many AWS partner programs.

Service provider with an extensive portfolio:

DXC Technology offers a comprehensive range of services. It offers a very wide range of professional services for AWS. The provider's consultants are experienced in incorporating security and compliance parameters and ensuring quality and cost compliance for customers in the context of public cloud transformation. DXC Technology also offers strategic support.

Caution

AWS competency programs in which DXC Technology participates have room for improvement. Expansion of these could stimulate interest in the market for AWS-related professional services.





AWS Managed Services

Who Should Read This Section

This report is valuable for service providers offering **AWS managed services** in **Germany** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence. The report emphasizes the rise of green cloud solutions in response to the growing demand for cost optimization, sustainability and security within increasingly complex hybrid and multicloud environments.

IT professionals

Should read this report to understand AWS managed service providers' relative strengths and weaknesses, which can help them drive digital transformation in their enterprises. Evaluating their utilization of advanced cloud management platforms (CMPs), automation tools and proficiency in areas such as MLOps and DataOps is essential to ensure that the managed infrastructure supports the development, deployment and scaling of digital services and applications.

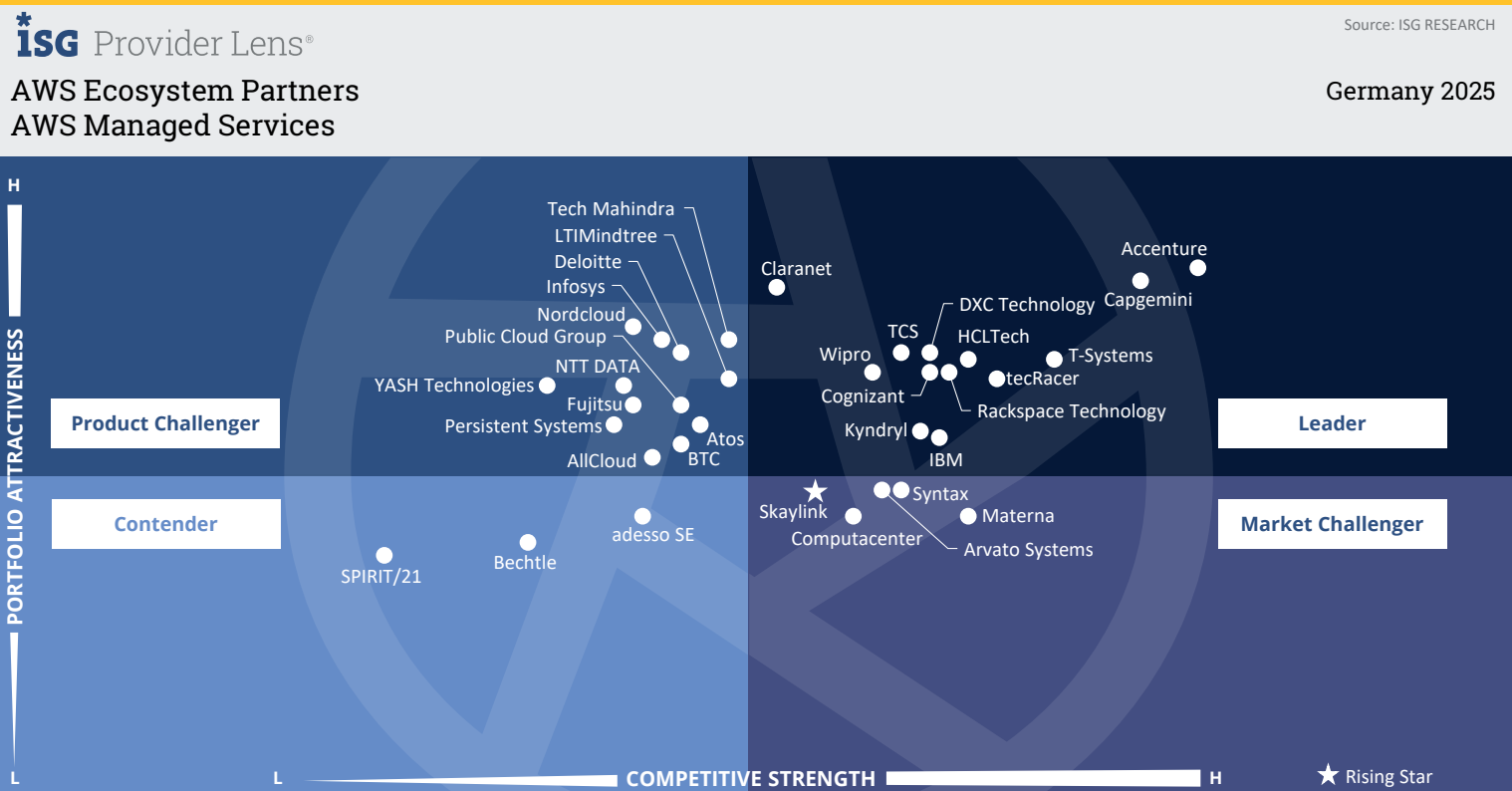
Technology professionals

Should read this report to understand AWS managed service providers' positions and their impact on enterprise transformations, alongside cloud migration benefits. The report outlines their skills in autonomous, ML-driven orchestration and management, expertise in designing and managing secure public and multicloud architectures, and the range and availability of their security resources and services.

Procurement professionals

Should read this report to understand how providers use automation and CMPs, integrate DataOps, MLOps and AIOps, and align with operational best practices to compare service offerings, evaluate value propositions and negotiate SLAs for effective cloud operations management.





This quadrant evaluates the **most relevant** providers of **managed services** for AWS solutions in Germany. By offering **orchestration** and **provisioning** through **monitoring** and **operations management**, they relieve the burden on clients.

Frank Heuer



AWS Managed Services

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, FMOps, MLOps and AIOps, 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 **ML-driven orchestration, configuration and management** of platforms and systems
3. Design, build and manage **public and multicloud** environments
4. **Support** big data and multiple database solutions and analytics
5. Engineer **DevOps** solutions
6. Provide **security** resources and services with scope and availability
7. Ability to measure and optimize cloud-related carbon emissions on AWS (preferred not mandatory)
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



Observations

As AWS Cloud Services become more widespread, more and more companies that lack the knowledge or specialist personnel to operate their own solutions are becoming interested in them. This trend is contributing to the increasing importance of external management of AWS solutions. However, the desire for greater professionalization is also an important driver for operation and management by specialized service providers, as this is a demanding task.

The increasing interest in external management of AWS solutions is demonstrated by the requirements of clients, e.g., (hybrid) multicloud landscapes, cost savings and efficient ticket management (through AI support), security and data protection, operational experience and end-to-end expertise. Service providers who cover the aforementioned spectrum and can also provide references and case studies have a particular advantage.

The security aspect is particularly relevant in view of increasing cyberattacks.

Last but not least, providers that can offer service delivery from Germany, especially with regard to data governance, can stand out positively. This is of interest to customers with increased data protection requirements and also to midsize companies. The latter target group is above average in its skepticism toward operations abroad and at the same time represents the fastest-growing market segment.

Skylink is the new Rising Star. Bechtle and YASH Technologies have successfully entered the quadrant. Netlution and Eviden are no longer represented in the quadrant; the latter because, as of this year, the cloud services business will only operate under the Atos brand, which continues to be represented in the quadrant.

Of the 46 companies evaluated for this study, 34 qualified for this quadrant, including 13 Leaders and one Rising Star.

accenture

Accenture occupies a prominent position as a leader among providers of managed services for AWS solutions in Germany. Among other things, secure, cost-efficient and innovative solutions contribute to this.

Capgemini

Capgemini has established itself as an experienced managed services provider that works closely with AWS and offers a broad portfolio of services. In particular, Capgemini has in-depth industry expertise.

claranet

Claranet offers versatile managed services for AWS-based solutions that can be operated at a high level of security. Claranet benefits from its expertise and experience in cloud hosting.

cognizant

Cognizant is an established service provider that combines comprehensive AWS managed services with a large team and extensive industry expertise.

DXC TECHNOLOGY

DXC Technology, with its global delivery capabilities, has established itself as a leading provider of AWS managed services. The advantages of automation also contribute to this high level of performance.

HCLTech

HCLTech has established itself as a leading provider of AWS-related managed services in Germany with its comprehensive offering, extensive industry expertise and, above all, its great dynamism.



AWS Managed Services



IBM is able to provide AWS managed services globally and for complex hybrid multicloud landscapes. IBM's industry expertise also contributes to successful projects.



Kyndryl has established itself as a leading provider of AWS-related managed services by supporting accelerated cloud modernization and offering a comprehensive range of services.



Rackspace Technology impresses in the AWS managed services market in Germany with its qualifications and its dedicated, results-oriented customer service, Fanatical Experience.



T-Systems distinguishes itself as a leading provider by emphasizing security and compliance as well as AWS managed services made in Germany.



TCS has established itself as one of the leading providers of AWS managed services in Germany with its comprehensive portfolio and reliable operations.



tecRacer, a German AWS pioneer, offers AWS managed services from Germany, has numerous AWS certifications and is very successful in this country due to its extensive AWS experience.



Wipro offers its customers a comprehensive range of services with strong security features as part of its AWS managed services. In addition, Wipro has numerous AWS competencies and certifications.



The German provider **Skaylink** is growing strongly due to the customer benefits derived from automation and is the new Rising Star in the managed services segment for the AWS platform in Germany.





"With its expertise in versatile multicloud solutions and global delivery capabilities, DXC Technology can distinguish itself as a leading provider of AWS managed services."

Frank Heuer

DXC Technology

Overview

DXC Technology, headquartered in Virginia, U.S., employs more than 120,700 people in 70 countries. In FY25, the company generated revenue of \$12.9 billion, with Global Business Services being the largest segment. DXC Technology's services for AWS solutions range from consulting and migration to managed services. DXC Technology participates in the AWS Managed Service Provider Partner Program and is an AWS Premier Tier Services Partner. The provider's German headquarters is located in Böblingen.

Strengths

Multicloud capabilities: DXC Technology offers versatile support for multicloud landscapes. The provider is not only an AWS Premier Tier Services Partner, but also a Microsoft Azure Expert Managed Services Provider and has partnerships with Google, Oracle and Alibaba. These capabilities enable DXC Technology to offer its customers multicloud solutions based on the most important hyperscaler platforms that are optimally tailored to their needs.

Leveraging automation benefits: DXC Technology's services are highly efficient. The provider is able to offer its AWS managed services with a high degree of automation based on a fundamentally highly industrialized service and delivery model.

Service provider with global presence:

DXC Technology excels at global managed services delivery and is able to deliver AWS managed services projects on a worldwide scale, owing to its extensive global presence. This capability is particularly attractive for large multinational companies, which speaks in favor of DXC Technology.

Caution

DXC Technology could do more to publicize its services. Given the service provider's market position, the case studies published on the AWS partner page could be expanded. Additional descriptions could further strengthen the preference for DXC Technology.





AWS Enterprise Data Modernization and AI Services

Who Should Read This Section

This report is valuable for service providers offering **AWS enterprise data modernization and AI services** in **Germany** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence. The quadrant highlights how enterprises in Germany use AWS services for data analytics and ML, leveraging AutoML and serverless tools for efficiency while prioritizing data security with Macie and PrivateLink.

IT professionals

Should read this report to understand the relative strengths and weaknesses of AWS data analytics, AI and ML service providers for driving digital transformation in enterprises. These insights will help optimize cloud investments and strategically select the right tools and partners to modernize infrastructure, enhance data-driven decision-making and accelerate the adoption of AI, GenAI and agentic AI technologies.

Procurement professionals

Should read this report to comprehend the current landscape of AWS data analytics, AI and ML service providers in Germany. These insights enable a structured comparison of providers based on qualifications, experience and potential value delivery, facilitating better contract negotiations and partner selection.

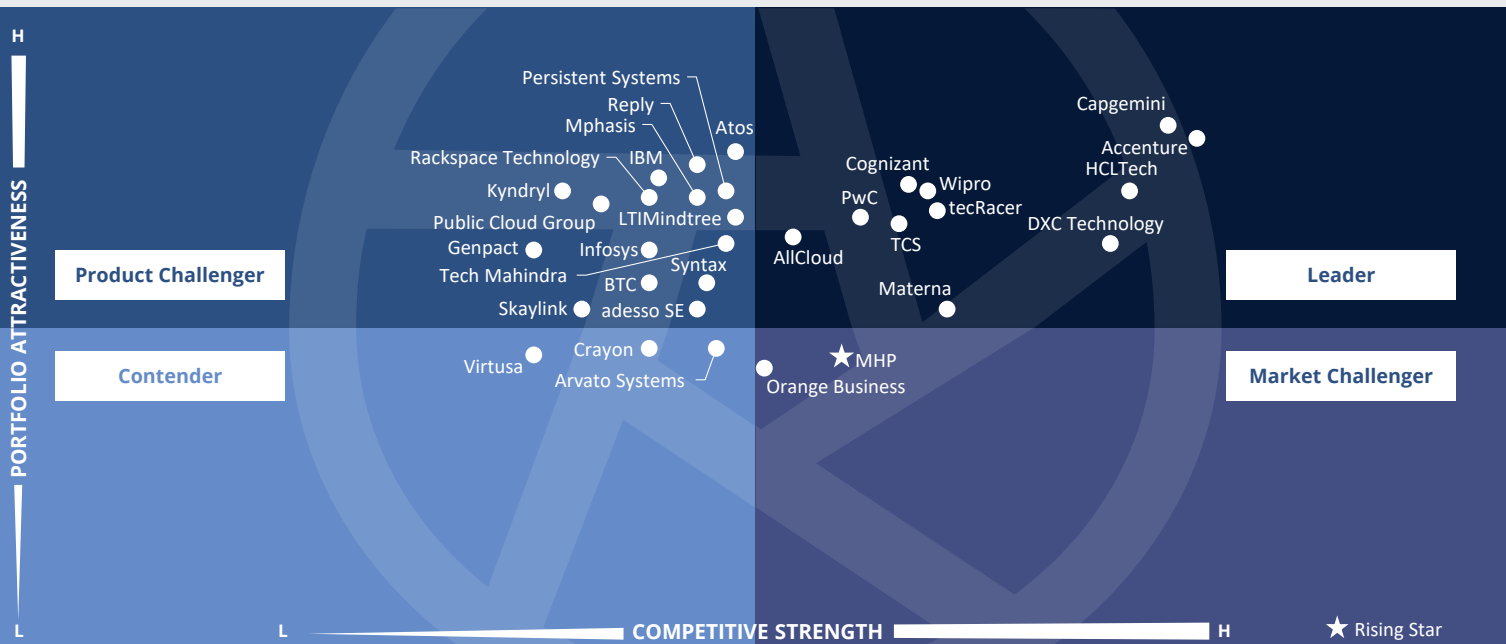
Analytics professionals

Should read this report to understand AWS data analytics, AI and ML service providers' positioning and their impact on enterprise transformations, alongside cloud migration benefits. The report highlights key trends, best practices and emerging technologies, equipping analytics professionals to lead successful data initiatives and deliver actionable insights.



AWS Ecosystem Partners AWS Enterprise Data Modernization and AI Services

Germany 2025



This quadrant evaluates the **most relevant** providers of **data modernization and AI** services on AWS in Germany. Offering these services is becoming increasingly **important** for AWS partners.

Frank Heuer



Definition

This quadrant evaluates service providers' capabilities across four essential domains: enterprise data ecosystem, insights and decision-making, agentic AI and GenAI with AWS and customized ML solutions.

Enterprise data ecosystems relate to providers' proficiencies in implementing and optimizing data platforms such as Amazon Redshift, Amazon RDS and Amazon Glue, emphasizing data sovereignty, scalability and metrics. Analytics and insights relate to providers' capabilities in delivering predictive analytics and real-time dashboards that transform data into actionable insights. Agentic AI and GenAI include innovative services and solutions developed using Amazon Bedrock, Amazon Q, Titan and Nova. Customized ML solutions include industry-specific, functional and domain solutions developed using the AWS suite of AI and ML tools.

Eligibility Criteria

1. Maintain AWS Select, Advanced or Premier Tier **partnership with data and analytics and ML competencies**
2. Develop, deliver, maintain and scale enterprise-grade hybrid/mixed-model **LLMs and agentic AI solutions**
3. Identify and utilize **relevant tools and technologies**
4. Employ **AWS-certified professionals with specific data engineering, ML and cloud architecture certifications**, including professional-level certifications
5. Demonstrate successful **enterprise-scale AWS data modernization or AI implementation projects** involving data modernization and AI components
6. Offer comprehensive services with **documented methodologies and accelerators**, demonstrating the ability to address the full spectrum of client needs
7. Exhibit specialized **expertise in industry verticals** with documented case studies highlighting measurable business outcomes achieved through AWS data and AI implementations
8. Demonstrate **experience utilizing AWS GenAI services** to address and resolve business problems
9. Maintain an active **AWS-focused innovation program**
10. Deploy and manage **IoT solutions on AWS** with competency and capability



AWS Enterprise Data Modernization and AI Services

Observations

Data modernization and AI are increasingly important topics for AWS partners in the context of consulting and implementing AWS-related projects. The underlying data is growing rapidly, especially data from IoT systems. It is often unstructured and siloed within companies, making it an untapped resource that can be leveraged to promote market success in an increasingly competitive environment.

Customers who have experimented with GenAI often want to strategically enter into GenAI and agentic AI projects. This market demand reinforces the focus on data modernization to enable AI on a large scale.

Due to the rapidly growing volume of data to be analyzed, many companies want or need to leverage the powerful capabilities of the public cloud, especially for data processing. Because integration with existing data storage infrastructure is highly complex, they rely on AWS' strong partner network for integration and service management.

Compared to last year's AWS Data Analytics, AI & ML quadrant, these are the most significant changes in provider positioning: PwC has risen from Market Challenger to Leader. The new Rising Star is MHP. Eviden (Atos) has moved from the Leader quadrant to the Product Challenger quadrant this year. Starting this year, the Atos Group's cloud services business will only operate under the Atos brand. The Berlin-based provider kreuzwerker, now fully integrated into the Public Cloud Group, is positioned in the quadrant, while OPITZ Consulting is no longer represented in the quadrant.

Of the 46 companies evaluated for this study, 32 qualified for this quadrant, including 11 leaders and one rising star.

accenture

Accenture offers extensive data modernization and AI services on AWS, backed by significant technical and business expertise.

AllCloud

Broad service range, close collaboration with AWS and a balanced customer base contribute to **AllCloud's** strong market position in the data modernization and AI services segment.

Capgemini

Capgemini stands out in the German market for AWS-related data modernization and AI services with its experience in AI solutions and its industry and consulting expertise.

cognizant

Cognizant is establishing itself as a leading service provider for data modernization and AI for the AWS platform in Germany. Improvements and investments in AI solutions contribute to Cognizant's momentum.

TECHNOLOGY

Effective customer support during implementation, extensive AI expertise and customer-oriented pricing make **DXC Technology** a leading provider of AWS-based data modernization and AI services in Germany.

HCLTech

HCLTech helps its customers achieve greater agility and is rapidly expanding its position as a leading provider of data modernization and AI services in Germany.

Materna

Materna impresses its customers with customized solutions and also benefits from its close customer relationships. The provider demonstrates a deep understanding of its clients and qualifies as a leading German provider of data modernization and AI services.



AWS Enterprise Data Modernization and AI Services



PwC, with its in-depth expertise in AI and business consulting, is emerging as a Leader in the market for data modernization and AI services on the AWS platform in Germany.



TCS is increasingly establishing itself as a leading provider of AWS-based data modernization and AI services in Germany through its dynamic development.

tecRacer

With its pioneering role in the German market and its outstanding number of AWS qualifications, **tecRacer** has made a name for itself as a strong provider of data modernization and AI services for the AWS platform and can boast of renowned references.



Wipro has broad technological expertise and offers a comprehensive range of services for AWS-based data modernization and AI services.

MHP

MHP is the new Rising Star in the German market for data modernization and AI services on the AWS platform. Close cooperation with AWS and in-depth vertical expertise contribute to this.





"Effective customer support during implementation and extensive AI expertise make DXC Technology a leading provider of AWS-based data modernization and AI services in Germany."

Frank Heuer

DXC Technology

Overview

Headquartered in Virginia, U.S., DXC Technology employs more than 120,700 people in 70 countries, including 10,000 AWS-accredited experts. In FY25, the company generated revenue of \$12.9 billion, with Global Business Services being the largest segment. DXC Technology offers a service suite for AWS-related data and analytics consulting, ML and AI, among others. DXC Technology is an AWS Premier Services Partner. The provider's German headquarters is located in Böblingen.

Strengths

Platform for accelerated implementation:

DXC SPARK provides a platform with prebuilt accelerators to reduce solution and transformation costs and accelerate improvements for customers.

Provider with AI expertise: DXC is an AWS Premier Tier Services Partner with a particularly strong position in AI. The provider has Generative AI Services competency and AI Practitioner certification. Customers benefit from this qualification, as they receive expert support even in challenging cases.

Willingness to take customer-oriented risks:

DXC Technology is willing to take customer-oriented risks and, unlike many other providers, also offers a results-based pricing model. This approach builds trust among

(potential) customers, as DXC Technology clearly demonstrates its confidence in the high quality of its own services.

Numerous published references:

DXC Technology's numerous references underscore its position in the market for data modernization and AI services based on AWS. These references also provide helpful guidance to many companies that often lack a concrete understanding of the topic and the providers in the market.

Caution

DXC Technology has strong technical expertise; however, it is advisable to consider expanding its business-relevant consulting services, as data modernization and AI services have a strong business relevance in many projects.





AWS SAP Workloads

Who Should Read This Section

This report is valuable for service providers offering **AWS SAP workloads** in **Germany** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence. Enterprises in Germany are migrating SAP applications to AWS for modernization, using automation and AI. By opting for hybrid solutions, partnerships with AWS and SAP help address transformation challenges.

Technology professionals

Should read this report to understand AWS SAP implementation and integration service providers' relative strengths and weaknesses for driving digital transformation in enterprises. Expertise in applying DevOps, automation and cloud-native design principles within the SAP context is critical for improving agility and integrating SAP data and processes with broader digital transformation initiatives.

SAP professionals

Should read this report to understand AWS SAP implementation and integration service providers' positioning and their impact on enterprise transformations, alongside cloud migration benefits. Key technical criteria include possessing both AWS and SAP certifications and partnerships, experience with provisioning and operations, and the ability to provide end-to-end security and compliance support that meets industry standards.

Procurement professionals

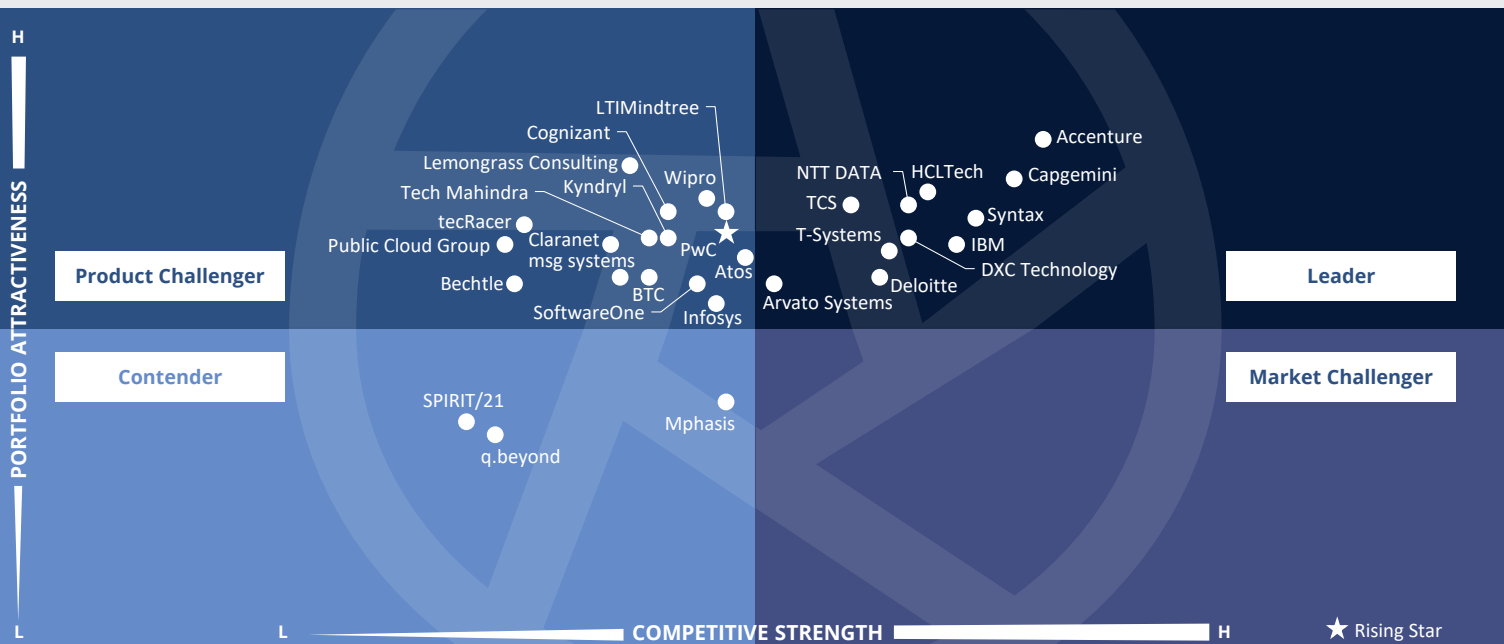
Should read this report to better understand the current landscape of AWS SAP implementation and integration service providers in Germany. It is essential to evaluate the breadth and depth of their service portfolio, customer references, the maturity of their pricing models and their ability to support specific SAP applications and services on AWS to select the most suitable partner.



ISG Provider Lens®
AWS Ecosystem Partners
AWS SAP Workloads

Source: ISG RESEARCH

Germany 2025



This quadrant evaluates the **most relevant AWS SAP workloads service providers** in Germany. The services include **provision and operation**. The changes brought about by SAP require **new solutions**.

Frank Heuer



AWS SAP Workloads

Definition

This quadrant assesses service providers that enable the provisioning and ongoing operation of SAP systems, such as SAP HANA or other platforms on AWS, along with their central management. These providers help enterprises implement AWS as a hardware replacement or extension to support IaaS. Service providers in this quadrant also explore AWS for RISE with SAP, which has gained increased traction as enterprises migrate toward cloud-first strategies. They optimize, design and develop new processes and business flows as a part of platform management by combining their services, such as SAP and AWS. This select group of service providers is responsible for implementing and ensuring subsequent operations.

In addition to having relevant AWS certifications, service providers in this quadrant require SAP certifications and partnerships to stay updated with SAP products, technologies, licensing and platform developments. They should also be able to demonstrate their impact on customer IT landscapes, applications and business processes.

Eligibility Criteria

1. Implement, customize, provision and support SAP applications services through a **breadth and depth of service portfolio**
2. Provide **resources** to support SAP offerings on AWS, including number and locations
3. Increase **awareness** and support SAP applications and services provisioning on AWS, including customer base
4. Offer **references** with a strong reputation for SAP applications, including services provisioning and support on AWS
5. Gain **experience** and relevant **certifications**, including AWS-certified SAP Competency
6. Offer suitable, mature and adaptable pricing models
7. **Allocate dedicated resources** (including business units) for DevOps, automation and cloud-native application design
8. Provide **end-to-end security and compliance support**, ensuring that SAP workloads on AWS meet industry regulations and standards



Observations

While software as a service has already captured a considerable market share for numerous applications (e.g., CRM and unified communications and collaboration), this process is not yet advanced for SAP solutions in Germany. Many clients still have reservations, as SAP solutions often control fundamental, existentially important processes within a company. The above average concerns about cloud solutions in Germany have a particularly strong impact.

For companies that have already taken the step of migrating SAP workloads to the cloud, AWS has become the preferred platform for operation. Since 2022, SAP has been focusing its business expectations and resources heavily on software delivery models based on cloud computing. Its RISE with SAP offering has also triggered cloud strategy discussions in companies that previously did not want to use AWS, which is an additional driver for the market.

With RISE with SAP, SAP is promoting the switch to the cloud and also offering to operate it. Although SAP is cooperating with partners in this area, this also means competition, especially for AWS partners that offer SAP hosting. Opportunities are increasing for partners that, for example, offer extensions in the AWS Cloud that SAP does not offer.

Arvato Systems has succeeded in moving up from the Product Challenger quadrant to the Leader quadrant. PwC is the new Rising Star. Evident, as Atos Group, has moved from the Leader quadrant to the Product Challenger quadrant this year. Starting this year, the Atos Group's cloud services business will only operate under the Atos brand. Bechtle is new to the quadrant. Netlution and Rackspace Technology are no longer positioned.

Of the 46 companies evaluated for this study, 30 qualified for this quadrant, including 11 Leaders and one Rising Star.

accenture

Accenture positions itself in the SAP-AWS market with its extensive portfolio, comprehensive resources and several years of experience as a powerful and accomplished service provider that works closely with AWS.



Arvato Systems has achieved premium certification, is increasingly impressing with its digital sovereignty and is rising to become a leader in the German market for SAP solutions on the AWS platform.



Capgemini impresses its customers with a comprehensive range of services and extensive industry expertise. Multi-Pillar S/4HANA architecture is one of Capgemini's tools that helps clients make the right architecture decisions.

Deloitte.

Deloitte is a service provider with extensive business knowledge, comprehensive resources, global experience and over three decades of experience in the SAP business. This makes Deloitte a leader in Germany for SAP solutions on the AWS platform.

DXC TECHNOLOGY

DXC Technology works closely with AWS to develop innovative solutions and is establishing itself in Germany as a leading provider of SAP solutions on the AWS platform.

HCLTech

HCLTech is expanding its leading position among providers of AWS-based SAP workloads in Germany. With its CloudSMART for SAP solution, HCLTech enables simplified and accelerated AWS-SAP migrations.



AWS SAP Workloads



IBM is positioning itself as a global player with extensive services, expertise and certifications in the market for AWS-based SAP solutions.



NTT DATA occupies a special position in the German market due to its deep understanding of the specific requirements of many midsize industries and its established position as an SAP partner.



Syntax is a highly experienced SAP service provider that contributes to the cost-effective and rapid implementation of AWS-SAP solutions. It has achieved a strong position as a leader in the German market.



T-Systems' AWS-SAP services are backed by an extensive service portfolio and extensive experience in operating large-scale SAP solutions. It enjoys trust among customers due to its origins.



TCS offers comprehensive AWS-SAP services and is driving automation forward. This supports customers in the efficient and rapid implementation of AWS-SAP projects, for example, with the preconfigured industry-specific S/4HANA solution Crystallus.



PwC is the new Rising Star in the German market for SAP solutions on the AWS platform. Its holistic transformation approach and extensive business and SAP expertise contribute to this advancement.





Leader

“DXC Technology is establishing itself in Germany as a leading provider of SAP solutions on the AWS platform.”

Frank Heuer

DXC Technology

Overview

DXC Technology, headquartered in Virginia, U.S., employs more than 120,700 people in 70 countries. In FY25, the company generated revenue of \$12.9 billion, with Global Business Services as the largest segment. DXC Technology's services for AWS SAP solutions range from consulting and migration to managed services. The provider holds SAP Consulting Competency and is an AWS Premier Services Partner. Its German headquarters are located in Böblingen.

Strengths

Close collaboration for innovative solutions:

DXC Technology has developed an automation solution that enables the deployment and lifecycle management of SAP systems on AWS. It was given access to a confidential preview of several AWS services before they were released. The provider also invested jointly with AWS to combine AWS tools with SAP data. The solution leverages more than 40 AWS services and enables new applications to be built within days rather than months.

Comprehensive range of services:

DXC Technology addresses the entire AWS SAP portfolio, from planning/architecture, migration and optimization to the operation of SAP in the AWS public cloud. The service provider accompanies customers from the

beginning to the end of their transformation to the public cloud.

Expertise with SAP solutions:

DXC Technology has more than 25 years of experience in SAP management for several hundred companies.

Established as a leader: Among many factors, those mentioned above have contributed to DXC Technology further expanding its leading market position after its rise to the Leader quadrant last year.

Caution

Although DXC Technology has numerous references on the AWS partner page, there are hardly any German references listed. More references from Germany could make it more attractive, especially for the dynamically growing SME segment.





Appendix

The ISG Provider Lens® 2025 – AWS Ecosystem Partners analyzes the relevant software providers/service providers in the German market based on a multi-stage market research and analysis process and positions these providers based on the ISG Research methodology.

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The market research and analysis data presented in this report includes research information from the ISG Provider Lens® program, ongoing ISG research programs, discussions with ISG advisors, briefings with service providers, and analysis of publicly available market information from various sources. In ISG's opinion, the data and information collected for this report reflect the current status as of August 2025 for both providers who actively participated and those who did not. Mergers and acquisitions that have taken place in the meantime and the associated changes are not taken into account in this report.

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



Author and Editor Biographies

Author



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Principal Analyst, Germany

Frank Heuer is Principal Analyst at ISG Germany. His focus is on cybersecurity, cloud computing, digital workspace, communications, and social business & collaboration.

His main areas of responsibility include advising ICT providers on strategic and operational marketing and sales.

Mr. Heuer is a speaker at conferences and webcasts on his key topics and a member of the IDG expert network. Mr. Heuer has been active as an analyst and consultant in the IT market since 1999.

Enterprise Context and Global overview Analyst



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Srinivasan PN is a Senior Lead Analyst at ISG and is responsible for supporting and co-authoring ISG Provider Lens studies on AWS and Digital Engineering. His area of expertise lies in engineering services and digital transformation. Srinivasan has 10 years of experience in the technology research industry, and in his prior role, he carried out research delivery for both primary and secondary research capabilities.

Srinivasan also authors enterprise context reports and global summary reports for his expertise. He also supports the advisors with his research skills and writes papers about the latest market developments in the industry.



Author and Editor Biographies

Study Sponsor

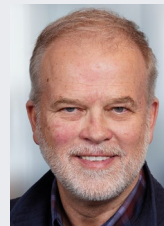


Aman Munglani
Senior Director and Principal Analyst

Aman Munglani leads the ecosystems and custom research practice for ISG. He brings over twenty years of expertise in emerging technologies and industry trends. His career is marked by significant contributions in guiding top executives from Global 2000 companies, offering strategic advice on digital transformation, start-up partnerships, driving innovation, and shaping technology strategies.

In his tenure exceeding twelve years at Gartner, Aman focused on providing CIOs and IT executives across Asia Pacific and Europe with insights on the practical implementation and advancement of new technologies, the evolution of infrastructure, and detailed vendor assessments.

IPL Product Owner



Jan Erik Aase
Partner and Global Head – ISG Provider Lens®

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.



iSG Provider Lens®

The ISG Provider Lens® Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners.

ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens® research, please visit this [webpage](#).

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iSG

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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.

For more information, visit isg-one.com.





OCTOBER, 2025

REPORT: AWS ECOSYSTEM PARTNERS