

AWS Ecosystem Partners

A research report comparing provider strengths,
challenges and competitive differentiators

Customized report courtesy of:

DXC TECHNOLOGY

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*Report Author: Dr. Tapati Bandopadhyay,
Ashwin Gaidhani,
Sameen Mohammed Siddique*

Driving sustainable growth and building intelligent enterprises through data-driven AWS modernization

The AWS ecosystem in the U.S. is undergoing a significant transformation, with service providers increasingly focusing on delivering advanced, value-driven cloud capabilities. This evolution is marked by substantial investments in emerging technologies, particularly generative AI (GenAI), agentic AI and data analytics, alongside continued emphasis on large-scale cloud migration, modernization and enterprise application support. Providers are developing highly specialized, often industry-specific solutions, and deepening their strategic alignment with AWS to deliver measurable business outcomes for their clients. The market is characterized by a strong drive towards innovation, operational efficiency and a refined approach to cloud adoption, moving beyond

basic infrastructure provision to holistic, AI-infused digital transformations.

Accelerating cloud modernization and data center exits:

Service providers are intensely focused on accelerating large-scale cloud migration and modernization initiatives, particularly driving enterprise data center exits and mainframe modernization. This involves deploying migration factories and leveraging advanced automation to achieve predictable and rapid transition of virtual machines and complex applications to AWS environments. Leading providers consider cloud migration and modernization their core business, highlighting its criticality in their revenue streams. The market is also shifting toward outcome-based and risk-sharing commercial models, where service providers commit to delivering specific business outcomes and often share in the financial risks or rewards with their clients.

Deep expertise and strategic advisory

alignment: The emphasis to fully leverage AWS services such as Amazon Elastic Kubernetes Service (EKS) and Amazon Elastic Container Service (ECS) for modern application landscapes is supported by substantial internal

AWS unlocks
enterprise outcomes
with intelligent
operations
and AI-infused
transformations.



Executive Summary

expertise through *AWS Ambassadors*, whose deep technical knowledge and engagement in pre-sales cycles demonstrably increase win rates and build client confidence. Few leaders reinforce their significant market position by holding a high ranking for *AWS Migration Acceleration Program (MAP)*, indicating a profound level of strategic alignment and early access to new AWS initiatives. Joint investment programs and the establishment of dedicated teams with AWS, sometimes targeting ambitious multiyear revenue goals, exemplify this deep, strategic alignment and long-term commitment to the AWS ecosystem in markets including the U.S. Holding premier sponsorship status for major AWS events like *re:Invent* further signals substantial investment and a deepening strategic engagement with AWS.

A key differentiator among U.S. service providers is their increasing ability to act as neutral advisors in complex cloud transformation scenarios, guiding clients through strategic decisions without inherent bias toward specific solutions. This advisory role often extends to embedding GenAI

and agentic AI capabilities into strategic planning, implementation and post-migration optimization. Providers are leveraging AWS AI services to develop AI-powered tools for use cases ranging from automated code generation and anomaly detection to enhancing developer productivity.

Advanced regulated and other verticalized cloud solutions: Many providers are actively involved as launch providers for new AWS features and services, including those related to sovereign cloud and specific industry solutions. While there are recognized examples for European sovereign clouds, the underlying capability development is critical for meeting U.S. GovCloud and FedRAMP requirements for government and highly regulated sectors. Providers are also intensely focused on industry-specific go-to-market (GTM) strategies, with significant investments in life sciences, manufacturing, automotive, aerospace, defense, energy and technology, media and telecommunications (TMT) in the U.S., tailoring solutions to meet unique sector demands. This comprehensive approach underscores the

commitment of U.S. service providers to deliver not just infrastructure, but holistic, outcome-driven cloud transformations.

Proactive and AI-powered cloud management:

The AWS managed services landscape in the U.S. is rapidly evolving, driven by a growing demand for comprehensive, AI-driven operational capabilities that extend far beyond basic infrastructure oversight. Service providers increasingly focus on intelligent operations, leveraging advanced AI and GenAI to automate processes, proactively predict and prevent issues, and enhance real-time decision-making. These initiatives include the development of proprietary platforms and accelerators that serve as comprehensive frameworks for cloud operations, FinOps and SecOps. A critical area of innovation is advanced FinOps, which utilizes AI for granular cost optimization, accurate forecasting and transparent chargeback mechanisms. Providers are demonstrating significant cost reductions for clients through these capabilities, often making such financial benefits a cornerstone of their value proposition. Some providers, for

example, state their ability to deliver AWS native services at a significantly lower cost because of internal automation and repeatability, making their managed services highly compelling for U.S. clients seeking financial efficiencies. This financial efficiency is coupled with a strong emphasis on cloud sustainability, with some providers beginning to track and reduce carbon footprints associated with cloud operations.

Providers are building robust security operations centers (SOCs) and frameworks to ensure resilient cloud security, with many emphasizing a *security-first approach* in their operations. For instance, some offer continuous compliance frameworks built on security data lakes that leverage GenAI and services like AWS Bedrock. These frameworks identify non-compliance with regulatory requirements and internal IT policies, allowing for proactive risk mitigation. Others are in the early stages of using agentic AI for FinOps and security, allowing for analysis and facilitating direct actions, which helps them enhance their intelligent operations through proprietary platforms. There is also a highlighted capability



across the market in integrating security within data environments, particularly for sensitive workloads. Furthermore, providers are adapting to the complexities of hybrid and multicloud environments, developing unified management platforms capable of overseeing diverse workloads across AWS, other public clouds and on-premises infrastructure.

Next-generation solutions leveraging agentic AI capabilities and secure data foundations:

The U.S. market for AWS enterprise data modernization and AI services is hyperfocused on GenAI and agentic AI, with service providers making substantial investments in developing and deploying these emerging capabilities. A drastic change in market approach is observed, as providers reorient their core strategies around AI, with a significant portion of their professional training and development now concentrating on AI certifications.

A fundamental step for providers is to actively modernize clients' data estates, building robust data lakes, data warehouses, and comprehensive data integration pipelines to ensure data readiness and quality for

sophisticated AI initiatives. This foundational work is critical, as the quality of AI output is directly linked to the underlying data strategy.

A significant and evolving trend is creating and deploying custom agents, agent factories and multiagent systems, often leveraging AWS Bedrock and other AWS AI services such as Amazon Q, Amazon Nova and Amazon Titan. Some service providers are positioned as launch partners for many of AWS' upcoming agentic AI announcements. Some are also developing orchestration layers designed to manage and facilitate interactions between agents from different technology providers, addressing the proliferating nature of agents in enterprise environments. Unique commercial models for custom agents have been introduced, with pricing based on complexity, alongside suites of AI accelerators that include tools for regulatory compliance. Service providers are exploring the Amazon Bedrock AgentCore to deploy fleets of specialized AI agents at scale.

Top leaders in GenAI are expanding their work from proof of concept (PoC) to at-scale,

end-to-end customer solutions. Engagements with large enterprise clients demonstrate how GenAI, when properly implemented with enterprise data, can leverage decades of engineering knowledge to change how organizations innovate fundamentally. Providers also actively build conversational interfaces for engineering and manufacturing departments using AWS Nova models.

Governance, an essential frontier in enterprise AI:

Beyond productivity, providers are building frameworks for responsible AI and governance to address concerns around bias, hallucination and data privacy. Some offer secure hub environments for customers to explore various large language models (LLMs), emphasizing security. This holistic approach signifies that AWS ecosystem providers are not just adopting AI, but are actively shaping its responsible and impactful deployment across the U.S. enterprise landscape.

RISE adoption, AI infusion and verticalization for SAP workloads on AWS:

In the U.S., the AWS SAP workloads market is heavily concentrated on the RISE with SAP AWS

offering. Service providers strategically facilitate these transitions, often promoting *near-zero-cost* S/4HANA conversion initiatives by combining financial incentives from both AWS and SAP to make migration highly appealing for clients. Partners increasingly leverage joint frameworks, solutions and funding for greenfield deployments. There is a notable uptick in discussions and active engagements for SAP S/4HANA Private Cloud Edition.

The scope of SAP workload modernization on AWS extends significantly beyond basic hosting, now deeply integrating downstream data strategies and infusing advanced AI capabilities directly into ERP processes. Some providers, for instance, have developed foundational LLMs trained with extensive ERP content to power GenAI tools and agents for ERP-centric solutions. Similarly, other providers are at the forefront of driving AI-led lifecycle automation for deployments, aiming to provide real-time intelligence across ERP landscapes. Service providers deploy specialized migration factories and accelerators to streamline and expedite



Executive Summary

SAP modernization journeys on AWS. There is an increased traction for industry-specific SAP on AWS solutions, aligning with AWS' strategy to address unique vertical challenges for sectors like manufacturing, healthcare, finance and public services.

Partner road map for GenAI leveraging Bedrock, Guardrails and Trainium:

The AWS ecosystem partner space is expected to experience the widespread adoption and scaling of GenAI applications, with inference becoming as fundamental as compute and storage. Amazon Bedrock is a central component of this trend, which provides partners with a broad selection of fully managed foundation models from various leading providers, including AWS' own Amazon Nova family, optimized for quality, cost and speed. Customizing models by incorporating proprietary data through retrieval-augmented generation (RAG) will be crucial, with Bedrock knowledge bases now supporting structured and multimodal data. Furthermore, trust and safety in GenAI will be paramount, with Bedrock Guardrails offering essential features to mitigate unwanted outputs and

hallucinations through automated reasoning and mathematical proofs. Cost optimization for GenAI inferencing is another key focus, addressed through innovations like model distillation and intelligent prompt routing, which enable faster and cheaper performance with minimal accuracy loss. The emergence of AI agents represents a transformative trend, allowing partners to build applications that can plan, act and self-reflect, extending to tasks like new code creation and bug tracking via tools such as Amazon Q Developer. The latest AWS Trainium2 chips provide the performance for building and fine-tuning large language and multimodal models for their clients faster and at a significantly lower cost.

In 2025, the AWS ecosystem empowers clients to move beyond infrastructure migration toward holistic, AI-infused digital transformations. By leveraging AI-ready data foundations, advanced GenAI, agentic AI, intelligent automation and industry-specific solutions, enterprises unlock new levels of efficiency and innovate at an unprecedented scale, turning technology investments into competitive advantages.





Provider Positioning

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	AWS Professional Services	AWS Managed Services	AWS Enterprise Data Modernization and AI Services	AWS SAP Workloads
Accenture	Leader	Leader	Leader	Leader
AllCloud	Contender	Product Challenger	Product Challenger	Not In
Apexon	Product Challenger	Not In	Product Challenger	Not In
Arvato Systems	Not In	Market Challenger	Not In	Not In
Aspire Systems	Contender	Contender	Contender	Not In
Atos	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Birlasoft	Product Challenger	Product Challenger	Contender	Product Challenger
Blazeclan	Contender	Contender	Contender	Not In
Capgemini	Leader	Leader	Leader	Leader





	AWS Professional Services	AWS Managed Services	AWS Enterprise Data Modernization and AI Services	AWS SAP Workloads
Coforge	Product Challenger	Contender	Product Challenger	Not In
Cognizant	Leader	Leader	Leader	Leader
Deloitte	Leader	Leader	Leader	Leader
Dexian	Not In	Not In	Not In	Contender
DXC Technology	Leader	Leader	Rising Star ★	Leader
Encora	Contender	Not In	Not In	Not In
Genpact	Product Challenger	Product Challenger	Product Challenger	Product Challenger
HCLTech	Leader	Leader	Leader	Leader
Hexaware	Leader	Product Challenger	Leader	Not In





Provider Positioning

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	AWS Professional Services	AWS Managed Services	AWS Enterprise Data Modernization and AI Services	AWS SAP Workloads
Hitachi Digital Services	Rising Star ★	Product Challenger	Product Challenger	Rising Star ★
IBM	Not In	Not In	Market Challenger	Market Challenger
Impetus	Contender	Contender	Contender	Not In
Infosys	Market Challenger	Market Challenger	Market Challenger	Market Challenger
Kyndryl	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Lemongrass Consulting	Not In	Not In	Not In	Product Challenger
LTIMindtree	Leader	Leader	Product Challenger	Leader
Mastek	Product Challenger	Not In	Not In	Not In
Mphasis	Rising Star ★	Rising Star ★	Rising Star ★	Product Challenger





	AWS Professional Services	AWS Managed Services	AWS Enterprise Data Modernization and AI Services	AWS SAP Workloads
NTT DATA	Leader	Leader	Leader	Product Challenger
Persistent Systems	Leader	Leader	Leader	Not In
PwC	Leader	Leader	Leader	Leader
Quantiphi	Product Challenger	Not In	Leader	Not In
Rackspace Technology	Leader	Leader	Leader	Leader
Slalom	Contender	Not In	Not In	Not In
Sutherland	Product Challenger	Product Challenger	Not In	Not In
Syntax	Product Challenger	Product Challenger	Product Challenger	Rising Star ★
TCS	Leader	Leader	Leader	Leader



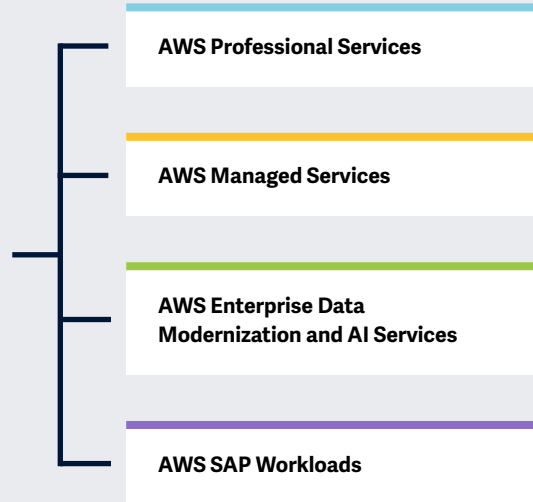


	AWS Professional Services	AWS Managed Services	AWS Enterprise Data Modernization and AI Services	AWS SAP Workloads
Tech Mahindra	Leader	Leader	Leader	Leader
TechWave	Not In	Not In	Not In	Contender
T-Systems	Product Challenger	Not In	Not In	Product Challenger
Version 1	Product Challenger	Product Challenger	Product Challenger	Not In
Virtusa	Product Challenger	Product Challenger	Product Challenger	Not In
Vision33	Not In	Not In	Not In	Contender
Wipro	Leader	Leader	Leader	Leader
YASH Technologies	Contender	Product Challenger	Contender	Contender
Zensar Technologies	Not In	Not In	Not In	Product Challenger



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, benefitting 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

This ISG Provider Lens® quadrant report covers the following four quadrants for services/solutions: 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:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments on their competitive strengths and portfolio attractiveness
- Focus on the regional market

Our study serves as an important decision-making basis for positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their current 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 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 the current market positioning of these providers based on the depth of their service offerings and market presence to benchmark their capabilities and facilitate informed decision-making for clients. The report evaluates providers offering consulting and migration services to guide businesses throughout their AWS cloud journeys.

Strategy professionals

Should read this report to understand how AWS professional services providers position themselves to support large-scale cloud transformation initiatives in the U.S. The report will also help them evaluate providers' ability to formulate effective cloud strategies, develop compelling business cases that demonstrate ROI, and provide guidance on ESG and GRC requirements integral to modern enterprise strategy.

Digital professionals

Should read this report to assess how AWS professional services partners can accelerate digital transformation initiatives in the U.S. The report outlines providers' capabilities in migrating and modernizing applications and data workloads, leveraging DevOps principles, and architecting scalable, resilient, cloud-native solutions. Evaluating expertise in specific AWS technologies, automated testing, deployment strategies and change management is key.

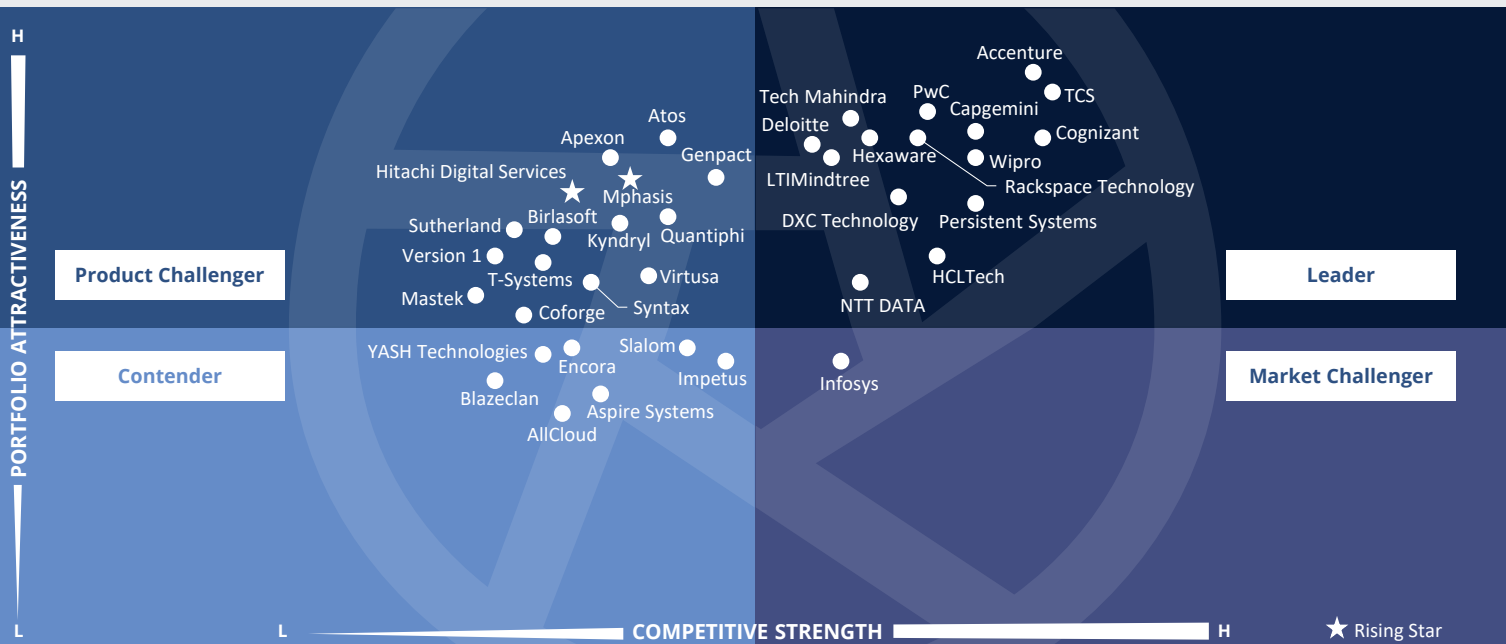
Technology professionals

Should use this report to conduct an in-depth examination of the technical competencies of AWS professional service providers in the U.S. Key areas include their proficiency in designing, building and modernizing complex cloud architectures such as hybrid and multicloud integrations, along with AWS security capabilities, software development practices, application migration techniques and the deployment of AI and ML workloads.

Procurement professionals

Can leverage this report to gain insights into provider competencies, AWS certifications, service delivery offerings and their track record in delivering value and measurable business outcomes. Through this report, procurement teams can compare providers effectively, assess potential partnerships and negotiate contracts based on a clear understanding of providers' market positioning and capabilities.





This quadrant assesses providers' **AWS strategic advisory and execution capabilities for end-to-end transformation**. It evaluates their ability to deliver full-stack modernization to ensure transformations succeed **technically and commercially**.

Dr. Tapati Bandopadhyay



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. 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

Service providers have evolved from facilitating basic cloud transitions to orchestrating comprehensive business transformations in the highly competitive U.S. market. The focus has shifted to outcome-driven modernization, where technical execution is linked to measurable business KPIs. AWS partners harness the full spectrum of the AWS cloud, leveraging advanced services like Amazon EKS for containerization, AWS Lambda for serverless architectures and Amazon Bedrock for embedding GenAI into core business processes.

Emphasis on verticalization: Leading partners collaborate with enterprises to build intelligent industry platforms on AWS. Using foundational services like Amazon HealthLake for life sciences or AWS Supply Chain for logistics as a starting point, they integrate custom GenAI models via AWS Bedrock to solve niche challenges from accelerating clinical trial analysis to optimizing last-mile delivery.

Integration of advanced technologies in transformation:

GenAI and agentic AI are becoming integral to cloud transformation, from advisory services to automating migration and development. Agentic AI is being explored across all stages of migration, especially in application dependency migration, migration strategy generation, code transformation, infrastructure provisioning and data migration.

Adoption of outcome-based commercial models:

Providers are increasingly moving from traditional billing models, such as time and materials, to outcome-based profit sharing and risk sharing. These new models directly link a provider's payment to the value they deliver, such as achieving specific business outcomes, realizing cost savings or optimizing AWS consumption.

From the 45 companies assessed for this study, 38 qualified for this quadrant, with 15 being Leaders and two Rising Stars.

accenture

Accenture demonstrates maturity in AWS professional services with a strong focus on modernization, GenAI and industry-specific transformation, backed by more than 1,200 joint projects and over 60,000 AWS-trained professionals.



Capgemini's approach is notably differentiated by its *Experience Led Transformation* methodology. It is driven by its consulting division's strategy, which starts with defining future business and customer experiences that act as a blueprint for technological transformation.



Cognizant's strategic element is its explicit focus on large-scale transformation deals with a total contract value (TCV) greater than \$100 million. This is supported by a library of over 70 AWS-specific transformational blueprints designed to guide these complex engagements.

Deloitte.

Deloitte's approach is distinguished by its focus on the human element of cloud transformation. It emphasizes that the biggest challenge is often people and processes, and its services are designed to manage organizational change alongside the technical migration.



DXC TECHNOLOGY

DXC Technology's primary strength lies in its proven ability to execute enterprise-grade modernization at a massive scale. Its experience in transforming complex legacy and mainframe environments into AWS-native architectures is a core differentiator that few providers can match.

HCLTech

HCLTech's key element strategy is its massive investment in a GenAI-enabled workforce. Its plan to train over 50,000 engineers with Amazon CodeWhisperer demonstrates a commitment to scaling AI-augmented software delivery and cloud skills across its global teams.

HEXAWARE

Hexaware's professional services are heavily productized around its proprietary Amaze® platform. This tool-led approach automates assessments and modernizations of applications and databases, aiming to reduce manual effort and accelerate cloud adoption for clients.

LTIMindtree

LTIMindtree's delivery model is built around its Infinity Cloud Platform, a unified suite of tools and solutions. This platform-based approach is designed to provide consistency and acceleration across its entire portfolio, from migration to analytics and governance.

NTT DATA

NTT DATA delivers outcome-focused transformations using a factory-based model with proprietary accelerators and industry-specific blueprints. Its extensive migration services and list of Competencies focus on sovereign cloud, demonstrating a mature, scalable practice.

Persistent

Persistent Systems' notable strength is its dedicated service line for VMware exit and VMware Cloud on AWS. As AWS and Broadcom's strategic partner, it provides a specialized capability to help enterprises navigate the complexities of transitioning from VMware environments.

pwc

PwC's key differentiator is its powerful brand and C-suite influence. It leads with business strategy and transformation consulting, positioning cloud adoption as a technology upgrade and a fundamental component of enterprise reinvention and value creation.

rackspace technology.

Rackspace Technology's Elastic Engineering model is a compelling differentiator. By providing customers with ongoing access to a dedicated pod of cloud experts, it fosters a collaborative, agile partnership that extends beyond traditional, project-based professional services.



AWS Professional Services



TCS' approach is heavily differentiated by its extensive library of proprietary tools and accelerators (iCMC, Cloud Counsel and more). This demonstrates a mature, factory-based cloud migration and modernization model, aiming for predictable and accelerated outcomes.



Tech Mahindra's primary differentiator is its deep investment in creating sovereign, proprietary LLMs like Project Indus. This, combined with unique partnerships with chipmakers like NVIDIA and Qualcomm, signals a strategic focus on custom, sovereign AI solutions.



Wipro's key differentiator is its GenAI-infused FullStride Cloud Studio, which it claims can accelerate cloud adoption five times at a 30 percent lower cost. This heavy focus on proprietary AI-driven automation and reusable assets is central to its value proposition.



Hitachi Digital Services' (Rising Star) significant advantage is the ability to integrate AWS services with the Lumada platform. This combination of IT and OT allows it to deliver unique, data-driven solutions, particularly for Industry 4.0 and IoT use cases.



Mphasis (Rising Star) exhibits deep industry expertise, particularly in financial services, utilizing specialized Competencies like DevOps. Its market approach is sharpened by strategic acquisitions, such as Stelligent, positioning it as an agile and innovative transformation partner.





"DXC Technology is a leader in U.S. AWS professional services, addressing multiindustry and mission-critical transformations, from mainframe and sovereign cloud modernization to business priorities like FinOps advisory and sustainability services."

Dr. Tapati Bandopadhyay

DXC Technology

Overview

DXC Technology is headquartered in Virginia, U.S. It has more than 127,200 employees across over 70 countries. In FY24, the company generated \$13.7 billion in revenue, with Global Infrastructure Services as its largest segment. DXC Technology offers a comprehensive suite of professional services covering strategy, design, migration and management for cloud, applications and analytics. Its deep technical expertise is demonstrated by over 12,000 active AWS certifications and more than 600 customer launches. The company provides a full range of consulting and migration services across the U.S. region, including for SAP and Oracle workloads.

Strengths

Accelerating cloud transformation: DXC has demonstrated strong momentum in delivering AWS professional services following its signing of an expanded AWS strategic transformation agreement in November 2023, securing new cloud transformation engagements across industries. This traction is underpinned by a growing base of AWS-certified professionals with deep technical expertise, positioning the company as a competent partner for modernization journeys.

Modernization with measurable impact: DXC's end-to-end capability in its professional services combines foundational cloud architecture with complex application modernization. The company designs and implements secure, scalable multicloud

foundations using AWS Well-Architected landing zone blueprints. Its Precision Guided Modernization™ service transforms complex environments like mainframes into AWS-native architectures, with quantifiable outcomes.

Strategy to execution: DXC provides strategic advisory and architectural planning across various technology domains, including cloud operating models, industry-specific assessments, GenAI, FinOps and governance. This strategic foresight combines execution expertise in modernizing complex systems, such as mainframe-to-cloud-native migrations, application refactoring, data lake modernization and AI and ML integration.

Caution

Through its partnership with AWS, DXC Technology fosters a culture of continuous learning that helps businesses build an essential talent ecosystem required to succeed in the digital marketplace. Further marketing these internal and client success stories can provide tangible proof of its successes within the U.S. market.





AWS Managed Services

Who Should Read This Section

This report is valuable for providers offering **AWS managed services** in the **U.S.** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence. Providers have ramped up their services for public and multicloud environments, focusing on optimization, cost reduction (FinOps), security and cloud automation while integrating operations, security and site reliability engineering (SRE) best practices.

Strategy professionals

Should read this report to identify AWS managed service providers (MSPs) in the U.S. capable of aligning cloud operations with broader business objectives. Key considerations include providers' ability to optimize cloud costs through robust FinOps methodologies, ensure high levels of security and compliance within managed environments, and build operational resilience.

Digital professionals

Should use this report to evaluate how AWS managed service providers can support and enhance digital transformation initiatives. Assessing their use of advanced cloud management platforms (CMPs), automation tools, and expertise in areas such as MLOps and DataOps is crucial to ensure that the underlying managed infrastructure effectively supports the development, deployment and scaling of digital services and applications.

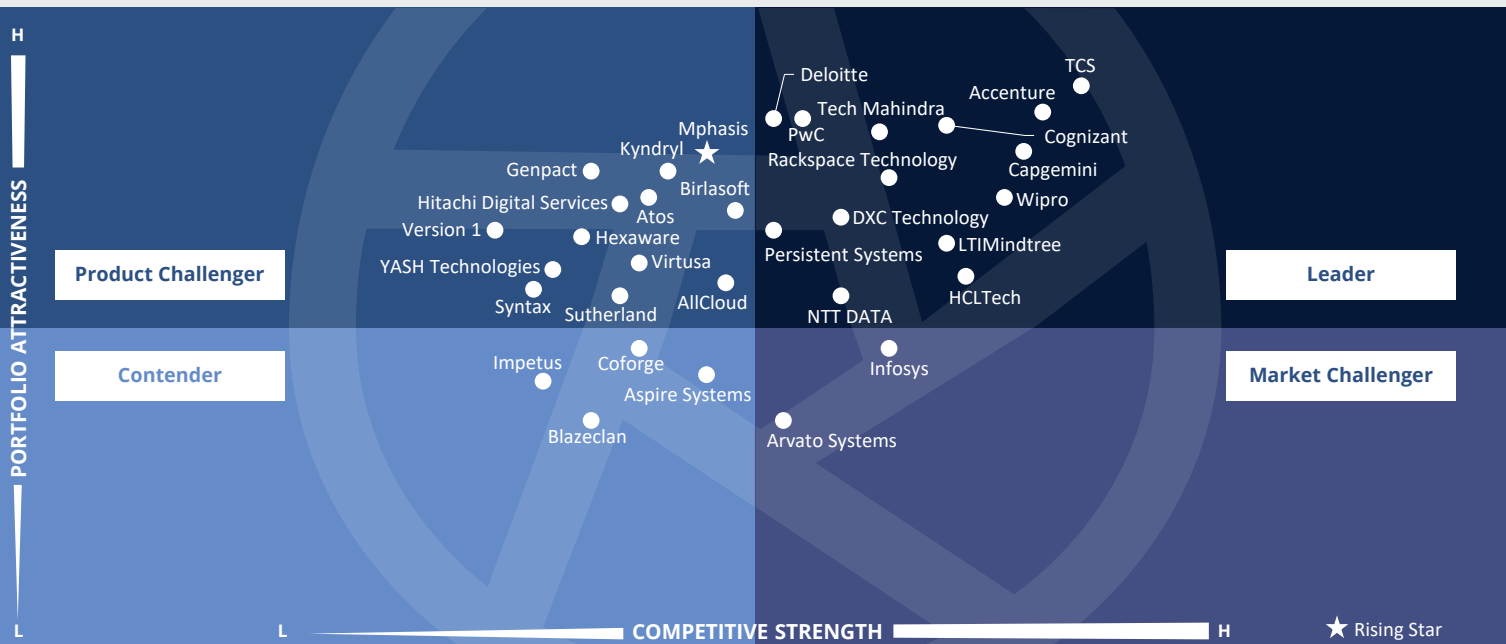
Technology professionals

Should read this report for a detailed assessment of the technical capabilities of AWS managed service providers, including their expertise in autonomous, ML-driven orchestration and management; proficiency in designing and managing secure public and multicloud architectures; and the scope 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 providers' ability to **deliver intelligent operations** for complex AWS estates. The focus is **proactively optimizing cost and performance through mature AIOps and FinOps disciplines**, ensuring resilience and efficiency.

Dr. Tapati Bandopadhyay



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 is advantageous
8. Apply AWS' operational best practices, including those aligned with **site reliability engineering (SRE)** principles
9. Experience in **solutions architecture** and **cost optimization (FinOps)**
10. **Migrate servers** and manage resource availability



AWS Managed Services

Observations

The paradigm of AWS managed services in the U.S. has shifted from reactive support to predictive operational intelligence, driven by AIOps. Providers are now differentiated by their ability to provide hyperautomated security and compliance, and proactive financial governance, ensuring that customer environments are stable and continuously optimized to deliver maximum business ROI.

Predictive AIOps becomes standard: The adoption of AIOps has matured from automated remediation to predictive prevention. Leading providers leverage services like Amazon CloudWatch Anomaly Detection and Amazon DevOps Guru to anticipate infrastructure issues, application performance degradation and potential security threats before they impact the business.

Hyperautomation for security and sovereignty: As security threats and data residency regulations intensify, providers deploy hyperautomation to maintain continuous compliance. They use AWS Security Hub and Amazon GuardDuty for threat detection and

automated remediation playbooks built on AWS Systems Manager. Furthermore, they are the key delivery partners for complex digital sovereignty requirements to ensure data remains within strict geopolitical boundaries.

Intensified focus on FinOps: FinOps has evolved into a more holistic value management office (VMO) concept, where providers manage the total business value of a customer's cloud investment. This extends beyond cost savings, including performance optimization, resource efficiency and sustainability. Providers rearchitect solutions to use more cost-effective options like AWS Graviton processors or serverless architectures.

From the 45 companies assessed for this study, 33 qualified for this quadrant, with 14 being Leaders and one Rising Star.

accenture

Accenture's managed services are underpinned by automation, secure foundations and scalability, offering robust post-migration operations, particularly in regulated industries such as insurance and healthcare.



Capgemini's Sustainable FinOps offering is the forward-looking element of its managed services. This practice combines traditional FinOps for cost optimization with GreenOps to measure and reduce carbon emissions, addressing a growing C-suite priority for sustainability.



Cognizant's Neuro® AI platform is the foundation of its managed services. The Neuro® Cybersecurity component is particularly notable, as it integrates disparate security tools into a single platform, using AI to enhance threat detection, risk management and compliance.



Deloitte's *secure-from-start* principle is a core tenet of its managed services. Its Cloud Account Management (DCAM) offering enhances AWS Control Tower by embedding automated CI/CD pipelines and broad policy enforcement directly into the account lifecycle.



DXC Technology's forward-looking aspect in managed services is the focus on platform engineering. Its Kubix framework, an open-source-based toolbox for building internal developer portals (IDPs), is designed to reduce the cognitive load on client development teams.



AWS Managed Services

HCLTech

HCLTech's highly integrated partnership with AWS is a unique factor of its GTM strategy, exemplified by its *2 in a box* model. This 1:1 alignment of dedicated sales and solution architect resources in each region ensures deep collaboration on client engagements.



LTIMindtree's managed services and AIOps platforms integrate with AWS CloudWatch to enhance IT operations through proactive monitoring, automated healing, and improved incident management, reducing downtime and costs.



NTT DATA's practice is anchored by a platform-led, automation-first approach that integrates AIOps and FinOps to deliver measurable efficiency gains. Expertise in regulated environments and a focus on proactive, predictive remediation are key strengths of the offering.



Persistent Systems' defining managed services feature is the practitioner-led *Seller + Doer* model. This approach ensures that technical experts are involved from the initial sales cycle through delivery, aiming to increase accountability and accelerate project kickoffs.



PwC differentiates its managed services with its deep cybersecurity and compliance practice. Holding all four AWS security Competencies enables it to embed robust, risk-led governance, a compelling proposition for regulated industries.



Rackspace Technology's core differentiator is its *Operate and Transform* model, which combines traditional 24/7 managed services with continuous modernization initiatives. This dual-focus approach ensures that customer environments are maintained and actively improved.



TCS' key MSP differentiator is its Cloud Exponence platform combined with flexible commercial models, such as RU-based pricing and a shared delivery model. This focus on directly addressing customer OpEx and providing financial transparency is a part of its strategy.



Tech Mahindra's CloudBlaze framework is a key differentiator, with specific, quantifiable claims to improve delivery speed by 75 percent and reduce TCO by up to 40 percent. The extensive automation of manual operational and migration tasks is central to its efficiency promise.



AWS Managed Services



Wipro strongly differentiates its managed services with a deep, integrated security practice. Its AWS Level 1 MSSP Competency and portfolio of proprietary security solutions like Cloud Guardian and CSAF highlight a security-first approach to cloud operations.



Mphasis (Rising Star) leverages an AI-first strategy to differentiate its managed services offering. A focus on embedding GenAI for TCO reduction and operational efficiency, combined with its industry-specific platforms, signals a strong innovation-led approach.





"DXC Technology redefines managed services on AWS by moving beyond traditional support to deliver intelligent, resilient platforms, integrating AI-driven operations and SRE principles with multicloud and sovereign environment management solutions."

Dr. Tapati Bandopadhyay

DXC Technology

Overview

DXC Technology is headquartered in Virginia, U.S. It has more than 127,200 employees across over 70 countries. In FY24, the company generated \$13.7 billion in revenue, with Global Infrastructure Services as its largest segment. DXC's managed services are built on an *Intelligent Operations* approach, supported by its proprietary platforms for data-driven automation. As an AWS MSP with over 30 AWS-validated qualifications, the company offers a flexible, modular portfolio from cloud operations to full-stack industry solutions. For the U.S. market, it provides a mature sovereign cloud offering for AWS GovCloud, supported by trained, U.S.-based personnel and coded security baselines.

Strengths

Proven delivery at scale: DXC's profound AWS expertise is validated by its recent achievement as an AWS Innovation Partner of the Year for 2024. It has executed over 600 customer launches on the AWS platform. This volume of successful deployments is driven by a strong team of more than 10,000 AWS-certified professionals.

Scalable service delivery across technology layers: DXC offers modular managed services. It provides various solutions from multicloud operations to full-stack infrastructure, security, applications and data management. The service delivery model is based on disciplines operating within an Agile framework, including platform engineering, SRE and DevSecOps. The services include multicloud orchestration, self-healing

capabilities, zero trust automations, FinOps for cloud financial management and LLMOps for AI model operations.

Enterprise-grade offerings on AWS

Marketplace: DXC demonstrates a growing presence on the AWS Marketplace with more than 20 solutions, allowing customers to deploy DXC's vetted services directly within their cloud environment easily. This diverse portfolio spans industry-specific applications like its recently launched (May 2025) DXC Assure SaaS insurance solutions, acceleration tools such as the AWS Staging Layer Accelerator, and core IT offerings, including the DXC Managed Cloud Services on AWS.

Caution

DXC Technology can better align its diverse services to deliver what clients value most, measurable results and outcome-based commercial agreements, by evolving its approach to a more collaborative partnership model, jointly defining problems and engineering solutions with clients.





AWS Enterprise Data Modernization and AI Services

Who Should Read This Section

This report is valuable for providers offering **AWS enterprise data modernization and AI services** in the **U.S.** 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 increasing accessibility of AI and ML, the democratization of GenAI and the proliferation of multiagent architectures have facilitated enterprises to develop custom models for competitive advantage.

IT professionals

Should read this report to better understand the relative strengths and weaknesses of AWS data modernization and AI service providers for effectively driving digital transformation initiatives, optimizing cloud investments, and strategically selecting 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 leverage this report to gain a clear understanding of providers' documented methodologies, accelerators, industry specialization with case studies demonstrating business outcomes, experience utilizing AWS GenAI services and active AWS-focused innovation programs. 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

Can utilize this report to gain insights into how providers shape data-driven strategies, drive innovation and empower organizations to unlock the full potential of their data assets. The report highlights key trends, best practices and emerging technologies, equipping analytics professionals to lead successful data initiatives and deliver actionable insights.

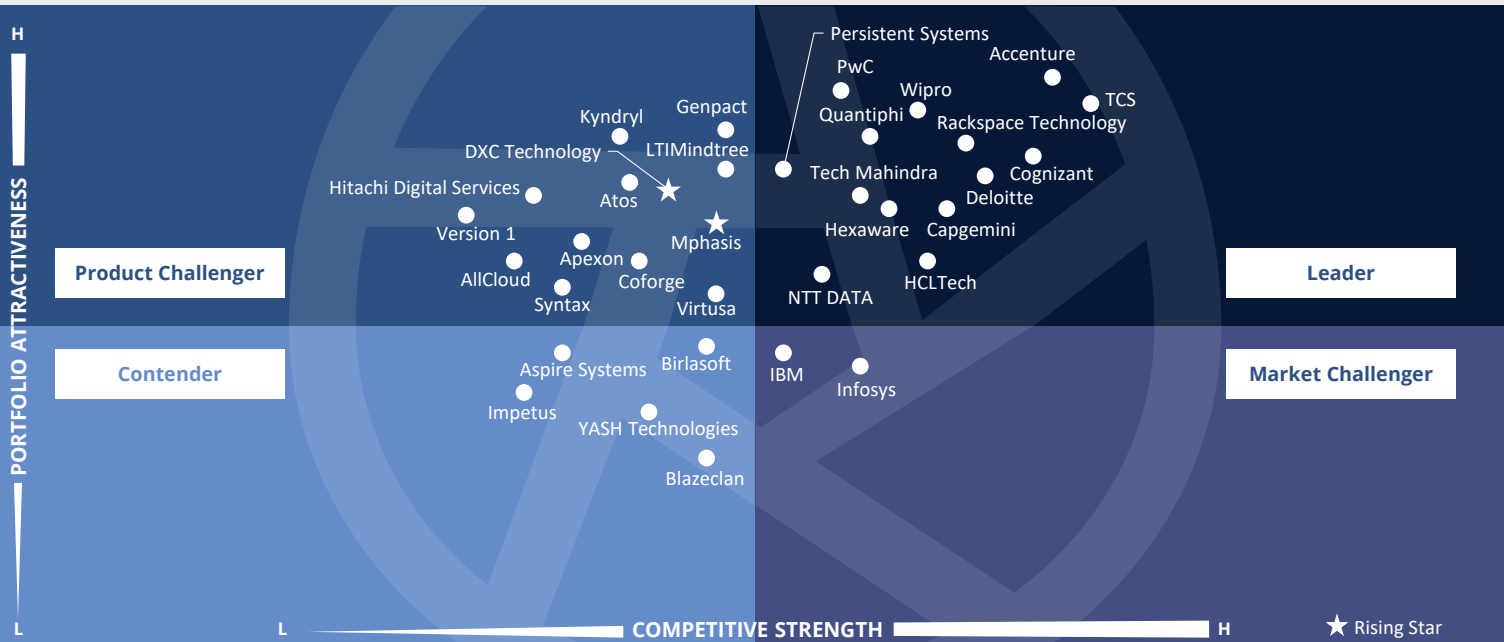
C-level executives

Should read this report to understand how AWS enterprise data modernization and AI service providers can help them achieve strategic objectives and maintain a competitive edge. This report provides a comprehensive overview of how data modernization and AI technologies drive innovation and create new revenue streams, enabling leaders to make informed decisions about technology investments and formulate effective strategies.



AWS Ecosystem Partners AWS Enterprise Data Modernization and AI Services

U.S. 2025



This quadrant assesses providers that enable **data-driven innovation** on AWS. It evaluates providers on creating an **AI-ready data foundation** and their **expertise in deploying production-grade GenAI and agentic AI systems** that drive business value.

Dr. Tapati Bandopadhyay



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



Observations

Providers have moved from experimentation to deploying production-grade GenAI on Amazon SageMaker and Amazon Bedrock to drive measurable revenue and productivity gains. Also, their focus has shifted from building data lakes to architecting unified, governed data ecosystems ready for GenAI and *agentic* AI systems. Their expertise now lies in operationalizing trusted AI, automating complex business workflows and unlocking real-time insights across the organization.

Ramp-up of GenAI platforms and accelerators:

There is a significant focus on building proprietary GenAI platforms and accelerators, leveraging AWS services like Amazon Q, Amazon Nova and Amazon SageMaker to drive enterprise adoption. Providers offer GenAI hubs and CoEs to provide access to multivendor LLM solutions and integrate with Bedrock for business-focused consumption tracking. Some have developed a GenAI studio with templates for customer prototyping. For enterprise knowledge management, solutions

are being built using intelligent search services like Amazon Kendra to unlock value from unstructured data.

Emphasis on agentic AI and multiagent systems: Companies actively develop complex agentic solutions and multiagent systems that enable more autonomous and intelligent automation. The focus is shifting to collaborative multiagent systems integrated with an agentic framework applied across the software development lifecycle.

Data as the foundation for AI: Recognizing that AI success depends on high-quality data, providers prioritize data modernization, unification and robust governance. A key strategy is building a *data unification framework* to ingest, govern and analyze data and provide a *360-degree view*.

From the 45 companies assessed for this study, 34 qualified for this quadrant, with 14 being Leaders and two Rising Stars.

accenture

Accenture, with a huge investment in AI and 25,000 certified professionals, accelerates enterprise data transformation through integrated cloud, data lakes, AI and ML and GenAI, particularly across life sciences and government sectors.

Capgemini

Capgemini's unique market position is its combination of deep product engineering (IT/OT) and large-scale data and cloud services. This allows it to deliver *Intelligent Industry* solutions that connect the physical and digital worlds, which is a key differentiator.

cognizant

Cognizant's distinctive investment is in Agentic AI with its Neuro® AI Multi-Agent Accelerator. This open-sourced, no-code development framework is designed to democratize and accelerate the creation of complex, multiagent AI systems for enterprises.

Deloitte.

Deloitte's unique factor in the data space is its strong emphasis on trust and risk management. The company leverages its extensive cybersecurity and privacy practice to help clients effectively manage and govern the risks associated with enterprise data and AI.

HCLTech

HCLTech's core strategy revolves around its Enterprise AI Foundry, a flagship offering for industrializing AI. This approach combines data, AI and cognitive infrastructure to help clients move beyond experimentation and scale their AI programs into production.

HEXAWARE

Hexaware's go-to-market strategy is key to its focus on creating scalable, GenAI-powered solutions for the AWS Marketplace. Offerings like its Intelligent Resolution Assistant and automated SAS-to-PySpark converter focus on productized, repeatable IP.



AWS Enterprise Data Modernization and AI Services



NTT DATA leverages a comprehensive portfolio of proprietary platforms and strategic consulting to drive data-led transformation. The offering focuses on the full data-to-value lifecycle, strongly emphasizing deploying scalable, industry-specific GenAI solutions.



Persistent Systems distinguishes itself with its iAURA 2.0 suite, an agentic AI framework for modernizing data and BI platforms. This product-led approach uses intelligent agents to automate complex migration and testing tasks, aiming to reduce reliance on tribal knowledge.



PwC's unique *Responsible AI* framework addresses governance, privacy, security and ethics, building trust and helping clients navigate the complexities of AI adoption, moving beyond purely technical implementation to strategic, risk-aware deployment.



Quantiphi's key strength is its clear identity as an AI and data specialist. Its strategy is heavily centered on a portfolio of proprietary, productized solutions like Baioniq (GenAI), QDox (IDP), and Q2Q (BI migration), which accelerate time to value for clients.



Rackspace Technology's strategic focus on *data first* as a prerequisite for trustworthy AI is a mature market position. Its Foundry for AI (FAIR) initiative emphasizes building robust, well-governed data foundations before scaling complex AI and GenAI workloads.



TCS strongly differentiates through its AI WisdomNext™ platform, which acts as a unified interface for clients to experiment across various GenAI models. This platform, combined with its extensive catalog of prebuilt industry solutions, accelerates AI adoption at scale.



Tech Mahindra's most significant differentiator is its investment in building sovereign LLMs for specific languages, such as Project Indus for Hindi dialects, built on SageMaker for Bedrock deployment. This showcases a unique capability in custom, culturally aware AI.



Wipro's strategy extends beyond tools to create industry-specific *Fields of Play* like Wealth AI and frameworks for Sovereign AI. This focus on packaging AI solutions for specific business outcomes and data sovereignty needs is a key differentiator.



AWS Enterprise Data Modernization and AI Services



DXC Technology's (Rising Star) unique solution is its productized SPARK IoT platform for CPG and manufacturing clients. This preconfigured solution accelerator, built in partnership with AWS, is designed to slash time to value for use cases like predictive maintenance and QC.



Mphasis (Rising Star) is powered by an extensive portfolio of proprietary AI and ML platforms and multiple algorithms on the AWS Marketplace. This IP-led approach, driven by dedicated R&D labs like NEXT Labs, places it at the forefront of applied AI and data modernization.



DXC Technology

Overview

DXC Technology is headquartered in Virginia, U.S. It has more than 127,200 employees across over 70 countries. In FY24, the company generated \$13.7 billion in revenue, with Global Infrastructure Services as its largest segment. DXC Technology's data and AI services focus on creating AI-ready data foundations and delivering business insights. Its offerings include BI, ML solutions and GenAI services built on SageMaker and Bedrock. A key solution is its SPARK IoT platform for manufacturing clients. The company offers data integration and governance services in the U.S. region.

Strengths

Industry-specific AI on AWS: DXC Technology takes a business-relevant industry-specific AI solutioning strategy for clients, exemplified by the cloud-native AI framework for pharmaceutical Regulatory Information Management (RIM) and the voice-to-voice translation prototype for Amazon Connect. These initiatives underscore a strategic focus on high-value, industry-specific applications that deliver measurable benefits such as cost reduction, efficiency gains and faster time to market.

Focus on scale: The DXC-AWS partnership drives higher PoC to production conversion rates. This collaboration effectively addresses both the *build* and *adopt* aspects of the enterprise AI journey.

Building on AgentCore and other

Bedrock services: DXC Technology, with its deep industry expertise and *AI Impact* methodology, serves as a critical bridge, translating AWS' advanced capabilities into secure, scalable and outcome-driven solutions for diverse enterprise clients. Its teams are helping clients execute on innovative agentic AI solutions on AI platforms like Amazon Bedrock AgentCore, alongside comprehensive developer tools such as Kiro and Strands Agents. These efforts aim to provide the most comprehensive and cost-effective AI development and deployment environment.

Caution

DXC Technology is helping clients adopt AI solutions correctly on AWS cloud-data-AI stacks, by focusing on build-test-run and *adopt*. This approach to scale, combined with the industry-specific solutions design approach, can be built into AI adoption frameworks for clients across different industries, with in-production benchmarks for everyday use cases.





AWS SAP Workloads

Who Should Read This Section

This report is valuable for providers offering **AWS SAP implementation and integration services** in the **U.S.** 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 adoption of AWS for RISE with SAP deployments is on the rise. Enterprises are incorporating advanced analytics and intelligence into their SAP workloads on AWS to drive business value while focusing on cost optimization.

Strategy professionals

Considering migrating or managing SAP environments on AWS within the U.S. should read the report to evaluate providers' ability to align SAP on AWS initiatives with broader enterprise goals, including supporting cloud-first strategies and RISE with SAP transformations. These professionals benefit from understanding providers' experience, relevant AWS-certified SAP competency and the ability to optimize business processes by integrating SAP and AWS services.

Digital professionals

Focused on enhancing the SAP ecosystem should use this report to identify partners with capabilities in implementing, customizing and supporting SAP applications on AWS, optimizing performance, and developing new business processes. Their 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.

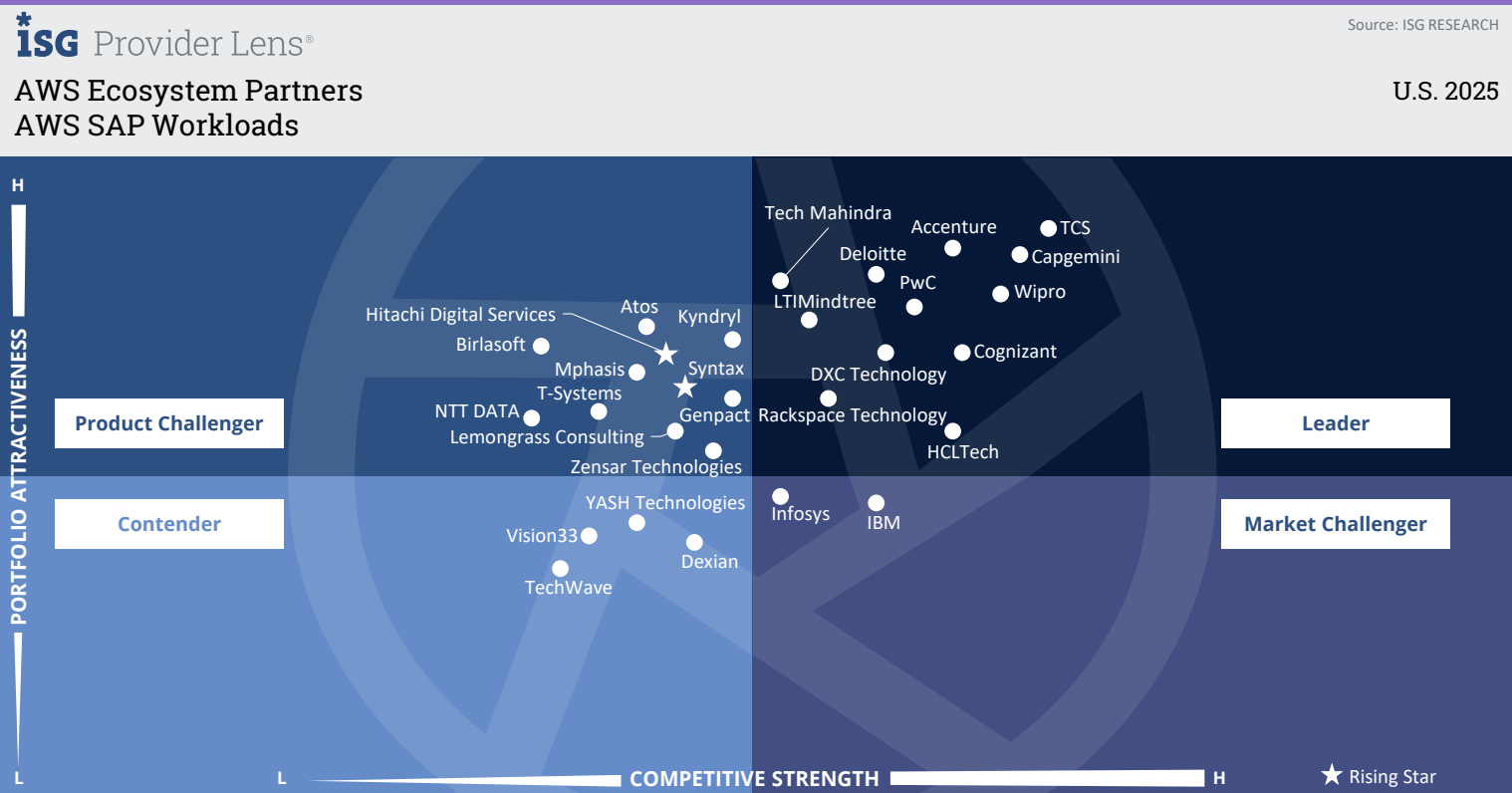
Technology professionals

Responsible for SAP systems should read this report to assess the technical proficiency of providers managing SAP on AWS in the U.S. 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

Sourcing services for SAP on AWS should read this report to evaluate potential partners' qualifications, including AWS-certified SAP competency. It is essential to evaluate the breadth and depth of their service portfolio, customer references, maturity of their pricing models and their ability to support specific SAP applications and services on AWS to select the most suitable partner.





This quadrant evaluates service providers' **integration capabilities, scalability and deployment efficiency for SAP workloads**, emphasizing **strategic advisory and implementation** for engineering core processes on AWS' infrastructure.

Dr. Tapati Bandopadhyay



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

AWS SAP partners' role has expanded beyond technical migration, focusing on accelerating business process reengineering through RISE with SAP and infusing the SAP environment with GenAI. They are unlocking the value of SAP data by integrating it with the broader AWS data ecosystem.

RISE with SAP as the digital transformation catalyst:

Providers are positioning RISE with SAP as a technical upgrade to S/4HANA and as the primary catalyst for business transformation. They provide strategic advisory and implementation services on the RISE offering, using it as a platform to redesign core financial and supply chain processes. They leverage AWS infrastructure's underlying reliability and performance, streamlined by tools like the AWS Launch Wizard for SAP.

Integration of AI and ML capabilities within SAP landscapes:

Providers are building custom solutions using Amazon Bedrock and SAP's native GenAI copilot, Joule, to create natural language interfaces that allow users to query inventory, generate financial reports or create

purchase orders using simple text commands. This infusion of AI drastically reduces training time, eliminates manual tasks and makes SAP processes more intuitive and efficient.

Turning SAP data into a composable enterprise asset:

Partners are breaking down the silo around SAP data, making it a composable asset for analytics across the enterprise. For example, they are architecting solutions that replicate SAP data in near real time into Amazon S3-based data lakes. From there, the data is integrated into Amazon Redshift and visualized in Amazon QuickSight, allowing businesses to blend ERP data with customer, IoT and third-party data to generate holistic insights.

From the 45 companies assessed for this study, 29 qualified for this quadrant, with 12 being Leaders and two Rising Stars.

accenture

Accenture delivers SAP transformations at scale with rapid migration frameworks and deep AWS-SAP integrations, highlighted by complex SAP workload migrations completed in under four months for U.S.-based clients.



Capgemini's depth of SAP practice is evident in its extensive library of *Path* solutions. These preconfigured, industry-specific accelerators (for example, EnergyPath and RetailPath) allow clients to accelerate value realization and lower TCO for their SAP transformations.



Cognizant's GenAI-powered Brownfield Conversion Express tool is a key innovation in its SAP practice. This SmartMove solution automates data validation and ABAP code remediation, aiming to reduce downtime by 30 percent and increase productivity in S/4HANA conversions

Deloitte.

Deloitte's *Near Zero Cost Migration* program is a compelling aspect of its SAP practice. This strategic collaboration with SAP and AWS is designed to accelerate the shift to RISE with SAP by directly addressing the financial barriers to entry for enterprise clients.



DXC Technology demonstrates a strong commitment to innovation by developing an extensive portfolio of AI-augmented applications for SAP BTP. Solutions like AI Virtual O2C Assistant and Smart Warehouse AGV embed intelligence directly into core business processes.

HCLTech

HCLTech's unique offering that showcases its market leadership is HyRISE. This solution allows clients to adopt the RISE with SAP model while hosting the infrastructure in its data center, directly addressing complex data security and sovereignty concerns.



AWS SAP Workloads



LTIMindtree's innovative feature in its SAP practice is DRAKE AI, a federated private GenAI solution trained on SAP data. This tool provides advanced capabilities like an API-driven transaction assistant and predictive recommendations for support channels.



PwC's primary differentiator is its deep business process and finance transformation expertise. Rather than leading with a technical lift-and-shift, it uses SAP on AWS as a catalyst for broader finance, supply chain and HR transformation, focusing on business value.



Rackspace Technology's 2025 SAP on AWS strategy capitalizes on the market's shift from migration to transformation. It solves the inherent complexity of multitier SAP landscapes by delivering expert application management for customers' FinOps, data integration and S/4HANA goals.



TCS' key differentiator in the SAP space combines RISE with SAP partner validation with its TCS Crystallus™ suite of preconfigured industry solutions. This blend of program expertise and proprietary accelerators is designed to de-risk and speed up transformations.



Tech Mahindra's standout capability is offering a unified management model for RISE and non-RISE SAP workloads. This integrated approach simplifies operations and pricing models for clients with complex hybrid SAP environments, addressing a significant market challenge.



Wipro's acquisition of SAP specialist Rizing provides it with deep, credible expertise. This, combined with the *Power of 3* near-zero-cost transformation model with AWS and SAP, creates a compelling value proposition of technical depth and financial incentive.



Hitachi Digital Services' (Rising Star) innovation is demonstrated by its targeted solutions for the automotive sector, including process improvement and plans for GenAI-powered SAP Copilots. This sharp focus on developing industry-specific use cases signals a strategic, value-driven approach.



Syntax's (Rising Star) *FreeMigration+* incentive is a highly aggressive and compelling differentiator. By offering core advisory and technical brownfield migration services at zero cost, it directly addresses budget constraints and lowers the barrier to entry for S/4HANA adoption.





Leader

“DXC Technology accelerates SAP modernization on AWS with industrialized S/4HANA migrations, FinOps-driven governance, AI-powered operations and industry-focused cloud accelerators for U.S. enterprises.”

Dr. Tapati Bandopadhyay

DXC Technology

Overview

DXC Technology is headquartered in Virginia, U.S. It has more than 127,200 employees across over 70 countries. In FY24, the company generated \$13.7 billion in revenue, with Global Infrastructure Services as its largest segment. DXC Technology offers a full-stack, automated PaaS for SAP on AWS, covering provisioning, lifecycle management, Basis and database layers. With over 25 years of experience managing more than 6,800 SAP environments, it has deep expertise and market-leading automation. The company supports traditional and RISE (SAP Cloud ERP) with SAP models and delivers services to U.S. clients in regulated industries via AWS GovCloud.

Strengths

Industrialized S/4 HANA migration: DXC Technology accelerates AWS adoption by leveraging a migration factory methodology and SAP data migration dashboards, enabling U.S. enterprises to modernize legacy ERP Central Component (ECC) systems with smooth transitions and high operational stability. Its Fast RISE Migration program and industry accelerators further streamline transformation and reduce risk during SAP cloud modernization.

Automated operations and lifecycle management: DXC Technology enhances workload observability through fully integrated real-time monitoring, AI-based search, lifecycle automation and self-service portals, ensuring predictive maintenance and minimizing downtime for SAP workloads on

AWS. It also implements automated event handling, remediation workflows and BTP monitoring with SAP Focused Run to improve operational agility and SLA adherence.

FinOps and security-driven governance: DXC Technology optimizes cost efficiency and regulatory compliance with cloud-native FinOps dashboards, AWS Elastic DR and SAP-focused security frameworks, delivering sustainable and secure SAP cloud operations for highly regulated U.S. industries. Its premium GreenOps initiatives and advanced SAP vulnerability and identity management services further strengthen governance and support enterprise sustainability goals.

Caution

DXC Technology can accelerate U.S. AWS SAP workload growth by expanding RISE complementary services, enhancing external observability, advancing SAP security and lifecycle automation, and scaling GreenOps and premium FinOps solutions to meet evolving enterprise and regulatory demands.





Appendix

The ISG Provider Lens® 2025 – AWS Ecosystem Partners study analyzes the relevant service providers in the U.S., based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

Study Sponsor:

Aman Munglani

Lead Authors:

Tapati B, Ashwin Gaidhani and
Sameen Mohammed Siddique

Editor:

Shaurya Vineet

Research Analyst:

Sameen M Siddique

Data Analyst:

Akshay Rathore

Project Manager:

Monika Pathak

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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 August 2025 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



Author and Editor Biographies

Lead Author



Dr. Tapati Bandopadhyay
Lead Analyst and Research Partner

Dr. Tapati Bandopadhyay has been an inventor, builder, practitioner and researcher in AI, intelligent automation and related domains, for 27+ years. She has been a global practice leader and executive-level advisor & consultant in AI-automation-cloud and services management, covering MLOps, AIOps, CloudOps, DataOps, ModelOps & DevOps metrics-driven practices and data and AI story-building and story-telling practices and tools.

As an ISG Lead Analyst on AWS and in AI-ML, consulting & managed services, she is responsible for defining and leading the ISG Provider Lens® branded research

projects for the US market. With more than 25 years of experience focused on AI, ML, data sciences and intelligent automation technology development, strategy and adoption practices across key industries, including BFSI, manufacturing & FMCG, retail, media, hi-tech & telco's, governments and healthcare services.

Lead Author



Ashwin Gaidhani
Lead Analyst and Research Partner

Ashwin Gaidhani has over 22 years of experience as an SME, advisor, practitioner and researcher in ESM and emerging technologies. He has worked as a global practice leader and an executive-level advisor in ESM, automation and cloud technologies, covering business transformation, ITES & ITIS, AIOps, CloudOps, metrics-driven practices. As an ISG Lead Analyst and research partner for studies related to hyperscalers such as AWS and Google, ESM services and platforms, and intelligent automation, he defines and leads the ISG Provider Lens® research projects for the markets in the U.S. and Europe.

With his extensive experience in service management, Ashwin has worked in technology operations, business consulting and advisory roles for large Global System Integrators (GSIs), independent software vendors (ISVs) and technology services companies. He is highly qualified and experienced in offering guidance on technology practice adoption across industries such as BFSI, manufacturing and retail.



Author and Editor Biographies



Research Specialist and Co-Author

Sameen Mohammed Siddique
Co-lead Analyst

Sameen is a co-lead analyst with ISG, with a key interest in the market and industry research across emerging technologies. She co-authors Provider Lens® studies on intelligent automation, AWS, Google Cloud, mainframes and others. She is also involved in authoring research articles, enterprise context and global summary reports with emerging technological landscapes. Her areas of expertise are automation, hyperscaler ecosystem, telecommunication, 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.



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.



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ISG (Information Services Group) (Nasdaq: III) is a leading global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth.

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