AWS Ecosystem Partners

A research report highlighting the significance of AWS partners to the success of AWS and its customers

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From cloud to data to insights, AI is revolutionising the AWS ecosystem and its impact on business

In recent years, AWS has made rapid advances in its cloud and AI technologies suite, alongside significant investment in its go-to-market approaches and partnership models. In parallel, the AWS provider ecosystem has largely risen to the challenge, with significant innovation in provider offerings and commercial models. The AWS ecosystem is increasingly dynamic and competitive, shaped by multiple forces of change. ISG discerns the following key trends:

- **Consolidation of generative AI and the rise of agentic AI:** AWS's suite of AI technologies has expanded dramatically over the past 12-18 months in scope, complexity and impact. Its AI suite includes Amazon Bedrock, a fully managed service for creating generative AI (GenAI) applications and AI agents from a large selection of foundation models; Amazon SageMaker, a fully managed service for building and deploying ML models; and Amazon Q, a GenAI-powered virtual assistant that can handle a wide variety of business process and IT tasks. To this portfolio, AWS has recently added Amazon Nova, a set of foundation models that can create images (Nova Canvas), carry out complex tasks (Nova Premier) or conduct natural conversations (Nova Sonics). These tools have now been augmented with agentic AI capabilities: for example, Amazon Q Developer can create intelligent coding agents; Amazon Transform creates agents for IT workload management; Amazon Nova Act creates agents for managing workflows around web browser operations.

  All of these tools are now a staple part of ecosystem providers' GenAI and agentic AI offerings, with a dizzying array of solutions evident. Perhaps the most significant impact has been in the development and use of IT itself, with providers using AWS core models and tools to create solutions that accelerate the software development lifecycle, such as code generation and testing. AWS AI tools are also increasingly

Enterprises see AWS technologies as key to **sustainability goals**.

used to speed up aspects of cloud migration and modernisation, for example, through automated IT assessment and app modernisation. They are starting to revolutionise IT operations through AI-powered anomaly detection, incident triaging and predictive maintenance. Beyond the IT sphere, AWS ecosystem providers help curate GenAI and agentic AI models for functional and domain solutions in industries as diverse as manufacturing, healthcare, and banking, financial services and insurance (BFSI).

- **Growing focus on cloud sovereignty:** In a world of heightened geopolitical volatility and policy uncertainty, enterprises in the UK and the rest of Europe are paying greater attention to cloud sovereignty, which is moving beyond its traditional focus on data residency requirements to also encompass operational and software aspects of the cloud environment. Most leading AWS providers now have a structured offering for sovereign cloud services, typically offered to providers in highly regulated sectors such as defence, healthcare or government. Some leading providers are also launch partners for the AWS European Sovereign Cloud, scheduled for launch at the end of 2025.
- **Emergence of industry-focussed solutions:** Industry clouds have been a feature of the Azure ecosystem for some time, but have not previously been prominent on AWS; however, this is now changing. Industry clouds are becoming a more common feature of the AWS ecosystem, with providers crafting industry-inflected cloud and data architectures highly tailored to different sectors' distinct business processes, analytical needs and regulatory requirements.
- **Pivot to cloud-native architectures:** A previous reliance on *lift and shift* migrations is starting to give way to increased enterprise preference for cloud-native modernisations on AWS, drawing on the panoply of DevOps, containerisation and operational tools available on Amazon Elastic Kubernetes Services (EKS). This trend is partly driven by cost and a desire amongst enterprises to rationalise sprawling legacy applications and benefits from the cloud-native networking, security and storage capabilities of the AWS cloud.
- **Full lifecycle approach to cost optimisation:** UK enterprises remain laser focussed on cloud costs. While FinOps as part of managed services remains as popular as ever, leading providers increasingly seek a full lifecycle approach to cost optimisation. Providers emphasise the importance of modernisation during migration, as *lift and shift* migrations or substantial legacy estates can leave enterprises with costly technical debt later on. Several providers also emphasise the importance of rightsizing the AWS cloud landing zones from the start and using services such as AWS Nitro for greater virtualisation of servers. Cost optimisation starts at the chip level, with providers seeking to move enterprise workloads to servers with high-performance cost characteristics, such as the AWS Graviton-based instances.
- **Serverless models gaining momentum:** Serverless, event-driven architectures on AWS are rising, as enterprises seek to dispense with the cost and time of managing underlying cloud infrastructure, provisioning and operations. Providers help create applications and microservices for enterprises using AWS Lambda and other tools such as AWS App Runner and AWS Step Functions to create and orchestrate distributed workflows.
- **AWS cloud for CX and hyperpersonalisation:** The AWS cloud is gaining popularity for its capabilities around CX, omnichannel services and hyperpersonalisation. More and more providers are using Amazon Connect for AI-assisted customer contact centre operations, posing a challenge to the traditional contact centre service providers. Providers can also harness Amazon's AI tools (such as Amazon Q) to automate certain aspects of contact centre operations and glean insights into customer behaviour and experiences.
- **Sustainability still matters:** Despite the apparent backlash in the US corporate world, sustainability and environmental, social and governance (ESG) issues remain

a key plank of enterprise IT strategies in the UK. Ecosystem providers emphasise AWS compute optimisation to help drive carbon-friendly cloud services. AWS AI tools are also increasingly used for various sustainability objectives, such as modelling climate risk or improving energy efficiency.

Despite considerable economic uncertainty, the UK market for AWS ecosystem providers remains generally buoyant. Demand for AWS-related services is fairly broad across different industries and sectors, with projects in energy, healthcare, life sciences, banking, insurance, telecoms and transport. A notable hotspot is the UK government and public sector, where demand for large-scale cloud and data transformations on AWS is strong in areas such as tax, welfare and security. Horizontal demand hotspots in the UK include VMware exits, FinOps, data modernisation and SAP migration. Several leading AWS providers are deeply embedded in the UK AWS ecosystem, with a regular cadence of leadership meetings, AWS-related workshops and sponsored events throughout the year.

Serverless, event-driven architectures on AWS are rising, as enterprises seek to dispense with the cost and time of managing underlying cloud infrastructure, provisioning and operations.

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
Aspire Systems	Not In	Product Challenger	Not In	Not In
Atos	Product Challenger	Leader	Product Challenger	Product Challenger
Birlasoft	Product Challenger	Product Challenger	Not In	Not In
BJSS	Product Challenger	Product Challenger	Product Challenger	Not In
Blazeclan	Product Challenger	Contender	Not In	Not In
Capgemini	Leader	Leader	Leader	Leader
Coforge	Contender	Not In	Not In	Not In
Cognizant	Leader	Leader	Leader	Leader
Deloitte	Rising Star ★	Product Challenger	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
DXC Technology	Leader	Leader	Leader	Leader
Endava	Not In	Not In	Contender	Not In
Fujitsu	Market Challenger	Market Challenger	Not In	Not In
GFT	Market Challenger	Not In	Product Challenger	Not In
HCLTech	Leader	Leader	Leader	Leader
Hexaware	Leader	Not In	Not In	Not In
Hitachi Digital Services	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Infosys	Market Challenger	Market Challenger	Market Challenger	Market Challenger
Kainos	Product Challenger	Product Challenger	Contender	Not In
Kyndryl	Product Challenger	Product Challenger	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
LTIMindtree	Leader	Product Challenger	Rising Star ★	Product Challenger
Mastek	Leader	Not In	Leader	Not In
Mphasis	Product Challenger	Contender	Product Challenger	Not In
N-iX	Product Challenger	Not In	Product Challenger	Not In
Noventiq	Product Challenger	Product Challenger	Product Challenger	Contender
NTT DATA	Leader	Leader	Market Challenger	Not In
Persistent Systems	Product Challenger	Product Challenger	Product Challenger	Not In
PwC	Product Challenger	Product Challenger	Product Challenger	Rising Star ★
Quantiphi	Not In	Not In	Leader	Not In
Rackspace Technology	Product Challenger	Product Challenger	Product Challenger	Contender

Provider Positioning

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	AWS Professional Services	AWS Managed Services	AWS Enterprise Data Modernization and AI Services	AWS SAP Workloads
Rebura	Product Challenger	Contender	Not In	Not In
Runibex Technology UK	Not In	Not In	Not In	Contender
Softcat PLC	Contender	Contender	Not In	Not In
TCS	Leader	Leader	Leader	Leader
Tech Mahindra	Product Challenger	Leader	Leader	Leader
Transact Technology Solutions	Contender	Not In	Not In	Not In
Version 1	Leader	Leader	Leader	Not In
Virtusa	Not In	Not In	Contender	Not In
Wipro	Leader	Leader	Leader	Leader
Zensar Technologies	Not In	Not In	Product Challenger	Not In

Key focus areas for AWS Ecosystem Partners 2025 study.

- AWS Professional Services
- AWS Managed Services
- AWS Enterprise Data Modernization and AI Services
- AWS SAP Workloads

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 democratising 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 specialising 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 specialisations 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 organisations 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 modernisation.

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.

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/ services and follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not in means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

AWS Professional Services

Who Should Read This Section

This report is valuable for service providers offering **AWS professional services** in the **U.K.** 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 generative AI (GenAI) expertise.

Digital professionals

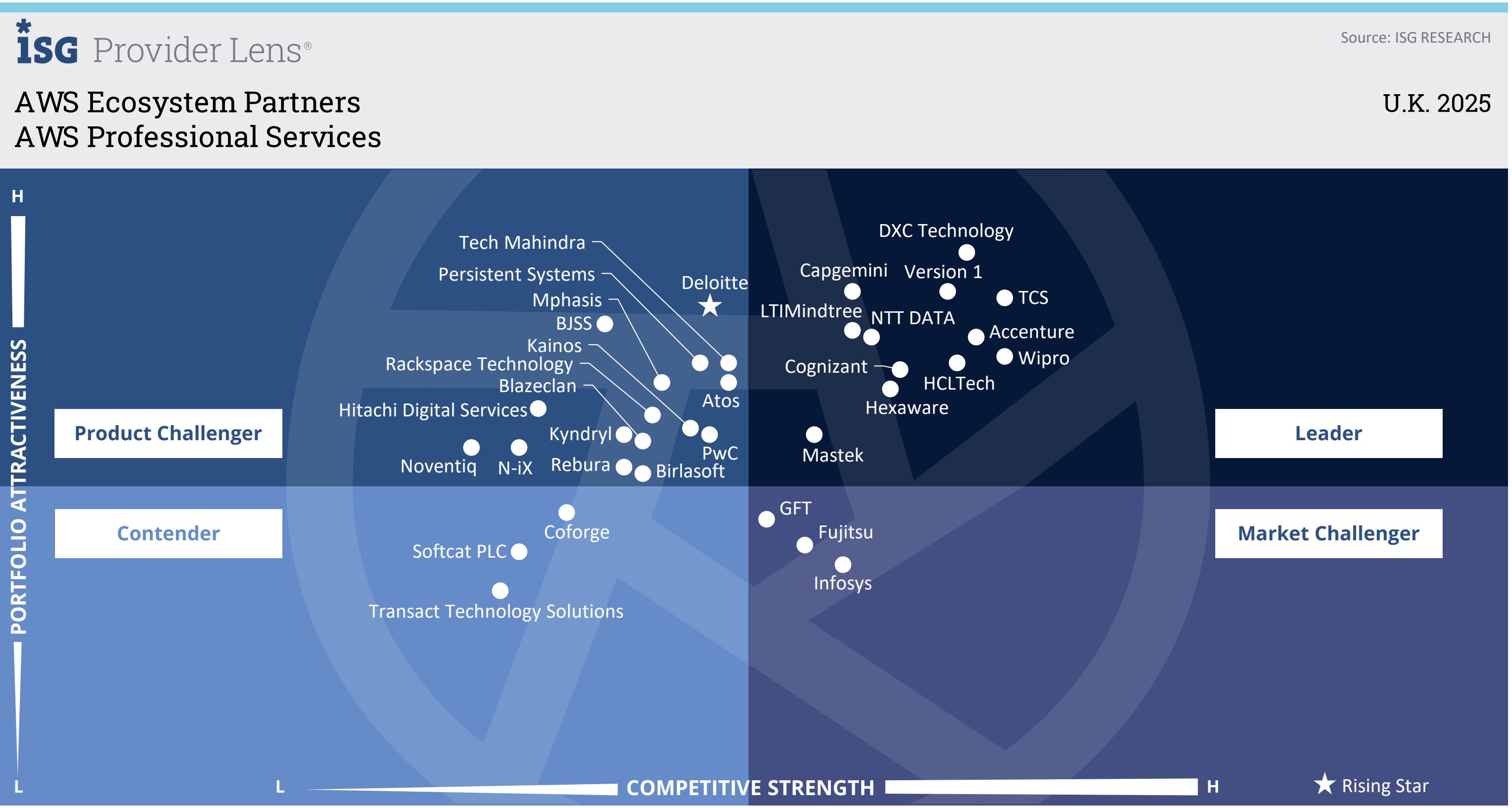
Should read this report to understand AWS professional service providers' relative strengths and weaknesses, which can help them drive digital transformation within their enterprises. Key areas involve their expertise in crafting, developing and modernizing intricate cloud architectures, including hybrid cloud 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 technologies, automated testing, deployment and change management is crucial.

Procurement professionals

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



This quadrant assesses service providers that offer **professional services** for AWS implementation projects in the UK. Providers increasingly incorporate **GenAI** and **agentic AI** capabilities into their migration and modernisation portfolios for AWS.

Mark Purdy

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 modernisation. 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 modernisation, 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-focussed 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 modernise **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 modernising enterprise workloads** for operational efficiency
11. Support for **sovereign cloud solutions, especially in Europe**

Observations

The AWS Professional Services quadrant continues to evolve in terms of the scope and complexity of services. ISG discerns several key trends influencing this quadrant. First, providers have noticeably stepped up their use of GenAI and, to some extent, agentic AI tools across many aspects of cloud modernisation on AWS, from initial landscape discovery to migration of legacy databases to software development to cloud governance and FinOps. Second, ecosystem providers increasingly seek to use a combination of AWS MAP funding and automation tools to create innovative financial models for AWS cloud modernisation, sometimes enabling enterprises to move to the cloud with zero CapEx requirements. Third, providers are ramping up their sovereign cloud capabilities and credentials, partly in response to client demand in highly regulated sectors but also driven by the expected launch of the AWS sovereign cloud scheduled for the end of 2025. Fourth, AWS' *power-of-three* model, involving collaboration between the global systems integrator (GSI), AWS and a third-party technology provider, is proving highly influential in shaping partnership models, with many providers highlighting their partnerships with third-party data or technology providers such as NVIDIA, Databricks and Snowflake.

From the 40 companies assessed for this study, 34 qualified for this quadrant, with twelve being Leaders and one Rising Star.

accenture

Accenture is a long-standing partner of AWS, driving large-scale, complex modernisations on the AWS cloud. Its strong position in the market is reflected in a host of AWS partner-of-the-year awards at AWS Reinvent in 2024.

Capgemini

Capgemini in February 2025, signed a new strategic collaboration agreement (SCA) with AWS, focusing on codeveloping new industry solutions for AWS in aerospace, energy and automotive.

cognizant

Cognizant has signed several SCAs with AWS, including an SCA for VMware migration to AWS, a smart manufacturing SCA, and an SCA for Cognizant's TriZetto healthcare management platform.

DXC TECHNOLOGY

DXC Technology has significant experience in implementing sovereign-cloud-type solutions for enterprises and public sector clients in the UK. It is a launch partner for AWS European Sovereign Cloud.

HCLTech

HCLTech has recently added the Life Sciences and Resilience Services Competency to its existing AWS Competencies, bringing its total to 15.

HEXAWARE

Hexaware has infused a slew of GenAI and agentic AI features into its Amaze® and RapidX™ platforms for cloud modernisation on AWS.

LTIMindtree

LTIMindtree has secured significant MAP funding for AWS cloud modernisations and has built up an array of AI-powered modernisation accelerators.

Mastek

Mastek takes a highly cloud-native approach to AWS migrations and modernisations. It has particular expertise in AWS modernisations for the UK government and public sector agencies.

NTT DATA has notable capabilities in mainframe modernisation via its UniKix Software Solution Suite. It has also introduced a Cloud Migration Factory heavily infused with AI-powered automation capabilities.

TCS has three SCAs with AWS, covering cloud modernisation, big data and VMware exits, enabling it to bring significant coinvestment to client cloud modernisations on AWS.

Version 1

Version 1 plans to invest GBP40 million in the UK, expanding its technology hubs in Belfast, Birmingham, Edinburgh, Manchester and Newcastle. It has been actively investing in infusing AI elements across its AWS portfolio of professional services.

Wipro has signed six SCAs with AWS, coinvesting with AWS in funding initiatives for client enterprise modernisation and industry solutions.

Deloitte has recently entered into a multiyear SCA with AWS, with plans to hire more than 800 certified AWS specialists globally and build AWS CoEs in Sub-Saharan Africa, Spain and Central Europe.

DXC Technology

Leader

"DXC Technology stands out as a leader in professional services on AWS, consistently demonstrating its expertise and experience in AWS cloud technologies for complex enterprise migrations and modernisations."

Mark Purdy

Overview

DXC Technology is headquartered in Virginia, US. 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 is an AWS Premier Tier Services Partner. It has 13 AWS Competencies, including Migration and Modernization Consulting, Mainframe Modernization Consulting, DevOps Consulting, Security Consulting, IoT Consulting and Resilience Services. The company won a 2024 AWS Innovation Partner of the Year award. It has a large business for its AWS professional services in the UK.

Strengths

Well-targeted modernisations: DXC offers an approach to cloud modernisation on AWS that is intricately tailored to the cloud maturity and industry of each client, for example, clients with little cloud experience that are looking to exit their data centres or clients that are already on the cloud but want to pivot their modernisation efforts in response to industry disruption. This approach is complemented by industry-specific cloud readiness and risk assessments and a plethora of industry-specific cloud solutions on AWS.

Compelling client impact: DXC is well versed in large-scale, complex modernisations on the AWS cloud. For a major financial services firm in the UK, it partnered with AWS to deliver a hybrid cloud architecture using AWS-native services, with GenAI-powered regulatory reporting and FinOps governance for efficient use of cloud resources. DXC estimates that the engagement yielded a 25 percent reduction in costs, while also cutting regulatory reporting time by 40 percent through greater use of automation and AI.

Sovereign Cloud expertise: DXC has significant experience working on AWS cloud engagements for UK public sector or highly regulated clients with rigorous data access and processing requirements. It is also one of the launch partners for the AWS European Sovereign Cloud, which is scheduled to launch towards the end of 2025.

Caution

DXC Technology should continue, if not accelerate, using GenAI and agentic AI elements across its overall portfolio of professional services on AWS, especially in cloud implementations, migrations and modernisations.

AWS Managed Services

Who Should Read This Section

This report is valuable for service providers offering **AWS managed services** in the **U.K.** 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 the increasingly complex hybrid cloud and multicloud environments.

IT professionals

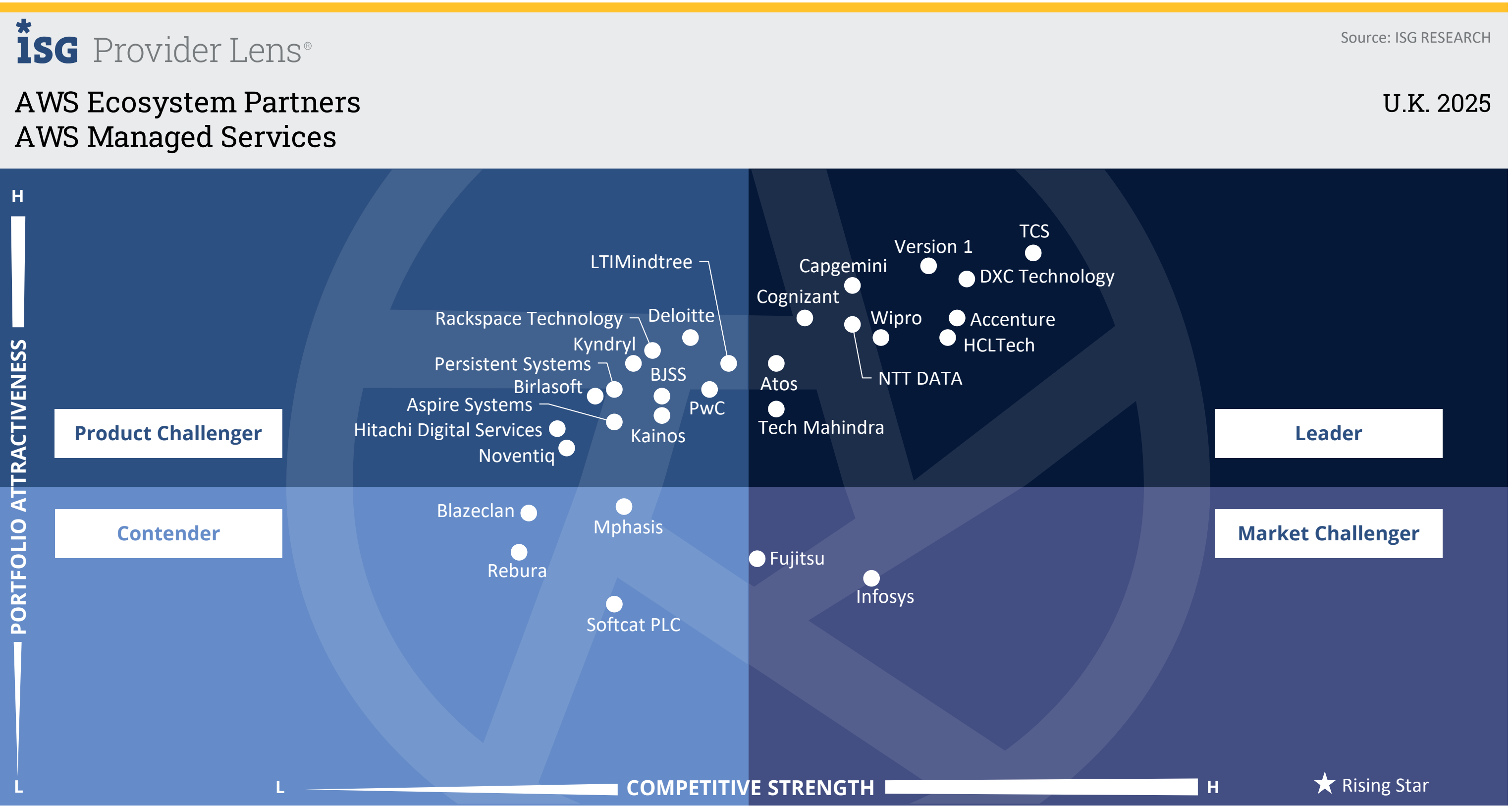
Should read this report to understand AWS managed service providers' relative strengths and weaknesses, which can help them drive digital transformation in their enterprises. Evaluating their utilization of advanced cloud management platforms (CMPs), automation tools, and proficiency in areas like MLOps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

Technology professionals

should read this report to understand AWS managed service providers' positions and their impact on enterprise transformations, alongside cloud migration benefits. This encompasses their skills in autonomous, ML-driven orchestration and management, expertise in designing and managing secure public cloud and multicloud architectures, and range and availability of 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 assesses providers that offer **managed services** for the AWS cloud. Providers are rapidly pivoting to **AI-infused** managed services on AWS, incorporating capabilities such as **AI-powered anomaly detection, reporting** and **self-healing**.

Mark Purdy

Definition

This quadrant covers MSPs offering professional services that encompass orchestrating, provisioning, monitoring, managing and optimising 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 optimise 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 utilisation, 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. Have the ability to measure and optimise cloud-related carbon emissions on AWS(preferred not mandatory)
8. Apply AWS' operational best practices, including those aligned **with site reliability engineering (SRE) principles Architecture** solutions and **optimise** costs **(FinOps)**
9. **Migrate servers** and manage resource availability

Observations

After a period of relative stasis, managed services on AWS have been turbocharged by several key technology and regulatory developments over the past year. One key trend is undoubtedly the role played by AI technologies in infusing intelligent automation capabilities across many aspects of the IT operations lifecycle, with intelligent automation powering areas such as IT observability, ITSM, security, reporting, incident remediation and self-healing IT. A second key trend is the growing demand for sovereign cloud services, especially in highly sensitive sectors such as government and defence. The launch of the AWS European Sovereign Cloud will undoubtedly give added impetus to this demand for sovereign cloud services. Third, cloud costs remain a particular concern for enterprises in the UK, driving a strong interest in providers' FinOps capabilities and flexible commercial models for managed services. Fourth, many providers emphasise their ability to provide industry-inflected cloud solutions, addressing the particular needs of enterprises in sectors such as banking, retail and energy.

From the 40 companies assessed for this study, 29 qualified for this quadrant, with eleven being Leaders.

Accenture is a seasoned provider of managed services on AWS, with a strong focus on managed security services. It also offers multiple industry and functional solutions.

Atos has gained several new AWS Competencies over FY24, notably the Digital Sovereignty Services and Resilience Services Competencies.

Capgemini brings a clear sustainability theme to its overall suite of managed services for the AWS cloud, with strong use of FinOps and GreenOps services and tools.

Cognizant has infused high levels of automation and GenAI and ML capabilities into its Skygrade® multicloud management platform.

DXC Technology has significantly enhanced many aspects of its managed services on AWS, notably by adding a raft of AI and automation features.

HCLTech has recently gained the Resilience Services Competency. It has also infused GenAI- and agentic AI-driven automation across many aspects of its managed services on AWS.

NTT DATA offers a highly flexible delivery approach for its managed services on AWS, blended across technology, people, platforms and delivery locations.

TCS is a seasoned provider of managed services on AWS, serving multiple clients across the UK in sectors such as finance, retail and life sciences.

Tech Mahindra has several SCAs covering jointly developed IP and go-to-market collaboration in areas such as telco network cloud, sports cloud and VMware exits.

Version 1

Version 1 has developed its ASPIRE managed services platform, infusing cloud operations with automation, classic AI, GenAI, process mining and virtual chatbots.

Wipro has incorporated many GenAI-powered intelligent automation features and solutions into its managed services offering for AWS and multicloud setups.

Leader

"DXC Technology is a leader in managed services on AWS, offering a highly modularised portfolio of service features with a strong infusion of AI and automation capabilities."

Mark Purdy

DXC Technology

Overview

DXC Technology is headquartered in Virginia, US. 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. It is an AWS Premier Tier Services Partner with 13 AWS Competencies, including Cloud Operations Services, Level 1 MSSP Consulting, Security Consulting, Resilience Services, Consumer Goods Services, Financial Services Consulting and Automotive Services. The company is an AWS MSP and an AWS Public Sector Solution Provider. It has a large client base for its AWS managed services in the UK, and a substantial number of professionals are dedicated to this.

Strengths

Modular approach: Recognising that clients often have their favoured tools for aspects of cloud services, DXC Technology has significantly enhanced the modularity of its managed services on AWS to give enterprises greater scope to *mix and match* different elements of their cloud environment. To this end, it has added many new features, such as integration layers for multicloud orchestrations and automation for proprietary observability tools such as Dynatrace.

GenAI-powered managed services: DXC has embedded many new AI and automation elements into its managed services for AWS, including enhanced self-healing capabilities, GenAI chatbots for cloud engineers and automated carbon reporting tools.

Experimentation sandbox: To help clients experiment with new software and AI solutions while safeguarding their operations, DXC has introduced LLMOps for AWS. It provides a sandbox environment where enterprises can develop and test new code, use LLMs or train and fine-tune models using automated pipelines in an isolated environment.

Client impact: DXC is a seasoned provider of AWS complex modernisations. For a major UK insurance underwriter, it is building a microservices-based cloud and data platform on AWS with an insurance partner. This platform will handle over 1.6 million claim notifications and 2.3 million premium transactions.

Caution

DXC Technology has made impressive strides in infusing AI into its managed services portfolio. Still, the company must maintain the momentum of its investments given the disruptive potential of agentic AI over the next several years.

AWS Enterprise Data Modernization and AI Services

This report is valuable for service providers offering **AWS enterprise data modernization and AI services** in the **U.K.** 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 U.K. enterprises' use of AWS services for data analytics and ML, leveraging AutoML and serverless tools for efficiency, while prioritizing data security with Macie and PrivateLink.

IT professionals

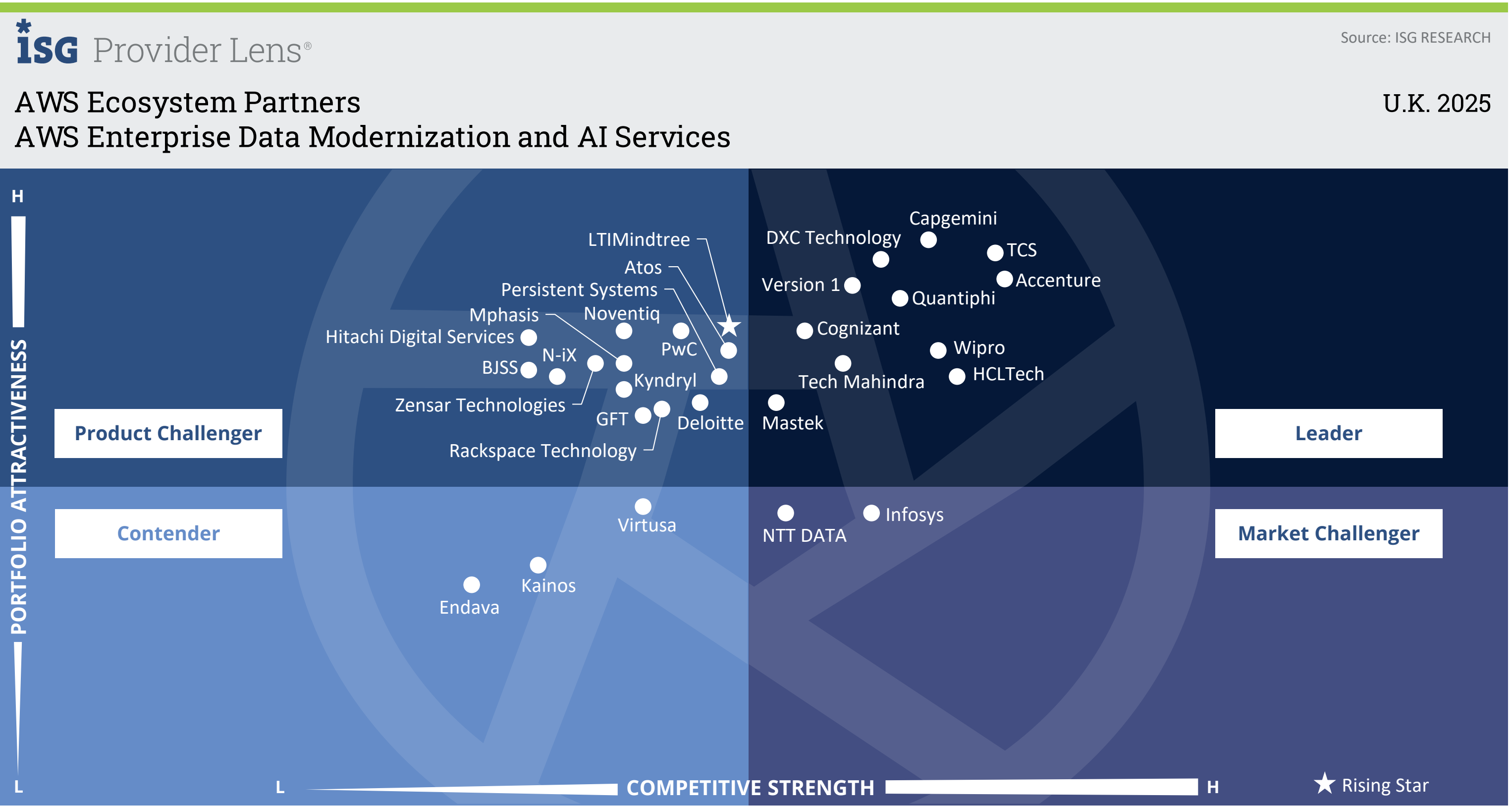
Should read this report to understand the relative strengths and weaknesses of AWS data analytics, AI and ML service providers for driving digital transformation in enterprises. This will allow them to effectively drive digital transformation initiatives; optimize cloud investments; and strategically 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 the U.K. This understanding can 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, empowering analytics professionals to lead successful data initiatives and deliver actionable insights.



This quadrant assesses service providers that offer **data modernisation** and **AI services** using the AWS technology suite. Providers emphasise their **accelerators** for **data modernisation**, the development of **industry** and **functional** AI use cases.

Mark Purdy

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 customised ML solutions.

Enterprise data ecosystems relate to providers' proficiencies in implementing and optimising data platforms such as Amazon Redshift, Amazon RDS and Amazon Glue, emphasising 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. Customised 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 modernisation or AI implementation projects** involving data modernisation 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 specialised **expertise in industry verticals** with documented case studies highlighting measurable business outcomes achieved through AWS data and AI implementations
8. Demonstrate **experience utilising AWS GenAI services** to address and resolve business problems
9. Maintain an active **AWS-focussed innovation programme**
10. Deploy and manage **IoT solutions on AWS** with competency and capability

Observations

The enterprise data modernisation and AI services space represents the AWS UK ecosystem's most dynamic and competitive quadrant. The biggest disruptor by far is undoubtedly the rise of GenAI and, increasingly, agentic AI models and applications, which have opened up new possibilities to drive increased enterprise productivity and value creation. Ecosystem providers support this AI revolution in many different ways: by forming partnerships with upstream LLM providers; by coinnovating with clients on use case creation, prototyping and production; or by providing compliance and policy support. Within this quadrant, providers heavily emphasise their *power-of-three* capabilities, underlining their experience of working with AWS and third-party technology providers to deliver integrated solutions to clients. Despite the intense interest in AI, many enterprises still struggle with legacy or patchwork data systems. Therefore, a large proportion of GSI work is still taken up by data modernisation projects, often involving AI-powered accelerators to help hasten legacy data migration to the AWS cloud.

From the 40 companies assessed for this study, 30 qualified for this quadrant, with 11 being Leaders and one Rising Star.

Accenture, in August 2024, announced a collaboration with AWS to develop a new responsible AI platform, covering AI governance, risk assessment, testing, and policy and regulatory compliance.

Capgemini has been highly active in developing agentic AI solutions on AWS, with use cases in production across sectors such as banking, manufacturing and hospitality.

Cognizant has invested significantly in agentic AI, including development of its Neuro® Multi-Agent Accelerator that works on top of AWS Bedrock.

DXC Technology has invested significantly in data and AI accelerators for AWS and has created a range of vertical and horizontal solutions for GenAI and agentic AI.

HCLTech offers a strong focus on enterprise data modernisation on AWS, with extensive tools, templates and data infrastructure spanning the entire data lifecycle.

Mastek

Mastek has developed a GenAI-powered Data Lake Launchpad, designed to turbocharge the onboarding of legacy databases into modern data lakes.

Quantiphi has achieved the Conversational AI Services Competency on AWS, and it is also a service delivery partner for Amazon Connect, AWS' contact centre transformation offering.

TCS has invested significantly in building a portfolio of GenAI and agentic AI solutions based on AWS technologies, and it also has an established track record of data analytics and AI projects for clients in the UK.

Tech Mahindra has been ramping up its AI and data talent on AWS. Its has also infused AI features throughout its D.A.H.L.I.A data modernisation platform.

Version 1

Version 1 has rapidly ramped up its GenAI and agentic AI capabilities, carrying out a slew of projects for major clients using AWS technologies over the past year.

Wipro has strongly pushed to use AWS AI technologies to create new horizontal, industry and functional use cases for enterprises.

LTIMindtree (Rising Star) has built a well-balanced portfolio of enterprise data and classical and GenAI solutions, with its Scarlet Data Modernisation Platform a particular highlight of its overall approach.

Leader

"DXC Technology is a leader in enterprise data modernisation and AI services on AWS, bringing an array of powerful data and AI accelerators and innovative AI-powered industry solutions."

Mark Purdy

DXC Technology

Overview

DXC Technology is headquartered in Virginia, US. 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 is an AWS Premier Tier Services Partner. It has 13 AWS Competencies, including Generative AI Services, Consumer Goods Services, Financial Services Consulting and Automotive Services. The company is an AWS Public Sector Solution Provider. It has a significant business for its enterprise data modernisation and AI services on AWS in the UK.

Strengths

Data and AI accelerators: DXC is notable for its significant investment in data and AI accelerators for AWS. A prime example is its AWS MLOps Quick Start solution, codeveloped with AWS, which provides an infrastructure-as-code MLOps environment that can be quickly deployed and customised for enterprise ML use cases. The solution includes features such as automated ML pipelines, model repositories, model monitoring and model experimentation spaces.

Industry and horizontal AI solutions: DXC has created various vertical and horizontal GenAI and agentic AI solutions. Built on Anthropic's Claude LLM and Bedrock, DXC's Oil and Gas Assistant is a conversational assistant allowing oil and gas enterprise users to query and analyse energy data encoded in multiple forms, such as text, table or geographic information system (GIS) files. The company also reports that its Agentic AI Modernization tool, which uses Amazon Bedrock and DXC's AI capabilities, can speed up migration analysis by up to 25 percent compared with traditional approaches.

Demonstrated client impact: DXC is a seasoned provider of data modernisations on AWS. For a world-famous sports club in the UK, it created a Content Management System and Digital Asset Management System on AWS, providing a variety of data insights and driving a 78 percent increase in club app users.

Caution

Given its increasing emphasis on business transformation and enterprise value creation, DXC Technology should consider introducing a greater element of risk-sharing or gainsharing into its overall commercial mix for AWS data and AI services.

AWS SAP Workloads

Who Should Read This Section

This report is valuable for service providers offering **AWS SAP workloads** in the **U.K.** 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. U.K. enterprises are migrating SAP applications to AWS for modernization, using automation and AI. While opting for hybrid solutions, partnerships with AWS and SAP address transformation challenges.

Technology professionals

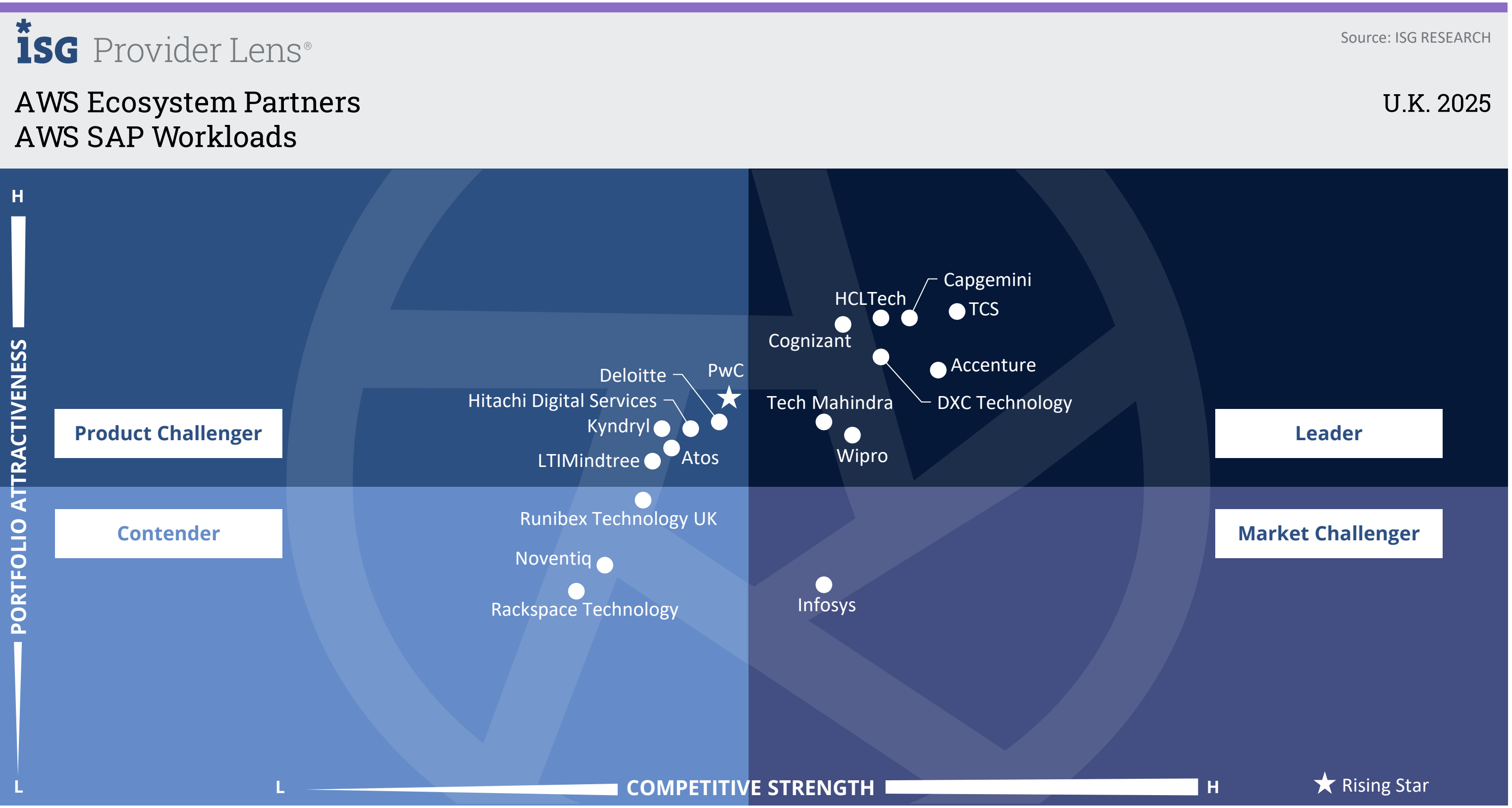
Should read this report to understand AWS SAP implementation and integration service providers' relative strengths and weaknesses for driving digital transformation in enterprises. The expertise in applying DevOps, automation and cloud-native design principles within the SAP context is critical for improving 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 comprehend the current landscape of AWS SAP implementation and integration service providers in the U.K. To select the most suitable partner, it is essential to evaluate the breadth and depth of their service portfolios and customer references, the maturity of their pricing models and their ability to support specific SAP applications and services on AWS.



This quadrant assesses providers that offer services for **SAP workloads on AWS**. Providers emphasise their use of **accelerators** to ease the transition of SAP workloads to the cloud and support **RISE with SAP constructs**.

Mark Purdy

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 optimise, 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, customise, 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

The quadrant tends to have relatively few Leaders, reflecting the scale and scope of SAP experience needed to operate in this highly complex area. All the Leaders in the quadrant have a long-established relationship with SAP and AWS. The SAP on AWS provider ecosystem continues to evolve and is driven by several key developments. First, the increased prominence of RISE with SAP, SAP's SaaS-based service delivery model, has prompted many providers to create specific advisory and delivery models for RISE on the AWS cloud. This has also been spurred by AWS campaigns to encourage more enterprises to move their AWS workloads to the cloud, either via a cloud-native approach or via a RISE construct. Second, nearly all leading providers heavily emphasise using accelerators — which may be AI-powered assets or methodologies — to quicken the migration of SAP workloads to AWS, with different approaches often used for brownfield and bluefield migrations. Third, agentic AI and GenAI have begun appearing in provider offerings for SAP on AWS, for example, in case management and data validation.

From the 40 companies assessed for this study, 18 qualified for this quadrant, with eight being Leaders and one Rising Star.

Accenture is a seasoned provider of services for SAP workloads on AWS, using AI and automation features to accelerate SAP migrations and modernisations.

Capgemini is a partner for the AWS accelerator programme for RISE, with significant investments in accelerators and migration methodologies.

Cognizant is notable for its commercial and deployment versatility for SAP engagements on AWS, with solutions for greenfield, bluefield and brownfield deployments.

DXC Technology has invested significantly in building accelerators for SAP on AWS, a prime example is its DXC Fast RISE with SAP for moving legacy SAP systems to RISE with SAP on the AWS cloud.

HCLTech has a well-established, 360-degree relationship with SAP. It has crafted various constructs for RISE with SAP on AWS engagements.

TCS has pioneered significant innovation in SAP services for AWS, notably harnessing GenAI to create tools that improve the efficiency and user experience of the SAP environment.

Tech Mahindra has developed a highly modular approach to RISE with SAP on AWS. It has also made significant GenAI and agentic AI investments in its SAP platforms and services.

Wipro emphasises using accelerators, notably its *Safe Passage* framework, to assist enterprises in migrating SAP workloads to the AWS cloud.

PwC (Rising Star) offers SAP services with a strong sustainability theme, such as Responsible Design and Production. It has also invested significantly in GenAI solutions for SAP.

DXC Technology

Leader

"DXC Technology is a leader in SAP services on AWS, demonstrating deep expertise across the SAP technology stack and bringing a high degree of commercial and technical flexibility to its client offerings for SAP on AWS."

Mark Purdy

Overview

DXC Technology is headquartered in Virginia, US. 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 has 13 AWS Competencies, including SAP Consulting, Migration and Modernization Consulting, Security Consulting. DXC Technology is an SAP global partner with more than 5,000 SAP certifications worldwide and over 15,000 SAP professionals. It has a large business for its SAP workloads on AWS in the UK and a significant number of AWS-certified professionals in the region.

Strengths

Extensive SAP experience: DXC is a seasoned provider of SAP workloads on AWS, and it has more than 25 years of experience in SAP Basis and infrastructure management. It operates more than 6,800 SAP environments worldwide, and has over 5 million users of its SAP services. It also offers a sovereign-type SAP service on the AWS government cloud for government, public sector and regulated clients.

SAP accelerators: DXC offers several accelerators for AWS migration and modernisation of SAP workloads on AWS. A notable example is DXC Fast RISE with SAP, which draws on best practice tools and accelerators to reduce the cost and time of migrating from legacy systems to SAP S/4HANA on AWS.

Service flexibility: DXC offers a variety of models for SAP workloads on AWS. Its primary offering is a PaaS model, which brings a range of automation technologies for provisioning, running and managing SAP workloads on AWS. The company also provides a complete lifecycle of services for RISE with SAP constructs on AWS, including assessment, migration, run services and modernisation. Customers can also run some SAP services natively on AWS while using RISE on AWS for other SAP services.

Caution

DXC Technology should consider showcasing more client examples and credentials for its SAP capabilities and services on AWS in the UK. It should also consider how the rise of agentic AI and multiagent models might influence the future direction of its SAP services on AWS.

Appendix

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

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The research and analysis presented in this report includes research from the ISG Provider Lens® program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. The data collected for this report represent information that ISG believes to be current as of 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

Mark Purdy
Principal Analyst, ISG

Mark Purdy is a Principal Analyst for Europe at ISG Provider Lens® and brings more than 30 years of experience working on economics and technology research in business and government. Mark has a particular focus on next-generation technologies, especially artificial intelligence and intelligent automation, digital twins, digital olfaction, machine learning, virtual reality and edge computing. Before joining ISG, Mark was chief economist at a major consulting firm for 20 years, leading work on the economic impact of AI and business futures, among other topics.

He has published widely in tier-1 media and business publications such as Harvard Business Review and Sloan Management Review on subjects such as the agentic AI and the future of work, AI-led decision-making, and the impact of AI on national competitiveness and techno-political competition.

Enterprise Context and Global overview Analyst

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Lead Analyst, ISG

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.

Study Sponsor

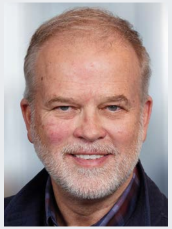
Aman Munglani

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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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.
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For more information, visit isg-one.com.

ISG Provider Lens®

OCTOBER, 2025

REPORT: AWS ECOSYSTEM PARTNERS