

AWS Ecosystem Partners

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



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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.



AWS 2025 BLUEPRINT

CORNERSTONES

QUADRANTS

AREAS

INNOVATION (Intellectual property – Accelerators – Responsible AI)	PARTNERSHIPS & ENGAGEMENTS (Tiers – Types)	COMPETENCY AND TALENT (Resources – Certifications)	INDUSTRY FOCUS AND ALIGNMENT (Verticals – Function)	EXPERIENCE AND ENGAGEMENT (Functionality – Capability)	SECURITY & PRIVACY (Data – Access – Environment)	AWS Professional Services	Consulting (Business & Technology)			Architecture (Design & Build)		Migration & Deployment Methodology (Hybrid & Multicloud)							
							Strategy & Transformation (Maturity Assessment & Road map)	Industry & Domain	ESG - GRC	Compute – Storage – Network Integrated Architecture		Modernization (E.g. Mainframes)	Applications & Data Workloads	Sovereign Cloud	Cloud Security				
							AWS Managed Services						Cloud Operations (Run – Hybrid & Multicloud Ops)			Performance		Optimize	
							Orchestration	Observability	FinOps	FMOps – LLMOps		Availability	IaaS	PaaS	SRE	PRE			
							AWS Enterprise Data Modernization and AI Services						Enterprise Data Ecosystem		Insights & Decision-making		Agent AI & GenAI With AWS		Customized ML Solutions
Amazon Redshift – Amazon RDS – AWS Glue		Data Sovereignty Scalability Performance		Predictive Analytics	Dashboards & Real-time Insights		Sagemaker Bedrock Amazon Q	Titan Nova	Industry-specific Solutions	Enterprise LLM									
AWS SAP Workloads						SAP Operations			Industry Focus SAP Expertise			Integrated D&A on SAP							
Consulting & Implementation		Integration		S/4HANA Migration	Industry Solutions	Tools & Accelerators		Security Frameworks & Solutions		AWS Solutions									
AWS Brazil Public Sector - Technology Services *Only for Brazil						Migration & Managed Services			Data Analytics & Machine Learning			ERP Workloads							
Consulting		Migration Applications & Data Workloads		Cloud Operations & Performance		Insights & Decision-making		Customized ML Solutions	Gen AI with AWS	IoT Data	ERP Operations	Integrated D&A on ERP							



Key focus areas for AWS Ecosystem Partners 2025 study

Simplified Illustration Source: ISG 2025



The ISG Provider Lens™ AWS Ecosystem Partners 2025 study offers the following to business and 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 different markets, including the U.S., U.K., Germany, Brazil, Mexico and APAC (excluding Japan, South Korea, PR China and Taiwan)

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.

Note: A key prerequisite for providers' participation is inclusion in the AWS Partner Network (APN).



Definition

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

Providers should offer advanced technologies and solutions tailored to architecture, security and specific industry needs. Migration involves automated testing, thorough planning, execution, deployment strategies and change management to ensure smooth transitions.

AWS partners possess extensive expertise in software architecture, Software development (including DevOps principles), application migration and modernization, enabling them to architect, deploy and manage scalable, resilient applications and services in the cloud environment.

Eligibility Criteria

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



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



Definition

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

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

Eligibility Criteria

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



AWS 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



Definition

This quadrant examines service providers that partner with AWS to develop, enable and deliver the capabilities required by public sector entities in Brazil. Firms in this sector face immense pressure to improve operations, reduce costs and enhance their ability to serve citizens. This quadrant aims to identify the best-suited providers that help public sector firms address their challenges and modernize their environments. Technology and service procurement needs and challenges of public sector entities are similar to those of complex commercial enterprises but typically involve restrictive procurement, staffing and operating system management needs.

AWS partners in this quadrant provide consulting, development, outsourced services and other IT services, covering application migration and modernization, managed services, ERP workload provisioning and migration, advanced analytics, AI, GenAI, and ML. ISG's clients use these studies to consider, evaluate and select providers that best suit their needs and help achieve their business objectives.

Eligibility Criteria

1. Offer **AWS-focused consulting road map and innovations**
2. Detail the scope and availability of **customer success enablement programs**
3. Provide a broad scope of **relevant tools, technologies and services** (such as Kubernetes, Docker, Istio and Envoy)
4. Design, build and manage **public and multicloud environments**
5. Showcase knowledge and expertise in **DevOps, solution architecture and server migration**
6. Offer suitable, mature and adaptable **pricing models**
7. Engage deeply with customers' **software migration and modernization** via AWS
8. Gain experience and certifications and participate in **AWS Partner Programs, including AWS Public Sector Partner**
9. Provide several **reputable references for services and solutions** across various public sectors using AWS



Quadrants by Region

As a part of this ISG Provider Lens™ quadrant study, we are introducing the following five quadrants on AWS Ecosystem Partners 2025:

Quadrant	U.S.	U.K.	Germany	Brazil	Mexico	APAC*
AWS Professional Services	✓	✓	✓	✓	✓	✓
AWS Managed Services	✓	✓	✓	✓	✓	✓
AWS Enterprise Data Modernization and AI Services	✓	✓	✓	✓	✓	✓
AWS SAP Workloads	✓	✓	✓	✓	✓	✓
AWS Brazil Public Sector — Technology Services				✓		

Note: *APAC regions (excluding Japan, South Korea, PR China and Taiwan)



The research phase falls in the period between April and August 2025, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in September 2025.

Milestones	Beginning	End
Survey Launch	April 10, 2025	
Survey Phase	April 10, 2025	May 9, 2025
Sneak Preview	August 4, 2025	
Press Release & Publication	September 2025	

Please refer to the [ISG Provider Lens™ 2025 research](#) agenda to view and download the list of other studies conducted by ISG Provider Lens™.

Access to Online Portal

You can view/download the questionnaire from [here](#) using the credentials you have already created or refer to the instructions in the invitation email to generate a new password.

We look forward to your participation!

Buyers Guide

ISG Software Research, formerly “Ventana Research,” offers market insights by evaluating technology providers and products through its Buyers Guides. The findings are drawn from the research-based analysis of product and customer experience categories, ranking and rating software providers and products to help facilitate informed decision-making and selection processes for technology.

In the course of the AWS Ecosystem Partners IPL launch, we want to take advantage of the opportunity to draw your attention to related research and insights that ISG Research will publish in 2025. For more information, refer to the [Buyers Guide research schedule](#).

Research Production Disclaimer:

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing the work identified by clients. This data is collected as part of the ISG FutureSource™ process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of the information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.



ISG Star of Excellence™ – Call for nominations

The Star of Excellence™ is an independent recognition of excellent service delivery based on the concept of “Voice of the Customer.”

The Star of Excellence™ is a program, designed by ISG, to collect client feedback about service providers’ success in demonstrating the highest standards of client service excellence and customer centricity.

The global survey is all about services that are associated with IPL studies. In consequence, all ISG Analysts will be continuously provided with information on the customer experience of all relevant service providers. This information comes on top of existing first-hand advisor feedback that IPL leverages in context of its practitioner-led consulting approach.

Providers are invited to [nominate](#) their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

It is our vision that the Star of Excellence™ will be recognized as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments.

To ensure your selected clients complete the feedback for your nominated engagement please use the Client nomination section on the Star of Excellence™ [website](#).

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply.

Here is the email address:
star@cx.isg-one.com



ISG Star of Excellence

The ISG Provider Lens 2025 – AWS Ecosystem Partners research study analyzes the relevant service providers in the global market, 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:

Frank Heuer, Ashwin Gaidhani, Mark Purdy, Srinivasan P N and Adriana Frantz

Research Analysts:

Srinivasan P N, Sameen Mohammed Siddique, Gabriel Sobanski and Arthur Moura

Data Analysts:

Akshay Rathore

Project Manager:

Pragathi Thimmaiya

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The research and analysis presented in this study will include data 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. ISG recognizes the time lapse and possible market developments between research and publishing, in terms of mergers and acquisitions, and acknowledges that those changes will not reflect in the reports for this study.

All revenue references are in U.S. dollars (\$US) unless noted.



Contacts For This Study

Study Sponsor



**Aman
Munglani**

**Senior Director and
Principal Analyst**



**Frank
Heuer**

**Lead Analyst,
Germany**



**Ashwin
Gaidhani**

**Lead Analyst,
U.S.**



**Tapati
Bandopadhyay**

**Lead Analyst,
U.S.**



**Mark
Purdy**

**Lead Analyst,
U.K**



**Srinivasan
P N**

**Lead Analyst,
APAC***



**Adriana
Frantz**

**Lead Analyst,
Brazil and Mexico**



**Sameen Mohammed
Siddique**

**Research Specialist,
U.S.**



**Gabriel
Sobanski**

**Research Analyst,
Brazil**



**Arthur
Moura**

**Research Analyst,
Mexico**



**Akshay
Rathore**

Data Analyst



**Pragathi
Thimmaiya**

Project Manager

*APAC regions (excluding Japan, South Korea, PR China and Taiwan)



ISG Provider Lens Advisors Involvement Program

ISG Provider Lens offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context.

In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three consultant advisors participate as part of each study's quality and consistency review process.

The consultant advisors ensure each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the consultant advisors' group and contribute at different levels depending on their availability and expertise.

The consultant advisors:

- Help define and validate quadrants and questionnaires,
- Advise on service provider inclusion and participate in briefing calls,
- Give their perspectives on service provider ratings and review report drafts.

ISG Advisors to this study



Anay
Nawathe

**Director, Cloud and
Infra Delivery Lead**



Susanta
Dey

**Principal Consultant —
Technology
Modernization**



Furkan
Yücel

**Senior Consultant —
Technology
Modernization**



Invited Companies

If your company is listed on this page or you feel your company should be listed, please contact ISG to ensure we have the correct contact person(s) to actively participate in this research.

* Rated in previous iteration

.Monks	AHEAD	Aspire Systems*	Bechtle
1Strategy	Alestra	ATALAIT	BeOnUp
2nd Watch	Algar Tech	Atos Group	Bestel
A3Data*	Alice&Bob.Company	Atos*	BIP
abat Group	AllCloud*	Autoverse*	Birlasoft*
AC3*	Allied Global	avvale	BJSS*
ACC	Altis	AX4B*	Blazeclan*
Accenture*	Ankercloud	Axity	Blue People
Acces Group	ANM	Axtel	Bluetab Solutions
Accolite Digital	Apex Systems	Ayesa	Bounteous
act digital	Apexon*	BABEL Group	Brillio
Adastra	ARQ	Bambu Mobile	BRLink*
adesso SE*	Arvato Systems*	BBVA Next Technologies	BRQ*
Agilisium*	ASG	B-DRIVE-IT	BSP Cloud



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* Rated in previous iteration

BTC*	Claranet*	CMD	CyberCX
C3entro Telecom	CleanSlate Technology Group	Codster de Mexico	D3Clarity
CACI	Clearscale	CoForge*	DaCodes
Capgemini*	ClickIT	Cognizant*	Daemon
Cascadeo*	Cloud Bridge Technologies	Colibri Digital	Darede*
Caylent	Cloud Comrade	Compass UOL*	Datacom
CBQA Solutions	Cloud Kinetics	Compucloud*	dataRain*
CDW	Cloud4c*	Computacenter*	DBACorp
CEICO ITT	CloudDog	Connectria	Dedalus*
CESAR	Cloudeeter	Connetico / Cevo	Deloitte*
CI&T	Cloudgenia*	Contino	Dexian*
cignuz	CloudUp	Corebi	Digital Geeks
Cirion Technologies	CloudZone	Crayon*	Digital Space Cloud Services Limited
CirrusHQ	Clouxter*	Criptonube*	Dimiour



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DirMOD	Ensitech de Mexico	G&P*	ho1a Innovación
DNX Brasil	Ensono*	GAVB	Honne Services
DNX.Solutions	EPAM Systems*	Genpact*	IA interactive
DoIT International	EPI-USE*	Getronics	IBM*
Druid	Escala 24x7*	GFT*	ilegra
DXC	Eviden (Atos Group)*	Globant*	Impetus*
DXC Technology*	EVOLUTIO	GotoBiz*	Improving
e-Core*	Extreme Group*	Grid Dynamics	In Motion
Effectual	Financial Solutions	Grupo Scanda*	Inawisdom
Embratel*	Flentas	Grupo SIAYEC	iNBest
Encora*	Flexa Cloud	GWCloud	inCloud Tecnologia
Endava*	Folio3 Software Inc.	HCLTech*	INCO
Engineering	FPT Software*	Hexaware*	Indra
Engineering Brasil	Fractal Analytics	Hitachi Digital Services*	Indra (Minsait)
Enkel*	Fujitsu*	Hitachi Vantara	inetum



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* Rated in previous iteration

Infosys*	Jump	Lumen Technologies	mLogica
Ingram Micro	Kainos Software Limited	Lumston*	Motherson
Inmetrics*	KIO Networks	Lytics	Mphasis*
Innova Solutions	Kloia	MadeinWeb*	msg systems*
Intelimatica	kreuzwerker*	Mantel Group	Mxmart Solutions
Intelimétrica	Kyndryl*	Mastek	MXMART*
Intellilabs	Leega	Materna*	myCloudDoor
IO Connect Services	Lemongrass	Matillion	Mytech
IPsense*	Lentech Inc.	Matrix Business USA Corp	Nagarro
IT Solutions	Lighthouse Technologies	Mechanical Rock	Navisite
ITC Infotech	Logicalis*	Metabase Q	nClouds
Itera*	Logicworks	MG Info	NEC
Ittransition	LTIMindtree*	MIGNOW*	Neiron
ITSTK	Lumen	Minfy	Neoris
ix Agency	Lumen (Cirion Technologies)	Mission Cloud	Netlution*



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Neurons Lab	Nyx technology	Persistent Systems*	Quantiphi*
Nextios*	O2B	PlusServer	Rackspace
Nfq	Oi Soluções	Positivo S+	Rackspace Technology*
N-iX*	OpenService	PRAGMA	Rapyder
Nordcloud*	OPITZ CONSULTING*	Presidio	Rebura*
Noventiq*	Optimen	Presidio	Reply*
Novis	Optimissa	Proatech*	Runibex Technology
NTT DATA*	Orange Business Services	Projetas	SC Empresarial
Nuage IT's everywhere	PA Consulting	Protiviti	SDT Electrónica
Nubiral	PALO IT	PruTech Solutions	Seidor*
Nubity	PC CENTRAL	Public Cloud Group*	Select Soluções
Nubosperta	PEAK	PwC*	Select Soluções*
Numen	Pentalog	Pyramid Consulting	Senior Sistemas*
Nuvens Consulting Limited	Perficient	Pyxis	Servix
nuvu	Persistent	q.beyond*	SIITECS



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Singtel Group/OpTus/NCS	SONDA	Tech Holding	TotalCloud
SIPSER cloud	Sourcefuse	Tech Mahindra*	Totalplay
SiTSA	Sparq	Technogi	Transact Technology Solutions
Skaylink*	Spassu	Techwave*	Trianz*
Sky.One*	Sphere IT	tecRacer*	Triple S*
Slalom*	SPIRIT/21*	TEKsystems	T-Systems*
Sngular	ST IT Cloud*	Telefonica	Ubertas Consulting
SNP Group	STAND 8	Teleperformance	UDS
SOAINT	Stefanini*	Telmex*	Unisys
Softcat plc	Sycomp	Telstra Purple*	upd8
SoftServe*	Syntax*	Tessellar Soluciones	V8.Tech*
Softtek	SysInnov	Thoughtworks*	Valcann*
SoftwareONE*	Tata Communications*	Tiger Analytics	Vention
SOIN	TCS*	TIVIT*	Versent
Solvimm (e- core)	TD SYNnex	TO THE NEW*	Version 1*



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* Rated in previous iteration

Virtusa*

Vision33*

Visionet

Vivaro

Wipro*

Wizeline

WorkDB

Workmates

World Wide Technology

Wundertec

XalDigital*

Xebia

Xtremax

Zensar Technologies*

Zivaro

Zoi



ISG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

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

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ISG

ISG (Nasdaq: III) is a 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.

For more information, visit isg-one.com.



APRIL, 2025

REPORT: AWS ECOSYSTEM PARTNERS