ISG Provider Lens®

Databricks Ecosystem Partners

Assessing service providers enabling enterprise Databricks transformations

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Databricks unifies data modernization, governance and scalable AI architecture for enterprises

Databricks has rapidly evolved into a central pillar of enterprise data and AI transformation strategies. Organizations are reevaluating the architectural core that supports data engineering, analytics, ML and GenAI workloads. The Lakehouse architecture, which unifies the scalability of data lakes with the reliability and performance of data warehouses, has emerged as a strategic response to the growing complexity of enterprise data estates. Capabilities including Delta Lake, Unity Catalog, MLflow, Mosaic AI and serverless compute position Databricks not merely as an analytics platform but as a comprehensive data-to-AI control plane. This platform evolution is unfolding against a broader backdrop of economic, technological and regulatory shifts that are reshaping enterprise data strategies globally.

Market context: data modernization in an AI-driven economy

The global market for data modernization is being shaped by macroeconomic pressure, accelerating AI adoption and structural shifts in enterprise operating models. Insights from ISG's **2025 Data and AI Programs** study indicate that despite heightened cost scrutiny and economic uncertainty, enterprises continue to expand investment in data and AI initiatives. Market sentiment toward data remains strong, with nearly three-quarters of organizations viewing data as a valuable asset worthy of sustained investment. However, this optimism is tempered by concerns around cost and security. Nearly 40 percent indicate that security risks reduce their willingness to collect and retain more data, and a similar proportion expresses concern that the cost of harmonizing and managing data across the enterprise may outweigh the benefits. This duality captures the tension at the core of modern data strategies. Enterprises recognize the immense potential of AI-driven insights, yet they remain cautious about governance exposure, compliance liabilities and operational overhead.

Databricks enables AI-first modernization with governed, scalable data foundations

Executive Summary

Data usability for AI has emerged as the leading anticipated challenge for 2025 and 2026. Fragmented silos, inconsistent standards and limited interoperability between legacy and cloud platforms continue to constrain scalable AI deployment. Organizations struggle to centralize, standardize and prepare datasets for LLM training, embedding and vectorization. Modernization is, therefore, increasingly AI-led rather than reporting-led. Enterprises are modernizing to make data AI-ready, with unified ingestion, transformation, governance and lifecycle management becoming foundational requirements.

Demonstrating measurable value further intensifies market pressure. Measuring ROI on data and AI investments remains a top concern, particularly as boards demand clearer justification for AI-related capital allocation. Benefits such as improved decision speed or risk reduction are difficult to quantify, reinforcing the need for integrated observability, cost transparency and performance tracking within modernization programs. Additionally, GenAI adoption continues to advance, though production maturity remains uneven.

Enterprises are expanding use cases cautiously while navigating integration gaps, governance complexity and cost variability. This measured progression strengthens demand for platforms capable of supporting experimentation and production within a consistent governance and financial framework.

Within this context, the Databricks ecosystem aligns closely with enterprise priorities. The Lakehouse architecture addresses fragmentation by unifying structured and unstructured data under a single control plane. Integrated governance capabilities respond to regulatory and security expectations, while native AI functionality supports AI-readiness objectives. Real-time observability and FinOps integration address growing demands for cost accountability and measurable outcomes. As enterprises seek to simplify complexity and scale AI responsibly, unified data platforms are becoming strategic enablers of sustainable transformation.

Strategic imperatives shaping the Databricks ecosystem

In light of current market dynamics, the evolution of the Databricks ecosystem aligns with three defining enterprise imperatives. First, enterprises are consolidating fragmented data estates spanning legacy warehouses, on-premises systems and multicloud environments. Second, enterprises are accelerating AI and GenAI adoption, moving from experimentation toward enterprise-wide deployment. Third, regulatory scrutiny and cost pressures are compelling enterprises to institutionalize governance, transparency and FinOps discipline across the data stack. Databricks provides an integrated foundation that addresses these shifts holistically, while service providers are shaping modernization and managed optimization strategies around these themes.

Strategic imperative 1: consolidation of fragmented data estates

- **Enterprise perspective: structural modernization imperatives**
  Enterprises continue to operate complex data landscapes built over years of incremental investments. Legacy warehouses such as Teradata, Oracle and SQL Server co-exist with siloed data marts, ETL pipelines and cloud-native analytics tools. These environments were originally optimized for structured, batch-oriented reporting rather than real-time analytics or AI-driven workloads.

  The fragmentation creates duplicated datasets, inconsistent definitions of business metrics, prolonged data preparation cycles and escalating licensing costs. Operational inefficiencies intensify when structured and unstructured data must be integrated for advanced analytics or AI use cases. Logs, streaming data, transactional systems and document repositories often remain disconnected from centralized analytics frameworks.

  Enterprises increasingly recognize that modernization must go beyond infrastructure migration. Consolidation requires establishing a single governed data backbone capable of supporting ingestion, transformation, analytics and AI from a unified architectural layer. The objective is to eliminate silos, reduce operational redundancy and enable scalable innovation on a consistent data foundation.

The convergence of transactional and analytical workloads further influences consolidation strategies. Enterprises seek low-latency data-serving capabilities that power AI-driven applications while maintaining analytical depth. The demand for near real-time intelligence necessitates architectures that bridge operational and analytical systems.

- **Service provider perspective: AI-driven lakehouse modernization**
  Service providers are responding with structured modernization frameworks centered on Databricks Lakehouse. Automation and AI-driven migration toolkits are accelerating transitions from legacy warehouses and ETL platforms while minimizing manual refactoring. Migration methodologies increasingly incorporate prebuilt connectors, reference architectures and reusable intellectual property to reduce risk and shorten time-to-value.

  Industry-specific accelerators are embedded into consolidation strategies to align transformation efforts with industry requirements. Financial services implementations emphasize regulatory reporting and data lineage, while healthcare deployments prioritize data privacy and interoperability. Manufacturing solutions integrate streaming data and predictive maintenance use cases. Verticalized templates enhance confidence and reduce implementation friction.

  Integration plays a pivotal role in modernization narratives. Strong demand exists for integrating enterprise systems such as SAP Business Data Cloud with Databricks to unify transactional and analytical insights. These integration frameworks allow enterprises to extract greater value from trusted operational systems while extending analytics and AI capabilities. Service providers increasingly co-develop and co-sell solutions with Databricks to ensure architectural alignment. Joint engineering initiatives, shared product roadmaps and coordinated GTM motions strengthen modernization outcomes. Close collaboration enables providers to incorporate emerging platform capabilities early in client engagements, reinforcing long-term ecosystem alignment.

Strategic imperative 2: acceleration of AI and GenAI at enterprise scale

- **Enterprise perspective: scaling AI beyond pilots**
  Enterprises have invested significantly in AI experimentation, yet scaling AI across business units remains a persistent challenge. Disconnected data pipelines, inconsistent MLOps practices, limited model lineage visibility and fragmented tooling slow the transition from pilot to production. AI initiatives often struggle to demonstrate repeatability and governance consistency.

  GenAI and agentic AI introduce additional complexity. Enterprises must manage vector search infrastructure, embedding pipelines, prompt governance, model evaluation and latency optimization. Human-in-the-loop validation processes are essential to ensure output quality and accountability. The transition from isolated prompt-based experimentation to domain-specific LLM deployments embedded within business workflows requires architectural cohesion and operational rigor. Organizations also face pressure to integrate AI across enterprise systems rather than confining use cases to innovation labs. Decision intelligence platforms must operate within secure, auditable frameworks while maintaining cost efficiency and performance reliability.
- **Service provider perspective: AI-native architectures and agentic enablement**
  Service providers are aligning AI enablement strategies with Databricks' AI-native capabilities. Databricks Lakehouse architectures converge data engineering, analytics, ML and GenAI into a single governed environment. Mosaic AI and MLflow are leveraged to streamline model development, lifecycle management and domain-specific LLM deployment.

  Providers are building reusable AI accelerators that incorporate vector search, prompt templates and evaluation mechanisms. These accelerators reduce experimentation cycles and accelerate production readiness. Agentic AI frameworks

are emerging within service portfolios, enabling orchestrated workflows with policy-guarded controls and secure state management.

The convergence of MLOps and LLMOps into unified lifecycle frameworks reflects a broader shift toward XOps by design. Enterprises increasingly expect FinOps, MLOps, AgentOps and observability to function cohesively rather than independently. Service providers are institutionalizing these capabilities within AI enablement programs to reduce operational overhead and improve reliability.

Additionally, co-innovation with Databricks further enhances AI acceleration efforts. Participation in early access programs and innovation labs allows providers to embed emerging AI capabilities directly into client engagements. Joint solution engineering strengthens alignment between service frameworks and platform evolution. Coordinated co-sell initiatives position AI modernization as a shared strategic narrative, increasing enterprise confidence in scalability and long-term viability.

Strategic imperative 3: governance, transparency and FinOps discipline

- **Enterprise perspective: trust, accountability and cost predictability**
  Regulatory scrutiny surrounding data privacy, fairness, explainability and compliance continues to intensify across industries. Enterprises must enforce fine-grained access control, implement PII masking policies, maintain automated lineage tracking and monitor bias across AI models. Governance has shifted from reactive compliance to proactive trust-building across the data-to-AI lifecycle.

  Cost management presents another critical dimension for enterprises adopting Databricks. AI workloads increase cloud consumption, creating variability in spending patterns. Finance and technology stakeholders require predictive scaling, Databricks Unit (DBU) tracking, workload right-sizing and measurable return on modernization investments. Migration initiatives must demonstrate improved TOC while preserving performance and scalability.

  Operational resilience is equally important. Real-time monitoring, SLA-based management and anomaly detection are essential to maintain reliability across data pipelines and AI models. Enterprises increasingly seek unified observability frameworks capable of providing end-to-end visibility into performance, cost and governance metrics. Secure collaboration further expands governance requirements. Cross-enterprise analytics initiatives demand trusted data sharing mechanisms that preserve compliance while enabling innovation.

- **Service provider perspective: managed optimization and continuous governance**
  Service providers are increasingly repositioning managed services from reactive support models to proactive optimization partnerships. Governance and cost management are no longer treated as downstream compliance activities; instead, they are embedded into the core architecture and operating model from the outset. Providers are standardizing on Unity Catalog as the central governance layer across client environments, enabling consistent policy management, lineage transparency, and access control across data and AI assets.

  FinOps maturity is becoming a visible differentiator across managed Databricks engagements. Consumption intelligence, workload right-sizing strategies and cluster performance optimization are being embedded directly into operational playbooks. Engagement models increasingly include structured cost forecasting, budget guardrails and usage accountability frameworks that align engineering decisions with financial objectives.

  Real-time observability is emerging as a defining feature of advanced managed services offerings within the ecosystem. Service providers are developing unified monitoring dashboards that combine cost consumption trends, SLA adherence metrics and data quality signals into integrated control views. These dashboards move beyond passive visualization and incorporate intelligent alerting, anomaly detection and predictive optimization recommendations.

Observability is increasingly positioned as an operational command center that enables early issue detection, faster remediation and continuous performance tuning.

Secure collaboration is also becoming a structured component of managed optimization strategies. Providers are incorporating Delta Sharing and clean-room architectures into enterprise data strategies to enable governed, multi-party analytics. This capability supports ecosystem-based innovation while maintaining strict compliance controls and auditability standards.

Overall, managed optimization within the Databricks ecosystem is evolving, and service providers are aligning governance, FinOps and observability into a unified operating model that supports sustained AI scale, cost discipline and operational resilience rather than periodic post-implementation adjustments.

Conclusion and market outlook

The Databricks ecosystem is evolving from a modernization platform into a strategic foundation for AI-driven enterprise transformation. As organizations confront fragmented estates, expanding AI ambition, regulatory complexity and cost scrutiny, the focus is shifting toward scalable operationalization. Data consolidation will remain central for enterprises that seek to scale AI and build a governed data foundation capable of real-time decision intelligence. Enterprises that fail to unify data estates under governed architectures will struggle to deploy agentic systems and real-time decision intelligence. Strategic emphasis must move from incremental integration to enterprise-wide convergence anchored in unified platforms.

AI adoption is also entering a more disciplined stage. Production-grade, domain-aligned AI embedded within workflows will replace isolated pilots. Enterprises will demand measurable ROI, governance assurance and end-to-end transparency. Architectures integrating lifecycle management, observability and cost optimization will define AI maturity. Governance and cost discipline will shape differentiation. Regulatory mandates and cybersecurity risks elevate governance into a strategic capability, while macroeconomic pressure reinforces cost visibility and predictive scaling. Real-time observability and optimization will become standard components of managed environments.

The partner ecosystem will be critical. Providers capable of delivering unified modernization-to-optimization lifecycle models will accelerate enterprise outcomes. Over the next three to five years, competitive advantage will depend less on tool selection and more on architectural discipline and ecosystem alignment. Enterprises that treat Lakehouse as a strategic control plane for the data-to-AI value chain will scale innovation while managing risk. Those that combine modernization with continuous optimization and governed AI execution will define the next era of enterprise performance.

Databricks is becoming the strategic lakehouse foundation that enables enterprises to modernize fragmented data estates, embed governance and FinOps by design, and scale AI and agentic innovation through unified, continuously optimized data-to-AI operations.

Provider Positioning

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	Modernization and AI/ML Enablement Services	Managed Data and Optimization Services
Accenture	Leader	Leader
Apexon	Product Challenger	Product Challenger
Aptus Data Labs	Contender	Contender
Avanade	Leader	Leader
Birlasoft	Product Challenger	Product Challenger
Brillio	Product Challenger	Product Challenger
Capgemini	Leader	Leader
Chetu	Contender	Contender
Cognizant	Leader	Leader
Customertimes	Contender	Contender
Deloitte	Leader	Leader

Provider Positioning

Page 2 of 3

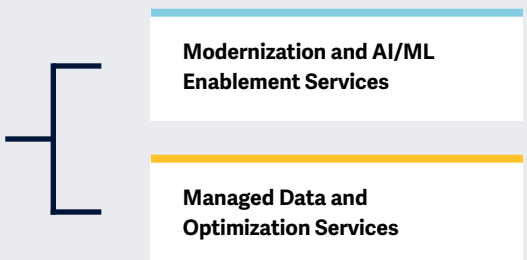
	Modernization and AI/ML Enablement Services	Managed Data and Optimization Services
EXL	Product Challenger	Product Challenger
EY	Leader	Leader
Genpact	Rising Star ★	Rising Star ★
Happiest Minds	Contender	Contender
HCLTech	Product Challenger	Product Challenger
Hexaware	Product Challenger	Product Challenger
IBM	Market Challenger	Market Challenger
Infocepts	Product Challenger	Product Challenger
Infosys	Leader	Leader
KPI Partners	Contender	Contender
LTM	Leader	Leader

Provider Positioning

Page 3 of 3

	Modernization and AI/ML Enablement Services	Managed Data and Optimization Services
Persistent Systems	Product Challenger	Product Challenger
Slalom	Product Challenger	Product Challenger
TCS	Leader	Leader
Tech Mahindra	Product Challenger	Product Challenger
Tiger Analytics	Leader	Leader
Tredence	Leader	Leader
ValueMomentum	Contender	Contender
Wipro	Leader	Leader
YASH Technologies	Contender	Contender

This study evaluates providers' capabilities based on their **service portfolio and competitiveness** within the Databricks ecosystem.



Simplified Illustration Source: ISG 2026

Definition

Databricks has become a pivotal platform driving the convergence of data engineering, analytics and AI. Its Unified Data Analytics Platform integrates data, AI and governance to accelerate time to insight and enable enterprise-scale GenAI. Built on the lakehouse architecture, Databricks unifies structured, unstructured and streaming data under a single governance framework powered by Delta Lake, Unity Catalog, MLflow and Mosaic AI. The introduction of MosaicML and Databricks AI/ agent frameworks strengthens its role as anenabler of enterprise-grade GenAI and custom LLM development, where governed data meets scalable AI capabilities.

The Databricks partner ecosystem has expanded rapidly, reflecting strong enterprise demand for modernization, governance and AI-ready platforms. Partners (providers) are critical in translating Databricks' vision into tangible business outcomes, spanning strategy, migration, operational optimization and innovation. As Databricks continues to natively integrate data intelligence and AI, it is evolving from a unified data management solution into a strategic AI backbone.

Providers' capabilities broadly fall into two quadrants:

- **Modernization and AI/ML Enablement Services**, including advisory, modernization, data engineering, data sharing and collaboration, and business application development.
- **Managed Data and Optimization Services**, including post-implementation support and cost optimization, with a focus on security, regulatory compliance and observability.

ISG's analysis evaluates service providers delivering Databricks-aligned consulting, implementation and managed services that enable scalable, secure, and cost-efficient data and AI transformation.

Scope of the Report

This ISG Provider Lens® quadrant report covers the following two quadrants for services/solutions: Modernization and AI/ML Enablement Services and Managed Data and Optimization Services.

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

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments (quadrants) based on their competitive strengths and portfolio attractiveness
- Focus on the Global and Brazil markets

Our study serves as the basis for important decision-making by covering providers' positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing vendor relationships and potential engagements.

Provider Classifications

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

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between $20 million and $999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above $1 billion, with activities worldwide and globally distributed decision-making structures.

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

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

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.

Modernization and AI/ML Enablement Services

Who Should Read This Section

This report is valuable for service providers offering Databricks modernization and AI/ML enablement services globally 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.

Technology professionals

should read this report to assess Databricks implementation partners' expertise in data engineering, governance, cloud architecture and multicloud deployment strategies. The report highlights providers skilled in Databricks native engineering, secure data sharing, multicloud architecture and MLOps, helping them accelerate migration, reduce delivery risk and operationalize AI at scale.

Business and strategy professionals

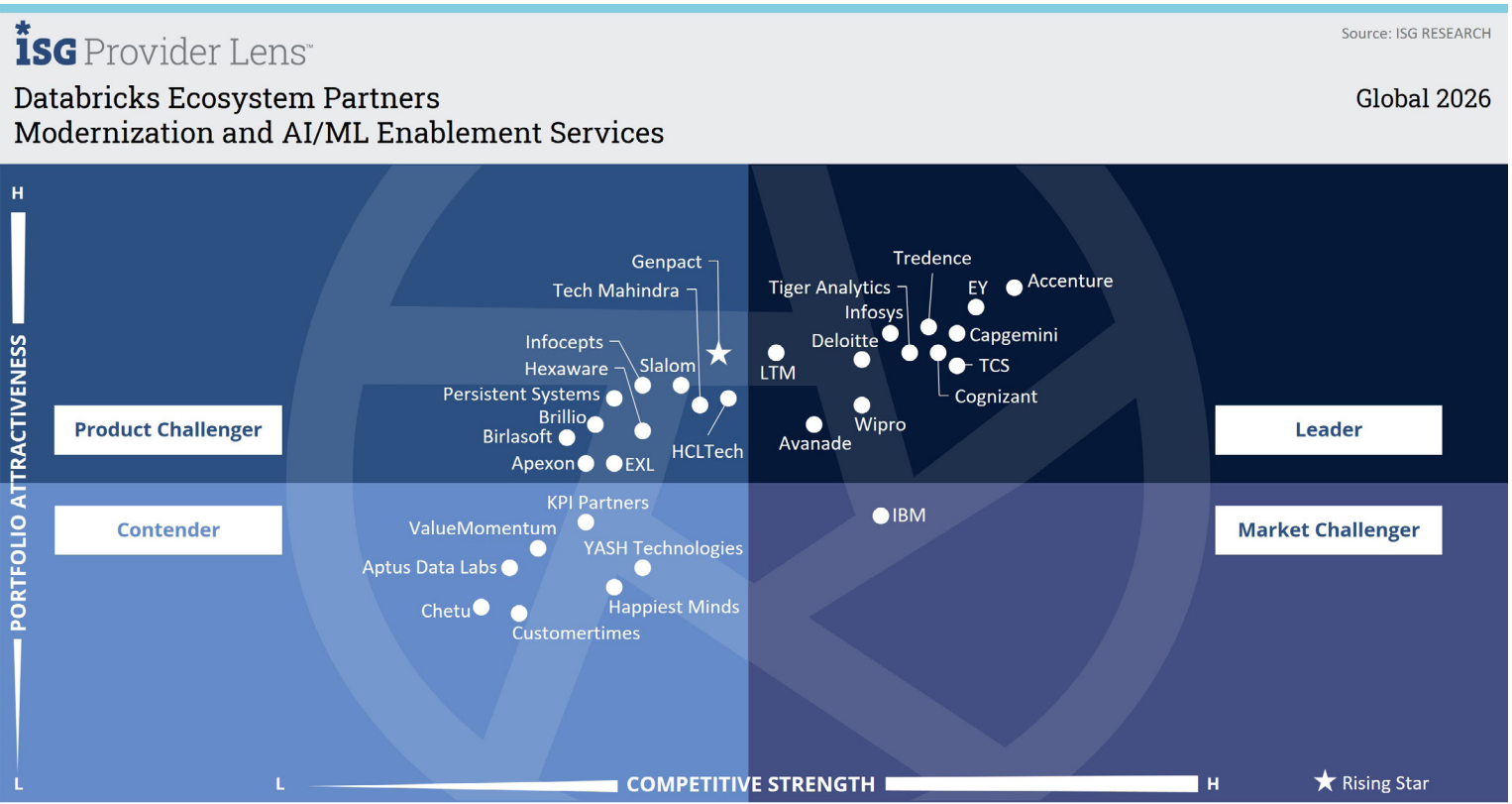
should read this report to track evolving Databricks-related trends, assess providers' ability to drive enterprise data maturity and cloud readiness, and identify strategic use cases. The report offers insights into advisory strength, modernization roadmaps and AI/ML enablement strategies that influence long-term business outcomes.

Procurement professionals

should read this report to evaluate providers offering strategic advisory and end-to-end delivery for Databricks implementations. The report guides the selection of partners that deliver measurable cost optimization and compliance assurance. It provides insights into vendor capabilities, contractual flexibility and risk mitigation strategies to support informed sourcing decisions aligned with enterprise transformation goals.

Research and innovation professionals

should read this report to assess providers' ability to harness AI, ML and Databricks' data capabilities for innovative, data-driven solutions. The report helps identify leaders driving next-generation technologies and advanced analytics, while highlighting partner roadmaps that enable cutting-edge solutions and future-proof enterprise strategies.



This quadrant assesses providers delivering **end-to-end Databricks modernization**, spanning **strategy, architecture, migration, and deployment** to enable scalable data and AI transformation, with strengths in **Lakehouse implementation, real-time analytics, and AI operationalization.**

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Definition

This quadrant evaluates providers that deliver end-to-end advisory, architecture, migration and deployment services on Databricks, helping enterprises define data and AI modernization strategies, implement Databricks Lakehouse Platform and accelerate AI adoption. Typical engagements include cloud and data modernization road maps, architecture and migration planning, data engineering, analytics enablement and governance setup through Unity Catalog.

Providers are evaluated on expertise in data architecture, Delta Lake and MLflow implementation, and multicloud or hybrid data integration, as well as their ability to operationalize streaming pipelines, enable real-time analytics and incorporate Mosaic AI into enterprise workflows. Leading providers combine strategic consulting with strong technical execution and reusable IP assets to shorten time to value.

Eligibility Criteria

1. Ability to offer **end-to-end Databricks services**, encompassing strategy, consulting, architecture design, migration planning and implementation
2. Expertise in **developing analytics frameworks, architectural blueprints, adoption road maps, AI and ML workflows**, and industry-specific data solutions and applications
3. Proven experience in **Databricks-based data modernization, migration and AI enablement** projects
4. Strong capabilities in **designing lakehouse and multicloud data architectures** using Delta Lake, Unity Catalog and MLflow
5. Referenceable **implementations involving analytics enablement, streaming data, or AI and ML solutions** using Databricks components
6. Documented **frameworks, accelerators or toolkits for ETL/ELT, governance or model lifecycle management**
7. Established **best practices for Unity Catalog setup, data security and lineage configuration**
8. **Capabilities in change management, user adoption** and enterprise enablement programs
9. Availability **of validated client case studies** or references showcasing Databricks-enabled outcomes
10. **Ecosystem alignment and strategic partnerships, including preferred partner designations or early-access participation**, that demonstrate innovation maturity

Observations

IT service providers are repositioning Databricks modernization as a strategic enterprise transformation initiative rather than a technical migration exercise. Offerings span advisory, architecture redesign, legacy estate decomposition and AI-ready data foundation buildout, supported by structured migration factories, reusable accelerators and industry-aligned blueprints. The emphasis has shifted from lift-and-shift transitions to governed lakehouse architectures, curated data products and domain-driven models that align modernization with measurable business outcomes.

A clear market trend is the embedding of AI readiness within the modernization phase itself. Providers are integrating MLOps, GenAI enablement and agentic orchestration frameworks directly into target-state architectures, ensuring that data platform transformation supports scalable AI adoption. Industry-focused accelerators and ERP-aligned integrations further connect lakehouse programs with functional transformation agendas across finance, supply chain, risk managementand customer operations. Databricks co-innovation, co-development models and ecosystem alignment are emerging as a key differentiating factor, enabling earlier access to emerging capabilities and reinforcing structured, repeatable deployment patterns. Overall, this quadrant reflects a convergence of data engineering, AI engineering and domain strategy to create scalable, intelligence-ready enterprise platforms.

From the 53 companies assessed for this study, 31 qualified for this quadrant, with 12 being Leaders and one a Rising Star.

accenture

Accenture enables enterprise modernization through Databricks-led lakehouse architectures, industry-specific accelerators and production-grade ML frameworks, supporting scalable AI and ML deployment and structured cloud data transformation.

avanade

Avanade emphasizes the convergence of Databricks Lakehouse services and Azure-native services, creating a tightly integrated modernization pathway optimized for enterprises standardizing on Microsoft-aligned data estates.

Capgemini

Capgemini executes Databricks modernization through an automation-led, industrialized model built on repeatable migration patterns and standardized platform delivery. Its industry specializations and product recognitions validate its cross-sector execution strength.

cognizant

Cognizant Cognizant is a Global Elite Partner of Databricks, delivering large-scale lakehouse modernization and AI enablement. Its Data, Decisions, AI and Agents framework integrates data transformation with agentic AI, supported by vertical accelerators and Brickbuilder-certified intellectual property.

Deloitte.

Deloitte's SAP-Databricks integration model indicates strength in bridging transactional ERP estates with AI-ready lakehouse architectures, particularly in regulated industries.

EY

EY delivers business-led data modernization and AI and ML enablement by integrating lakehouse transformation with finance, supply chain and risk solutions, supported by sector-aligned teams and cross-ecosystem alliances with Microsoft, SAP and NVIDIA.

Infosys

Infosys demonstrates early-stage co-innovation, modernization programs and structured AI foundation enablement. Its integration of multimodal data harmonization, domain-specific small language models (SLMs and agentic orchestration reflects forward-looking enterprise AI positioning.

LTM's active participation in advisory boards, Most Valuable Professionals (MVP representation and community-building initiatives reflects ecosystem engagement that extends beyond revenue generation into product influence and capability shaping.

TCS combines large-scale Databricks modernization with accelerator-led AI enablement, helping enterprises transition from legacy data estates to AI-ready, scalable lakehouse architectures.

Tiger Analytics drives Databricks modernization by building an enterprise data foundation and extending it into governed analytics and AI use cases, with Unity Catalog adoption and ongoing optimization treated as part of the enablement motion.

Tredence structures modernization across layered components, including ingestion accelerators, KPI modeling, semantic abstraction and AI activation, indicating architectural coherence rather than tool-centric deployment.

Wipro delivers Databricks data modernization and AI enablement through industry-focused solutions and ecosystem integration. Its approach combines lakehouse transformation, Unity Catalog governance and SAP-aligned data consolidation.

Genpact (Rising Star) has consolidated Databricks modernization into a repeatable process that integrates migration tooling, data product structuring and conversational analytics patterns, while extending AI enablement across verticals such as finance, retail and healthcare.

Rising Star

"Genpact distinguishes modernization from migration by embedding data product engineering, semantic modeling and agent integration into transformation programs rather than positioning them as downstream enhancements."

Gowtham Sampath and Hemangi Patel

Genpact

Overview

Genpact is headquartered in New York, U.S. It has more than 125,000 employees across over 30 countries. In FY24, the company generated $4.8 billion in revenue. Genpact differentiates Databricks modernization from basic migration by engineering curated domain-specific data products and governed marketplace constructs. Through automated translation frameworks and industry-focused AI assets, it links lakehouse transformation with operational decision systems, reinforcing domain-centric AI enablement innovation.

Strengths

Industry-aligned data modernization: Genpact demonstrates strong capability in Databricks modernization programs, differentiating between migration and true platform modernization. Its approach combines automated schema mapping, ETL translation, validation frameworks and data product engineering to transition complex legacy estates. It emphasizes the creation of curated domain-specific data products and marketplace constructs to enable governed, consumption-ready architectures rather than lift-and-shift transitions.

Domain-led AI approach: Genpact embeds AI enablement within business transformation programs, particularly across finance, supply chain, fraud and pricing analytics. Assets such as Finance One, Priceflex and Shrink Sense illustrate the integration of ML, simulation models and agentic workflows on Databricks. This approach reflects the ability to link modernization investments with operational decision systems across banking, retail, manufacturing and healthcare.

Structured ecosystem integration: Genpact aligns closely with Databricks' industry GTM structure through a formalized Databricks business group and co-developed industry solutions. Its participation in Brickbuilder validation programs and joint roadmap discussions demonstrates active co-innovation.

Caution

Genpact could further refine its AI enablement narrative by expanding standardized MLOps and agentic AI playbooks across industries, ensuring consistent scalability as adoption moves from pilot to enterprise deployment.

Managed Data and Optimization Services

Who Should Read This Section

This report is valuable for service providers offering Databricks managed data and optimization services globally 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.

Technology professionals

should read this report to understand how providers deliver continuous platform optimization and AI-driven monitoring. The report equips them with strategies for secure governance and operational efficiency to sustain long-term performance in the Databricks environment. It describes approaches to enhance query performance, reduce costs and simplify workload management, while highlighting integration practices across analytics, ML and business intelligence tools.

Data management and governance professionals

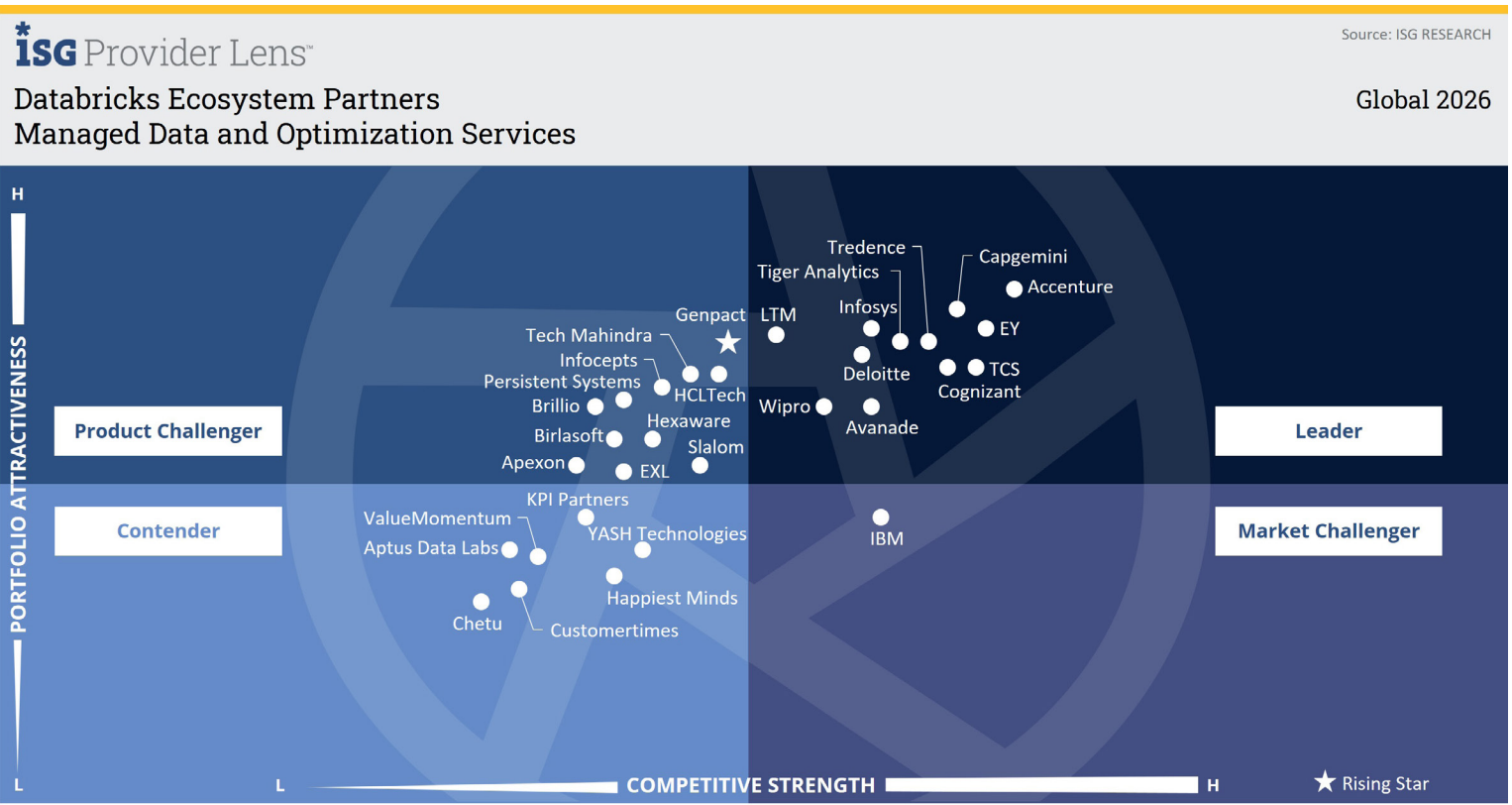
should read this report to explore strategies for maintaining data integrity and compliance while optimizing Databricks performance. They will discover how managed services and AI-driven monitoring ensure secure, reliable data operations. The report explains how providers address data security and privacy needs across their Databricks managed and support services portfolio.

Procurement professionals

should read this report to compare Databricks' managed and support service providers globally. The report helps identify vendors that deliver proactive value realization and cost control and transform maintenance into a strategic function for measurable improvements. The report shows how MSPs deliver continuous optimization, AI-driven monitoring and secure governance, directly influencing vendor selection and performance management.

Field service professionals

should read this report to learn how providers ensure operational continuity and efficiency through AI-driven maintenance and release management. The report offers practical insights for adopting data-driven practices that reduce downtime, improve service delivery, optimize scheduling and enhance customer satisfaction, while positioning organizations to scale efficiently in the Databricks ecosystem.



This quadrant assesses providers delivering **post-deployment Databricks operations**, focusing on **optimization, governance, and FinOps** to ensure scalable, secure environments, with strengths in **automation, observability, and cost-performance management**.

Gowtham Sampath and Hemangi Patel

Definition

This quadrant assesses providers that deliver post deployment operations, optimization and governance for Databricks environments. These managed services span monitoring, cost management, FinOps, performance tuning, compliance and MLOps automation, ensuring the reliability, scalability and regulatory adherence of Databricks workloads across hybrid cloud and multicloud infrastructures.

In this quadrant, providers are evaluated on their ability to enable intelligent operations through automation, observability and policy-driven governance. Leading providers demonstrate depth in performance optimization, cost forecasting, lineage and audit management, and secure access control. Providers are increasingly combining FinOps, MLOps and AI-driven observability into unified management frameworks that sustain operational excellence and maximize ROI.

Eligibility Criteria

1. Capabilities in delivering **Databricks-specific managed services**, including **monitoring, FinOps, optimization, SLA management, incident management** and platform operations support
2. Established **CI/CD automation for Databricks workflows**, with seamless model lifecycle governance, drift detection and rollback support
3. Expertise in **MLOps and LLMOps automation**, including model retraining, evaluation and deployment workflows
4. Expertise in **implementing enterprise-grade access controls, data protection and continuous compliance monitoring**
5. Expertise in **implementing Unity Catalog for access control, lineage tracking and regulatory compliance**
6. Ability to enable **continuous data quality monitoring** and maintain **audit-ready governance practices**
7. Ability to deliver **AI-driven observability, anomaly detection, automated remediation, proven FinOps-driven cost optimization** and centralized monitoring dashboards for platform efficiency
8. Documented success in improving **platform efficiency, reliability and cost transparency** through continuous performance tuning and optimization
9. Ability to **offer user training, certification programs and continuous environment optimization**
10. Customer success stories showcasing **measurable outcomes for managed services on Databricks**

Observations

This quadrant reflects increasing industrialization of Databricks environments as enterprises move from deployment to sustained operations. Governance-first managed services models are becoming standard, anchored in Unity Catalog enablement, fine-grained access controls, lineage tracking and metadata-driven policy enforcement. This signals growing emphasis on compliance, auditability and secure data democratization across large and regulated estates.

Cost and performance discipline are also central themes. Providers are embedding FinOps practices, DBU transparency, workload rationalization and consumption forecasting into ongoing operations. Observability frameworks now extend beyond infrastructure monitoring to include data quality oversight, drift detection, SLA-backed telemetry and automated remediation workflows. MLOps and LLMOps lifecycle controls are increasingly institutionalized, supporting controlled retraining, version management and responsible AI guardrails. Collectively, the quadrant illustrates the maturation of lakehouse operations into stable, scalable ecosystems that balance AI innovation with governance rigor, operational resilience and cost accountability.

From the 53 companies assessed for this study, 31 qualified for this quadrant, with 12 being Leaders and one a Rising Star.

Accenture delivers managed data and ML operations through standardized deployment frameworks, industrialized MLOps practices and Databricks lifecycle management, enabling scalable, reliable and performance-driven AI environments.

Avanade's integration of MLflow-enabled MLOps and Mosaic AI within its industry accelerators demonstrates a clear emphasis on transitioning AI workloads from experimentation to production, embedding operational analytics into core business processes.

Capgemini positions Unity Catalog migration and centralized governance as core transformation components, indicating that compliance and data ownership models are integrated early and serve as key components of Databricks engagements.

Cognizant provides managed Databricks services focused on governance, FinOps and operational optimization. Its structured CoE-led model supports lakehouse environments with controlled consumption, compliance alignment and performance monitoring.

Deloitte combines FinOps controls, telemetry-driven observability and structured MLOps into a cohesive managed services construct designed to sustain performance, compliance and cost discipline across the AI lifecycle.

EY delivers managed Databricks services focused on governance, cost optimization and operational stability, integrating Unity Catalog-based controls, FinOps discipline and cloud-agnostic observability to support scalable, secure and performance-optimized lakehouse environments.

Infosys exhibits strong governance and lifecycle discipline through unified DataOps, LLMOps and AgentOps. Its value realization framework and catalog management indicate a structured approach to sustaining ROI across large Databricks estates.

LTM integrates platform audits, drift detection, data quality monitoring and policy enforcement within managed environments, strengthening compliance and audit readiness across lakehouse estates.

TCS provides managed Databricks services focused on governance, cost optimization and operational monitoring. Its approach integrates FinOps, Unity Catalog enablement and performance frameworks to support secure, scalable and value-driven lakehouse operations.

Tiger Analytics drives Databricks platform optimization through structured Databricks Unit (DBU) cost reviews, cluster and storage remediation, serverless adoption and GenAI-enabled ticket triage, positioning sustained efficiency as part of post-deployment ownership.

Tredence integrates FinOps, observability and MLOps within a unified AI operations model, positioning optimization as a continuous governance discipline rather than reactive remediation.

Wipro provides managed Databricks services centered on governance, operational optimization and cross-platform integration. Its frameworks support secure data access, workload efficiency and lifecycle management across enterprise lakehouse estates.

Genpact (Rising Star) incorporates governance controls, drift monitoring and cost performance reviews into its managed services model, positioning optimization as a continuous lifecycle discipline.

Rising Star

"Genpact's managed services extend beyond platform support to include continuous workload optimization and FinOps automation, enabling efficiency improvements alongside incremental expansion opportunities."

Gowtham Sampath and Hemangi Patel

Genpact

Overview

Genpact is headquartered in New York, U.S. It has more than 125,000 employees across over 30 countries. In FY24, the company generated $4.8 billion in revenue. Genpact extends modernization into sustained governance through Unity Catalog enablement, lifecycle-based data product controls and metadata intelligence. Its embedded FinOps automation, DBU efficiency monitoring and MLflow-driven MLOps frameworks support controlled retraining, drift oversight and cost-optimized AIOps across Databricks environments.

Strengths

Modern foundation governance: Genpact extends modernization into sustained platform governance through Unity Catalog enablement, metadata intelligence and data product lifecycle management. This approach emphasizes structured classification, access control and data marketplace discipline to support scalable AI workloads. This positions Genpact's managed services as an architectural extension rather than post-implementation support.

AI-driven operational optimization: Genpact integrates automation agents and FinOps frameworks to continuously assess workload efficiency and cost performance across Databricks deployments. Its optimization initiatives include pipeline rationalization, DBU efficiency review, and AI-assisted code validation. These initiatives enable structured operationalization of ML and GenAI workloads within live environments.

MLOps-driven AI governance: Genpact embeds disciplined MLOps practices within Databricks environments, integrating MLflow-based experiment tracking, Git-enabled version control and Unity Catalog Feature Store for governed feature reuse. With Lakehouse Monitoring supporting drift detection and performance oversight, Genpact enables reliable model inference, controlled retraining and sustained accuracy across AI deployments.

Caution

Genpact could further strengthen its managed services capabilities by proactively expanding observability frameworks that integrate model drift analytics, workload telemetry and cost performance benchmarks into unified dashboards, enhancing transparency across enterprise Databricks environments.

Appendix

The ISG Provider Lens® 2026 – Databricks Ecosystem Partners study analyzes the relevant software vendors/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.

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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 the April 2026 for providers that actively participated and for providers that did not. ISG recognizes that many mergers and acquisitions may have occurred since then, but this report does not reflect these changes.

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

The study was conducted in the following steps:

1. Definition of Databricks 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

Lead Analyst

Gowtham Kumar Sampath

Assistant Director and Principal Analyst, ISG Provider Lens®

Gowtham Sampath is a Principal Analyst with ISG Research, responsible for authoring ISG Provider Lens® quadrant reports for Banking Technology/Platforms, Digital Banking Services, Cybersecurity and Analytics Solutions & Services market. With 15 years of market research experience, Gowtham works on analyzing and bridging the gap between data analytics providers and businesses, addressing market opportunities and best practices.

In his role, he also works with advisors in addressing enterprise clients' requests for ad-hoc research requirements within the IT services sector, across industries. He is also authoring thought leadership research, whitepapers, articles on emerging technologies within the banking sector in the areas of automation, DX and UX experience as well as the impact of data analytics across different industry verticals.

Lead Analyst

Hemangi Patel

Senior Manager and Principal Analyst - ISG Provider Lens®

Hemangi brings over 10 years of experience in strategy research and consulting, with a specialization in the ICT sector. She has a strong track record of delivering high-quality projects, including comprehensive quality analysis, in-depth primary and secondary research, market entry and go-to-market strategies, competitive benchmarking, company analysis and opportunity assessments.

At ISG, Hemangi leads research efforts for service provider intelligence reports, focusing on BPO with an emphasis on customer experience and contact center services. Hemangi holds a Bachelor's degree in Commerce from Mumbai University and a Master of Science in Economics from Symbiosis International University, Pune.

Study Sponsor

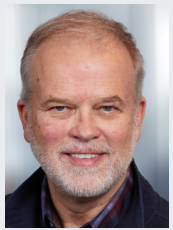
Namratha Dharshan

Chief Business Leader

Namratha brings over 19 years of market research experience, leading the ISG Provider Lens® program focused on BPO and AI and Analytics. Namratha also leads the India Research team and is a speaker on ISG's flagship platform, the ISG Index. She leads the ISG Provider Lens BPO charter that includes coverage on AI, GenAI and analytics. The program includes more than 20 different reports. She is also responsible for delivering research on service provider intelligence. As part of her role, she heads a team of analysts and manages the delivery of research reports for the Provider Lens® program.

She is principal analyst and is responsible for authoring thought leadership papers and service provider intelligence report in the areas of BPO focused on customer experience and contact center services. She has also authored other horizontal service line reports like finance and accounting and vertical focused reports for insurance. She is also part of Senior Leadership Council for India Research and represents a team of over 100 research professionals.

IPL Product Owner



Jan Erik Aase

Partner and Global Head – ISG Provider Lens®/ISG Research

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 partner and global head of ISG Provider Lens®, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

ISG Provider Lens®

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

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The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.

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ISG Provider Lens®

APRIL, 2026

REPORT: DATABRICKS ECOSYSTEM PARTNERS