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RESEARCH

A Shift from Technology to Intelligence: The Rise of the Frontier Partner

The Center of Gravity is Moving Toward Agentic Innovation and Proprietary AI Systems

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Key Points

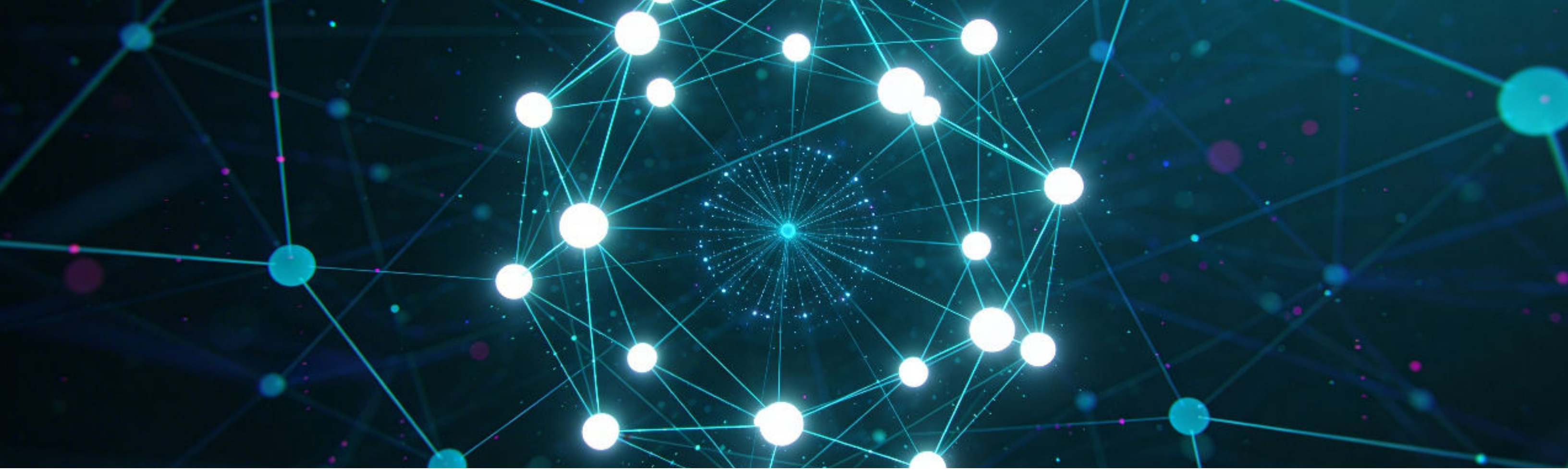
1. **The Introduction of Frontier Partners:**
   The 2026 technology landscape has transitioned from the "Model Era" to the "Orchestration Era." While foundational AI models remain the intellectual core of the industry, their commercial viability now depends on a network of channel partners, systems integrators, and infrastructure alliances to deliver on the promise of AI. Going forward, partners will need to go beyond reselling and system integration and invest in becoming "Model Orchestrators." An enterprise in 2026 does not want to choose between one AI solution or another; they want a partner who can build a Multi-Model Swarm that uses the best tool for each specific task. These AI-native partners will emerge as the most critical allies for the modern enterprise, which will grapple with AI sprawl and ROI uncertainty.

2. **The "Advisory Partner" is No Longer Enough:**
   As enterprise demand for applied AI surges, traditional System Integrators (SI) and digital transformation consultancies are being pressured to move beyond high-level concepts and deliver tangible, AI, and Agentic use cases. As enterprises push AI into revenue, operations, and customer workflows, partners are increasingly expected to engineer and run agentic processes in production, not simply recommend architectures or tools. This will require a new bench of talent and AI-first vendor relationships.

3. **The Center of Gravity is Moving, Again:**
   As AI-pioneering companies such as Anthropic, NVIDIA, OpenAI, and Palantir gain traction in the enterprise, they are quickly needing to establish their own large-scale alliances and go-to-market programs to scale market coverage, compete against hyperscalers with large established partner ecosystems, and inject trained talent into clients and partners. Frontier Partners will naturally gravitate toward those companies first, rather than partnering with legacy technology vendors that have an AI solution as part of their overall portfolio.

4. **Current Channel Programs Will Not Suffice:**
   There is a big leap from vendor channel programs rooted in volume-based incentives or basic product training to one that will need to support partners that have their own AI-related IP, specialized R&D labs, deep technical co-development, and agentic workflows.

5. **Disintermediation Risks:**
   The"Generalist Technical Partner" moving standardized, pre-built solutions is once again facing an existential threat. These legacy partner types, anchored in undifferentiated resale, implementation, support services, and IT outsourcing models, are at the most risk from Frontier Partners capturing the lion's share of AI projects without support from current vendor partners such as Adobe, Cisco, Dell, HPE, IBM, Lenovo, Microsoft, NetApp, Oracle, SAP, and ServiceNow.



Recommendations for Enterprise Technology Vendors and Channel Leaders

1. **Establish an AI-Native Partner Scouting and Incubation Mandate:**
   Aggressively identify high-potential Frontier Partners, such as Decagon or Thinking Machines Lab, experiment with joint co-development projects to validate their proprietary agentic IP, and strategically pursue M&A or scale partnerships based on proven technical outcomes.
2. **Prioritize Deep Technical Talent Acquisition:**
   To remain relevant, legacy GSIs and technology solution providers should follow the lead of market movers such as Accenture, which acquired Faculty in January 2026 to gain "Frontier" talent and secure dominance in the high-end AI services market. These targeted M&A deals can deliver market-ready specialized AI labs or AI consultancies that possess the sovereign ability to build custom LLMs and autonomous agents, and to orchestrate multi-agent solutions.
3. **Actively Pursue Deep Co-Innovation Alliances with AI Pioneers:**
   Vendors and services firms must secure strategic, large-scale alliances with leading AI-pioneering companies (e.g., Anthropic, NVIDIA, OpenAI). The goal is to foster co-innovation, develop shared talent pools (such as the Accenture–Anthropic Business Group), and rapidly scale access to vertical- and industry-specific solutions that customers demand.
4. **Invest in New "Frontier Partner" Programs and Incentives:**
   As the center of gravity moves, so should partner programs. As with the transition from resale programs to "as-a-service" programs, those vendors who fail to adapt their partner management frameworks to support these highly autonomous, engineering-heavy firms will find themselves locked out of the conversation with Frontier Partners.
5. **Establish an Aggressive M&A Thesis for High-Caliber AI Boutiques:**
   High-growth Frontier Partners are prime acquisition targets, building repeatable IP around agentic workflows (agent factory patterns, Copilot extensions, standardized agent frameworks), which are exactly the assets slower, larger partners would prefer to buy rather than build from scratch. Large integrators and consultancies must systematically acquire high-leverage AI-first boutiques (such as The Hackett Group acquiring LeewayHertz or CourtAvenue acquiring BotsCrew) to accelerate GenAI delivery capabilities, secure scarce senior technical talent, and acquire proprietary IP, thereby moving the value proposition from conceptual strategy to engineered, production-grade platforms.

Meet the Frontier Partner

The next big wave of enterprise artificial intelligence (AI) centers around agent-based systems. These agentic systems will be underpinned by frontier models, and the companies that deploy them to their advantage at large will become frontier firms. But as with any technological leap, it will be accompanied by a new breed of partner positioned to deploy the intelligence, technology, services, and associated workflows. We are witnessing the birth of an AI-first partner persona, what Futurum calls a Frontier Partner.

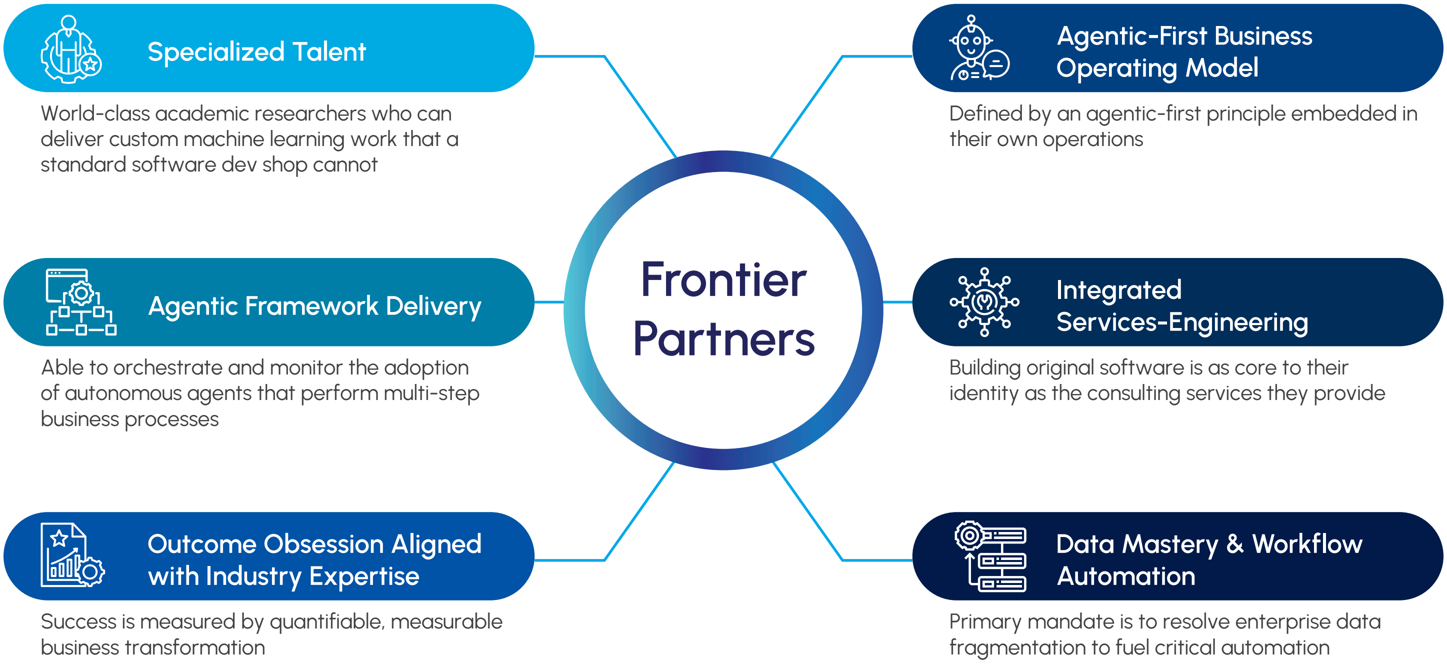
These next-generation partners are distinguished by an AI, agentic-first mindset and operating model, deep technical co-development capabilities, AI workflows, and multi-agent orchestration. This designation is reserved for firms that do not just implement third-party AI hardware and software but design, build, and launch original agent-based solutions that push the boundaries of what is possible with Agentic AI-first solutions. In practice, this AI-native posture increasingly expresses itself through end-to-end business process automation, where agents orchestrate workflows across systems, enforce guardrails through human-in-the-loop approvals, and connect operational data flows that legacy partners still treat as integration work.

What separates a Frontier Partner from a traditional System Integrator (SI) is a fundamental shift in the business operating model, moving from "hours for dollars" to "AI-led innovation as tied to outcomes and use-case improvement." Increasingly, this AI-native design-and-build mandate extends beyond individual applications into full business processes, where Frontier Partners embed AI across systems of record, automates multi-step decision flows, and introduces agent-driven execution models that reshape how work moves through the enterprise.

It's true that some of Frontier Partners' characteristics may echo traits seen in previous waves of technology partners. However, the crucial difference lies in their unique blend of software development and professional services capabilities, deep customer and domain understanding, and, above all, an agentic-first approach to everything they do.

While these partners are still finding their footing in the landscape, we expect Frontier Partners will display the following six characteristic traits (Figure 1):

Figure 1: Frontier Partner Characteristics



Source: Futurum Research, February 2026

- **They Will Exemplify the Agentic-First Business Operating Model:** These firms are defined by an agentic-first principle embedded in their own operations, not just their client work. They don't just deploy agents; they possess an agentic mindset to design, build, and operationalize sophisticated autonomous systems, orchestrating multi-agent solutions for complex business processes while maximizing performance. In customer engagements, this agentic mindset shows up as workflow-level orchestration rather than point solutions. Frontier Partners design agents that coordinate across CRM, ERP, data platforms, and custom systems, with built-in human-in-the-loop controls for approvals, exception handling, and compliance, enabling enterprises to trust automation in high-impact business functions.

- **They Will Offer a Tightly Integrated Services-Engineering Blend:** Building original software is as core to their identity as the consulting services they provide. Operating with an "Everyone is a Developer" mindset, they blend strategic advisory with rigorous software development to generate original IP, including specialized SLMs (small language models), vertical AI accelerators, and proprietary agents and AI toolkits that become the bedrock of the client's infrastructure.

- **They Will Navigate Data Mastery & Workflow Automation:** The Frontier Partner understands that AI is only as powerful as the data feeding it. They specialize in wrangling fragmented, "messy" enterprise data and transforming it into a high-fidelity launchpad for automation, focusing on automating high-value, critical business processes.

- **They Will Have an Outcome Obsession Aligned with Industry Expertise:** Success is measured by quantifiable, measurable business transformation, not hours or slide decks. Their obsessive focus on client outcomes is underpinned by deep expertise in their customers' specific industries, allowing them to scope and deliver solutions that yield tangible improvements in efficiency, revenue growth, or risk mitigation.

- **They Will Deliver via Agentic Frameworks:** This isn't just about deploying agents; with the explosion of agents entering enterprises, the need to orchestrate and monitor the adoption of autonomous agents that perform multi-step business processes without human intervention will become a key service offering for Frontier Partners.

- **They Will Have a High Concentration of PhD and Specialized Talent:** These are not traditional "IT outsourcing" firms. They are characterized by a "talent-heavy" approach with PhD-led teams and fractional AI leadership. Companies such as Brainpool AI, Agathon, and Deepsense AI market themselves as home to world-class academic researchers who can deliver custom machine learning work that a standard software dev shop cannot. Others (such as Agathon AI or Tribe AI) offer "Fractional CTO" or "Fractional CAIO" (Chief AI Officer) services for companies that need strategic support but can't afford a full-time $500k/year executive.

Frontier Partners are better positioned to develop more bespoke, AI-led apps, while experimenting with flat pricing based on meeting agreed-upon outcomes, compared with trying to customize vendor offerings. According to Futurum's 1H 2026 Enterprise Software Decision Makers Survey of 830 executives with purchase authority for enterprise software, 38% of respondents indicated that SaaS vendors are currently missing the mark with meeting customer expectations around vendor competency, addressing their specific needs, and providing acceptable implementation time frames and pricing terms; this is the door opener Frontier Partners need. While the average deal size may be smaller than previous SI deals, likely due to AI enabling faster development and customization cycles with fewer human resources, these efficiency uplifts will allow Frontier Partners to chase and win more deals.

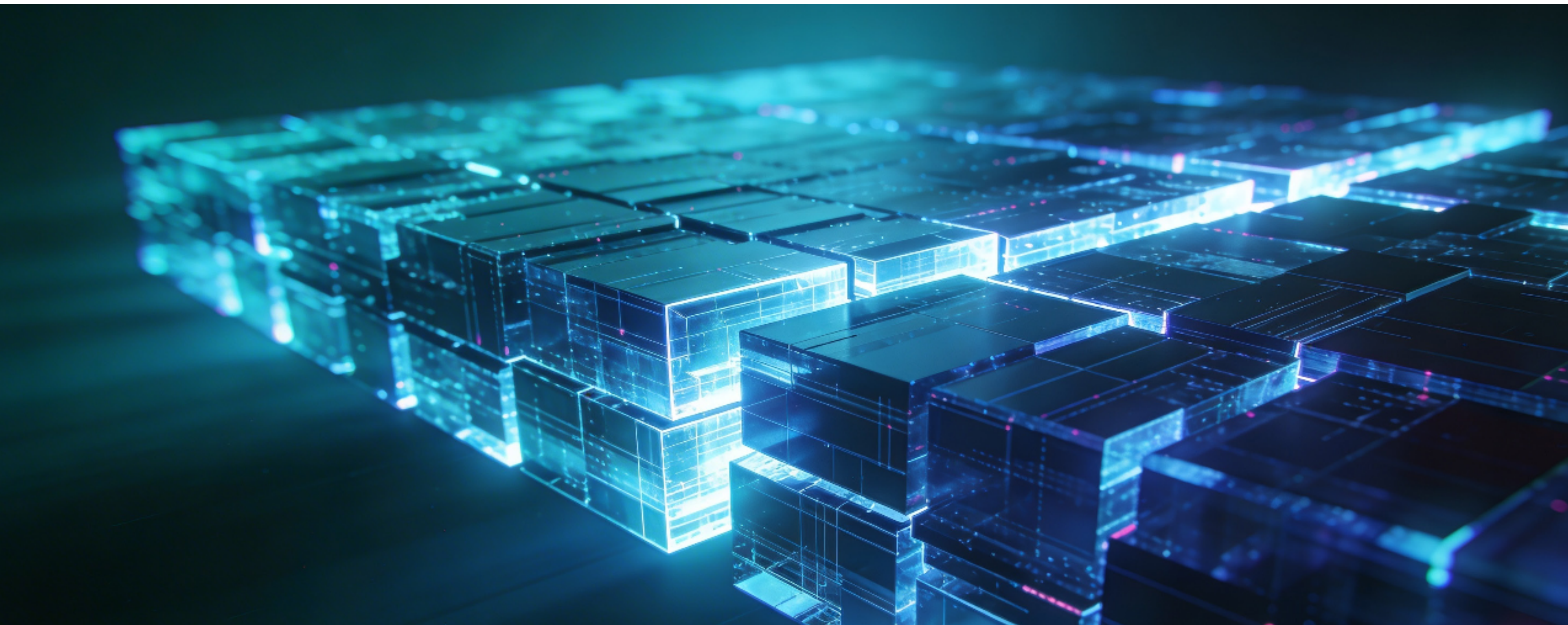
A Necessary Evolution of Traditional Partner Programs

Frontier Partners will disrupt how long-standing technology vendors (such as Adobe, Dell, IBM, Lenovo, Microsoft, NetApp, and ServiceNow, just to name a few) recruit, onboard, and manage their ever-evolving partner ecosystem. Similar to what happened when cloud services began to take hold, traditional IT vendors were struggling not only to compete with cloud-native vendors (AWS, Google, Salesforce), but also to convince their partner ecosystem to transition from on-premise to cloud-based solutions, as "born-in-the-cloud" partners were gaining market traction.

While there are similarities, this inflection point is much different. The pace of partner transformation is accelerating beyond anything experienced in prior disruptive shifts. Traditional partners moving toward Frontier Partner status are operating on AI-compressed timelines, where adaptation is measured in months rather than the multi-year arcs typical of cloud transitions. AI-native delivery models, agent-driven workflows, and automation-first operating structures collapse learning curves and execution cycles simultaneously. As a result, the window to reposition is likely 12 to 18 months, not three to five years.

This acceleration will challenge traditional partner programs to transition toward an entirely new set of partners, skill requirements, technical capabilities, revenue and sales models, ongoing support services, and technology relationships. This time, the technological leap is not cloud services; it is Generative AI and Agentic AI. Common program tropes, such as volume-based incentives and online product training curricula, will become less impactful. Instead, the expectation will be around offerings that foster co-development, accompanied by agentic workflows to manage the partnership.

Partners who treat this as a gradual evolution risk will find that the market has already re-sorted, with Frontier Partners established and laggards struggling to re-enter conversations shaped by AI-native expectations. Furthermore, vendors who fail to adapt their partner management frameworks to support these highly autonomous, engineering-heavy firms will find themselves locked out of this high-impact, emerging community.



AI-First Partner Programs

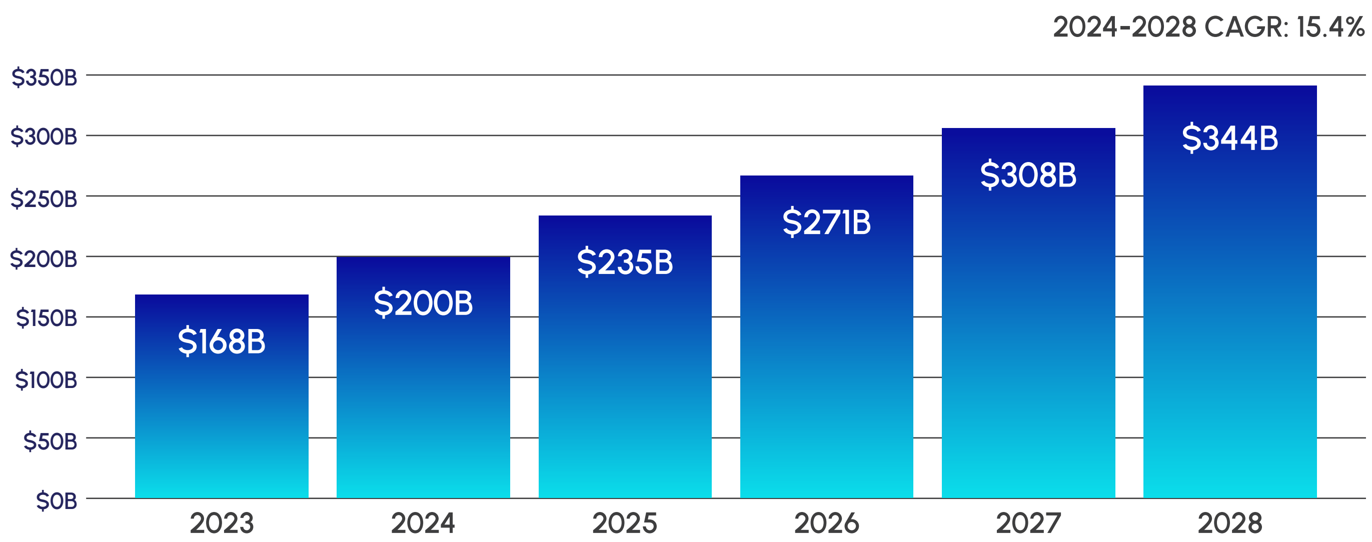
Leading AI vendors such as NVIDIA, Anthropic, and OpenAI, which launch new products weekly, strike multi-billion-dollar partnerships almost as often, and have enough customer "pull" to deliver massive growth, have a different challenge. They will be looking for deep AI expertise and capability that Frontier Partners possess, while also investing in developing talent within the large Global System Integrators (GSIs) to meet demand. NVIDIA's partner programs elevate global consulting and systems integration firms that can deeply operationalize its full-stack AI platform, positioning them as preferred implementation arms for large-scale enterprise AI programs. OpenAI and Anthropic are pursuing hybrid models: they are forming large, strategic alliances with firms including Accenture, Deloitte, and CGI to industrialize the deployment of ChatGPT and Claude, even as they grow their own advisory and delivery capabilities for select strategic accounts. This evolution further blurs the boundary between software vendor, consultancy, and systems integrator, and raises the bar for Frontier Partners, who must both collaborate with and, in some cases, compete against the AI platforms on which they are building.

Early signals indicate that managing these partners and alliance programs will require streamlining co-innovation, developing a robust cloud/software/agent marketplace strategy, and scaling access to vertical and industry-specific solutions for customers at the early stages of their AI deployments. Alliances such as the Accenture–Anthropic Business Group will train ~30,000 Accenture professionals on Claude and co-developed offerings for CIOs to scale AI in software development and core operations, and these alliances are expected to become the norm. Many of these Frontier Partners will naturally be acquired by GSIs, as seen with Accenture's acquisition of Faculty and The Hackett Group's acquisition * of LeewayHertz.

Capturing the Opportunity

The rise of the AI Frontier Partner represents a fundamental reshaping of the cloud and services landscape. Frontier Partners are distinguished by their ability to embed AI directly into end-to-end business processes, moving enterprises toward agent-driven execution models that blend automation, oversight, and cross-system coordination as a single operating fabric. As AI becomes a top national agenda for many countries across the globe [see Sovereign AI: What Nations Want (And What They'll Actually Get)], the need for locally capable partners who understand both the "code" and the "compliance" is paramount. The application development market will grow 15.4% annually to $344 billion in 2028 (Figure 2), and much of that opportunity will land with Frontier Partners.

Figure 2: Application Development Market (2023–2028; in USD Billion)



Source: Futurum Research, November 2025

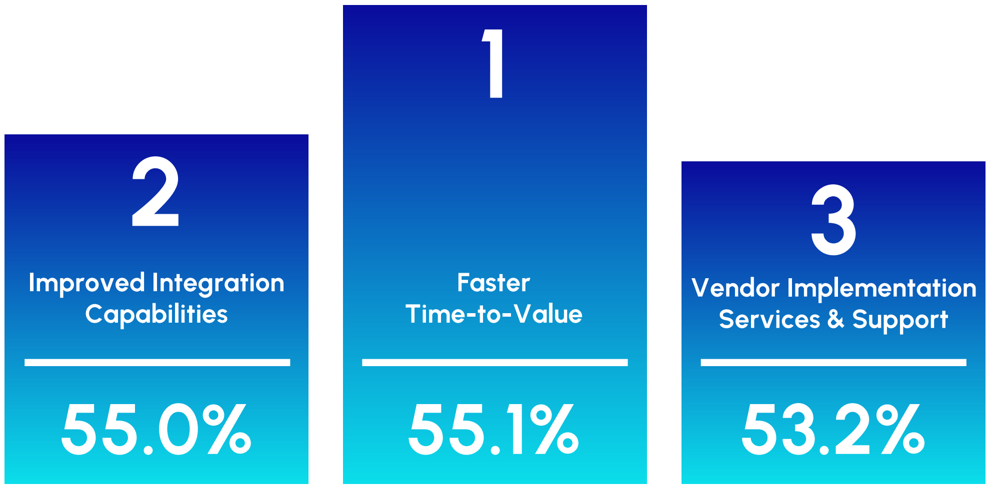
Recent Futurum Research decision-maker survey data reinforces why Frontier Partners have a natural advantage right now, and why the window is narrow.

AI-enhanced capabilities now influence 44% of all new enterprise application purchases, up from 19% just two years ago, with buyers explicitly prioritizing automation and predictive intelligence over incremental feature depth.

This creates a land-grab moment where the winners will be those who can design, deploy, and govern cross-functional, agent-orchestrated workflows. Frontier Partners are structurally better positioned to capture this opportunity because they operate above individual applications, embedding AI directly into business processes, and can connect systems, data, and human-in-the-loop controls into cohesive operating models that legacy partners and product-centric vendors struggle to deliver.

Moreover, enterprise buyers are open to spending, but need assistance in unlocking the value of software. According to Futurum's 1H 2026 Decision Maker survey of IT buyers, improved integration capabilities (55.1%), faster time-to-value (55.0%), and better vendor implementation services and support (53.2%) were the most important factors to unlocking future budget for application purchases (Figure 3). The primary takeaway: A "Frontier Partner" wins this budget by proving they can integrate complex AI stacks faster than the client can do it themselves or by trying to work solely with a vendor.

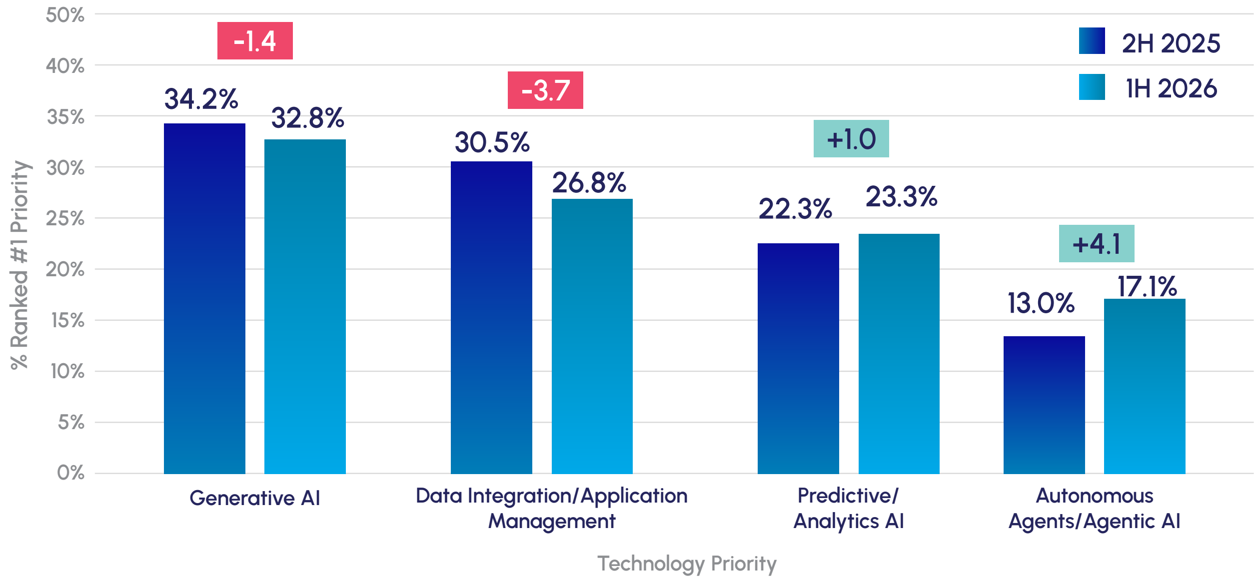
Figure 3: Most Important Factors to Unlocking Budget for Software Purchases



Source: 1H 2026 Enterprise Software Decision Maker Survey, Futurum Research, January 2026

Legacy partners who remain anchored in legacy advisory risk disintermediation as technology priorities face an "Agentic Shift"(Figure 4). As cloud marketplaces and Frontier Partners move up the value chain, the rest of the market will face continued economic pressures. If a partner cannot provide its own proprietary methodology or a unique "AI-related moat," it will remain beholden to their vendor partner's product road-map, revenue share model, and other people's innovation.

Figure 4: Technology Priority Rankings - The 'Agentic Shift'



Q: What underlying technologies are considered the highest priority for your organization? H1 2026 N=830, H2 2025 N=865

Source: 1H 2026 Enterprise Software Decision Maker Survey, Futurum Research, January 2026

What to Watch

The M&A Frenzy: Expect a wave of acquisitions as "Big Four" and Tier 1 integrators scramble to buy mid-sized AI labs with specialized industry knowledge. Accenture's acquisition of Faculty serves as a blueprint for its AI journey. As Accenture did back in 2015 when they purchased Cloud Sherpas to gain a greater foothold in Salesforce's booming SaaS-based CRM business, Accenture's first major move of 2026 – the acquisition of a quintessential Frontier Partner, Faculty, a decision-intelligence and AI consultancy that focus on "Decision Science" and "Safe AI" that provides the specialized, high-stakes capability Fortune 500 companies crave but cannot build internally. This is a clear example of a big services player buying deep, specialized AI and data-science capabilities to differentiate in AI-native transformation.

By appointing Faculty's CEO as Accenture's new CTO, Accenture is doing more than just expanding its headcount; it is fundamentally altering its DNA. Warner's transition from an AI laboratory leader to the head of technology for the world's largest consultancy suggests that the future of Accenture is no longer just "services" – it is engineering. This is the new benchmark: If you are not co-inventing the future with your client under the guidance of technical pioneers, you are simply a cost center.

This transaction, and others like it, underscore a consistent strategic pattern emerging across the services landscape. Large consultancies and digital transformation firms are systematically acquiring AI-first boutiques to accelerate their agentic and GenAI delivery capabilities, secure scarce senior technical talent and proprietary IP, and transition their value proposition from conceptual strategy and "slideware" to fully engineered, production-grade platforms.

The Rise of AI and Agentic Marketplace: Just as the iPhone needed the App Store to become a powerhouse, AI agents need these AI marketplaces to reach customers and offer standardized procurement. These marketplaces range from deep enterprise workflows to open catalogs and developer ecosystems, directories organizing AI and agentic solutions, curated agent toolkits and prebuilt agent templates, and robust security and governance capabilities.

Early leaders in this space are Salesforce AgentExchange, AI Agent Store, AWS AI Agents & Tools Marketplace, Relevance AI, Google's Vertex AI Agent Builder, Microsoft Agent Store, AI Agents Directory, and Hugging Face. These marketplaces represent the primary hubs for discovering, deploying, and monetizing agentic AI solutions, each catering to slightly different segments.

Cloud Marketplace Dominance: Hyperscaler Marketplaces are becoming a mainstream enterprise procurement channel. By the end of 2025, over $21B in third-party software purchases flowed through hyperscaler-operated marketplaces, rising toward $42B by 2029. These marketplaces now represent roughly 5% of global enterprise software GMV, signaling structural adoption rather than experimental use. Watch how AWS and Azure marketplaces begin to offer "Frontier Services" directly, further squeezing legacy partners who lack proprietary IP.

Frontier Partners Enter the Fold: Companies such as Agathon AI, AI Superior, Basis AI, Bold Tech, BotsCrew, Brainpool AI, Caylent, Ciridae, CourtAvenue, Decagon, Deepsense AI, Distyl AI, Faculty, Higgsfield, Intellectyx AI, LeewayHertz, Markovate, Master of Code, Mesh AI, Netomi, Scopic, Thinking Machines Lab, Tribe AI, Unify GTM, and Vstorm are early examples of Frontier Partners. More will emerge and gain notoriety.

While they vary in size, they share an "AI-Service-First" business model focused on bridging the gap between raw AI models (such as OpenAI's GPT-4 or Anthropic's Claude) and actual business workflows and processes that deliver ROI quickly and efficiently. Their offerings range from AI strategy and audits to fine-tuning RAG and connecting modern AI to existing databases or CRM systems.

Most of these companies do not own the underlying Large Language Models (LLMs). Instead, they act as the "middle-mile" that makes the technology usable. They are similar because they provide:

- **Custom AI Agents:** Building autonomous bots that don't just "chat" but actually perform tasks (e.g., Decagon and BotsCrew for customer service; Unify GTM for sales).
- **Production-Grade Engineering:** They move clients past the "Playground" phase into "Production," handling data privacy, SOC 2 compliance, and latency.
- **Domain Specificity:** Instead of general AI, they build tools for specific industries. For example, LeewayHertz focuses on enterprise blockchain and AI, while Faculty is known for high-level data science and government projects.

Technology vendors will need to become an 'ambidextrous channel organization' where they manage existing partner types [MSP, Reseller, SI, etc] and Frontier partners simultaneously to ensure they are protecting current revenue and capturing future revenue.

Why This Matters Right Now

Frontier Partners are thriving because most enterprises have "AI fatigue." After a year of playing with ChatGPT, companies have realized that building a custom, secure, and reliable AI tool is incredibly hard. These Frontier Partners are the "shovels" in the AI gold rush; they provide the labor and expertise to make the technology actually work.

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