ISG Provider Lens®

AWS Ecosystem Partners

AI-Powered Business Transformation with AWS

A study assessing AWS partners' capabilities to support evolving business and technology needs



Customized report courtesy of:

DXC

QUADRANT REPORT | OCTOBER 2026 | APeJCK

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APAC enterprises are shifting from cloud adoption to AI-enabled business value at scale

Opener

This study benchmarks APAC AWS service providers across cloud migration and modernisation, managed services, data lifecycle management and business transformation. It covers global systems integrators (GSIs), regional providers, AWS-focused specialists and ecosystem partners, with analysis across India, ASEAN and Australia/New Zealand. The research examines how AWS infrastructure investments, platform capabilities, partner programmes and local market dynamics shape provider strategies and customer adoption.

Market Context

The APAC AWS ecosystem is entering a more significant phase of maturity. Cloud adoption is no longer primarily a question of whether enterprises should move workloads; it is increasingly about what should be modernised, where it should run, how quickly value can be realised and how the resulting environment can support AI at scale. AWS is supporting this transition by expanding infrastructure and regional capabilities. The Thailand Region is now generally available, while the New Zealand Region adds local infrastructure and data residency options. These developments matter because local presence is becoming essential for regulated industries, public sector workloads and customers with sovereignty requirements. AWS also made Amazon Bedrock available across additional APAC locations, including Jakarta, Thailand and Malaysia, widening the addressable market for GenAI and agentic workloads.

The regional market is also becoming increasingly diverse. India boasts substantial engineering capabilities, high demand for digital services and a large pool of AWS talent. In contrast, ASEAN is more fragmented, but this fragmentation creates opportunities for partners with local language, regulatory, industry and GTM expertise. Singapore

AI-ready operations, **trusted data** and **agentic AI** are redefining AWS success.

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continues to serve as a regional hub, while Indonesia, Malaysia, Thailand, Vietnam and the Philippines are developing robust domestic cloud ecosystems. Australia and New Zealand have a different focus, with enterprises prioritising security, sovereignty, resilience and sophisticated managed services. For providers, therefore, *APAC capability* is becoming less credible as a single regional proposition. Winning requires a portfolio of country-level plays connected by common IP, delivery assets and AWS alignment.

Another important shift is that the ecosystem is broadening beyond traditional consulting and infrastructure services. AWS now describes its partner network as spanning services and software partners across a very large global footprint, while its regional programmes increasingly emphasise validated specialisation, industry expertise and measurable customer outcomes.

Enterprise Priorities

The first priority is still modernisation, but the nature of modernisation is changing. Enterprises increasingly expect partners to move beyond lift-and-shift towards application modernisation, database transformation, SAP modernisation, VMware-related transformation, mainframe modernisation and cloud-native engineering. AWS has explicitly expanded partner incentives around migration and modernisation, including VMware- and SAP-related initiatives. This expansion creates substantial opportunities for service providers, particularly those that can combine assessment, migration factories, application refactoring and post-migration managed services rather than offering them as separate engagements.

The second priority is turning GenAI experimentation into production. Across APAC, enterprises are moving from isolated copilots and proofs of concept towards governed AI platforms, enterprise search, knowledge assistants, customer service automation, software engineering and industry-specific applications. The expansion of Bedrock availability across regional locations strengthens this trajectory because it simplifies data residency, latency and governance challenges at the local level. Partners are, therefore, expected to provide more than model integration. They must also offer data engineering, RAG architecture, model evaluation, AI security, responsible AI controls, MLOps, FinOps, and increasingly, agentic AI engineering. AWS' own AI adoption framework highlights business, people, governance, platform, security and operations as interconnected dimensions, reinforcing the need for multi-disciplinary services.

The third priority is cloud economics and operational resilience. After several years of rapid cloud consumption, CIOs and CFOs are scrutinising unit economics, idle resources, architectural efficiency, licensing, observability and workload placement. This scrutiny is elevating FinOps, cloud optimisation, automation and managed operations on the agenda. The opportunity is particularly strong for providers that can connect cost optimisation with modernisation rather than treating FinOps solely as a reporting exercise. In APAC, this also has a localisation dimension; providers need to understand differences in cloud maturity, pricing sensitivity, regulatory constraints and operating models across countries rather than applying a uniform optimisation approach.

Fourth, sovereignty and security are becoming key buying criteria rather than compliance afterthoughts. Local AWS Regions, cross-Region resilience, data residency, identity modernisation, threat detection and cloud security are increasingly embedded in transformation programmes. In markets such as Australia, New Zealand, Singapore and India, providers that can combine local regulatory understanding with global delivery depth have a clear advantage. AWS' regional partner ecosystem increasingly reflects this need for specialised capabilities and industry expertise.

Lastly, the industrialisation of AI and cloud services is a growing priority. Enterprises are shifting away from one-off proofs of concept towards reusable platforms, accelerators, governance frameworks and managed AI operations. This shift favours providers with pre-built assets, domain-specific IP and repeatable architectures. It also changes the dynamics of the relationship: the partner that owns the operating model, automation and continuous

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optimisation can retain relevance after the initial implementation.

Provider Dynamics

The provider landscape is becoming more polarised. At the top end, GSIs are using AWS as a transformation platform rather than simply a cloud infrastructure destination. Their differentiation increasingly stems from industry solutions, application modernisation, data and AI capabilities, global delivery and the ability to manage complex multinational estates.

A second tier of providers is gaining relevance through regional specialisation. AWS' regional awards highlight a broad set of firms across ASEAN, including country-focused partners in Indonesia, Malaysia, the Philippines, Singapore, Thailand and Vietnam. This focus is important because APAC customers do not necessarily want a global template localised at the end of a sales cycle. They prefer partners that understand domestic regulations, procurement structures, language, industry dynamics and local talent constraints. The strongest regional specialists are, therefore, becoming strategic complements to global providers, rather than simply lower-cost alternatives.

A third dynamic is the rise of AWS-native specialists. These firms are often differentiated by deep AWS expertise, rapid implementation, managed services and focused competencies in data, security, AI or migration. Their advantages include speed and specialisation, while their limitation can be scaled across large multinational accounts. The market is consequently creating more opportunities for ecosystem-based delivery, where a GSI, regional specialist, ISV and AWS jointly assemble the required capabilities. AWS has also introduced mechanisms intended to make multi-partner collaboration and co-selling easier, which could further strengthen this model.

The partner value proposition is also shifting from credentials to evidence. AWS continues to expand its specialisation and competency programmes, resulting in a large network of partners. Certifications remain important, but they are increasingly table stakes. Enterprises are looking for demonstrable outcomes: migration velocity, modernisation rates, AI production deployments, reduced cloud cost, improved resilience, faster release cycles and industry-specific IP. AWS' specialisation framework is explicitly built around validated expertise, while its recent partner activity emphasises measurable customer value.

Another structural shift is the increasing importance of AWS Marketplace and co-selling. Partners are being encouraged to package services and software into repeatable offerings and use Marketplace as a route to market. This shift is particularly relevant in APAC, where scaling a country-by-country sales model can be expensive. Providers with reusable accelerators, industry solutions and Marketplace-ready offerings can extend their reach without proportionally increasing local sales infrastructure. AWS is also strengthening partner incentives, deal registration, Marketplace motions and co-selling capabilities, making ecosystem-led revenue generation central to partner strategy.

This evolution is also changing what *scale* means. Historically, scale in the context of AWS services was measured through certified talent, cloud revenue and the number of customers managed. Increasingly, it will be measured through repeatability: how many industry use cases can be deployed from a common architecture, how much delivery can be automated, how quickly a partner can move from one country to another and how effectively it can convert AWS investments into recurring managed service revenue. AWS' profitability framework and partner programmes increasingly reward breadth, specialisation and business-model diversification, reinforcing this trend.

Finally, acquisitions and capability consolidation should remain on the radar. As AI, data, security and cloud economics become intertwined, providers will increasingly look for specialised assets that can accelerate capability development rather than building every competency organically. The most attractive targets are likely to be firms with strong local AWS relationships, scarce talent, proprietary IP or repeatable industry solutions. This could make the ecosystem more concentrated in strategic capabilities while maintaining diversity in delivery models.

Outlook

The APAC AWS services market is moving towards a more sophisticated phase in which the cloud is the foundation, not the end

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product. The strongest growth opportunities will lie at the intersection of modernisation, AI, data, security, sovereignty and managed operations. India should remain the region's largest talent and delivery engine, while ASEAN is likely to produce a widening set of country-specific growth stories. Australia and New Zealand should continue to reward providers with strong security capabilities, regulated industry experience and sovereign cloud credentials.

The market is rapidly transitioning from copilots to agentic AI. Enterprises are prioritising governed AI platforms, secure multi-agent orchestration and outcome-based delivery models that transform end-to-end business processes while maintaining trust and control.

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Provider Positioning

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	AWS Professional Services	AWS Managed Services	AWS Data Lifecycle Management Services	AI-Powered Business Transformation with AWS
AC3	Not In	Product Challenger	Not In	Not In
Accenture	Leader	Leader	Leader	Leader
Aspire Systems	Not In	Product Challenger	Not In	Not In
Atos	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Birlasoft	Contender	Contender	Not In	Not In
Brillio	Product Challenger	Product Challenger	Not In	Not In
Capgemini	Leader	Leader	Leader	Leader
Cevo	Not In	Not In	Market Challenger	Not In
CI&T	Contender	Not In	Not In	Contender
Cloud4C	Product Challenger	Product Challenger	Contender	Not In
CloudKeeper	Not In	Contender	Not In	Not In

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Provider Positioning

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	AWS Professional Services	AWS Managed Services	AWS Data Lifecycle Management Services	AI-Powered Business Transformation with AWS
Cognizant	Leader	Leader	Leader	Leader
Deloitte	Product Challenger	Product Challenger	Product Challenger	Product Challenger
DXC Technology	Leader	Leader	Leader	Leader
FPT Software	Market Challenger	Not In	Not In	Not In
Fractal Analytics	Product Challenger	Not In	Product Challenger	Product Challenger
Genpact	Not In	Not In	Product Challenger	Product Challenger
GFT	Product Challenger	Not In	Contender	Contender
HCLTech	Leader	Leader	Leader	Leader
Hitachi Digital Services	Product Challenger	Rising Star ★	Product Challenger	Market Challenger
Infosys	Product Challenger	Product Challenger	Leader	Leader
ITC Infotech	Product Challenger	Leader	Product Challenger	Contender

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Provider Positioning

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	AWS Professional Services	AWS Managed Services	AWS Data Lifecycle Management Services	AI-Powered Business Transformation with AWS
Kyndryl	Rising Star ★	Product Challenger	Product Challenger	Product Challenger
LTM	Product Challenger	Rising Star ★	Rising Star ★	Rising Star ★
Mantel Group	Contender	Not In	Market Challenger	Market Challenger
Minfy	Not In	Contender	Not In	Not In
Mphasis	Product Challenger	Product Challenger	Not In	Not In
NCS	Market Challenger	Market Challenger	Not In	Not In
NTT DATA	Leader	Leader	Rising Star ★	Leader
Orange Business	Product Challenger	Product Challenger	Not In	Not In
Persistent Systems	Product Challenger	Product Challenger	Product Challenger	Product Challenger
PwC	Leader	Leader	Leader	Leader
Quantiphi	Product Challenger	Not In	Product Challenger	Product Challenger

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Provider Positioning

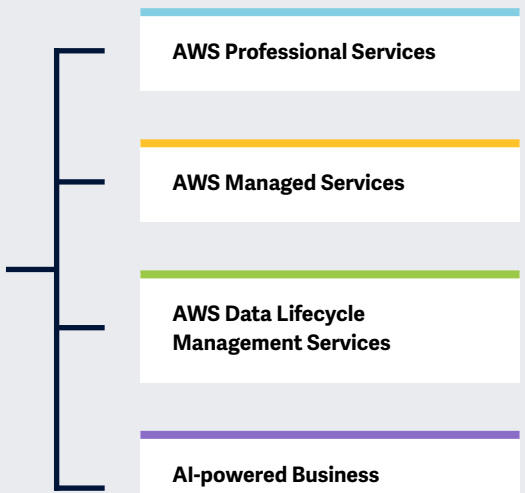
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	AWS Professional Services	AWS Managed Services	AWS Data Lifecycle Management Services	AI-Powered Business Transformation with AWS
Rackspace Technology	Product Challenger	Product Challenger	Not In	Not In
Slalom	Not In	Product Challenger	Not In	Not In
Tata Communications	Contender	Contender	Not In	Not In
TCS	Leader	Leader	Leader	Leader
Tech Mahindra	Leader	Leader	Product Challenger	Rising Star ★
Visionet	Contender	Not In	Not In	Contender
Wipro	Leader	Leader	Leader	Leader
YASH Technologies	Contender	Product Challenger	Contender	Not In
Zensar Technologies	Contender	Not In	Contender	Not In

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Key focus areas of the **AWS Ecosystem Partners 2026** study.

Simplified Illustration Source: ISG 2026



Definition

The AWS Ecosystem – Between Innovation and Sovereignty

In 2026, the AWS partner ecosystem is entering a decisive maturity phase defined by the operationalisation of advanced AI and deeper partner-led innovation. AWS has moved rapidly beyond foundational GenAI toward production-grade agentic AI, enabling partners to design, deploy and operate intelligent systems within clearly defined security, compliance and governance frameworks. As a result, partners are no longer differentiated by innovation alone, but by their ability to implement, assure and optimise AI-enabled enterprise platforms at scale.

Building on the momentum from re:Invent 2025, AWS has expanded its AI and cloud foundation through advances in Amazon Bedrock, Bedrock AgentCore, Nova models, agentic development services, custom silicon and resilient regional infrastructure.

These capabilities strengthen the partner opportunity around AI modernisation, industry cloud solutions, data platforms, workload transformation and managed operations. The key shift is from experimentation to governed execution, where transparency, policy enforcement, operational control and measurable outcomes become central to enterprise adoption.

AI governance and digital sovereignty have emerged as critical priorities, with AWS strengthening its focus on helping customers meet stringent regulatory and data residency requirements. Through sovereign cloud initiatives, AWS enables partners to deliver solutions that align with regional compliance mandates. Providers that combine cloud engineering, AI expertise, security, regulatory understanding, industry knowledge and managed services capabilities will be best positioned to support clients in building trusted, scalable and resilient AI-enabled businesses.

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Scope of the Report

This ISG Provider Lens® quadrant report covers the following four quadrants for services/ solutions: AWS Professional Services, AWS Managed Services, AWS Data lifecycle Management Services, AI-powered Business Transformation with AWS.

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

- Transparency on the strengths and weaknesses of relevant providers/ software vendors
- A differentiated positioning of providers by segments (quadrants)
- Focus on the APeJCK market

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).

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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.

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AI-powered Business Transformation with AWS

Who Should Read This Section

This report is valuable for providers offering **AI-powered business transformation services with AWS** in **APeJCK** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights providers' market positioning based on their AI and GenAI capabilities and market presence. It emphasizes the growing adoption of AWS-powered AI solutions, leveraging services such as Amazon Bedrock and Amazon SageMaker to build scalable, secure and intelligent workflows.

Technology professionals

Should read this report to understand AWS AI and GenAI service providers' relative strengths and weaknesses in enabling enterprise-wide transformation. It highlights their expertise in building agentic systems, developing custom ML models and leveraging AWS services such as Bedrock and SageMaker to design scalable, AI-driven workflows and platforms.

AI and data professionals

Should read this report to assess providers' positioning and their ability to operationalize advanced AI solutions. It covers their capabilities in agent-based architectures, AI lifecycle management, optimization using AWS custom silicon and adherence to responsible AI practices for secure, ethical and compliant deployments.

Procurement professionals

Should read this report to evaluate the current landscape of AWS AI service providers in APeJCK. It enables comparison of providers based on their AI capabilities, co-innovation programs, industry-specific solutions and their ability to deliver measurable business outcomes, helping organizations select the right partner for large-scale AI transformations.

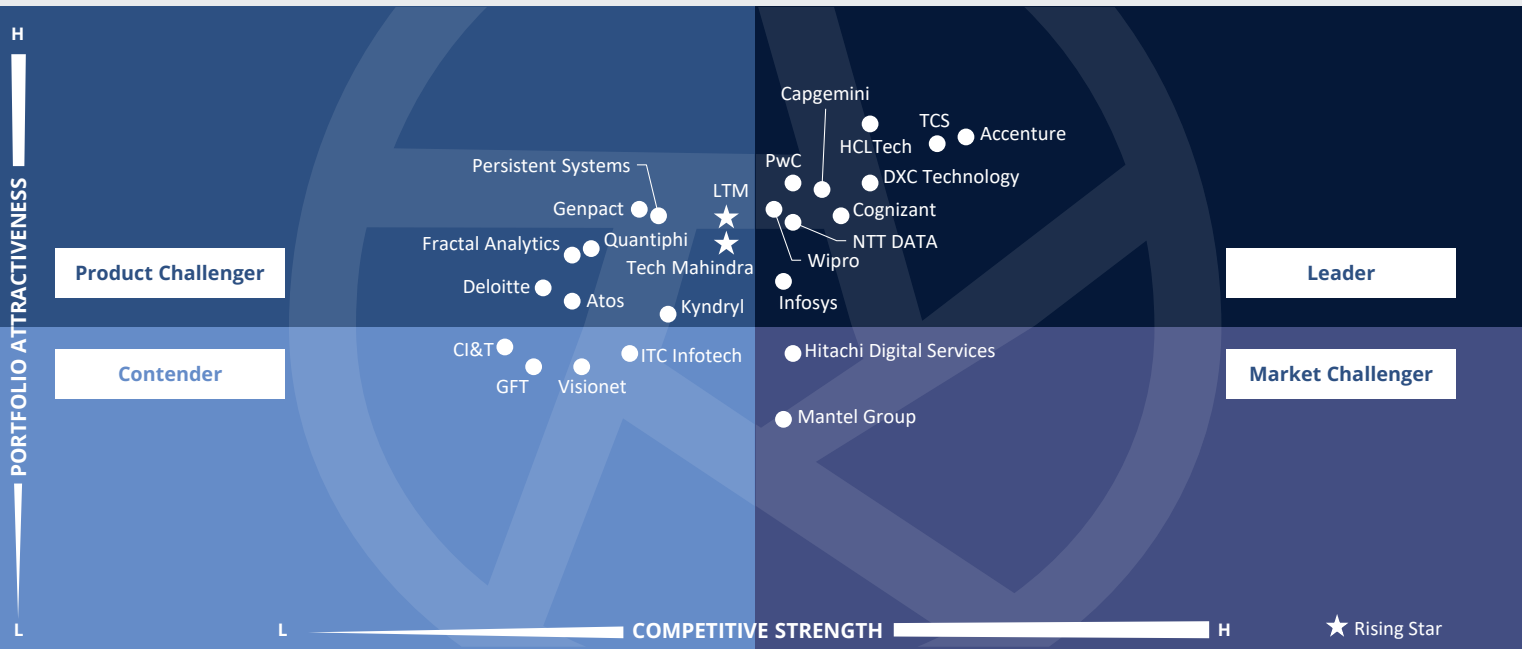
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ISG Provider Lens®

Source: ISG RESEARCH

AWS Ecosystem Partners
AI-Powered Business Transformation with AWS

APeJCK 2026



This quadrant evaluates providers that leverage AWS AI capabilities to move enterprises from **experimentation to production**, combining **agentic AI, governance and industry expertise** to deliver **measurable business transformation** and long-term value.

Srinivasan P N

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Definition

This quadrant evaluates AWS ecosystem partners that enable enterprise-wide AI-powered transformation by combining advanced GenAI, agentic systems and purpose-built infrastructure. These providers deliver end-to-end services spanning strategy, design, development, deployment and lifecycle management of AI solutions, leveraging AWS-native agentic frameworks and AI suite of services, such as Amazon Bedrock and SageMaker AI, to operationalise intelligent business workflows.

Providers demonstrate strong capabilities in building and managing agent-based systems, developing customised ML models and optimising performance using AWS custom silicon such as Graviton and Inferentia. Their offerings also extend to co-innovation programs, AI factories and enterprise-scale AI platforms tailored to industry-specific needs. A strong emphasis is placed on responsible AI practices, ensuring secure, ethical and compliant deployment of AI solutions aligned with organisational and regulatory requirements.

Eligibility Criteria

1. Demonstrate **end-to-end AI transformation capabilities across strategy**, use case design, solution development, deployment, governance and lifecycle management on AWS
2. Use **AWS-native AI services**, including Amazon Bedrock, Amazon SageMaker, Amazon Q, agentic AI capabilities or equivalent AWS AI and ML services
3. Showcase expertise in AWS custom silicon for performance optimisation and cost efficiency
4. Offer **customized ML and enterprise LLM solutions** tailored to industry-specific use cases
5. Establish **AI CoEs, co-innovation labs and AI factories** to accelerate enterprise AI adoption
6. Provide measurable **business outcomes** driven by AI-led transformation initiatives
7. Embed **responsible AI frameworks** covering governance, explainability, security and compliance
8. **Provide pre-built accelerators**, reusable assets and agent templates to speed time-to-value
9. Exhibit **specialised expertise in industry verticals with documented case studies** highlighting measurable business outcomes achieved through AWS AI implementations
10. Demonstrate relevant **AWS certifications, competencies and partnerships in AI and ML** domain
11. Demonstrate **ongoing investment in AI innovation**, including roadmaps, CoEs and talent development

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Observations

As enterprises move beyond isolated AI pilots, the focus is shifting towards scaling AI as a core business capability. Organisations are increasingly seeking partners that can industrialise AI adoption, integrate AI into enterprise workflows and deliver measurable business outcomes, while maintaining governance, security and operational control.

A key trend is the rapid evolution from conversational copilots to agentic AI systems capable of reasoning, orchestrating tasks and executing multi-step business processes. AWS is accelerating this transition through its Agentic Process Transformation (APT) vision, which combines GenAI, agents, automation and domain expertise to reimagine end-to-end business processes. Enterprises are increasingly adopting AI platforms, multi-agent architectures and reusable delivery frameworks that accelerate the transition from PoC initiatives to production-scale deployments across business functions, customer engagement and operations.

Responsible AI, governance and trust are becoming foundational requirements for enterprise adoption. Growing regulatory scrutiny and heightened cybersecurity concerns are driving demand for robust controls around explainability, lineage, model monitoring, security testing and policy enforcement. Organisations are increasingly looking for providers that can embed governance, compliance and risk management across the AI lifecycle while supporting sovereignty and data residency requirements.

At the same time, AI economics is emerging as a strategic priority. As model volumes and agent-based workloads increase, enterprises are prioritising cost-efficient architectures, AI observability and lifecycle governance to improve transparency and maximise ROI. This trend is accelerating the adoption of AI factories, intelligent workload management, model optimisation and AI-driven FinOps capabilities to operationalise AI at scale.

These trends reflect a broader market shift from experimentation to enterprise-scale transformation, with service providers helping organisations build sustainable AI operating models, modernise business processes and realise measurable value from AI investments through governed, secure and scalable AI ecosystems.

From the 42 companies assessed for this study, 25 qualified for this quadrant, with 10 being Leaders and two Rising Stars.

accenture

Accenture differentiates itself by connecting industry expertise, cloud modernisation and agentic AI through repeatable products, platforms and transformation frameworks.

Capgemini

Capgemini's AI narrative is increasingly centred on industrialised deployment, governance, scalability and integration with core business processes rather than only experimentation.

cognizant

Cognizant has developed a broad portfolio of AI platforms, accelerators and industry blueprints focused on improving productivity, decision-making and business process transformation.

DXC

DXC is positioning AI as a business transformation engine rather than a standalone technology capability. Its strategy combines governance, orchestration, industry context and human oversight to support responsible AI adoption.

HCLTech

HCLTech has made AI the core principle of its AWS strategy, embedding AI across modernisation, operations, CX, data platforms and business process transformation.

Infosys

Infosys links AI adoption to cloud transformation, operational efficiency and enterprise workflow modernisation, rather than positioning it as an isolated technology initiative.

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NTT DATA's AI strategy extends beyond GenAI deployment to encompass governance, platform engineering, LLMOps, agent lifecycle management and business workflow integration. This enterprise-oriented approach positions it strongly in the evolving agentic AI market.

PwC focuses on AI adoption challenges, going beyond model deployment to include, among others, governance, workforce readiness, risk management and operating model redesign. This consulting-led approach aligns well with enterprises in regulated industries.

TCS is focused on production-scale GenAI and agentic AI adoption, emphasising business value realisation, industry transformation and operationalised AI rather than isolated pilots.

Wipro has evolved from a cloud-focused partner to an enabler of business transformation by integrating AI, modernisation, data and operating model redesign into enterprise transformation engagements.

LTM (Rising Star) demonstrates strong alignment with enterprise AI adoption trends through investments in agentic platforms, AI engineering frameworks and AWS transformation initiatives.

Tech Mahindra's (Rising Star) AI strategy on AWS combines cloud modernisation with operational AI use cases. References of engagements made public reveal a pragmatic focus on process transformation, automation of network operations and industry-specific AI deployment.

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Leader

"DXC Technology's AI strategy reflects an enterprise-focused approach that prioritises governed agentic AI, operational scalability and industry-specific transformation outcomes rather than isolated AI experimentation."

Srinivasan P N

DXC Technology

Overview

DXC Technology is headquartered in Virginia, US. It has more than 115,000 employees across over 70 countries. In FY26, the company generated $12.6 billion in revenue. DXC Technology is investing heavily in agentic AI, enterprise automation and AI-enabled transformation through platforms such as AI Workbench, Xponential, AdvisoryX, OASIS and LabX. These platforms are designed to help organisations move AI initiatives to governed, production-scale deployments on AWS, where transformation outcomes are aligned with business objectives.

Strengths

Enterprise agentic AI platform: DXC AI Workbench and OASIS serve as platforms for building, orchestrating and governing enterprise AI agents on AWS. The solution supports multi-agent workflows, human-in-the-loop controls, decision traceability and operational governance, helping accelerate the deployment of AI use cases into production.

Comprehensive AI transformation frameworks: X7ponential, AdvisoryX, OASIS and LabX collectively cover strategy, governance, incubation and delivery of AI-based transformation initiatives. These frameworks help organisations move from AI ambition towards business outcomes that are scalable, while maintaining governance and operational discipline.

Responsible AI and governance focus: DXC places much emphasis on observability, AgentOps, governance, FinOps and human oversight. It recognises that agentic AI adoption requires operational controls, runtime governance and enterprise-grade accountability in addition to the right model performance.

Industry-centric AI innovation: DXC is developing AI capabilities across financial services, insurance, healthcare, logistics, defence and manufacturing, as well as the public sector. Offerings such as the Regulatory AI Engine and industry-specific agentic solutions demonstrate its focus on embedding domain context into enterprise AI adoption.

Caution

DXC's AI portfolio is extensive and continues to evolve rapidly. While the breadth of investments demonstrates commitment, customers may seek additional long-term production references and clearer evidence of scaled business outcomes across multiple industries and geographies with the increasing maturity of agentic AI adoption.

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Appendix

The ISG Provider Lens® 2026 – AWS Ecosystem Partners study analyses the relevant software vendors/service providers in the APeJCK 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 September 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 ($US) unless noted otherwise.

The study was conducted in the following steps:

1. Definition of AWS Ecosystem Partners market
2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities and use cases
4. Leverage ISG's internal databases and advisor knowledge & experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts & figures received from providers and other sources.
6. Use of the following key evaluation criteria:
   * Strategy and vision
   * Innovation
   * Brand awareness and presence in the market
   * Sales and partner landscape
   * Breadth and depth of portfolio of services offered
   * Technology advancements

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Lead Author



Srinivisan P N
Lead Analyst

Srinivasan PN is a Senior Lead Analyst at ISG Research with over 12 years of experience in the technology and market research industry. He specializes in Digital Engineering Services, Manufacturing, the AWS cloud ecosystem and broader digital transformation trends, with a strong focus on how emerging technologies are reshaping enterprise IT landscapes. In his current role, Srinivasan leads and co-authors ISG Provider Lens® studies particularly across Digital Engineering, Manufacturing and AWS Ecosystem domains. He is responsible for developing quadrant assessments that provide actionable insights for enterprises and service providers. His work combines deep domain expertise with rigorous primary and secondary research methodologies. Srinivasan is also an active contributor to ISG's thought leadership, authoring research articles and papers that analyze market developments, technology evolution and competitive positioning. He works closely with advisors to support enterprise clients through tailored, ad-hoc research engagements, delivering insights across industries and use cases. Prior to his current role, Srinivasan was involved in end-to-end research delivery, building strong capabilities in both primary and secondary research. His analytical rigor and industry perspective enable him to translate complex technology trends into strategic insights for business and IT stakeholders.

Enterprise Context and Global Overview Analyst



Sandya Kattimani
Research Specialist

Sandya Kattimani is a senior research analyst at ISG and is responsible for supporting and co-authoring ISG Provider Lens® studies on Contact Center, Life Sciences, Mainframes. Sandya has over 6 years of experience in the technology research industry and in her prior role, she carried out research delivery for both primary and secondary research capabilities. Her area of expertise lies in Competitive Intelligence, Customer Journey Analysis, Battle Cards, Market analysis and digital transformation. She is responsible for authoring the enterprise content and the global summary report, highlighting regional as well as global market trends and insights. Prior to this role she has worked as technology research analyst, where she was responsible for project work which includes detail technology scouting, competitive intelligence, company analysis, technologies study and other Ad hoc business research assignments.

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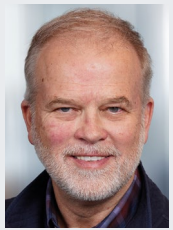
Heiko Henkes

Director & Principal Analyst, Global IPL Content Lead

Heiko Henkes serves as Director and Principal Analyst at ISG, overseeing the Global ISG Provider Lens® (IPL) Program for all IT Outsourcing (ITO) studies alongside his pivotal role in the global IPL division as a strategic program manager and thought leader for IPL lead analysts.

Henkes heads Star of Excellence, ISG's global customer experience initiative, steering program design and its integration with IPL and ISG's sourcing practice. His expertise lies in guiding companies through IT-based business model transformations, leveraging his deep understanding of continuous transformation, IT competencies, sustainable business strategies and change management in a cloud-AI-driven business landscape. Henkes is known for his contributions as a keynote speaker on digital innovation, sharing insights on using technology for business growth and transformation.

IPL Product Owner



Jan Erik Aase

Partner and Global Head – ISG Provider Lens®

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor.

Now as a research director, principal analyst and global head of ISG Provider Lens®, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

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OCTOBER, 2026

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