ISG Provider Lens®

AWS Ecosystem Partners

AWS Data Lifecycle Management Services

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

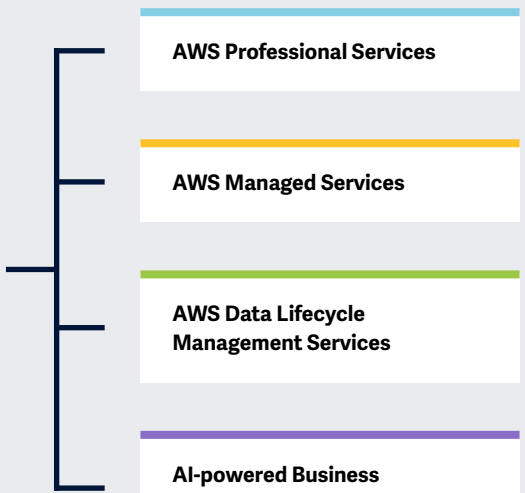
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	AWS Professional Services	AWS Managed Services	AWS Data Lifecycle Management Services	AI-Powered Business Transformation with AWS
Rackspace Technology	Product Challenger	Product Challenger	Not In	Not In
Slalom	Not In	Product Challenger	Not In	Not 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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AWS Data Lifecycle Management Services

Who Should Read This Section

This report is valuable for providers offering **AWS data lifecycle management services** in **APeJCK** 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 breadth of their data lifecycle and governance capabilities and market presence. It emphasizes how enterprises leverage AWS for end-to-end data management, advanced analytics, AI and ML use cases, while prioritizing data sovereignty, regulatory compliance and responsible AI through robust governance frameworks and AWS-native services.

IT professionals

Should read this report to understand AWS data service providers' relative strengths and weaknesses in managing the end-to-end data lifecycle. It highlights capabilities in data integration, governance and management of structured and unstructured data, along with expertise in AI-ready pipelines, real-time processing and data quality management to support scalable, compliant data operations.

Technology professionals

Should read this report to assess providers' market positioning and their ability to enable data-driven transformation. It outlines providers' expertise in AWS-native data architectures, advanced analytics and predictive and prescriptive modeling, as well as capabilities to ensure data sovereignty, regulatory compliance and responsible AI-aligned governance.

Procurement professionals

Should read this report to evaluate providers based on their data governance frameworks, data platforms' scalability and their ability to deliver measurable business outcomes. It supports the comparison of service offerings, the assessment of value propositions and the selection of partners that align with enterprise data strategy and compliance requirements.

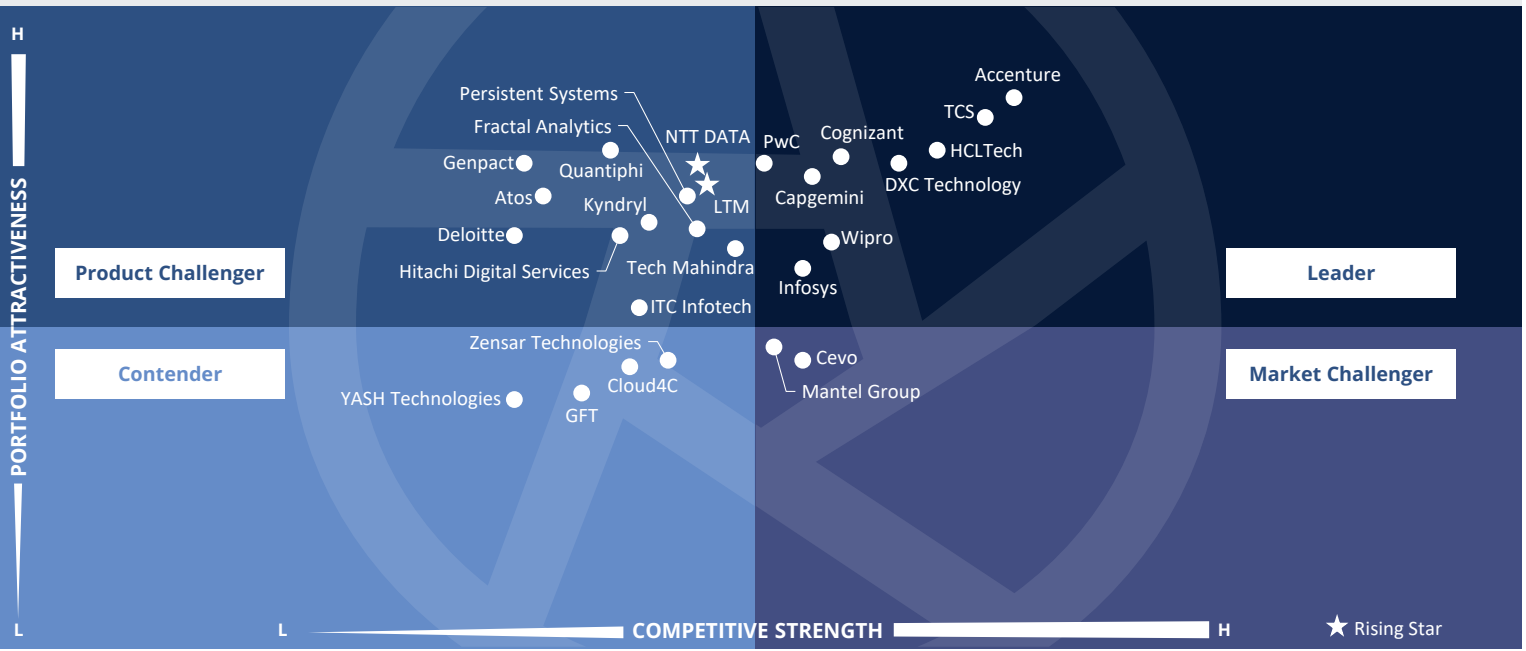
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ISG Provider Lens®

Source: ISG RESEARCH

AWS Ecosystem Partners
AWS Data Lifecycle Management Services

APeJCK 2026



This quadrant assesses providers that help organisations **modernise data estates, establish trusted, governed data foundations** and manage the full data lifecycle to support analytics, compliance, **data sovereignty and AI readiness** at scale.

Srinivasan P N

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Definition

This quadrant evaluates AWS ecosystem partners that deliver end-to-end data lifecycle and governance services, enabling organisations to integrate, store, process, govern and derive value from data across its lifecycle on AWS. Providers support data sovereignty and governance through capabilities such as geographic data residency, regulatory compliance and data quality management (DQM) with lineage tracking, ensuring compliant data operations across regions and industries.

Providers enable a scalable enterprise data ecosystem by leveraging AWS-native data management, integration and orchestration capabilities to support the ingestion, processing and governance of structured and unstructured data workloads. Differentiation is driven by AI-ready data pipelines, real-time processing, domain-specific data products, responsible AI-aligned governance and measurable business outcomes. They offer insights and decision-making capabilities through advanced analytics, predictive and prescriptive models and real-time dashboards.

Eligibility Criteria

1. Demonstrate **end-to-end data lifecycle capabilities** across ingestion, storage, processing, governance and archival on AWS
2. Provide **data sovereignty and compliance solutions**
3. Enable **trusted and well-governed data through capabilities** such as metadata management, data cataloguing, lineage visibility, data observability and enterprise governance frameworks
4. Design and implement scalable data platforms using **AWS-native services** such as Redshift, RDS and AWS Glue
5. Implement scalable solutions that **optimise data performance for handling high-volume workloads**
6. Deliver **advanced analytics capabilities**, including predictive and prescriptive insights
7. Provide **real-time dashboards and decision intelligence solutions**
8. Support lifecycle management for **distributed or edge-to-cloud data environments**, including IoT, where relevant
9. Demonstrate measurable business outcomes through data-driven transformation initiatives
10. Maintain relevant **AWS DLM competencies** (for example, Data & Analytics Consulting Competency) and certifications (for example, Big Data, Data Engineer)
11. Demonstrate responsible **AI-aligned data governance**, ensuring transparency, auditability and compliance across enterprise data pipelines supporting AI and analytics use cases

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Observations

The rapid expansion of AI, analytics and data-intensive business processes is reshaping how enterprises approach data lifecycle management on AWS. Organisations increasingly recognise that successful AI outcomes depend less on model sophistication and more on the quality, governance and accessibility of the underlying data. As a result, investments are shifting towards modern data foundations that support trusted, scalable and AI-ready data ecosystems.

A key trend is the adoption of open lakehouse architectures and unified data platforms that enable a single source of truth across analytics, AI and operational workloads. Enterprises are also accelerating the deployment of zero-ETL architectures, real-time data pipelines and enterprise data products to improve data accessibility and reduce complexity across distributed environments.

Governance, quality and lineage are moving to the forefront of data strategies. Service providers are strengthening capabilities in metadata management, automated classification, policy-driven governance and data observability to help organisations maintain trusted and compliant data assets throughout their lifecycle. At the same time, the rise of agentic data engineering is automating data discovery, modelling, governance and lifecycle operations, reducing manual effort and accelerating delivery.

Data sovereignty, security and regulatory compliance remain critical priorities, particularly in highly regulated sectors. Organisations are seeking providers that can deliver centralised governance, lifecycle automation, immutable data protection and continuous compliance monitoring, while meeting increasingly stringent residency and control requirements.

These trends reflect a broader shift in the market, where data lifecycle management is becoming a strategic enabler of AI adoption, real-time decision intelligence and enterprise-wide transformation.

From the 42 companies assessed for this study, 27 qualified for this quadrant, with nine being Leaders and two Rising Stars.

accenture

Accenture's strategy focuses on making enterprise data AI-ready through automation, governance and semantic-layer architectures, creating a strong bridge between cloud modernisation and AI adoption.

Capgemini

Capgemini differentiates by applying data lifecycle management to complex industry environments where traceability, interoperability and long-term data value are critical.

cognizant

Cognizant demonstrates strong alignment across data modernisation, governance and AI enablement, supported by reusable accelerators and sector-specific data solutions.

DXC

Data lifecycle management is a strategic growth area for **DXC**, supported by investments in governance, automation, data engineering and AI-ready data foundations. The firm's emphasis is on accelerating trusted data consumption while maintaining governance and compliance.

HCLTech

HCLTech has aligned its data strategy around autonomising data operations, democratising insights and scaling enterprise AI adoption through structured DataOps and agentic engineering practices.

Infosys

Infosys' AWS data practice emphasises modernisation of legacy data estates and the creation of cloud-native data platforms capable of supporting advanced analytics and AI initiatives.

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PWC's data strategy is closely linked to governance, operational decision-making and future AI enablement. This approach reflects its broader focus on cloud transformation and enterprise risk management.

TCS combines data engineering, governance, modernisation and AI-enabled analytics with reusable accelerators and industry frameworks to support large-scale cloud data programmes.

Wipro increasingly positions data modernisation as a prerequisite for AI adoption, linking cloud-native data foundations with governance, operational efficiency and business transformation objectives.

LTM (Rising Star) combines deep data engineering expertise with reusable modernisation frameworks that improve migration speed, governance and operational efficiency.

NTT DATA (Rising Star) integrates data strategy, governance, analytics and AI enablement within a unified transformation framework. Its focus on trusted data foundations aligns well with enterprise requirements for AI readiness and regulatory compliance.

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Leader

"DXC differentiates through metadata-driven data engineering and governance-led modernisation, helping enterprises build scalable and AI-ready data ecosystems on AWS."

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 combines AWS cloud services, governance frameworks, metadata-driven engineering and industry-specific accelerators to help enterprises modernise, govern and operationalise data estates at scale. Its Data Integration Framework (DIF) serves as a key foundational platform that strengthens data lifecycle outcomes through automation, lineage, governance and AI-ready data foundation capabilities.

Strengths

Metadata-driven data engineering: A key differentiator is DXC's emphasis on metadata-driven architecture and configuration management. By treating infrastructure, systems and data processes as metadata assets, the company enables improved governance, automation, scalability and operational transparency across complex data estates.

Governance and compliance focus: DXC integrates governance capabilities, including data catalogues, lineage tracking, transformation management, anomaly detection, monitoring and quality controls, throughout the data lifecycle. These capabilities help enterprises strengthen compliance, operational trust and AI-readiness.

Industry data platforms and modernisation expertise: DXC continues investing in industry-oriented platforms for banking, insurance, telecommunications, healthcare, manufacturing and the public sector. Its data modernisation engagements leverage AWS alongside technologies such as Databricks and other ecosystem components to address complex transformation requirements.

Agentic AI-driven modernisation solution DXC's DIF provides a configurable ingestion and transformation framework supporting ETL and ELT workloads across multi-tenant and multi-environment architectures. The framework incorporates governance catalogues, lineage management, automated reconciliation, monitoring capabilities and deployment automation to accelerate enterprise data modernisation initiatives.

Caution

DXC's broad technology ecosystem approach provides flexibility but can introduce architectural complexity for organisations seeking highly standardised AWS-native data platforms. Clients may want clearer benchmarks on DIF adoption and measurable business outcomes across industries and regions.

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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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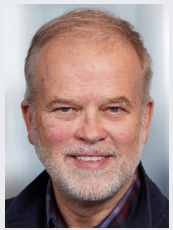
Heiko Henkes

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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