ISG Provider Lens®

AWS Ecosystem Partners

AWS Managed 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

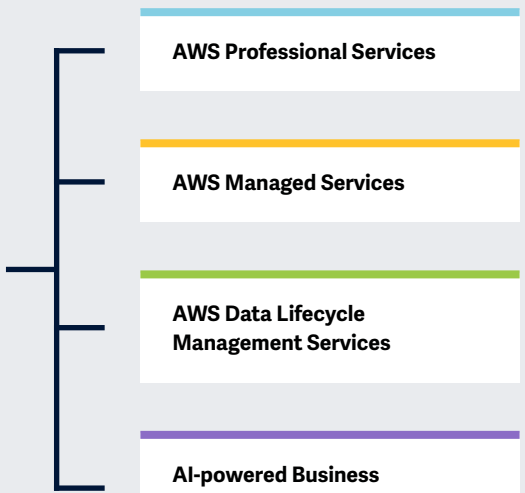
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	AWS Professional Services	AWS Managed Services	AWS Data Lifecycle Management Services	AI-Powered Business Transformation with AWS
Rackspace Technology	Product Challenger	Product Challenger	Not In	Not In
Slalom	Not In	Product Challenger	Not In	Not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

Who Should Read This Section

This report is valuable for providers offering **AWS managed services** in **APeJCK** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG outlines providers' market positioning based on their service depth and market presence. It also highlights the growing focus on green cloud solutions driven by the need for cost efficiency, sustainability and security in complex hybrid and multicloud environments.

IT professionals

Should read this report to understand AWS managed service providers' relative strengths and weaknesses in operating, securing and optimizing public and multicloud environments. It assesses the use of CMPs, automation and integration of DataOps, MLOps and AIOps to support efficient cloud operations and scalable digital services.

Technology professionals

Should read this report to evaluate providers' market positioning and their role in enterprise transformation. It covers capabilities such as AI-driven and autonomous operations, secure multicloud architecture management and expertise in cost optimization, compliance and SRE-based operating models.

Procurement professionals

Should read this report to compare providers based on their automation capabilities, CMP usage and alignment with FinOps and security frameworks. It supports informed decision-making when evaluating service offerings, assessing value and negotiating SLAs for effective and resilient cloud management.

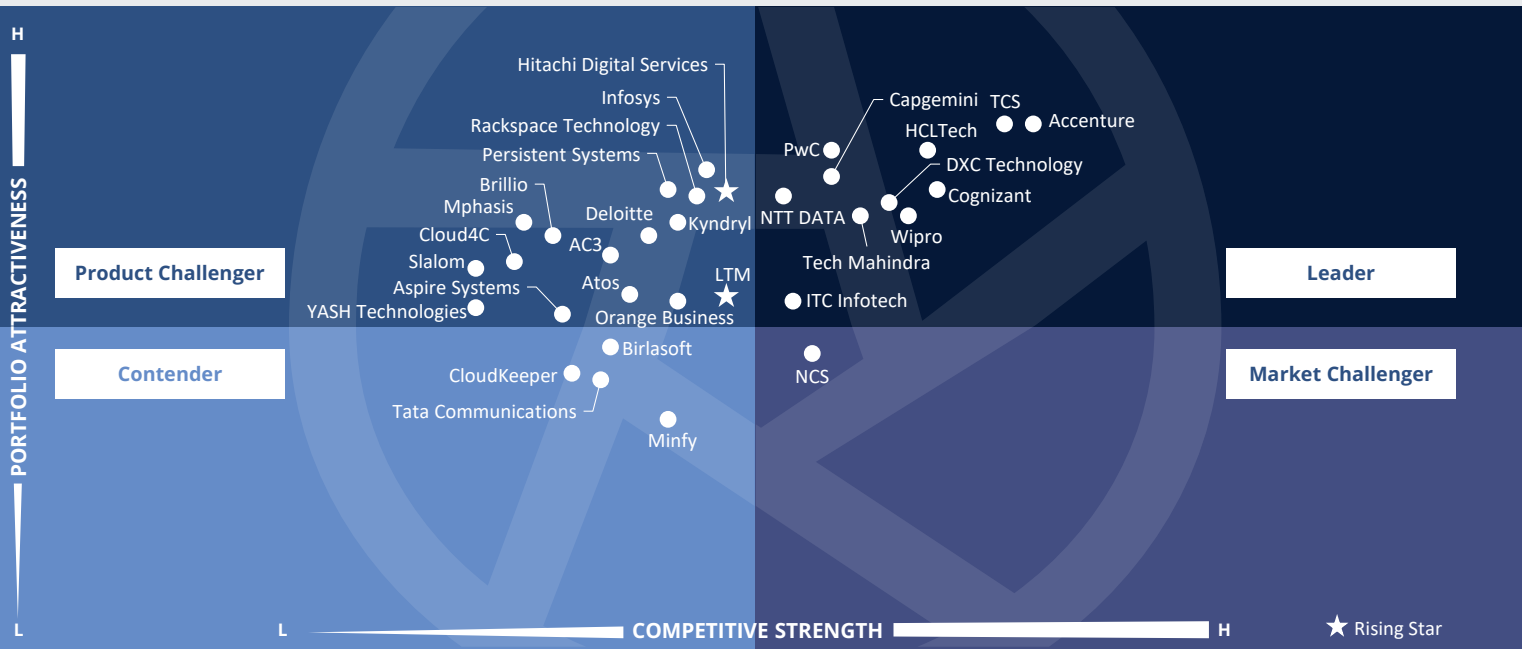
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ISG Provider Lens®

Source: ISG RESEARCH

AWS Ecosystem Partners
AWS Managed Services

APeJCK 2026



This quadrant assesses providers that help enterprises evolve from **infrastructure operators to strategic partners** through **operations automation, security modernisation, cost optimisation** and **resilience** across increasingly complex **hybrid and multicloud environments**.

Srinivasan P N

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Definition

This quadrant evaluates managed service providers that operate, secure and optimise enterprise clients' AWS-based public cloud and multicloud environment. It focuses on managed IaaS and PaaS services on hyperscale public cloud platforms, delivered by third-party providers, with an emphasis on optimising performance, reducing costs, and ensuring security and compliance. Providers use developed or licensed cloud management platforms (CMPs) and tools to deliver the highest level of automation and transparency in the managed cloud resource pool in terms of capacity utilisation, costs and independent management.

Providers integrate DataOps, MLOps, AIOps and platform reliability engineering (PRE) with FinOps methodologies and automated security frameworks to build resilient, compliant and well-governed cloud environments. Differentiation is increasingly driven by autonomous operations, AI-assisted remediation, AgentOps and LLMOps readiness, AI workload, cost governance and site reliability engineering (SRE)-based operating models.

Eligibility Criteria

1. Hold AWS Managed Service Program **certification**
2. Demonstrate expertise in autonomous **AI-driven orchestration, configuration and management** of platforms and systems, including AgentOps and LLMOps
3. Demonstrate **AI FinOps maturity, including governance and optimisation of agentic and AI runtime costs**, supported by proven delivery best practices
4. Use AIOps, automation, self-healing, SRE practices and platform engineering methods to improve reliability, productivity and operational consistency
5. Design, build and **manage public and multicloud environments**
6. **Support** big data and multiple database solutions and analytics
7. Engineer **DevOps and platform engineering solutions**, incorporating CI/CD and PRE practices
8. Provide **security** resources and services with scope and availability
9. **Measure and optimise cloud-related carbon emissions**, sustainability reporting and GreenOps capabilities for AWS is advantageous
10. Apply AWS' operational best practices, including those aligned with **SRE principles**
11. Experience in **solutions architecture and cost optimisation (FinOps)**
12. **Migrate** servers and manage resource availability

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Observations

In 2026, enterprises in APAC are increasingly seeking AWS Managed Services providers that can help optimise cloud operations, enhance resilience and deliver increased business value from increasingly complex cloud environments. As organisations scale their cloud footprints, service providers are evolving from traditional infrastructure operators to strategic partners focused on operational excellence, automation and governance.

A key trend is the adoption of AIOps and autonomous operations to improve incident management, reduce manual intervention and accelerate issue resolution. Providers are leveraging AI-driven monitoring and automation to enable proactive operations and enhance service reliability.

FinOps is also gaining prominence as enterprises focus on controlling cloud spend and maximising return on AWS investments. Service providers are strengthening cost governance capabilities through continuous optimisation, usage visibility and financial accountability frameworks.

Security remains a critical priority, driving increased adoption of security automation, Cloud Security Posture Management (CSPM) and compliance monitoring. At the same time, organisations are expanding observability and site reliability engineering (SRE) practices to improve performance, availability and operational resilience across business-critical workloads.

As hybrid cloud and multicloud strategies continue to mature across the region, providers are enhancing their capabilities to deliver consistent governance, visibility and operational support across diverse environments. These trends reflect a broader shift in the managed services market, where AWS partners are becoming strategic enablers of resilient, intelligent and cost-efficient cloud operations.

From the 42 companies assessed for this study, 32 qualified for this quadrant, with 11 being Leaders and two Rising Stars.

accenture

Accenture is repositioning managed services from labour-driven support models towards AI-enabled operational transformation. Its AWS partnership and automation-led delivery model strengthen its market leadership.

Capgemini

Capgemini's managed services proposition extends beyond infrastructure operations to include modernisation, security, application management and cloud-native transformation. The firm's AWS competencies and MSP designation reinforce delivery credibility.

cognizant

Cognizant emphasises autonomous operations, cloud optimisation and modernisation services supported by AI-driven operational platforms and a scalable delivery model.

DXC

DXC Technology is evolving managed services beyond traditional operations by integrating agentic AI, automation, and governance into cloud management frameworks. Its emphasis is on continuous modernisation rather than standalone operational support.

HCLTech

HCLTech has successfully evolved traditional cloud operations towards AI-powered managed services, embedding automation, observability, FinOps and autonomous remediation into its AWS delivery model.

ITC Infotech

ITC Infotech demonstrates a mature AWS Managed Services practice supported by AWS MSP status, multiple AWS competencies, proprietary cloud operations platforms and a strong automation-first operating model. Its integrated cloud, data and AI strategy strengthens long-term managed services engagements.

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NTT DATA demonstrates strong operational maturity across AWS environments, combining governance, automation, observability and cloud economics into a unified operating model. Its growing focus on AIOps, AgentOps and autonomous operations aligns well with evolving enterprise cloud requirements.

PwC's managed services strategy is closely aligned with its advisory heritage. The firm emphasises business outcomes, operational risk management and industry-specific operating models, supported by AWS-enabled platforms and managed operations.

TCS is embedding AI, automation, FinOps and self-healing capabilities into managed cloud operations while leveraging a large AWS-certified workforce and strong delivery footprint in APAC.

Tech Mahindra's AWS Managed Services proposition is anchored in operational management rather than platform ownership. Its strength lies in combining cloud operations, modernisation, and industry-specific engineering capabilities.

Wipro is repositioning managed services around AI-assisted operations, automation and outcome-led delivery models that extend beyond infrastructure support into operational transformation.

Hitachi Digital Services

Hitachi Digital Services (Rising Star) positions managed services as an engineering-led operational model rather than a traditional infrastructure support function. Its emphasis on resiliency, observability, automation, FinOps and cloud reliability aligns well with large enterprise modernisation and operational transformation programmes.

LTM (Rising Star) integrates managed services with migration and modernisation capabilities, creating a continuous transformation-to-operations model backed by proprietary AWS accelerators.

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Leader

"DXC Technology is advancing managed services beyond traditional operations by integrating agentic AI, automation and governance into cloud management frameworks. Its emphasis is on continuous modernisation rather than on standalone operational support."

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 delivers AWS Managed Services through a platform-led operating model that combines automation, intelligent orchestration, operational resilience and cloud modernisation. Its investments in OASIS, AI-enabled operations and enterprise-scale service delivery position it as a transformation-focused managed services provider. Its AI-enabled OASIS platform and transformation-centric delivery approach help enterprises optimise cloud operations and support continuous modernisation initiatives.

Strengths

AI-enabled managed services platform: DXC's OASIS platform introduces intelligent orchestration capabilities to managed services environments, combining human expertise with agentic AI to improve operational resilience and service delivery. The platform has already been deployed across multiple customer environments and represents a significant evolution of traditional cloud operations models.

Industrialised cloud operations: DXC emphasises standardised cloud operations supported by multicloud orchestration, governance, resilience, automation and FinOps disciplines. This approach allows clients to optimise and modernise their AWS environments while maintaining operational continuity.

Scale and AWS partnership maturity: DXC continues to strengthen its relationship with AWS through joint engagements and collaboration with AWS ProServ. The company highlighted significant growth in AWS customer adoption and expanded competency coverage, supporting large-scale migration and modernisation programmes.

Industry-critical operations expertise: DXC's managed services experience spans highly regulated and mission-critical sectors, including financial services, healthcare, government and transport. This experience supports customers seeking modernisation without disrupting core business operations.

Caution

While DXC shows strong managed services modernisation capabilities, its platform-centric strategy may require customers to navigate multiple proprietary frameworks and operating models. Buyers may also seek additional regional proof points that demonstrate measurable business outcomes from AI-driven operations programs.

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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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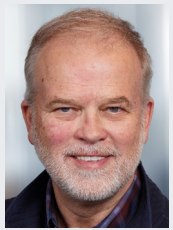
Heiko Henkes

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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