ISG Provider Lens®

AWS Ecosystem Partners

AWS Professional Services

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



Customized report courtesy of:

DXC

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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

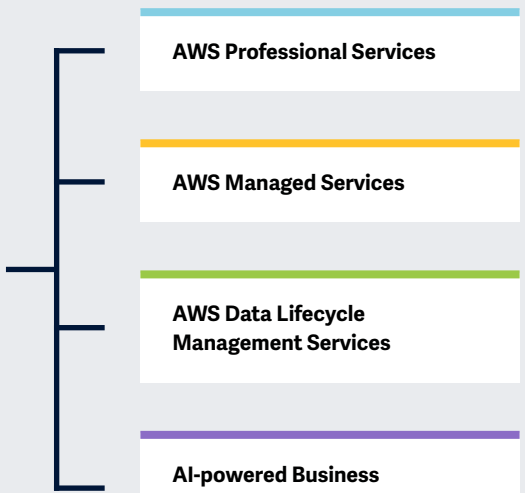
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	AWS Professional Services	AWS Managed Services	AWS Data Lifecycle Management Services	AI-Powered Business Transformation with AWS
Rackspace Technology	Product Challenger	Product Challenger	Not In	Not In
Slalom	Not In	Product Challenger	Not In	Not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

Who Should Read This Section

This report is valuable for providers offering **AWS professional services** in **APeJCK** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG showcases providers' current market positioning based on the coverage of their service portfolios and their overall market presence. The report also underscores the fast-paced evolution of the AWS cloud ecosystem, fueled by the growing adoption of cloud-native architectures and highlights the rising demand for expertise in GenAI.

Digital professionals

Should read this report to navigate their AWS cloud journeys more effectively. It profiles providers offering end-to-end consulting, migration and modernization services, helping organizations build pragmatic cloud strategies, develop credible business cases and embed governance and ESG considerations while aligning with broader business objectives.

Technology professionals

Should read this report to understand how AWS partners deliver advanced, tailored solutions across architecture, security and industry-specific needs. The report highlights software architecture capabilities, DevOps-driven delivery and application migration and modernization, along with expertise in designing and managing scalable, resilient cloud-native environments.

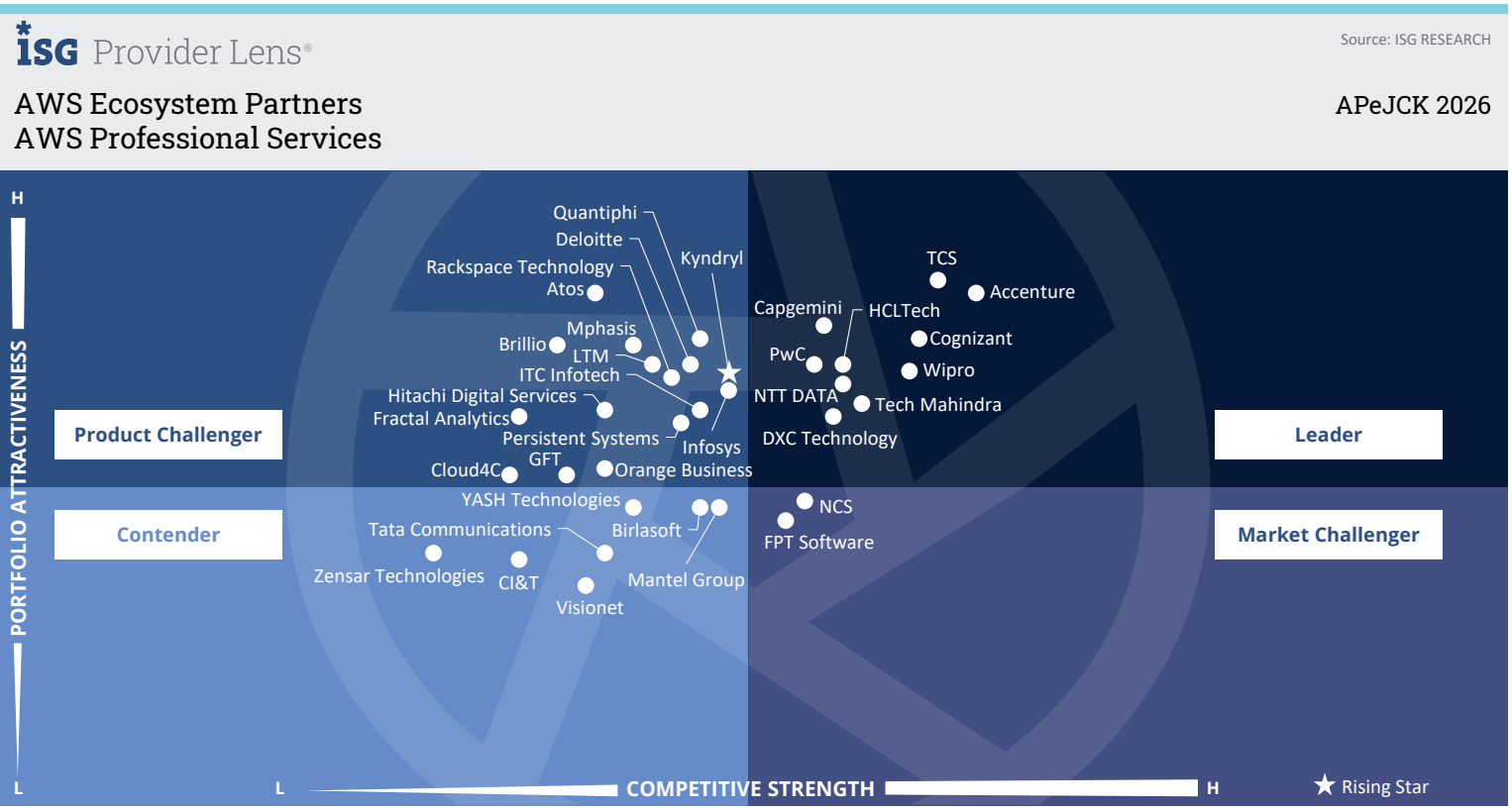
Procurement professionals

Should read this report to assess providers offering comprehensive AWS consulting and migration services. It helps compare capabilities, evaluate potential partners and select vendors that best align with technical, operational and strategic requirements.

Cloud and transformation specialists

Should read this report to evaluate providers' strengths in planning and executing complex migrations. It outlines best practices in automated testing, detailed planning, deployment strategies and change management to ensure seamless transitions to AWS.

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This quadrant assesses providers that help enterprises plan, migrate and modernise workloads on AWS. It evaluates capabilities in **cloud strategy, migration execution, modernisation**, security and governance to deliver measurable business outcomes.

Srinivasan P N

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Definition

This quadrant evaluates providers offering a robust suite of consulting and migration services to guide and support businesses through their AWS cloud journeys. These providers deliver a wide range of services tailored to meet diverse business and IT needs, including business and technology consulting, migration and modernisation. The offerings encompass cloud strategy formulation, compelling business case development and support for ESG and GRC needs. Providers should offer advanced technologies and solutions tailored to architecture, security and specific industry needs. Migration involves automated testing, thorough planning, execution, deployment strategies and change management to ensure smooth transitions. AWS partners possess extensive expertise in software architecture, software development (including DevOps principles), application migration and modernisation, enabling them to architect, deploy and manage scalable, resilient applications and services in the cloud environment.

This quadrant evaluates providers that deliver a comprehensive portfolio of consulting, migration, and modernisation services to help enterprises plan, execute, and optimize their AWS cloud journeys. These providers support diverse business and technology requirements through services spanning cloud strategy, business case development, migration planning, modernisation, governance, risk and compliance (GRC), and sustainability (ESG) initiatives. Providers are expected to offer deep expertise in cloud architecture, security, industry-specific solutions, and advanced AWS technologies. Their migration capabilities should include assessment, planning, automation, testing, deployment, change management, and operational readiness to ensure seamless and low-risk transitions to the cloud. AWS partners in this quadrant demonstrate strong competencies in software architecture, application development, DevOps practices, migration, and modernisation. They help enterprises design, deploy, and manage scalable, resilient, and cloud-native applications while accelerating innovation, improving operational efficiency, and maximising value from AWS investments.

Eligibility Criteria

1. Offer a wide range of **AWS competencies**, service delivery offerings and related certifications with consulting and migration expertise
2. Develop an AWS-focused consulting **roadmap and innovations** (current and planned)
3. Demonstrate **value for clients** through perceptible business outcomes and other measurable improvements, driving business and technology transformation
4. Migrate **business-critical applications** for customers using AWS
5. Design, build and modernise an **integrated cloud architecture** to lead migration and hybrid cloud and multicloud integration
6. Participation in the AWS **Migration Acceleration Program (MAP)** is advantageous
7. Deliver **industry-specific solutions** aligned with AWS Industry Cloud offerings
8. Demonstrate rigorous **AWS security capabilities**, including advanced threat protection and compliance framework implementation
9. Showcase a strong portfolio of AI- and ML-driven innovations, including expertise in deploying **GenAI and modernising enterprise workloads**
10. Offer **TCO management** of multi-agentic business workflows and autonomous solutions for modernisation initiatives
11. Support advisory, architecture and migration for **sovereign cloud solutions**, especially in Europe

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Observations

AWS professional services providers in APAC are increasingly supporting enterprise cloud initiatives through modernisation-led transformation programmes that combine consulting, migration, application modernisation and cloud-native engineering. Organisations are prioritising business outcomes, operational agility and technical debt reduction, prompting providers to strengthen advisory capabilities, modernisation frameworks and automated migration approaches that accelerate large-scale cloud adoption and transformation.

The market is also witnessing greater adoption of AI-enabled cloud transformation, with providers embedding GenAI, agentic AI and intelligent automation across assessment, migration, testing, modernisation and operational workflows. Enterprises are looking to create AI-ready environments by modernising applications and data estates while improving productivity, accelerating delivery timelines and enhancing value realisation from AWS investments.

Security, compliance and governance remain key considerations across APAC, particularly in regulated industries. Providers are expanding capabilities around cloud security, sovereign cloud readiness, risk management and compliance frameworks to address evolving regulatory requirements. At the same time, enterprises increasingly expect integrated approaches that combine modernisation, AI enablement, governance and cost optimisation within a unified transformation strategy, favouring providers with strong consulting depth, industry expertise and scalable delivery models.

From the 42 companies assessed for this study, 35 qualified for this quadrant, with 10 being Leaders and one Rising Star.

Accenture offers a comprehensive AWS portfolio spanning migration, modernisation and AI-enabled transformation. Its modernisation frameworks, cloud governance capabilities and strong regional presence help enterprises accelerate large-scale cloud and business transformation initiatives.

Capgemini combines consulting, engineering and industry expertise to support AWS migration and modernisation initiatives. Its focus on cloud-native transformation, industry alignment and AI-enabled modernisation helps enterprises accelerate adoption and innovation.

Cognizant leverages AI-enabled modernisation frameworks, cloud-native accelerators and extensive APAC delivery capabilities to support complex AWS transformation programmes. Its flexible engagement models help enterprises align cloud adoption with business outcomes.

DXC Technology combines migration, modernisation and cloud consulting capabilities with innovation-led transformation services. Its strong delivery footprint in APAC and growing AI portfolio help enterprises modernise legacy environments while improving operational agility.

HCLTech emphasises AI-led modernisation and factory-based cloud transformation supported by automation frameworks and industry-focused solutions. Its AWS capabilities help enterprises accelerate migration, modernisation and business transformation initiatives.

NTT DATA combines structured migration methodologies, cloud-native engineering and modernisation expertise within a unified AWS transformation framework. Its industry-focused approach helps enterprises accelerate cloud adoption while reducing transformation complexity.

PwC differentiates itself through its risk-led consulting approach, digital sovereignty expertise and business-focused transformation services. Its governance, compliance and AI advisory capabilities support enterprises in navigating complex AWS modernisation programmes.

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TCS delivers AWS migration and modernisation services supported by industry solutions, security capabilities and agentic AI innovation. Its structured transformation approach helps enterprises connect cloud adoption initiatives with measurable business outcomes.

Tech Mahindra emphasises consulting-led migration and modernisation services backed by automation-driven delivery frameworks and industry expertise. Its AWS-focused transformation approach supports enterprises in pursuing large-scale modernisation and cloud adoption initiatives.

Wipro combines platform-led modernisation, AI-enabled engineering and governance-driven transformation services within its AWS portfolio. Its automation capabilities and lifecycle-based approach help enterprises accelerate modernisation while improving operational efficiency.

Kyndryl (Rising Star) focuses on modernisation-led cloud transformation supported by infrastructure expertise, transformation advisory and operational resilience capabilities. Its consulting-led AWS approach helps enterprises modernise complex environments and improve long-term cloud value realisation.

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Leader

"DXC Technology combines large-scale modernisation capabilities, global delivery depth and a growing portfolio of AI-led innovation services, positioning the company strongly to support enterprises pursuing AWS-enabled transformation in APAC."

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. The provider supports AWS engagements with capabilities spanning consulting, cloud infrastructure, migration and modernisation, application services and analytics. In APAC, DXC combines its delivery operations across India, Singapore, Australia, Malaysia and the Philippines with innovation environments such as the Digital Innovation Lab Asia to support enterprise cloud transformation and modernisation initiatives.

Strengths

Migration and modernisation focus: DXC aligns cloud transformation with migration and modernisation initiatives across infrastructure, applications and analytics environments. Its delivery centres provide cloud infrastructure, automation, application management and modernisation services that help enterprises address legacy technology challenges while improving operational agility and supporting long-term transformation objectives.

Innovation-led transformation: DXC complements consulting and delivery services with innovation facilities, including the Digital Innovation Lab Asia, Digital Transformation Centers and AI-focused centres of excellence. These facilities help enterprises explore new operating models, evaluate emerging technologies and advance cloud-enabled business transformation programmes.

AI-enabled modernisation: DXC embeds AI capabilities into its transformation portfolio through AI Workbench and OASIS with a governed AI architecture that supports orchestration, governance and multi-model integration. This approach helps enterprises establish AI-ready foundations while maintaining governance, traceability and control across modernisation initiatives.

Caution

DXC could strengthen its APAC positioning by providing more region-specific evidence of AWS migration, modernisation and AI transformation outcomes, helping enterprises better assess the business impact of its innovation, consulting and delivery capabilities.

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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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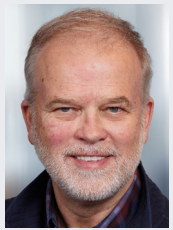
Heiko Henkes

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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