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 | U.K.

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Report Author: Frank Heuer

The potential of the AWS partner ecosystem: balancing innovation and sovereignty

This ISG Provider Lens® study benchmarks providers delivering services across consulting and transformation, managed services, data lifecycle management and AI-powered business transformation. The assessment spans large-enterprise and midmarket segments and evaluates how providers enable companies to migrate to the AWS platform, secure and manage AWS solutions and leverage the benefits of AI.

Market Context

In recent years, the flexibility and cost benefits of cloud solutions have made this deployment model increasingly prevalent for IT applications and infrastructure. Furthermore, crisis-driven inflationary cost pressures and relatively weak economic growth are currently prompting many companies to transform their IT landscapes into architectures that are efficient and cost-flexible.

Cloud-native solutions enable the development and execution of scalable applications in cloud environments. The growth of the cloud-native market provides an ideal environment for cloud-native solution providers in the UK.

Cloud hyperscalers continue to be the biggest beneficiaries of the rising demand for cloud solutions due to their exceptional ability to scale rapidly and operate flexibly. AWS is the world's leading hyperscaler and, together with Microsoft Azure, plays a dominant role in the UK market. AWS is benefiting from the growing cloud-native market in this country. Even with the more critical stance towards US providers since the White House administration change in early 2025, especially on digital and data sovereignty, the dominance of AWS and the other hyperscalers is unlikely to be materially affected for the foreseeable future. Even though a few UK providers have made considerable progress, the advantages of the hyperscalers currently outweigh any potential concerns.

Given its global significance, AWS is an attractive partner for service and technology providers and collaborates with many of these providers through the AWS Partner Network

AWS partners in the UK that combine **innovation** with **sovereignty** have good **opportunities**.

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(APN). The APN is the global programme for AWS partners. It helps them develop AWS-based business opportunities and solutions by providing business, technical, sales and marketing support. As AWS' importance as an IT provider grows rapidly, the AWS partner ecosystem is also becoming increasingly significant. Its partners are, therefore, reaping growing benefits from AWS' increasing success.

Enterprise Priorities

According to ISG's 2025 Market Lens™ study on IT budgets and spending, productivity improvements and cost reductions are the top priorities for companies seeking performance improvements through IT investment. Consequently, demand for cloud-native and AWS solutions is growing rapidly, as these solutions are characterized by efficiency and cost flexibility.

UK companies are increasingly turning to external service providers to design, implement and operate AWS solutions because cloud adoption is becoming more complex, while internal technology teams face growing demands on their time and capabilities.

A key driver is the shortage of specialist AWS expertise. Many organisations have experience with traditional IT infrastructure but lack the depth of skills required to architect cloud environments, modernise applications, implement cloud-native services and operate them efficiently at scale. External providers can bring certified AWS expertise, established methodologies and experience from multiple customer environments, reducing implementation risk and accelerating time to value.

Resource constraints are another important factor. Internal IT teams are often focused on business-critical operations and ongoing transformation programmes, leaving limited capacity for large-scale cloud migrations or continuous optimisation. Service providers can supply additional engineering and operational capacity when required, including 24/7 monitoring, incident management, security operations and platform management.

Companies are also seeking a greater degree of professionalisation and standardisation. As AWS environments grow, informal or project-by-project approaches can lead to inconsistent architectures, insufficient documentation, uncontrolled costs and operational risks. Experienced providers can introduce governance frameworks, automation, Infrastructure-as-Code, FinOps practices, security controls and standard operating models that make cloud environments more predictable and scalable.

Security and compliance are particularly important in the UK. Customers increasingly expect AWS environments to be securely designed from the outset and continuously monitored during operation. External specialists can provide dedicated security expertise, managed detection and response, compliance frameworks and proven approaches to identity, data protection and resilience.

Finally, the rapid development of AI and GenAI is creating a new capability gap. Many organisations understand the strategic potential of AI but lack the expertise to translate it into practical business transformation.

Increasingly, UK companies are looking for partners that can combine AWS expertise, secure operations, automation, cost management, data and AI capabilities and take responsibility for measurable business outcomes.

In the UK, there are interesting market segments with specific requirements. Large enterprises currently represent the most important and mature market segment. The financial services market is particularly attractive and in high demand. On the other hand, the financial services sector also places specific demands on security, resilience, regulatory compliance and data sovereignty. When offering services to this sector, cloud providers must clearly demonstrate that they can handle regulated and business-critical workloads. Compared with the EU, the UK public sector is more open to cloud solutions. At the same time, data sovereignty is also gaining importance here.

Provider Dynamics

In a highly dynamic market such as the AWS-based solutions, it will become increasingly important to implement projects promptly. Therefore, automation is becoming central to AWS deployments. Beyond the accelerated implementation of AWS projects, the disruptive

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changes to applications brought about by GenAI and agentic AI are playing a more prominent role. For instance, agentic AI can support the modernisation and transformation of legacy applications. The modernisation of contact centres through the integration of chatbots and GenAI represents a transformative shift in customer service technology. With Amazon Bedrock, Amazon Q, Titan and Nova, AWS provides the tools for developing innovative solutions enabled by agentic AI and GenAI.

AWS partners that can demonstrate extensive expertise and certifications related to AWS' AI tools, therefore, have an advantage. Furthermore, in light of growing cyberthreats, the importance of partners' security expertise is increasing. For example, the AWS MSSP Competency ensures that customers receive the highest level of security for their cloud operations. In the context of discussions driven by geopolitical developments concerning digital and data sovereignty and to strengthen customer trust, AWS' Digital Sovereignty Services Competency is becoming increasingly important, both now and in the future.

AWS professional services: The integration of AWS consulting and migration into a holistic professional services offering enables the seamless implementation of AWS projects. Consequently, the interlinking of these two service components is becoming increasingly prevalent in the market. Providers that offer consulting and migration as standalone services and specifically combine the two areas to create consistent added value for their customers are proving successful.

APN serves a dual purpose. This ecosystem is also a key success factor for AWS itself. The more effectively customers are advised by AWS partners, the better AWS' business will perform. At the same time, these partners can benefit from their customers' successful entry into the AWS ecosystem through follow-on business such as managed services. Service providers that offer support for AWS operations, such as end-to-end services, have strong prospects for success and receive high ratings in this study; this opens up comprehensive development prospects for their AWS solutions.

Technologies are advancing rapidly in the cloud sector as a whole and within the AWS ecosystem in particular. Given the increasing competitive pressure, it has become important for end-user organisations to execute AWS migrations quickly to realize time-to-value. Consequently, automation, often supported by AI, is being utilised as part of professional services. Accordingly, this analysis indicates that AWS partners capable of leveraging these technologies are positioned to benefit.

AWS managed services: Partners offering end-to-end AWS capabilities backed by references and case studies are particularly well-positioned. Finally, providers offering UK-based operations, especially for data sovereignty, can differentiate themselves. Security is also highly pertinent given the increasing number of cyberattacks.

AWS data lifecycle management services: Leading AWS partners are evolving their traditional data lakes and data warehouses into AI-enabled data ecosystems that combine collection, integration, processing, analysis and archiving. Governance, compliance, metadata management and data sovereignty are increasingly being integrated directly into data platforms.

The growing use of AI and distributed cloud environments is driving the adoption of data lifecycle management services on AWS. This is shifting the focus from pure data management to using data for specific business decisions.

AWS partners that combine data lifecycle management with transparency, compliance and sovereignty can differentiate themselves from the competition and support organisations in developing resilient, compliant and auditable data environments.

AI-powered business transformation with AWS: AI-driven business transformation on AWS is evolving from pilot projects to comprehensive transformation initiatives. In this context, automation, robust data foundations and agent-based AI are becoming increasingly important.

Leading AWS partners are developing agent platforms, multi-agent models and reusable solution building blocks to automate complex business processes and support decision-making. At the same time, governance and compliance are becoming key prerequisites for the scalable deployment of AI.

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AWS partners can set themselves apart by providing AI models and also by rapidly and comprehensively implementing agent-based transformations that take industry requirements, governance and compliance into account.

Outlook

The UK AWS market is gradually shifting from migration-led growth toward AI, data, application modernisation and managed business outcomes. Basic AWS migration and managed services will become increasingly commoditised. Key risks include margin pressure, rapid AI technology cycles and customer concerns around portability and lock-in.

Organisations should prioritise AI-ready data foundations, FinOps, security and application modernisation, while establishing clear approaches to portability, resilience and governance. AWS Marketplace should increasingly become part of strategic procurement and partner-management models.

The biggest provider capability gaps will be production GenAI/agentic AI, data engineering, cybersecurity, FinOps and industry-specific transformation. Providers should also strengthen marketplace capabilities. The key shift is from selling AWS skills and headcount to repeatable IP and measurable business outcomes.

Large global providers that combine AWS scale with strong AI and data capabilities are well- positioned to capture more strategic work. Specialist UK AWS partners, differentiated by proprietary IP, strong client relationships and a deep understanding of UK clients, should also gain a larger share of strategic engagements. Traditional infrastructure/managed services providers reliant on migration factories and commodity managed services face greater differentiation pressure unless they add AI, modernisation, FinOps and automation. AWS' UK partner awards already highlight this movement towards AI, modernisation and marketplace-led propositions.

AWS service providers that ensure secure cloud management and digital sovereignty, while also delivering innovative solutions, are particularly well-positioned. In this context, AI-based approaches are becoming increasingly important, as they enable efficiency, automation and new application scenarios.

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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
Accenture	Leader	Leader	Leader	Leader
Aspire Systems	Not In	Product Challenger	Not In	Not In
Atos	Product Challenger	Product Challenger	Leader	Product Challenger
Birlasoft	Contender	Product Challenger	Not In	Not In
Brillio	Product Challenger	Contender	Rising Star ★	Market Challenger
Capgemini	Leader	Leader	Leader	Leader
CGI (BJSS)	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Coforge	Contender	Product Challenger	Leader	Contender
Cognizant	Leader	Leader	Leader	Leader
Deloitte	Product Challenger	Product Challenger	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
DXC Technology	Leader	Leader	Leader	Leader
Endava	Not In	Not In	Contender	Not In
Fractal Analytics	Not In	Not In	Not In	Product Challenger
Fujitsu	Market Challenger	Contender	Not In	Not In
Genpact	Not In	Not In	Product Challenger	Product Challenger
GFT	Market Challenger	Not In	Product Challenger	Contender
HCLTech	Leader	Leader	Leader	Leader
Hexaware	Leader	Market Challenger	Leader	Not In
Hitachi Digital Services	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Infosys	Market Challenger	Market Challenger	Market Challenger	Market 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
ITC Infotech	Product Challenger	Contender	Product Challenger	Not In
Kainos	Product Challenger	Product Challenger	Contender	Contender
Kyndryl	Product Challenger	Product Challenger	Product Challenger	Product Challenger
LTM	Leader	Rising Star ★	Product Challenger	Product Challenger
Mastek	Leader	Not In	Market Challenger	Market Challenger
MHP	Not In	Not In	Not In	Product Challenger
Mphasis	Product Challenger	Contender	Product Challenger	Product Challenger
N-iX	Product Challenger	Not In	Product Challenger	Not In
Noventiq	Not In	Product Challenger	Product Challenger	Product Challenger
NTT DATA	Leader	Leader	Market Challenger	Leader

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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
Persistent Systems	Product Challenger	Product Challenger	Contender	Product Challenger
Presidio (Transact)	Contender	Not In	Not In	Not In
PwC	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Quantiphi	Product Challenger	Not In	Product Challenger	Product Challenger
Rackspace Technology	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Rebura	Product Challenger	Contender	Not In	Not In
Scale Factory	Market Challenger	Not In	Market Challenger	Rising Star ★
Softcat PLC	Contender	Contender	Not In	Not In
TCS	Leader	Leader	Leader	Leader
Tech Mahindra	Product Challenger	Leader	Leader	Leader

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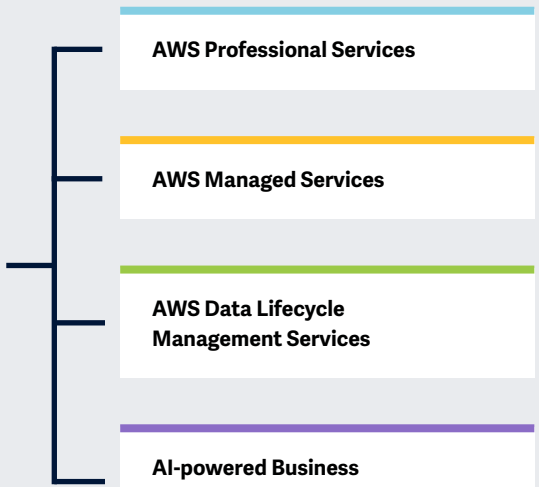
Provider Positioning

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	AWS Professional Services	AWS Managed Services	AWS Data Lifecycle Management Services	AI-powered Business Transformation with AWS
Version 1	Leader	Leader	Leader	Leader
Virtusa	Not In	Not In	Contender	Contender
Visionet	Not In	Not In	Not In	Contender
Wipro	Leader	Leader	Leader	Leader
YASH Technologies	Not In	Product Challenger	Not In	Not In
Zensar Technologies	Product Challenger	Not In	Product Challenger	Product Challenger

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



Simplified Illustration Source: ISG 2026

Definition

In 2026, the AWS partner ecosystem is entering a decisive maturity phase defined by the operationalization 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 optimize 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 modernization, 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, and AI-powered Business Transformation with AWS.

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

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments (quadrants) on their competitive strengths and portfolio attractiveness
- Focus on the regional 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 the **U.K.** 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

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

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

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.

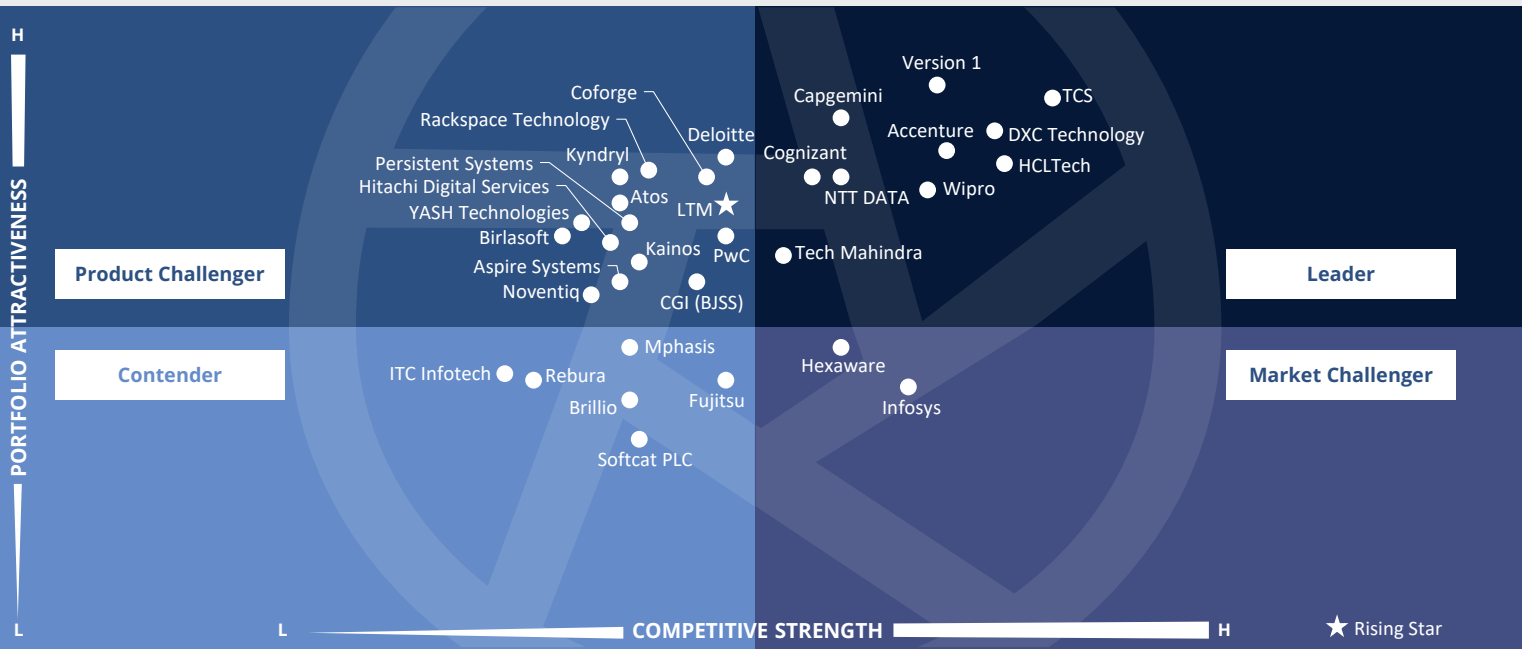
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ISG Provider Lens®

Source: ISG RESEARCH

AWS Ecosystem Partners
AWS Managed Services

U.K. 2026



This quadrant evaluates the **most relevant** AWS managed services providers in the UK, focusing on how they help clients simplify day-to-day operations and address **security** and **data sovereignty** requirements.

Frank Heuer

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Definition

This quadrant evaluates managed service providers that operate, secure and optimize 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

As AWS cloud services become increasingly widespread, so is the demand from businesses that lack the in-house expertise or specialist staff required to operate AWS solutions. As a result, the outsourced management of AWS solutions is becoming increasingly important. There is also a need for greater professionalisation, as the operation and management of AWS solutions are complex tasks.

User requirements range from support for hybrid multicloud environments, via cost optimisation and AI-supported ticket management, to security, data protection and efficient operation. Providers that can offer these capabilities from a single source and demonstrate them through robust references and case studies have a distinct advantage. Protection against increasing cyberattacks is a particularly crucial aspect.

Service delivery from the UK also offers differentiation potential, particularly regarding data governance and data protection. This is relevant to companies with stringent requirements, particularly small and midsize enterprises. SMEs are disproportionately sceptical about operating abroad, yet they constitute one of the fastest-growing market segments. With its Digital Sovereignty Competency, AWS has, since the end of 2024, been offering a specialisation for AWS partners with expertise in helping clients address their digital sovereignty requirements.

From the 46 companies assessed for this study, 33 qualified for this quadrant, with 10 being Leaders and one a Rising Star.

accenture

Accenture is known for its innovative solutions and security expertise. It has established itself as a leading provider of AWS managed services in the UK, with security being a particular strength.

Capgemini

Capgemini is a leading AWS managed services provider distinguished by its deep industry expertise, comprehensive service portfolio and extensive experience, while also enabling an optimal multicloud mix.

cognizant

Cognizant is a leading provider of AWS managed services in the UK, with its broad industry knowledge, extensive service portfolio and comprehensive resources, addressing a wide range of customer requirements.

DXC

DXC Technology offers efficient AWS managed services, focusing on automation, and has global delivery expertise. It offers flexible support for multicloud environments.

HCLTech

HCLTech is a leading provider of AWS managed services in the UK, backed by a wide range of services and extensive resources. It provides comprehensive support even to demanding industries.

NTT DATA

NTT DATA is a leading provider of AWS managed services in the UK, combining deep expertise with highly flexible delivery capabilities. Its well-structured sovereign cloud offering further strengthens its position.

TCS TATA CONSULTANCY SERVICES

TCS has established itself as a leading provider of AWS managed services in the UK, with a wide range of services, deep AWS expertise and its close collaboration with AWS. The reliability of its solutions further strengthens this position.

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Tech Mahindra is a leading provider of AWS managed services in the UK, combining strong vertical expertise with its highly automated Cloud BlazeTech platform. It offers comprehensive capabilities tailored to industry-specific requirements.

Version 1 is a leading provider of AWS managed services in the UK, combining a vision for next-generation delivery with deep sovereign cloud expertise and a strong commitment to sustainability.

Wipro stands out with its wide range of services, highly qualified staff, and solutions with robust security features. This positions the company as a leading provider of AWS managed services in the UK.

LTM (Rising Star) offers a comprehensive range of AWS managed services and a customer-focused pricing model, which contributes to its dynamic growth and market positioning in the UK.

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Leader

"DXC Technology is a leader in AWS managed services in the UK that offers a highly modularised portfolio of service features with a strong infusion of AI and automation capabilities."

Frank Heuer

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, with Global Infrastructure Services as a key business segment. It is an AWS Premier Tier Services Partner and AWS Managed Service Provider. DXC Technology has 14 AWS Competencies spanning cloud operations, security, resilience and industry consulting. The company has a large client base for its AWS managed services in the UK, with a substantial number of dedicated professionals serving them.

Strengths

Strong fit for multinational clients: DXC excels at delivering managed services globally. Its extensive global presence positions it well to execute AWS managed services projects on a worldwide scale, attracting large multinational corporations.

Modularity for flexibility: DXC recognises that clients often prefer their tools for aspects of cloud services and has therefore significantly enhanced the modularity of its managed services on AWS, giving enterprises greater flexibility to combine and customise different elements of their cloud environment. It has also introduced several new features, including integration layers for multicloud orchestrations and automation capabilities for proprietary observability tools such as Dynatrace.

Agentic managed services: DXC has embedded many AI and automation elements into its DXC OASIS AWS managed services. These capabilities include governed autonomous remediation, AI agents for AWS cloud operations, and automated cost and security analysis.

Sandbox for clients: DXC has introduced LLMOps for AWS to help clients experiment with new software and AI solutions while safeguarding their operations. It provides a sandbox environment where enterprises can develop and test new code.

Caution

While DXC Technology has a broad portfolio of AWS-related competencies, Digital Sovereignty is not among them. Achieving this competency could help strengthen DXC Technology's position as the preferred choice among prospective clients in the UK. Sovereignty is an important issue in the context of managed services.

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Appendix

The ISG Provider Lens® 2026 – AWS Ecosystem Partners study analyses the relevant service providers in the UK 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.

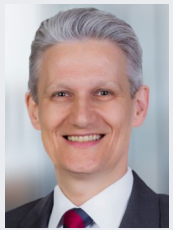
All revenue references are in U.S. dollars ($US) unless noted otherwise.

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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Frank Heuer is Principal Analyst at ISG Germany. His focus is on cybersecurity, cloud computing, digital workspace, communications, and social business & collaboration.

His main areas of responsibility include advising ICT providers on strategic and operational marketing and sales. Mr. Heuer is a speaker at conferences and webcasts on his key topics and a member of the IDG expert network. Mr. Heuer has been active as an analyst and consultant in the IT market since 1999.

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Sandya Kattimani
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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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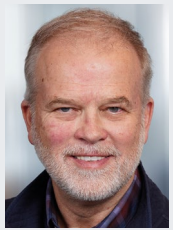
Heiko Henkes

Director and Principal Analyst

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

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

IPL Product Owner



Jan Erik Aase

Partner and Global Head – ISG Provider Lens®

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

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

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OCTOBER, 2026

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