

# AWS Ecosystem Partners

## AWS Consulting Services

A research report comparing provider strengths,  
challenges and competitive differentiators

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### The AWS ecosystem - A strategic advantage for business transformation

AWS has introduced significant developments in 2023, propelling cloud operations and computing into a new era of digital transformation initiatives. These developments have enhanced the competitive landscape, task efficiency and economies of scale. Additional factors contributing to an elevated pace of digital transformations include quick adaptability to changes, socioeconomic and geopolitical circumstances and rapidly evolving enterprise expectations. Hybrid and multicloud strategies have emerged to utilize cloud solutions for varied end-user specializations and industry use cases and technology capabilities. These strategies facilitate efficient integration of applications on platforms from various cloud providers, consolidating cross-platform solutions such as serverless architecture and industry-defined computing environments.

Furthermore, the poly-cloud strategy is growing, particularly in unique and complex use cases that demand high-performance computing (HPC). Such providers are evaluating and formalizing these strategies for deployment in client environments. However, enterprise users are cautious about this approach due to concerns related to cloud-to-cloud connectivity, the expanse of geographic coverage and potential disruptions affecting multiple stakeholders' application performance.

The global cloud market spans various regions, including North America, Asia Pacific, Europe, Latin America and the Middle East and Africa. AWS stands out as the leading hyperscaler across all the regions, with a sizeable market share in the cloud IaaS and PaaS markets. The AWS cloud spans 99 Availability Zones across 31 geographic regions and has over 100,000 partners from over 150 countries, contributing to its extensive market penetration. While AWS has a significant presence in North America, it has expanded its reach further. Aligning governance processes to keep workloads in tandem with cloud framework policies aided its ongoing expansion

**AWS** is at the  
forefront of  
transforming  
business verticals  
by driving Industry-  
focused cloud  
solutions.



initiatives in 2023 to Melbourne (Australia - AWS Asia Pacific), Hyderabad (India - AWS Asia Pacific), and Aragón (Spain - AWS Europe). AWS builds a symbiotic relationship with its partner ecosystem, collaborating on strategic offerings, technological innovation and industry-focused areas. The company continually realigns and expands its programs to fit the right track and segment service providers based on their core competencies and focus areas. AWS also adds certification, training and partnership programs, such as AWS Ambassador Partner Program, enabling service providers to deliver sustainable solutions to enterprise clients that adhere to market standards. AWS actively promotes partnerships and co-branding initiatives within its partner network to drive joint go-to-market (GTM) efforts. Service providers gain credibility through their association with AWS and contribute to generating higher revenue. Amazon Marketplace is gaining popularity by democratizing novel industry solutions offered by service providers, allowing enterprise clients to access and utilize them easily. Also, AWS' CSR (corporate social responsibility) initiatives,

such as the free educator enablement program by AWS Machine Learning University, provide self-paced AI and ML digital courses to developers globally.

AWS leverages its extensive experience and partner network to provide industry-specific services for the finance, healthcare, industrial and manufacturing industries. Global system integrators are exploring a product segmentation strategy of modifying existing products into new versions to suit industry requirements. The financial services industry relies on data security and resilience. Financial services institutions realizing the importance of end-to-end data integration, have started implementing them through holistic services bundles provided by global system integrators to achieve this. Notable examples include Nasdaq's migration of the first U.S. options market to AWS and the U.S. Securities and Exchange Commission's approval of OCC's (Open Cloud Consortium) cloud infrastructure proposal with AWS. Such measures are transforming the financial landscape in the U.S., encouraging other institutions to follow suit in their cloud migration strategies.

There is increased awareness about climate change that has led enterprises to embrace sustainable practices. AWS and its partner network mandate the implementation of measures for a sustainable future. For example, AWS Well-Architected Framework helps enterprises efficiently manage their cloud resources, reducing resource consumption compared to the private cloud. This, in turn, lowers the cost of ownership and carbon footprint. The scalable and cost-optimized designs promoted by AWS contribute to these sustainability efforts. Aligning governance processes with cloud architecture frameworks and policies has further aided in tracking enterprises' progress toward sustainability initiatives.

### **Newly-defined Emerging focus areas of global system integrators and enterprise clients**

Global system integrators are introducing financial engineering programs that depart from the traditional FinOps model. These programs offer immediate cost-saving opportunities by optimizing AWS technological platforms, allowing clients to save on compute capacity and manage virtual machine capacity efficiently.

### **Financial engineering programs to expedite cost efficiency**

Financial engineering programs proposed by global system integrators have enabled them to gain traction in the market. They represent a shift from the traditional FinOps model of managing economic costs within the purview of the organizational requirements. Financial engineering programs enable clients to save on the AWS technological platform by providing immediate cost-saving opportunities. Global system integrators purchase and manage compute capacity and transfer required virtual machine capacity to the clients daily. This optimization technique helps in the client's long-term financial sustainability.

### **Integrating IT asset management (ITAM) and FinOps for comprehensive advantage**

Cloud financial management has extended its reach from the IaaS and PaaS markets into the cloud infrastructure market. IT asset management (ITAM) is an organizational discipline that tracks and reports the lifecycle of IT assets such as software, hardware, software licenses and other tangible and



intangible assets. FinOps teams have the expertise to enhance the cost-efficiency of their cloud resources. However, applying FinOps methodology on software resources and their licensing mobility is niche. Expanding FinOps usage necessitates the inclusion of ITAM. This integration aids FinOps practices by optimizing license considerations across TSVs (technology software vendors), such as AWS, GCP and Microsoft Azure.

Cloud adoption has proportionately increased the number of service providers. Hyperscalers tailor their value proposition to meet the specific requirements of end-user specialization, use case and geographic locations. Thus, enterprises have realized the potential benefits of using multiple and hybrid cloud solutions for varied purposes. However, adopting a multicloud strategy creates governance and management challenges for enterprise clients. These challenges encompass maintaining consistent cloud security and compliance and addressing the challenges of automating and controlling cloud infrastructure. AWS Cloud Operations services and AWS Systems

Manager helps to seamlessly integrate applications running across AWS, Google Cloud and Microsoft Azure through a single panel. AWS Cloud Operations services provide a unified operational view, effectively managing portability and orchestration challenges across different cloud environments.

AWS focuses on time to value by enforcing small and incremental changes that are simple to test, deploy and minimize risk. For instance, the Amazon SageMaker shadow test facilitates enterprise clients to configure errors and rectify performance issues before final delivery, reinforcing customer confidence with an error-free interface. Additionally, AWS introduces a DevSecOps solution by amalgamating security capabilities into the DevOps methodology. This approach aids in the early identification and resolution of security issues during the initial stages of the development lifecycle, ultimately enhancing productivity. The newly launched. AWS Config, which supports proactive compliance, represents another time-to-value capability by this leading technology vendor. AWS's unwavering emphasis on business agility for faster deployment of new features

and applications enables swift adaptation to evolving market conditions. As businesses incline toward data-driven business models, AWS identifies market potential in enterprises struggling to establish data ingestion pipelines. AWS has the first-mover advantage by introducing advanced Redshift capabilities to simplify data ingestion.

Beyond its core compute and storage services, AWS has also tapped into the cloud security market, consistently releasing resilient network connectivity models. AWS' latest networking capabilities described at re:Invent are geared toward safeguarding corporate applications. Features such as VPC Lattice, Verified Access and ENA Express prioritize secure networking solutions. Through collaborative efforts, such as Open Cybersecurity Schema Framework (OCSF) project involving AWS and 17 security vendors, AWS actively contributes to services that monitor, detect and mitigate security issues. Similarly, many partners provide security analytics on Security Lake to cater to the various security needs of enterprise clients.

**AWS keeps pace in a rapidly evolving technological landscape by developing cloud offerings and democratizing them for enterprise use.**




## Provider Positioning

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	AWS Consulting Services	AWS Migration Services	AWS Managed Services	AWS Data Analytics and Machine Learning	AWS SAP Workloads
1Strategy	Not In	Not In	Not In	Contender	Not In
2nd Watch	Contender	Not In	Product Challenger	Contender	Not In
Accenture	Leader	Leader	Leader	Leader	Leader
Agilisium	Not In	Contender	Not In	Product Challenger	Not In
AllCloud	Contender	Contender	Contender	Not In	Not In
Apexon	Not In	Product Challenger	Not In	Not In	Not In
Arvato Systems	Market Challenger	Contender	Contender	Not In	Contender
Aspire Systems	Contender	Not In	Product Challenger	Not In	Not In
Atos	Product Challenger	Product Challenger	Product Challenger	Not In	Not In
Capgemini	Leader	Leader	Leader	Leader	Leader



 Provider Positioning

	<b>AWS Consulting Services</b>	<b>AWS Migration Services</b>	<b>AWS Managed Services</b>	<b>AWS Data Analytics and Machine Learning</b>	<b>AWS SAP Workloads</b>
Cascadeo	Not In	Not In	Contender	Not In	Not In
Clearscale	Contender	Not In	Not In	Contender	Not In
Cognizant	Leader	Leader	Leader	Leader	Leader
Deloitte	Leader	Leader	Leader	Leader	Leader
Dexian	Product Challenger	Contender	Contender	Not In	Contender
DXC Technology	Product Challenger	Leader	Leader	Product Challenger	Leader
Ensono	Not In	Not In	Contender	Not In	Not In
Eviden (Atos)	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Genpact	Not In	Not In	Not In	Leader	Not In
GFT	Not In	Contender	Not In	Not In	Not In



## Provider Positioning

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	AWS Consulting Services	AWS Migration Services	AWS Managed Services	AWS Data Analytics and Machine Learning	AWS SAP Workloads
HCLTech	Leader	Leader	Leader	Leader	Leader
Hexaware	Leader	Product Challenger	Not In	Rising Star ★	Not In
IBM	Leader	Product Challenger	Leader	Market Challenger	Product Challenger
Impetus	Contender	Not In	Not In	Not In	Not In
Infosys	Leader	Leader	Leader	Leader	Leader
Kyndryl	Rising Star ★	Product Challenger	Rising Star ★	Product Challenger	Rising Star ★
Lemongrass	Not In	Not In	Not In	Not In	Product Challenger
LTIMindtree	Leader	Leader	Leader	Leader	Leader
Mphasis	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Navisite	Not In	Not In	Not In	Not In	Contender






## Provider Positioning

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	AWS Consulting Services	AWS Migration Services	AWS Managed Services	AWS Data Analytics and Machine Learning	AWS SAP Workloads
N-iX	Not In	Contender	Not In	Contender	Not In
NTT DATA	Market Challenger	Market Challenger	Market Challenger	Market Challenger	Not In
Persistent Systems	Rising Star ★	Rising Star ★	Rising Star ★	Product Challenger	Not In
PwC	Leader	Rising Star ★	Product Challenger	Product Challenger	Leader
Quantiphi	Not In	Product Challenger	Not In	Rising Star ★	Not In
Rackspace Technology	Leader	Leader	Leader	Leader	Market Challenger
Slalom	Contender	Contender	Not In	Contender	Not In
Syntax	Not In	Product Challenger	Not In	Not In	Product Challenger
TCS	Leader	Leader	Leader	Leader	Leader
Tech Mahindra	Leader	Leader	Leader	Leader	Rising Star ★



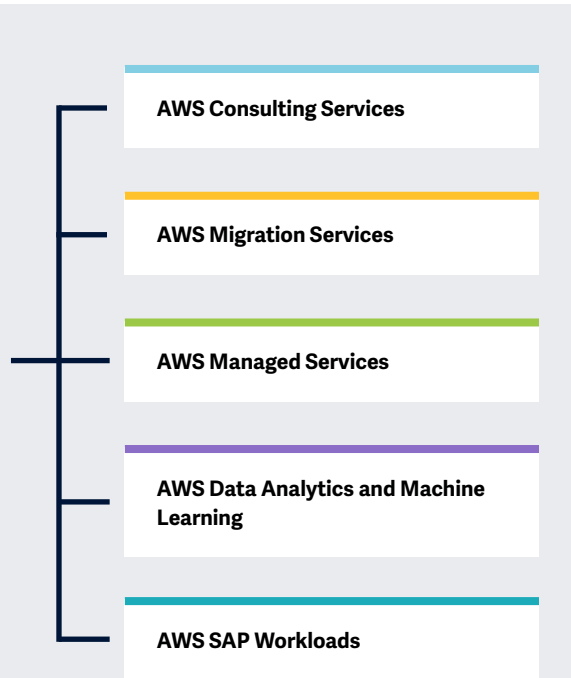
 Provider Positioning

	<b>AWS Consulting Services</b>	<b>AWS Migration Services</b>	<b>AWS Managed Services</b>	<b>AWS Data Analytics and Machine Learning</b>	<b>AWS SAP Workloads</b>
Techwave	Not In	Not In	Not In	Not In	Contender
TO THE NEW	Product Challenger	Not In	Product Challenger	Product Challenger	Not In
Trianz	Contender	Product Challenger	Product Challenger	Not In	Not In
Unisis	Not In	Not In	Market Challenger	Not In	Not In
Virtusa	Not In	Product Challenger	Not In	Contender	Not In
Vision33	Not In	Not In	Not In	Not In	Contender
Wipro	Leader	Leader	Leader	Leader	Leader
Zensar Technologies	Not In	Product Challenger	Product Challenger	Product Challenger	Product Challenger



# Key focus areas for AWS Ecosystem Partners in 2023.

Simplified Illustration; Source: ISG 2023



## Definition

In 2022, AWS introduced major innovations in services related to the cloud, data analytics and machine learning (ML) alongside a general mission that is all about supporting clients in their transformation toward sustainability, focusing on digital sovereignty and the objective of enhanced innovation power. Public cloud usage tends to outstrip traditional infrastructures and, therefore, known techniques for operations. The success of AWS' mission depends on sophisticated CloudOps that cover cloud security and governance, resource and cost optimization, intelligent provisioning of resources and service availability across delivery models (including the edge) – all this implies the need for maximum interoperability of services.

Consequently, AWS has several engagement models to enable its strategic service provider partners to train and upskill their cloud workforces in leveraging the latest platform innovations through its AWS Partner Network (APN). The partnerships have matured in terms of AWS opportunities,

including migration, consulting, data and artificial intelligence (AI), SAP services and managed services.

Some of the main innovations that have contributed to AWS' growth and market expansion, including APN and enterprise clients, are new high-performance EC2 C7g instances with AWS Graviton3 processors, new locations for AWS DataSync and AppSync simplified interfaces for Pub/Sub APIs. AWS has also made major contributions in the data, AI and ML spaces through additional offerings and enhancements.

AWS partners play a critical role in ensuring that customers and prospective customers of AWS can keep up with its pace of innovation and make a meaningful entry into the AWS services space, respectively.



### Scope of the Report

In this ISG Provider Lens™ quadrant report, ISG covers the following five quadrants for services/solutions: AWS Consulting Services, AWS Migration Services, AWS Managed Services, AWS Data Analytics and Machine Learning, AWS SAP Workloads

This ISG Provider Lens™ study offers IT decision makers with the following:

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

Our study serves as the basis for important decision-making in terms of 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 IT providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT 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 IT 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 Challenger, Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens™ quadrant may include service providers that ISG believes have 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).





### 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.

**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 a follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

**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.

**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.





# AWS Consulting Services

### Who Should Read This Section

This report is relevant to enterprises across industries in the U.S. for evaluating the capabilities of AWS consulting service providers offering cloud ecosystem transformation services to meet unique enterprise demands.

In this quadrant, ISG highlights the current market positioning of AWS consulting providers in the U.S. and how they address enterprise challenges in the country. This assessment is based on the expanse of providers' service offerings and market presence.

As the cloud drives enterprise digital transformations, choosing the suitable cloud model, hyperscaler, planning workload assessment, migration and management is critical. As enterprises lack technological expertise, skilled professionals, and proper change management practices,

they partner with expert external agencies that can help them achieve the desired outcomes by leveraging FinOps, cybersecurity, AI and analytics.

Providers must have robust capabilities and a strong talent base to offer end-to-end support for elevating enterprise cloud journeys.



**Technology professionals** should read this report to better understand AWS consulting service providers' relative strengths and weaknesses that can help them drive digital transformation in their enterprises.

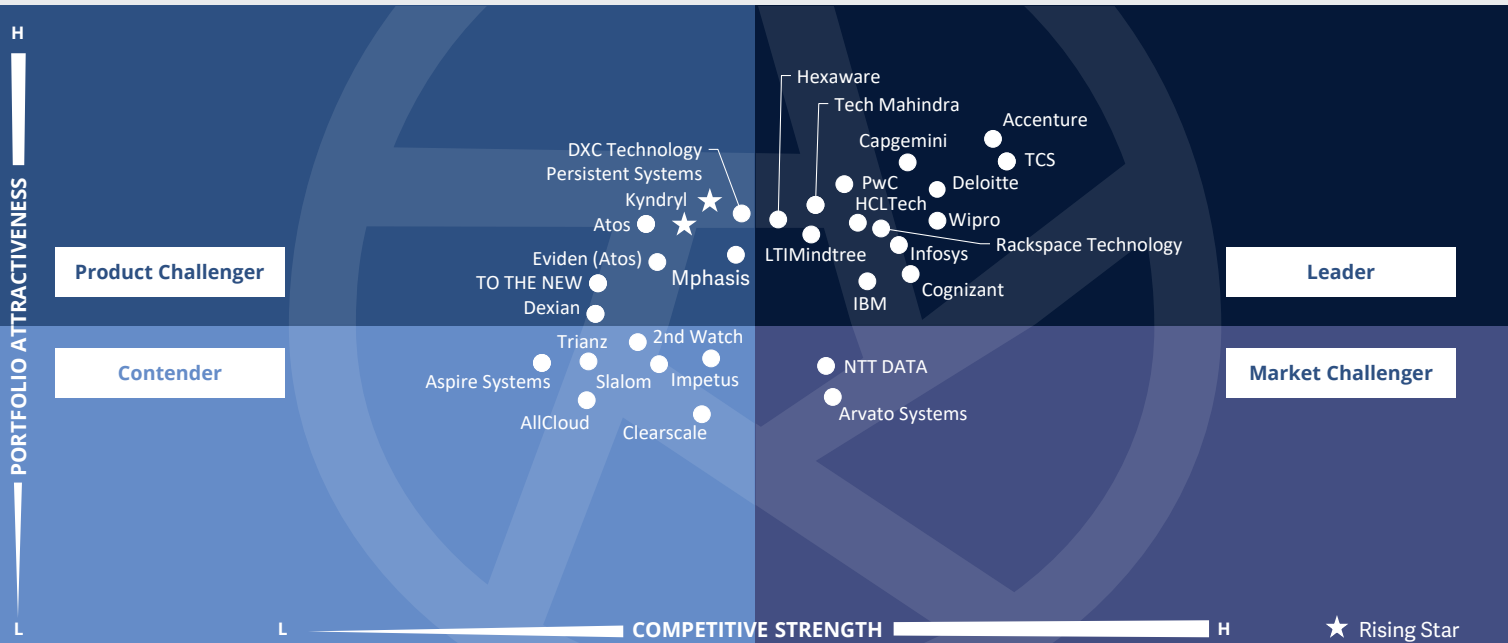


**Digital professionals** should read this report to understand the positioning of AWS consulting service providers and their impact on enterprise transformations and cloud migration benefits.



**Procurement professionals** should read this report to understand the current landscape of AWS consulting service providers in the U.S.





This quadrant assesses service providers' competence in delivering **diverse business, technology and domain consulting** within the AWS space. This is a crucial space with **new additions, such as ESG**, focusing on sustainability within the consulting domain.

Ashwin Gaidhani





## AWS Consulting Services

### Definition

This quadrant includes consulting partners that form the single-largest group in the AWS Partner Network (APN) coterie. Providers in this quadrant offer training, analysis, insight and guidance to address a wide range of business and IT needs, including cloud strategy, business case development and support, and client needs for (and delivery of) governance, risk and compliance (GRC) support. They must not only offer critical technologies, architecture, security and industry-specific solutions but also demonstrate their ability to deliver business value through consulting services.

### Eligibility Criteria

1. Availability of **staff** with experience and certification to support and deliver relevant offerings
2. Wide scope of **AWS competencies** and service delivery offerings and related certifications
3. AWS-focused consulting **roadmap and innovations** (current and planned)
4. Demonstrate **value for clients** through perceptible business outcomes or other measurable improvements
5. Scope and availability of **enabling programs** for customer success (for example, planning workshops and training)
6. Offer a **range** of security tools, technologies and services.
7. Demonstrate credibility in the area of AWS services and solutions through notable **references**
8. Ensure the suitability, maturity and adaptability of the **pricing model**



### Observations

#### Increasing Role in Security and Compliance:

As businesses face data breaches and privacy concerns, the demand for security consulting services, such as governance, risk and compliance (GRC), is rising. AWS consulting partners (service providers) guide enterprise clients to implement strong security measures and meet stringent compliance standards. AWS offerings such as AWS Security Hub and AWS Config are instrumental in aggregating and analyzing security alerts and ensuring compliance.

#### Emphasis on Industry-Specific Solutions:

There is a growing demand for consultants with industry-specific expertise as businesses increasingly rely on specialized technical and business knowledge and experience to reengineer their processes. Global system integrators are assembling teams to supplement AWS services with industry-centric competencies, covering regulatory and compliance aspects. The AWS Competency Program recognizes consultants with proven technical expertise and a successful

track record in various industry sectors. These competency programs are increasingly becoming part of service providers' strategic roadmaps.

#### Rise of Fin-Ops Consulting:

Enterprise clients often require assistance managing their cloud environments while optimizing costs. Consulting partners (global service integrators) are helping these enterprises to control AWS operating costs by deploying a combination of proprietary FinOps solutions and AWS Fin-Ops components. Investments in innovation and product development are priorities to assist customers in optimizing AWS usage and performance and in implementing cost management best practices. AWS Well-Architected Framework and AWS Trusted Advisor are among the essential practices and services consultants provide to assist enterprise clients in effective AWS cost management.

From the 62 companies assessed for this study, 31 have qualified for this quadrant with 14 being Leaders and two Rising Stars.

### accenture

**Accenture** has more than 30 awarded competencies and operates multiple service delivery centers. Accenture, a longstanding AWS Premier Consulting Partner, recently introduced, Velocity, a cloud-based platform enabling partners and customers to start their cloud journey seamlessly.

### Capgemini

**Capgemini**, a trusted AWS partner for over a decade, exhibits technological expertise in intelligent industry solutions. With over eight AWS competencies, it empowers clients with intelligent and efficient customer-driven sustainable business solutions. It is an AWS Premier Consulting Partner with more than 2,500 AWS certifications.

### cognizant

**Cognizant** offers digital platform services on AWS across industries, accelerating innovation and improving business agility. Leveraging AWS expertise, Cognizant drives innovation, and fosters increase business agility.

### Deloitte.

**Deloitte**, a Premier Tier Partner in the AWS Partner Network (APN), holds over 19 AWS competencies. Deloitte and AWS founded Olympus, a global investment fund for industry-centric solutions. Collaborating on engineering services, Deloitte's digital banking platform speeds financial solutions delivery with AWS.



## AWS Consulting Services

### HCLTech

**HCLTech** recently acquired the AWS Cloud Operations Competency recognition, establishing significant expertise in various cross-functional areas of cloud operations.



**Hexaware's** consulting focuses on addressing client needs, optimizing business processes and assisting in expanding enterprises' digital footprint. Hexaware's subsidiary, Mobiquity, offers AWS consulting services. Hexaware has also achieved the AWS Migration Competency status.



**IBM** has been an AWS Premier Tier Consulting Partner for over five years and offers consulting services and software solutions to enterprises, assisting them through their digital transformations.



**Infosys**, an AWS Premier Consulting and Managed Services Partner, helps enterprises discover, evaluate and integrate software and services for accelerating business transformation. Infosys Cobalt and the AWS ecosystem help businesses design and create novel solutions and reduce the GTM time.



**LTIMindtree** leverages its proprietary C=BT2 (Cloud Transformation @ Exponential Speed) model on AWS to ensure a rapid and successful cloud adoption and transformation roadmap for enterprises. LTIMindtree recently achieved Premier Partner Status in the AWS Partner Network.



**PwC**, a top consulting and advisory provider, uses AWS Services for complex enterprise infrastructure strategies. AWS aids PwC in areas such as blockchain, VR, analytics and IoT. Its cybersecurity, data analytics and risk mitigation skills drive successful digital transformation for enterprises.



AWS and **Rackspace Technology** share a longstanding partnership featuring more than 16 AWS competencies and over 2,200 certifications. Rackspace Technology, including Onica by Rackspace Technology, delivers cutting-edge AWS capabilities to enhance enterprises' operational efficiency, agility, innovation and cost-effectiveness.



**TCS'** consulting portfolio includes end-to-end services comprising cloud advisory services, application modernization, cloud-based industry solutions and cybersecurity services. TCS addresses a range of use cases across various industry verticals.



**Tech Mahindra** has been an AWS Premier Consulting Partner and Managed Services Partner for five years. It has more than 1,500 accredited AWS associates and over 500 AWS-certified engineers and architects across industries.



## AWS Consulting Services



**Wipro** merges its comprehensive service portfolio and industry experience with the AWS platform to help enterprises to achieve digital transformation and drive innovation. The Wipro AWS Launchpad has many solutions that guide enterprises in reimagining and accelerating their cloud journeys.

### kyndryl

**Kyndryl** (Rising Star) and AWS collaboratively support both large enterprises and SMEs in rapidly modernizing and transforming their businesses. Together they are empowering several AWS-certified professionals and building joint solutions for accelerating customer journeys and supporting innovation within the cloud ecosystem.

### Persistent

**Persistent Systems** (Rising Star) and AWS continue to deliver innovation and cloud services through technology accelerators. AWS customized solutions, and Persistent Systems' expertise expedites enterprises' digital transformations.





“PwC empowers clients’ AWS journeys with its strong industry knowledge and data technology expertise.”

Ashwin Gaidhani

### Overview

PwC is headquartered in London, U.K. and operates in 152 countries. It has more than 327,900 employees across 690 global offices. In FY22 the company generated \$50.3 billion in revenue, with Advisory as its largest segment. PwC’s global consulting services are dedicated to shaping new emerging technologies and simplifying implementation processes to derive maximum value for enterprises. The company’s consulting services help enterprises discover new transformation streams and drive innovation. PwC’s Emerging Tech Labs works with enterprises to turn innovative idea implementation into driving actionable insights.

### Strengths

#### **AWS consulting for client business transformations:**

PwC positions itself as a business transformation partner that is committed to achieving tangible results for clients planning to adopt and scale AWS solutions within their enterprises. With over 6,000 global accreditations, 20 AWS Competencies and more than 10 Service validations, PwC offers human-led, tech-powered AWS transformation solutions, helping clients drive business revenue and impact while managing risk and building resilience.

#### **Integrated AWS practice:**

PwC’s technical experts minimize business disruption, optimize workflows, maximize impact and deliver results faster through new operating models across DevOps, security and analytics.

### **AWS Redshift partner:**

PwC’s designation as an AWS Redshift Service Delivery Partner (SDP) highlights its proven track record in delivering high-quality data transformation solutions to enterprise clients. The company’s expertise in data modernization, data engineering, DataOps enablement and data warehouse solutions enables it to provide solutions that can fit the unique needs of specific clients.

### Caution

PwC’s industry knowledge-powered AWS consulting practices can set vertical-specific strategic cloud impact benchmarks in U.S. and global markets. With an enhanced focus on improving these benchmarks, PwC could elevate the standard for business outcomes-driven vertical cloud consulting.





# Appendix

The ISG Provider Lens™ 2023 – AWS Ecosystem Partners study analyzes the relevant software vendors/service providers in the U.S. 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 services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of August 2023, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

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

The study was divided into 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 & use cases
4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)
5. Use of Star of Excellence CX-Data
6. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
7. Use of the following key evaluation criteria:
  - \* Strategy & vision
  - \* Tech Innovation
  - \* Brand awareness and presence in the market
  - \* Sales and partner landscape
  - \* Breadth and depth of portfolio of services offered
  - \* CX and Recommendation



## Author & Editor Biographies



Lead Author

**Ashwin Gaidhani**  
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Ashwin Gaidhani is an enterprise governance and digital business transformation expert. He is a research partner at ISG and has extensive experience in enterprise service management and transformative technologies. Ashwin's business technology expertise revolves around technology business management, work design methodologies and enterprise governance. He is a creative leader who designs, describes and implements strategies to drive digital transformation. With over 22 years of experience, he is a practice leader, executive-level advisor and

influencer. Ashwin leads the Enterprise Service Management (platforms and services), Intelligent Automation (Platforms and Services), AWS Ecosystem, ServiceNow and Workday Ecosystem studies. Ashwin is highly qualified and experienced in service management, with lifecycle experience in technology operations, business consulting and advisory roles for large global system integrators (GSIs), independent software vendors (ISVs) and technology product companies.



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**Dr. Tapati Bandopadhyay**  
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Dr. Tapati Bandopadhyay has been an inventor, builder, practitioner and researcher in AI, intelligent automation and related domains, for 27+ years. She has been a global practice leader and executive-level advisor & consultant in AI-automation-cloud and services management, covering MLOps, AIOps, Colugos, DataOps, ModelOps & DevOps metrics-driven practices and data and AI story-building and story-telling practices and tools. As an ISG Lead Analyst on AWS and in AI-ML, consulting & managed services, she is responsible for defining and leading the ISG Provider Lens branded research projects for the US market.

With more than 25 years of experience focused on AI, ML, data sciences and intelligent automation technology development, strategy and adoption practices across key industries, including BFSI, manufacturing & FMCG, retail, media, hi-tech & telco's, governments and healthcare services.





## Author & Editor Biographies



*Research Analyst*

**Srinivasan PN**  
**Research Specialist**

Srinivasan PN is a Research Specialist at ISG and is responsible for supporting and co-authoring ISG Provider Lens™ studies on AWS & Google Ecosystem, Digital Engineering, Manufacturing, and Mainframe. His area of expertise lies in engineering services and digital transformation. Srinivasan has close to 9 years of experience in the technology research industry, and in his prior role, he carried out research delivery for both primary and secondary research capabilities.

Srinivasan also authors enterprise context reports and global summary reports for his expertise. He also supports the advisors with his research skills and writes papers about the latest market developments in the industry.



*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.



### ISG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens™ research, please visit this [webpage](#).

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### ISG

ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 900 clients, including more than 75 of the world's top 100 enterprises, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis.

Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,600 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.

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**REPORT: AWS ECOSYSTEM PARTNERS**