AWS Ecosystem Partners

AWS Data Analytics, AI and ML

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

pwc

QUADRANT REPORT | OCTOBER 2024 | U.S.

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Accelerating innovation with AWS ecosystem - Integrating cloud capabilities for strategic advantage

Maximizing AWS investments: AWS services growth has been driven by the increasing adoption of cloud services across various industries. Businesses are seeking to leverage AWS' robust, scalable and secure infrastructure to enhance their operations, innovate and remain competitive. Several key trends have emerged in the professional and consulting services space, reflecting businesses' evolving needs and priorities.

One of the most prominent trends is the heightened demand for cloud migration services. As enterprises continue to recognize cloud migration benefits, such as cost savings, improved agility and scalability, there has been a significant uptick in projects to move on-premises infrastructure to AWS. Post migration, organizations are increasingly focusing on optimizing their cloud environments. This trend

has led to a surge in demand for services that help businesses maximize the value of their AWS investments. These services include cost optimization, performance tuning and architecture reviews.

Security and compliance remain top priorities for businesses operating in regulated industries such as finance, healthcare and government. The complexity of maintaining robust security postures in the cloud has led to a growing need for specialized consulting services. These services focus on implementing best practices, such as the AWS Well-Architected Framework, and ensuring compliance with industry standards and regulations.

Embracing hybrid and multicloud strategies with AWS: While AWS remains a dominant player in the cloud market, there is a noticeable trend toward hybrid and multicloud strategies. Businesses seek consulting services to design and implement architectures spanning multiple cloud providers and on-premises environments. This trend is driven by the desire for flexibility, risk mitigation and the ability to leverage the best services from different providers. The rapid growth of the AWS ecosystem has

AWS is transforming the enterprise landscape by offering unmatched scalability, security and agility for business success.

led to a talent shortage, with a high demand for skilled professionals. Consulting firms are addressing this challenge by investing in upskilling programs for their employees and leveraging AWS training and certification programs. The AWS Partner Network (APN) is also crucial in enabling partners to develop the necessary skills and competencies to meet market demands.

AWS continues to lead the data infrastructure and enterprise cloud-ready AI services market with its comprehensive data analytics and AI services suite, including notable tools like AWS Bedrock, Code Whisperer and Q Developer. These services are shaping the future of data-driven decision-making and intelligent automation. The trend toward real-time analytics is also gaining momentum, with services like Amazon Kinesis enabling companies to process streaming data and derive immediate insights, enhancing their responsiveness to market changes. There is also a significant focus on democratizing AI, making it accessible to a broader range of businesses. This is evident in the growing popularity of pre-built models and automated

ML tools, which simplify the development and deployment processes.

Generative AI has been one of the most exciting developments in the AI landscape since 2023. AWS Bedrock, a foundational service for GenAI, allows users to create sophisticated models for various applications, including content creation, design, and drug discovery. For instance, companies in the media industry use AWS Bedrock to generate realistic images and videos, reducing production costs and time. Researchers are leveraging this technology in the pharmaceuticals sector to simulate and develop new molecular structures, accelerating drug development processes. AWS Code Whisperer and Q Developer, along with the recent partnerships with Anthropic for Claude advanced LLMs and the APIs curated on the Huggingface platform, are also revolutionizing software development and Python-based data and ML coding by providing real-time code suggestions powered by ML. This service enhances developer productivity and code quality by offering context-aware recommendations as developers write code. For instance, a software development firm might

use Code Whisperer to assist in writing complex algorithms, reducing the time spent on coding and minimizing errors. This tool is precious for novice programmers and can significantly shorten the learning curve.

Integrating AI with data analytics creates new opportunities for enhanced decision-making. Businesses are combining predictive analytics with AI models to forecast trends, optimize operations and improve CX. AWS services, such as Amazon Forecast and Amazon Personalize, enable companies to harness the power of AI-driven predictions and recommendations. Retailers, for example, are using these tools to anticipate inventory demand and personalize shopping experiences, resulting in increased customer satisfaction and reduced operational costs.

Transforming enterprise IT with AWS for SAP workloads: As enterprises seek to modernize their IT landscapes and enhance operational efficiencies, AWS has become a preferred platform for running SAP workloads. Several trends are shaping the landscape of AWS SAP services, driven by the need for agility, scalability and innovation. One of the primary

trends is the migration of SAP workloads to AWS. This trend is particularly pronounced among large enterprises with complex SAP landscapes. AWS provides a range of migration tools and services, such as AWS Migration Hub, AWS Application Migration Service and the AWS Migration Acceleration Program (MAP) for SAP, to facilitate seamless transitions. The push toward SAP S/4HANA, SAP's next-generation ERP suite, is a significant driver for AWS adoption. Enterprises are leveraging AWS to support their SAP S/4HANA transformation journeys, benefiting from AWS' high-performance computing capabilities, scalable storage solutions and comprehensive security features.

Elevating enterprise services portfolio productivity with AWS managed services: The adoption of AWS Managed Services is on the rise as more organizations seek to outsource their cloud management tasks. Businesses realize that managing a cloud environment requires specialized skills and resources, which can be costly and challenging to maintain in-house. By leveraging AWS Managed Services, companies can offload

Executive Summary

routine tasks, such as monitoring, patching, backups and disaster recovery, to AWS experts, allowing their IT teams to focus on strategic initiatives. Security and compliance remain top priorities for organizations, particularly those in regulated industries such as finance, healthcare and government. AWS Managed Services provides a comprehensive approach to security, including continuous monitoring, threat detection and incident response. The service also helps organizations meet compliance requirements by providing governance, risk and compliance (GRC) frameworks tailored to industry standards. This focus on security and compliance drives increased adoption of managed services as businesses seek to ensure their cloud environments are secure and compliant without having to manage these aspects themselves.

Cost optimization and efficiency gains are critical concerns for businesses using cloud services. AWS Managed Services includes tools and practices to help organizations optimize their cloud spend. Services like AWS Cost Explorer, AWS Budgets and AWS Trusted Advisor are integrated into managed services

to provide insights into cloud usage and identify opportunities for cost savings. This trend is particularly important in the current economic climate, where businesses are pressured to maximize the return on their cloud investments while minimizing costs. The demand for managed DevOps on the cloud grows as companies seek to accelerate their software development and deployment processes. AWS Managed Services offers a range of DevOps solutions, including continuous integration and continuous deployment (CI/CD) pipelines, infrastructure as code (IaC) and automated testing and deployment. The trend toward managed DevOps is driven by the need for faster time-to-market, improved software quality and reduced operational complexity.

Clients can utilize the AWS cloud ecosystem to enhance business growth and drive effective operations. With AWS, enterprise clients can leverage scalable infrastructure, robust security measures and unparalleled agility to drive innovation and efficiency across their organizations. By harnessing the advanced capabilities of AWS services, clients can accelerate growth, optimize performance and stay competitive in a rapidly evolving market.

Provider Positioning

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	AWS Professional Services	AWS Managed Services	AWS Data Analytics, AI and ML	AWS SAP Workloads
Accenture	Leader	Leader	Leader	Leader
Agilisium	Not In	Not In	Product Challenger	Not In
AllCloud	Contender	Product Challenger	Not In	Not In
Apexon	Product Challenger	Not In	Product Challenger	Not In
Arvato Systems	Not In	Contender	Not In	Not In
Aspire Systems	Not In	Contender	Not In	Not In
Atos	Product Challenger	Product Challenger	Product Challenger	Not In
Autoverse	Contender	Not In	Not In	Not In
Birlasoft	Product Challenger	Product Challenger	Contender	Not In
Capgemini	Leader	Leader	Leader	Leader

Provider Positioning

	AWS Professional Services	AWS Managed Services	AWS Data Analytics, AI and ML	AWS SAP Workloads
Cascadeo	Not In	Contender	Not In	Not In
Coforge	Contender	Product Challenger	Contender	Not In
Cognizant	Leader	Leader	Leader	Leader
Deloitte	Leader	Leader	Leader	Leader
Dexian	Product Challenger	Product Challenger	Not In	Not In
DXC Technology	Leader	Leader	Product Challenger	Leader
Encora	Contender	Contender	Contender	Not In
Ensono	Not In	Not In	Contender	Not In
Eviden (Atos Group)	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Genpact	Rising Star ★	Not In	Leader	Not In

Provider Positioning

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	AWS Professional Services	AWS Managed Services	AWS Data Analytics, AI and ML	AWS SAP Workloads
GFT	Contender	Not In	Not In	Not In
HCLTech	Leader	Leader	Leader	Leader
Hexaware	Leader	Not In	Leader	Not In
Hitachi Digital Services	Product Challenger	Product Challenger	Not In	Product Challenger
IBM	Not In	Leader	Leader	Product Challenger
Impetus	Contender	Contender	Product Challenger	Not In
Infosys	Leader	Leader	Leader	Leader
Kyndryl	Rising Star ★	Leader	Product Challenger	Product Challenger
Lemongrass Consulting	Not In	Not In	Not In	Product Challenger
LTIMindtree	Leader	Leader	Leader	Leader

Provider Positioning

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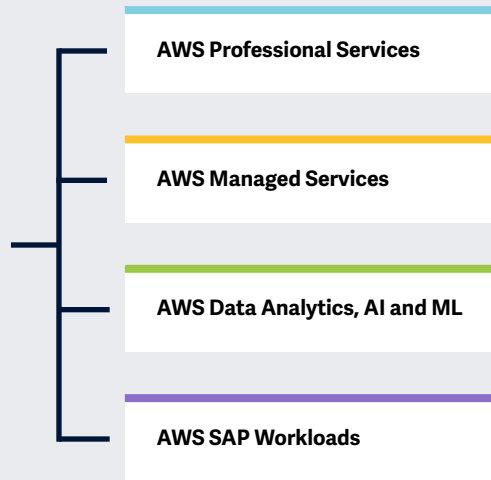|	AWS Professional Services	AWS Managed Services	AWS Data Analytics, AI and ML	AWS SAP Workloads
Mphasis	Product Challenger	Product Challenger	Product Challenger	Product Challenger
N-iX	Contender	Not In	Contender	Not In
NTT DATA	Market Challenger	Market Challenger	Market Challenger	Not In
Persistent Systems	Leader	Product Challenger	Rising Star ★	Not In
PwC	Leader	Rising Star ★	Leader	Leader
Quantiphi	Product Challenger	Not In	Rising Star ★	Not In
Rackspace Technology	Leader	Leader	Leader	Leader
Slalom	Product Challenger	Not In	Contender	Not In
Syntax	Product Challenger	Product Challenger	Product Challenger	Product Challenger
TCS	Leader	Leader	Leader	Leader

Provider Positioning

	AWS Professional Services	AWS Managed Services	AWS Data Analytics, AI and ML	AWS SAP Workloads
Tech Mahindra	Leader	Leader	Leader	Rising Star ★
TechWave	Not In	Not In	Not In	Contender
TO THE NEW	Not In	Contender	Product Challenger	Not In
Trianz	Not In	Contender	Not In	Not In
Version 1	Contender	Not In	Not In	Not In
Virtusa	Product Challenger	Product Challenger	Contender	Not In
Vision33	Not In	Not In	Not In	Contender
Wipro	Leader	Leader	Leader	Leader
Zensar Technologies	Product Challenger	Product Challenger	Product Challenger	Not In

Key focus areas for **AWS Ecosystem Partners** 2024.

Simplified Illustration Source: ISG 2024

AWS Professional Services

AWS Managed Services

AWS Data Analytics, AI and ML

AWS SAP Workloads

Definition

In 2024, AWS introduced major innovations in services related to the cloud, data analytics and ML alongside a general mission that supports clients in their transformation toward sustainability, focusing on digital sovereignty and enhanced innovation power. Public cloud usage tends to outpace traditional infrastructures and known operational techniques. The success of AWS' mission depends on sophisticated CloudOps that cover cloud security and governance, resource and cost optimization, provisioning resources intelligently and service availability across delivery models (including the Edge). This strategy implies the need for maximum interoperability among services.

AWS has several engagement models to enable its strategic service provider partners to train and upskill their cloud workforces and leverage the latest platform innovations through the AWS Partner Network (APN). The partnerships have matured in terms of AWS cloud opportunities, including migration, consulting, data and AI, SAP services and managed services.

AWS continues solidifying its leadership and commitment to technological innovation, which is emphasized by various strategic alliances and pioneering developments. Partnerships are pivotal for cutting-edge innovation, future-proofing the technology service providers' road map and defining their strategies. The industry focus continues to strengthen the collaboration between global system integrators and AWS in developing solutions. These developments, coupled with AWS' ongoing commitment to product innovation and strategic foresight, signal a future where digital transformation is not just about technological advancement but also sustainable and responsible growth. AWS is paving the way for next-generation cloud services through its latest partnerships and product initiatives, reinforcing its role as a catalyst for industry-wide innovation and ethical, technological practices.

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 Analytics, AI and ML and AWS SAP Workloads.

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 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).

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.

★ **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.

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.

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.

AWS Data Analytics, AI and ML

AWS Data Analytics, AI and ML

Who Should Read This Section

This report is relevant to enterprises across industries in the U.S. for evaluating providers of AWS data analytics, AI and ML services. In this quadrant, ISG highlights the current market positioning of these providers in the U.S. and how they address the challenges enterprises face in the context of AWS data analytics, AI and ML.

The growing demand for rapid decision-making is driving a surge in real-time data analytics. Enterprises are leveraging tools such as Amazon Kinesis and AWS MSK to extract immediate insights from streaming data. Simultaneously, enterprises are accumulating massive datasets in cloud-based data lakes using Amazon S3. AWS Lake Formation simplifies the management of these data repositories, enabling efficient data analysis.

AI and ML are becoming more accessible to a broader audience. Cloud-based platforms such as Amazon SageMaker streamline the development and deployment of ML models. Pre-built AI services, such as Amazon Comprehend, Rekognition and Translate, empower non-technical users to integrate AI into their applications.

Enterprises are increasingly developing custom AI and ML models aligned with specific business objectives to gain a competitive edge. Advanced hardware accelerators such as AWS Trainium and Inferentia are being employed to optimize model training and inference for specialized applications.

IT professionals should read this report to better understand the relative strengths and weaknesses of AWS data analytics, AI and ML service providers to drive digital transformation.
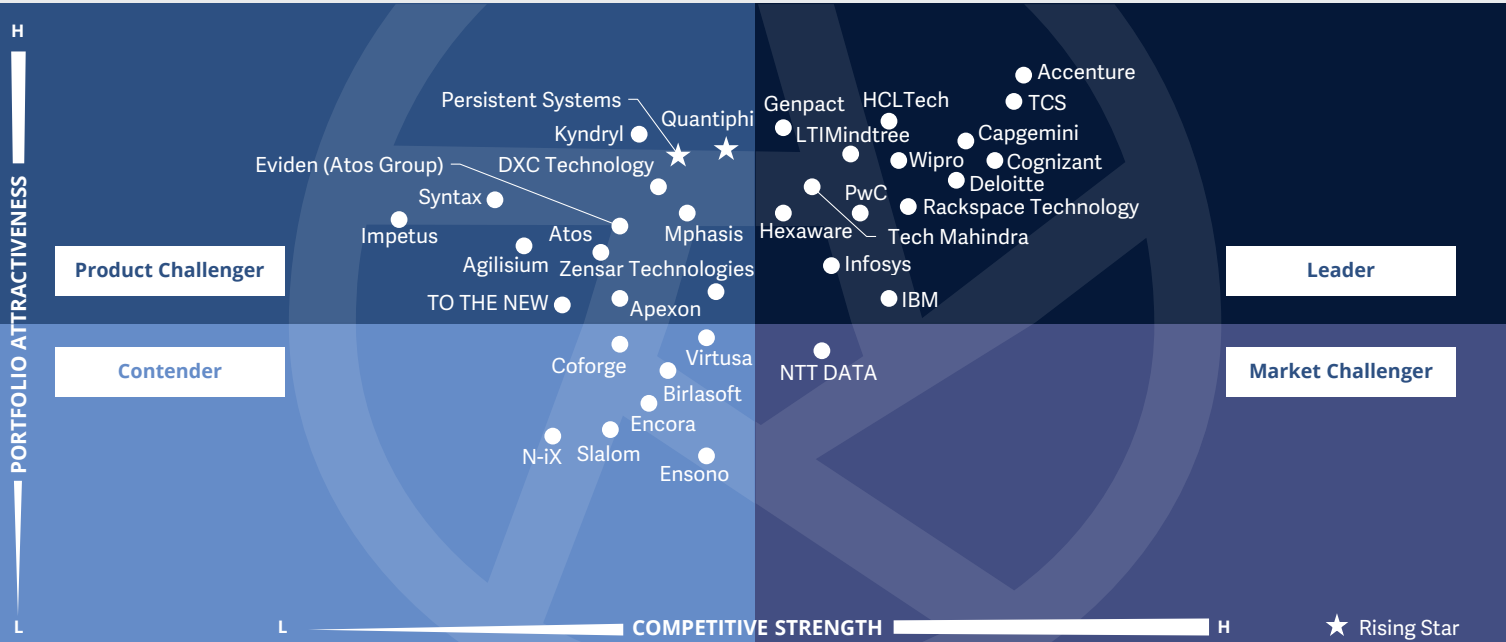
Analytics professionals can understand AWS data analytics, AI and ML service providers' current market positioning and their impact on enterprise transformations, alongside cloud migration benefits.

Procurement professionals should read this report to understand AWS data analytics, AI and ML service providers' current positioning in the U.S.

ISG Provider Lens™

AWS Ecosystem Partners
AWS Data Analytics, AI and ML

Source: ISG RESEARCH

U.S. 2024

PORTFOLIO ATTRACTIVENESS

Product Challenger

Contender

Leader

Market Challenger

Accenture
Genpact   HCLTech   TCS
Persistent Systems   LTIMindtree   Capgemini
Kyndryl   Quantiphi   Wipro   Cognizant
Eviden (Atos Group)   DXC Technology   Deloitte
Syntax   PwC   Rackspace Technology
Impetus   Atos   Mphasis   Hexaware   Tech Mahindra
Agilisium   Zensar Technologies   Infosys
TO THE NEW   Apexon   IBM
Coforge   Virtusa   NTT DATA
Birlasoft
Encora
N-iX   Slalom
Ensono

L ————— COMPETITIVE STRENGTH ————— H   ★ Rising Star

This quadrant assesses **AWS data analytics, ML and AI service providers** for their ability to utilize analytics and ML to **convert data into insights**, driving innovation and efficiency in client operations — a key area for innovation among service providers.

Ashwin Gaidhani

Definition

This quadrant covers providers of two increasingly intertwined sets of IT capabilities — the ability to collect and analyze an array of data types and amounts and the ability to demonstrate ML capabilities that enable faster and more efficient analysis of various kinds of data within and across a growing range of systems and applications. The providers in this space must demonstrate capabilities and experience in data science (including big data and advanced analytics), database and solution architecture, ML and related AI development (including generative AI), IoT data processing, solutions and implementation, software development, networking and data privacy and security. Most of these providers use an adaptive portfolio of tools and technologies to develop and deliver solutions.

Eligibility Criteria

1. Scope and use of **relevant tools and technologies**

2. Service/solution **integration capabilities** and offerings

3. Scope and availability of **enabling programs** for customer success (for example, planning workshops and training)

4. Availability, experience and certification of **experts** in analytics, data science and ML

5. Ability to provide an AWS-focused offering **road map** and innovations (current and planned)

6. Number and reputation of **references** for ML and analytics services and solutions on AWS

7. Suitability, maturity and adaptability of **pricing model** with a go-to-market (GTM) strategy

8. Breadth and depth of **partner and channel** relationships

9. Competency and capability in **deploying and managing IoT solutions** on AWS

Observations

The U.S. market for data analytics, AI and ML on AWS is highly competitive, driven by the increasing demand for data-driven decision-making. Global system Integrators deploy solutions encompassing big data analytics, ML, IoT data processing and security, utilizing a range of AWS services such as Amazon S3, Amazon Redshift, Amazon SageMaker and AWS IoT. Global system integrators (GSIs) harness various AWS services, including advanced data analytics and GenAI tools, to deliver comprehensive solutions that provide enterprises with real-time operational insights and predictive analytics.

Below are some of the key strategies and offerings from global system integrators in this space:

Delivering comprehensive data-driven solutions: Global system integrators utilize a wide range of AWS services, including data visualization tools like Amazon QuickSight and IoT analytics platforms such as AWS IoT Analytics, to create integrated solutions that empower businesses to gain a complete view of their operations, allowing real-time insights, predictive analytics and proactive decision-making.

Democratizing GenAI with a focus on responsible implementation: Global system integrators are developing expertise in AWS GenAI offerings and providing services such as consulting, implementation, training and support to guide enterprises in integrating these solutions within their operations. Recognizing the importance of ethical implications, AWS and its partner network incorporate responsible AI principles, explainability tools and bias detection mechanisms into their offerings.

Deploying high-impact AI and ML solutions: Global system integrators help businesses identify significant use cases and support serverless architecture for AI and ML tasks, develop custom models tailored to specific needs and operationalize solutions like Amazon SageMaker, Amazon Comprehend and Amazon Rekognition for continuous value generation.

From the 65 companies assessed for this study, 36 qualified for this quadrant, with 15 being Leaders and two Rising Stars.

accenture

Accenture harnesses AWS capabilities to deliver AI-powered customer engagements through its ACE accelerators. It integrates AWS native solutions for data lakes via the Accenture Insights Platform and scales business insights with 40 AWS competencies in data and analytics.

Capgemini

Capgemini leverages its over 15-year partnership with AWS to deliver end-to-end cloud services. With more than 15,500 AWS certifications and dedicated AWS technical teams, Capgemini offers robust capabilities in cloud migration, modernization and managed services.

cognizant

Cognizant's Data and Intelligence Toolkit, powered by GenAI, drives data modernization and AI-driven solutions on AWS. With tools such DataIQ and the ETL Conversion Tool, Cognizant accelerates client transformation, achieving significant performance improvements.

Deloitte.

Deloitte drives business value with AI and ML on AWS, using MLOps and solutions such as TrueServe™. From data consolidation to computer vision, Deloitte and AWS deliver practical, industry-specific AI innovations, transforming enterprises into AI-powered organizations.

Genpact's strength in AWS AI and data analytics is demonstrated by its ability to accelerate cloud transitions using Cora GenCodeY, ensuring seamless AWS integration and optimized operations.

HCLTech

Recognized as an AWS Generative AI Competency Partner, **HCLTech** drives innovation with AI and ML solutions, such as the AI marketplace, Amazon EMR implementations and GenAI-led transformations across various industries.

HEXAWARE

Hexaware offers comprehensive AI, ML and data analytics services, including over 20 deployable GenAI solutions. It also has partnerships with DataSwitch and Leaplogic. Leveraging Amazon SageMaker and Redshift, it delivers industry-specific solutions such as Paymatix and Elevate360 Hub.

IBM

IBM, with 20 AWS competencies, demonstrates exceptional capability in leveraging AWS' AI, ML and data analytics services. Its advanced solutions enable clients to drive significant business transformation, optimize operations and enhance decision-making.

Infosys

Infosys leverages AWS AI to provide scalable, AI-driven insights and forecasting. Utilizing Amazon Comprehend and SageMaker, Infosys offers secure, cost-efficient big data solutions across industries, enhancing decision-making and business automation.

LTIMindtree

LTIMindtree boosts AI and ML capabilities with the Scarlet accelerator for seamless migration to AWS. Using Amazon SageMaker, it offers end-to-end AI solutions, including complex pattern detection and AI-driven automation, for data-driven decisions and operational efficiency.

pwc

PwC's Analytics and AI Transformation, integrated with AWS' cloud architecture, delivers AI-driven insights and automation. With tools such as Amazon QuickSight and AWS Redshift, PwC enhances operational efficiency and CX at scale.

rackspace technology.

Rackspace Technology delivers AI, ML and data analytics, leveraging AWS Code Whisperer and LLMs. Its expertise in data analytics and ML drives solutions through conversational AI and natural language processing (NLP), boosting customer satisfaction, productivity and revenue.

tcs TATA CONSULTANCY SERVICES

TCS employs the DATOM™ framework and tools such as DEER and MasterCraft™ Data Plus to deliver advanced AI, ML and data analytics solutions. TCS provides domain-led solutions such as financial spreading and intelligent document porocessing (IDP), enhancing data governance and accelerating innovation.

TECH mahindra

Tech Mahindra employs advanced AI and ML solutions on AWS, utilizing tools such as InfoWise and Sprinter for data migration and governance. It delivers industry-specific AI solutions for enhanced customer engagement, predictive analytics and operational efficiencies.

wipro

Wipro's Data Intelligence Suite accelerates AI, ML and data analytics on AWS, utilizing AWS Glue and Redshift. With GenAI solutions such as PolicyGPT and Digital Telco, Wipro enhances business insights and automation across BFSI, retail, healthcare and communications.

Persistent

Persistent Systems (Rising Star) delivers comprehensive AI, ML and data analytics solutions. Recognized for its GenAI capabilities, it integrates tools like PiCloud and GenAI Hub to drive innovation and operational efficiency for clients across industries.

quantiphi Solving What Matters

Quantiphi's (Rising Star) Contact Center Transformation solutions, recognized by AWS for Conversational AI competency, enhance customer service through AI-driven automation. Its GenAI solution, Baioniq, utilizes LLMs to extract actionable insights, boosting operational efficiency.

🏆
Leader

"PwC leverages AWS data and AI to redefine clients' business by transforming user journeys in the datascapes."

Ashwin Gaidhani

PwC

Overview

PwC is headquartered in London, U.K. It has more than 364,200 employees across over 680 offices in 151 countries. In FY23 the company generated $53.1 billion in revenue, with Advisory as its largest segment. With its unique approach to GenAI and a strong emphasis on ethical AI, PwC helps clients achieve breakthrough business outcomes and maintain a competitive edge. Recognized as a leader in AI and analytics, PwC continues to drive innovation and efficiency through its AI and ML services on AWS.

Strengths

Client outcomes through AI: PwC enables clients to take an outcomes-assured route to leveraging AI across enterprise application lifecycles. The focus is on enhancing key client business outcomes, such as profitability and competitive advantages, productivity and accelerated time-to-market for client innovations.

GenAI adoption: PwC leverages AWS GenAI services to develop customized AI solutions tailored to specific business requirements, including top-priority use cases such as customer services, search and query applications and knowledge automation.

GenAI from AWS: PwC collaborates with AWS to build industry- and business-relevant GenAI solutions leveraging Code Whisperer, the AI-powered code assist tool from AWS, designed to enhance code quality, identify potential issues and accelerate software development cycles. Code Whisperer uses ML models to provide actionable insights, enabling developers to deliver high-quality applications with increased reliability and efficiency. PwC has the capabilities to enable clients to refactor legacy applications leveraging AWS GenAI services in code reengineering.

Caution

PwC should enhance its focus on utilizing AWS GenAI platforms to boost developer productivity further and optimize software development processes. PwC can better guide its clients by publishing improvement benchmarks and leveraging the latest GenAI attributes to address potential technology adoption and strategy implementation gaps.

Star of Excellence

A program, designed by ISG, to collect client feedback about providers' success in demonstrating the highest standards of client service excellence and customer centricity.

In the ISG Star of Excellence™ research on enterprise customer experience (CX), clients have given feedback about their experience with service providers for their **AWS Ecosystem Partners** services.

Based on the direct feedback of enterprise clients, below are the key highlights:

Client Business Role

▲ **Most satisfied**
Shared Services Operations

▼ **Least satisfied**
Finance

Region

▲ **Most satisfied**
Central/South America

▼ **Least satisfied**
North America

Industry

▲ **Most satisfied**
Chemicals

▼ **Least satisfied**
Public Sector

Industry Average CX Score

73.6

▲ Highest CX: 95
▼ Lowest CX: 50

CX Score: 100 most satisfied, 0 least satisfied
Total responses (N) = 1220

Most Important CX Pillar

Business Continuity and Flexibility

Service Delivery Models	Avg % of Work Done
Onsite	59.2%
Nearshore	18.3%
Offshore	22.5%

Appendix

Methodology & Team

The ISG Provider Lens 2024 – 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 study will include data 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. ISG recognizes the time lapse and possible market developments between research and publishing, in terms of mergers and acquisitions, and acknowledges that those changes will not reflect in the reports for this study.

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

Lead Author

Ashwin Gaidhani
Research Partner

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.

Research Analyst

Srinivasan P N
Senior Lead Analyst

Srinivasan PN is a Research Analyst at ISG and is responsible for supporting and co-authoring ISG Provider Lens™ studies on AWS and Digital Engineering. His area of expertise lies in engineering services and digital transformation. Srinivasan has 10 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.

Study Sponsor

Aman Munglani
Director: Hyperscalers, Digital Innovator Series and Custom Research

Aman Munglani leads the ecosystems and custom research practice for ISG. He brings over twenty years of expertise in emerging technologies and industry trends. His career is marked by significant contributions in guiding top executives from Global 2000 companies, offering strategic advice on digital transformation, start-up partnerships, driving innovation, and shaping technology strategies. In his tenure exceeding twelve years at Gartner, Aman focused on providing CIOs and IT executives across Asia Pacific and Europe with insights on the practical implementation and advancement of new technologies, the evolution of infrastructure, and detailed vendor assessments.
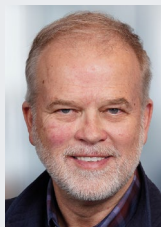
IPL Product Owner

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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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 AI and 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 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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OCTOBER, 2024

REPORT: AWS ECOSYSTEM PARTNER 2024