ISG Provider Lens™

AWS Ecosystem Partners

AWS Managed Services

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

pwc

QUADRANT REPORT | OCTOBER 2024 | U.S.

Table of Contents

Report Author: Ashwin Gaidhani

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 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

	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

Page 2 of 5

	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

	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

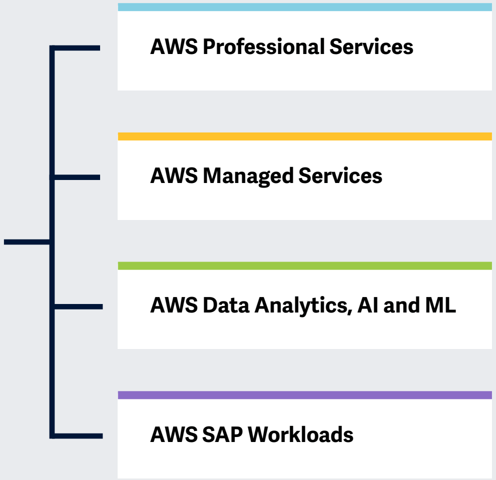
	AWS Professional Services	AWS Managed Services	AWS Data Analytics, AI and ML	AWS SAP Workloads
Mphasis	Product Challenger	Product Challenger	Product Challenger	Product Challenger
N-iX	Contender	Not In	Contender	Not In
NTT DATA	Market Challenger	Market Challenger	Market Challenger	Not In
Persistent Systems	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

Page 5 of 5

	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

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.

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.

★ **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 Managed Services

Who Should Read This Section

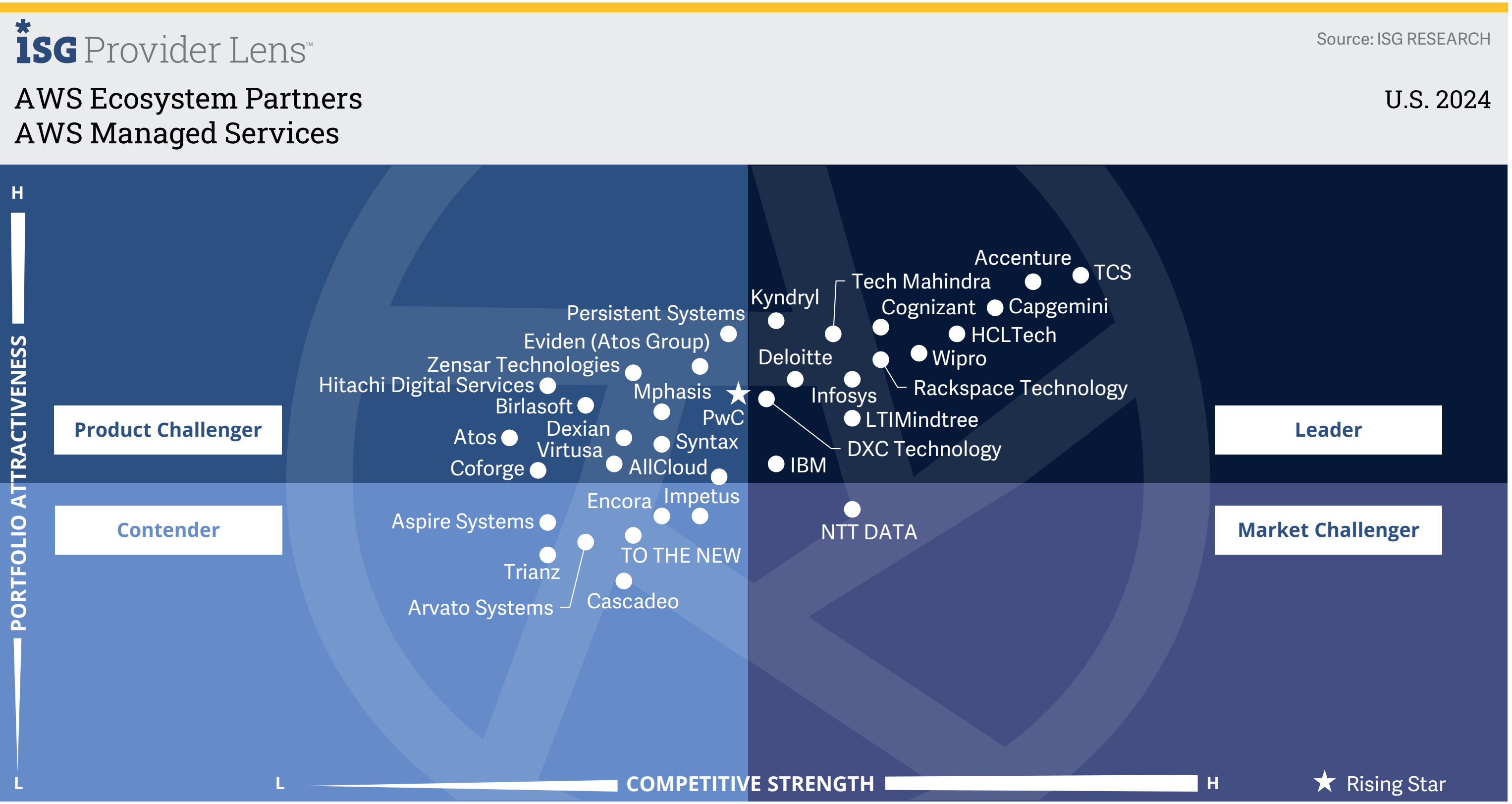
This report is relevant to enterprises across industries in the U.S. for evaluating AWS managed service providers. In this quadrant, ISG highlights the current market positioning of these providers in the U.S. and how they address the critical challenges associated with offering managed services in the AWS ecosystem. ISG's assessment is based on the expanse of providers' service offerings and market presence.

The U.S. market is increasingly outsourcing cloud infrastructure management and operations to external partners. Enterprises are carefully selecting providers capable of securely delivering comprehensive managed services. The demand for tools that optimize cloud spending and usage is growing as enterprises prioritize cost efficiency. With the surge in containerization and microservices, cloud-native strategies are becoming essential. Providers must offer global services, a strong talent pool and a robust portfolio aligned with these emerging trends to secure partnerships.

IT professionals should read this report to understand AWS managed service providers' relative strengths and weaknesses to drive digital transformation.

Technology professionals should read this report to understand AWS managed service providers' market positions and their impact on enterprise transformations, alongside cloud migration benefits.

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



This quadrant assesses service providers that offer **managed services for public and private cloud environments**, leveraging **ML for the orchestration**, configuration and management of platforms combined with **FinOps and security**.

Ashwin Gaidhani

Definition

This quadrant covers MSPs offering professional services that encompass orchestrating, provisioning, monitoring and managing operations of a customer's public cloud and multicloud environment. The services are in addition to IaaS and PaaS hyperscale platforms for public clouds from third-party service providers. The aim is to maximize performance in the cloud, reduce costs and ensure compliance and security. The providers typically use developed or licensed cloud management platforms (CMPs) and tools to deliver customers with the highest level of automation and the necessary transparency over the managed cloud resource pool in terms of capacity utilization, costs and independent management.

Eligibility Criteria

1. Have AWS Managed Service Program **certification**
2. Expertise in autonomous **ML-driven** orchestration, configuration and management of platforms and systems
3. Experience in designing, building and managing **public and multicloud** environments
4. Ability to **support** big data and multiple database solutions and analytics
5. Experience in **DevOps** engineering
6. Scope and availability of **security** resources and services
7. Experience in **solutions architecture and cost optimization (FinOps)**
8. Experience in **server migration** and handling resource availability

Observations

Cloud operations and management have become integral and mandated components of any cloud transformation initiative by enterprises, irrespective of scale and region. The investment and expansion of the AWS portfolio across different horizontals and verticals, including GenAI, has encouraged enterprises to embrace and expand their horizons with AWS. This expansion has created a tremendous opportunity and demand for service providers with adequate AWS capabilities, talent community and domain expertise as go-to partners for enterprises aiming for a seamless transformation experience.

- With the emergence of cost optimization and value realization, enterprises are becoming cautious in selecting providers that could have FinOps as a core element of their transformation journey. Providers are investing heavily in developing in-house FinOps tools that could help enterprises monitor cost and resource utilization.
- With GenAI taking the mainstream in every discussion, AIOps is gaining momentum among enterprises. It could help them improve their focus, resolve incidents faster, improve cost optimization and enhance security capabilities. Thus, providers are investing in building competencies and capabilities around AIOps.
- Compared to European countries, U.S. enterprises are less mature in sustainability. However, this trend has been changing recently, and there has been strong traction toward including sustainability as a component in their cloud journey, with GreenOps as one of the core elements of service providers.

From the 56 companies assessed for this study, 35 qualified for this quadrant, with 14 being Leaders and one Rising Star.

accenture

Responsible AI blueprint by **Accenture** will make it easier and faster to navigate and develop AI that minimizes unintended bias, improves transparency and provides end-to-end governance.

Capgemini

With its adaptive cloud operations, **Capgemini** provides multicloud support, integration with hybrid and edge use cases, an adaptable cloud operations framework and embedded cloud-native security features for continuous improvement at the core.

cognizant

Cognizant's NeuroAIOps solution suite supports enterprises in continuous monitoring and advanced requirements such as site reliability engineering (SRE) and chaos engineering, resulting in optimal performance.

Deloitte.

The AWS Cloud Garage at **Deloitte** provides businesses with a dynamic team of innovative designers and developers, who can quickly turn impactful business concepts into functional prototypes.

DXC TECHNOLOGY

DXC Technology's GenAI solution for managed services enables customers to improve productivity, SLAs and platform visibility. It allows users to interact with log data through a chatbot and get insights on issues, status and possible recommended improvements by optimizing the time and effort.

HCLTech

HCLTech is one of the premier partners of the FinOps foundation. It has over 150 certified FinOps professionals who bring complete consistency, visibility and control to cloud operations.

IBM's AI-powered application management for AWS, native and hybrid cloud environments improve application resiliency and performance of the enterprise cloud environment.

Infosys utilizes its Cloud Cobalt platform with a set of services, solutions and platforms that accelerate the cloud journey in a resilient manner.

Kyndryl guides enterprises by integrating cloud-native services with over 50 in-house regulatory frameworks to maintain compliance standards and industry regulations across cloud environments.

LTIMindtree's Canvas CloudXperienz platform offers comprehensive visibility into business and IT environments. It enables users to monitor performance, identify peak and off-peak business needs and benchmark enterprise applications, infrastructure and cloud resources.

Rackspace Technology's Optimizer+ is a robust service that includes CloudHealth analytics and best practice guidance on architecture, monitoring and cost optimization.

TCS utilizes its Machine First Delivery Model (MFDM™)-based cloud operations to efficiently manage cloud resources and full-stack environments on hybrid cloud platforms.

Tech Mahindra has created an AWS jump-start kit as a guidance document. It features various AWS services and best practices tailored to specific use cases, emphasizing tools, development methodologies and testing guidelines to facilitate quick solution designs on AWS.

Wipro's Full Stride Cloud initiative brings the entire gamut of cloud capabilities under a fully integrated, full-stack offering, creating an end-to-end cloud services delivery engine.

PwC's (Rising Star) responsive resolution approach facilitates complete ownership of managed services through a centralized command center to promote seamless communication and visibility.

PwC

★ Rising Star

"Extensive consulting, strong AWS capabilities and a global delivery footprint position PwC as a Rising Star in this quadrant."

Ashwin Gaidhani

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. PwC, with an extensive focus on sustainability, creates effective ESG reporting, sustainability strategies and sustainable technologies to help enterprises understand the opportunities and risks within the sustainability landscape. PwC was named a Global GSI Security Partner of the Year finalist by AWS in 2023.

Strengths

PwC integrated AWS managed services approach: PwC's managed services go beyond traditional labor arbitrage and outsourcing. They focus on strategically integrating services across tax, legal, cyber and IT. PwC combines expertise in migration management and change management, supported by distinct managed service pillars.

DevOps-led cloud journey: PwC accelerates customers' cloud journey using DevOps, enabling them to stay ahead of the market by accelerating product release cycles and improving automation usage. The provider has charted an end-to-end DevSecOps journey, helping customers understand the approach, timeline and differentiations — from identifying the suitable business case to defining the operating model to building strategic architectures — to automate, maintain and scale DevSecOps.

Optimized IT spending: Enterprises could use the Cloud Consumption and Financial Optimization (CFO) solution to manage and optimize their IT spending with new tools and processes. The provider can guide enterprises across their journey by advising on the cloud's TCO at the initial stages of cloud adoption. PwC provides optimization analysis in both single and multicloud environments, develops cloud financial governance frameworks by setting up cloud governance CoEs and uses its proprietary Cloud Efficiency Scorecard throughout the delivery of each service.

Caution

PwC, known for its diverse technological capabilities, domain expertise and global delivery networks, should also focus on improving customer experience and satisfaction by working closely with clients as an extended team.

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.

Source: ISG Star of Excellence™ research program, Insights till October 2024

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

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.

Study Sponsor:
Aman Munglani

Lead Author:
Ashwin Gaidhani

Editor:
Ananya Mukherjee

Research Analyst:
Srinivasan P N

Data Analyst:
Akshay Rathore

Consistency Advisor:
Anay Nawathe

Project Manager:
Shailendra More

Information Services Group Inc. is solely responsible for the content of this report. Unless otherwise cited, all content, including illustrations, research, conclusions, assertions and positions contained in this report were developed by, and are the sole property of Information Services Group Inc.

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.

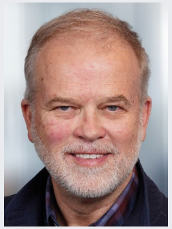
Srinivasan also authors enterprise context reports and global summary reports for his expertise. He also supports the advisors with his research skills and writes papers about the latest market developments in the industry.

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.

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.

ISG Research™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

ISG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: Public Sector.

For more information about ISG Research™ subscriptions, please email contact@isg-one.com, call +1.203.454.3900, or visit research.isg-one.com.

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 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.

For more information, visit isg-one.com.

OCTOBER, 2024

REPORT: AWS ECOSYSTEM PARTNER 2024