

AWS Ecosystem Partners

AWS Professional Services

A research report comparing provider strengths,
challenges and competitive differentiators

Customized report courtesy of:



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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




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

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	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

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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



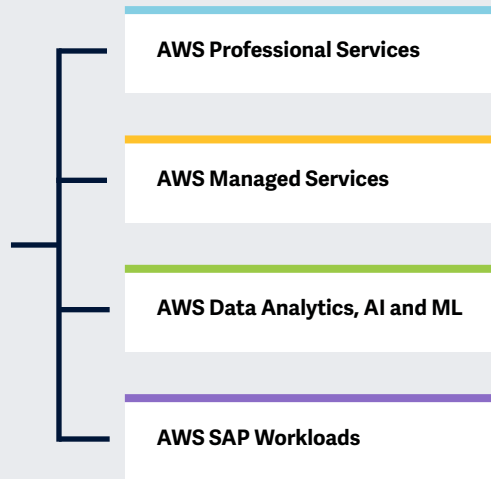
 Provider Positioning

	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



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.

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 Professional Services

Who Should Read This Section

This report is relevant to enterprises across all industries in the U.S. for evaluating providers offering AWS professional services. In this quadrant, ISG highlights the current market positioning of these providers in the U.S. and how they address enterprises' challenges.

The cloud computing landscape is undergoing a significant transformation. Enterprises are adopting a more strategic approach to cloud adoption by focusing on specific modernization initiatives such as platform engineering, DevOps and application refactoring. This targeted approach, combined with the increasing interchangeability of cloud platforms, is driving a shift toward platform-agnostic architectures.

As the cloud continues to mature, security, resiliency and cost optimization are becoming paramount. Dedicated teams and specialized partnerships are essential for effectively managing these critical areas. The demand for versatile professionals with a blend of

development, operations and cloud expertise is surging. In essence, the cloud is evolving into a sophisticated environment where segmented modernization, platform independence, robust security and a skilled workforce are key components of success. These trends are reshaping the cloud ecosystem and creating new opportunities for AWS professional service providers.



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

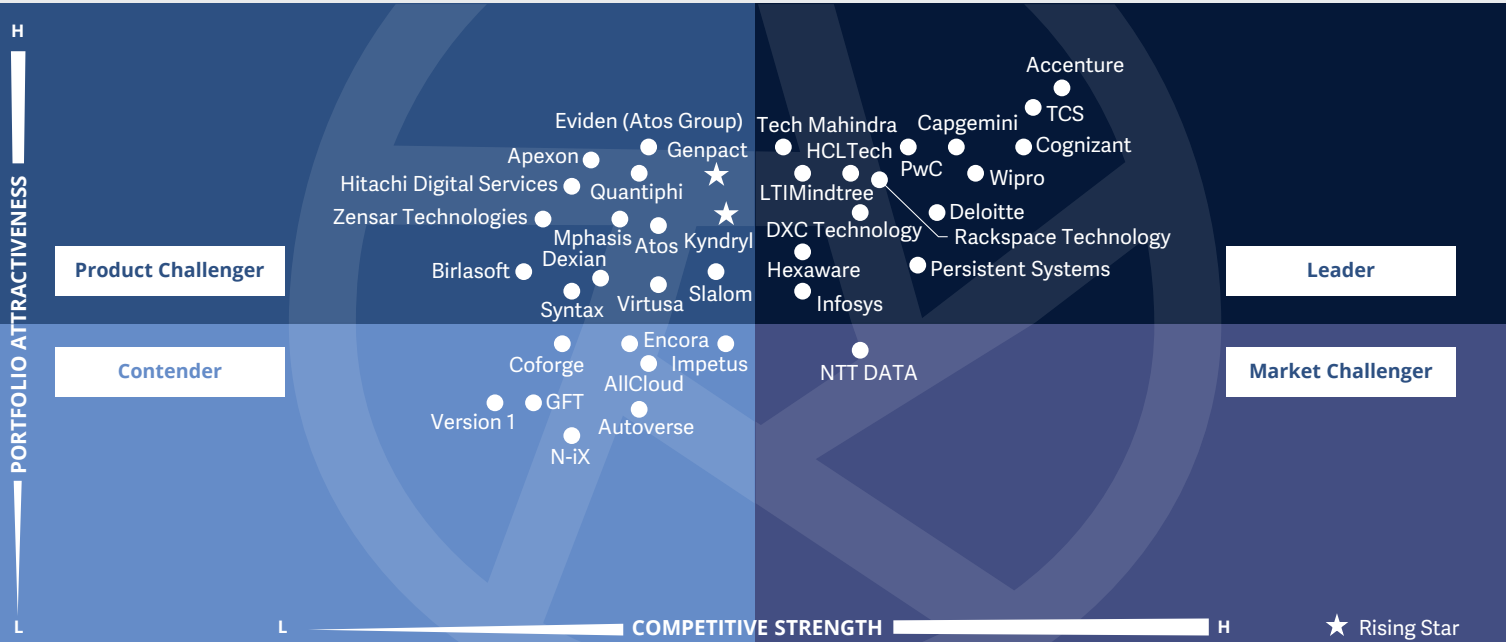


Procurement professionals should read this report to better understand AWS professional service providers' current market positioning in the U.S.



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





This quadrant assesses service providers that **manage and operate AWS cloud environments**, with a particular focus on embedding the latest technologies and **FinOps principles to enhance cost efficiency and optimize cloud utilization.**

Ashwin Gaidhani



AWS Professional Services

Definition

AWS Professional Services encapsulates a comprehensive consulting and migration services suite to guide and support businesses through enterprise clients' AWS cloud journeys. The providers in this quadrant excel in delivering a broad spectrum of services tailored to meet diverse business and IT requirements through business and technology consulting as the first step, followed by migration. The offerings encompass cloud strategy formulation, compelling business case development and insightful support for environmental, social and governance (ESG) and governance, risk and compliance (GRC) to ensure enterprises navigate the cloud landscape with confidence and strategic advantage.

The providers in this quadrant are committed to offering cutting-edge technologies and solutions addressing architecture, security and industry-specific needs and underscore the delivery of tangible business value through expert consulting services. Migration requires automated testing, comprehensive planning

and execution, deployment strategies and rigorous change management to facilitate smooth transitions. AWS partners bring deep expertise in software architecture, software development (including DevOps principles), application migration, modernization, and the capability to architect, deploy and manage scalable, resilient applications and services in the cloud environment.

AWS Professional Services providers, through their consulting and migration services, offer businesses the necessary insights, skills and technological prowess to navigate the complexities of cloud adoption. By leveraging these services, organizations can achieve accelerated innovation, enhanced operational efficiencies and substantial business value in their cloud endeavors.

Eligibility Criteria

1. Have a wide scope of **AWS competencies** and service delivery offerings and related certifications with consulting and migration expertise
2. AWS-focused consulting **road map and innovations** (current and planned)
3. Demonstrate **value for clients** through perceptible business outcomes or other measurable improvements driving business-technology transformation
4. Offer **ESG** and **GRC** guidance, tools, technologies and services
5. **Scope of business-critical applications** migrated for customers using AWS
6. Competency, capability and experience in design — **building and modernizing integrated cloud architecture** — to lead migration and multicloud integration
7. Being part of the **AWS Migration Acceleration Program (MAP)** is advantageous



Observations

Service providers are leveraging AWS' extensive suite of offerings to provide technical expertise and industry-specific solutions to navigate the dynamic AWS landscape, optimize costs and implement robust security measures. GSIs leverage AWS Outposts, AWS Direct Connect and AWS Landing Zone accelerator to analyze existing workloads and identify patterns and dependencies to facilitate a smooth transition to AWS.

Some of the trends observed in the market are as follows:

Customized vertical-specific offerings:

Service providers have developed a suite of industry-specific solutions, such as AWS HealthLake and AWS for Financial Services, addressing unique use cases. They mainly target industries such as retail, financial services, manufacturing, telecommunications, media and entertainment, healthcare and life sciences, education, government sectors, and supply chain and logistics to provide differentiated solutions.

GenAI reshaping code writing and enhancing SDLC phases:

GenAI-powered solutions such as Amazon CodeWhisperer have significantly reduced the complexity of migrating workloads to the cloud. Amazon Q Developer empowers developers by accelerating the development process while improving code quality and upgrading applications.

Surge in AWS migration consulting:

Architecture design and performance optimization advisory services are vital in guiding organizations' migration journey. Skilled consultants help organizations develop tailored cloud strategies that meet their unique data requirements and compliance needs. Consulting partners help identify cost-effective placement for workloads, implement robust security measures across the hybrid environment and orchestrate seamless migrations with minimal disruption.

From the 65 companies assessed for this study, 38 qualified for this quadrant, with 15 being Leaders and two Rising Stars.

accenture

Accenture accelerates end-to-end cloud adoption and transformation with over 30 AWS competencies and 33,000 AWS certifications, utilizing advanced accelerators and centers of excellence for strategy, migration and managed services.



Capgemini has been partnering with AWS for over 15 years, delivering 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 boasts over 70 AWS-specific transformation blueprints and more than 145 well-architected associates. With proprietary platforms such as Skygrade and NeuroIT, Cognizant delivers comprehensive cloud strategy, migration and modernization services tailored to enterprise needs.

Deloitte.

Deloitte offers comprehensive cloud cybersecurity managed services as an AWS Level 1 MSSP. With 10 MSS specializations, the company provides 24/7 security protection and monitoring. It integrates AI and ML for threat detection, ensuring clients' seamless cloud transformation.



DXC Technology, with over 2,000 AWS certifications and specialized methodologies such as Precision-Guided Modernization™, accelerates cloud migrations and modernizations, ensuring secure, scalable and cost-effective solutions for enterprises.

HCLTech

HCLTech leverages its CloudSMART portfolio to deliver scalable cloud transformations. It offers comprehensive cloud strategy, governance and security services, utilizing proprietary tools such as DPrizm™ for continuous modernization and operational excellence.



AWS Professional Services

HEXAWARE

Hexaware excels in cloud and data migration with Amaze®. With over 2,000 cloud-certified consultants and more than 900 AWS certifications, the company accelerates cloud adoption and digital transformation. AI- and ML-driven analytics and AWS-native services ensure reduced TCO and enhanced CX.

Infosys

Infosys, an AWS Premier Consulting Partner, drives cloud transformations with Infosys Cobalt. It offers end-to-end consulting, migration and managed services and ensures secure, optimized cloud ecosystems using advanced tools such as Infosys ValuePLUS and BOM Optimizer.

LTIMindtree

LTIMindtree drives AWS transformations with C=BT2 framework and Infinity platform. Over 1,500 AWS-certified professionals and tools such as Infinity Applens and Canvas AIOps ensure rapid, scalable and secure cloud migrations and modernization.

Persistent

Persistent Systems leverages its IP-based tools and accelerators, such as ExtenSURE.AI and PiCAS, to ensure efficient cloud migrations and modernization. It drives seamless cloud transformations and operational excellence across industry verticals.

pwc

PwC leverages its 16 AWS competencies and over 7,100 global accreditations to drive cloud transformations. Its Cloud Transformation services minimize roadblocks and expedite processes using AWS accelerators, enhancing business agility, productivity and security.

rackspace technology

Rackspace Technology, with over 2,800 certifications, excels in application modernization and cloud-native development. Its Elastic Engineering model delivers scalable, cost-effective and agile cloud transformations using advanced tools and accelerators.

tcs TATA CONSULTANCY SERVICES

TCS, with more than 40,000 AWS certifications, leverages proprietary tools such as iCMC and Cloud Mason for efficient cloud migrations. Its comprehensive AWS services, including FinOps and DevOps COE, drive holistic cloud transformations for clients.

TECH mahindra

Tech Mahindra leverages proprietary solutions such as NetOps.ai and BlueMarble to accelerate digital transformation for industries such as telecommunication, manufacturing and healthcare, ensuring minimal downtime and seamless transitions.

wipro

Wipro leverages its FullStride Cloud Services to deliver end-to-end cloud transformations. With 13 AWS competencies, the company integrates advanced solutions such as Mainframe A to Z and ProServe Strategic Delivery, ensuring efficient cloud migrations and modernizations.



Genpact (Rising Star) offers comprehensive AWS Professional services, leveraging unique AI-based solutions such as Cora GenCodeY. With a strong emphasis on AWS' Well-Architected Framework and industry-specific solutions, Genpact drives scalable business outcomes for clients across various sectors.

kyndryl

Kyndryl (Rising Star) accelerates digital transformation through its Cloud Native Services for AWS and rigorous application modernization strategies. Leveraging its Cloud CoE and Kyndryl Bridge platform, it offers enhanced application release cycles and reduced integration complexities.





“With a strong focus on business outcomes, PwC’s global team of technical and business specialists helps clients achieve tangible value out of their AWS investments.”

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 offers a broad spectrum of AWS Professional Services, including cloud migration, application modernization and cybersecurity. With 16 AWS competencies and eight service validations, PwC leverages its deep industry knowledge and global network to guide clients through cloud transformations. Its iterative test-and-learn approach and business outcome focus ensure clients achieve strategic impact and agility in their cloud journeys.

Strengths

Cutting-edge cloud and AI from AWS: As a global leader in professional services, PwC has forged a strategic partnership with AWS to harness its advanced cloud infrastructure and cutting-edge AI capabilities. This collaboration aims to accelerate digital transformation, enhance operational efficiency and drive innovation for enterprises across diverse industries in the U.S. market.


Futuristic and human-led, tech-powered AWS: PwC and AWS combine industry-leading technology and services with effective cloud strategy consulting to help complex and highly regulated enterprises modernize their business systems and processes on AWS and achieve desired outcomes.

Data-driven cloud paths: Around 88 percent of executives reported that achieving measurable value from new technology investments remains a roadblock to transformation. Adopting new technologies may not always deliver the desired business outcome. PwC enables true integration of technology and business strategy for clients seeking an integrated strategy and the right know-how to realize value from digital investments.

Caution

By engaging in collaborative research initiatives with AWS to innovate on industry-specific ML algorithms, PwC can better address complex optimization challenges faced by clients across industries.





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.

Customer Experience (CX) Insights

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



- ▲ 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.

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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



Author & Editor Biographies



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.



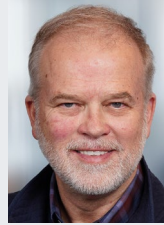


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Aman Munglani
Director: Hyperscalers, Digital Innovator Series and Custom Research

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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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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