

AWS Ecosystem Partners

AWS SAP Workloads

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

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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


	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



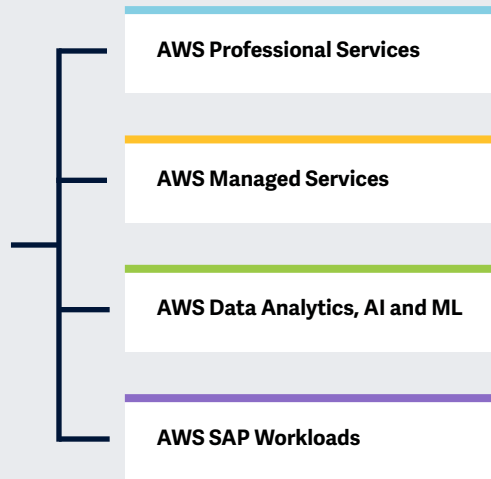
 Provider Positioning

	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 SAP Workloads

Who Should Read This Section

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

Enterprises are actively migrating SAP workloads to cloud. SAP and AWS are collaborating to streamline the transition of business modules through modernization and transformation. The IT landscape is evolving with the growing adoption of multicloud strategies and a focus on verticalized solutions. Enterprises are incorporating advanced analytics and intelligence into their SAP workloads to drive business value. Given the current economic climate, cost optimization is a top priority for enterprises running SAP workloads on AWS. Enterprises are actively seeking strategies to reduce costs without compromising performance or reliability.

Enterprises are increasingly turning to AWS Elastic Disaster Recovery (DRS) as a safeguard against disruptions caused by natural disasters, power outages, application failures or data loss. DRS simplifies disaster recovery by automating the process and leveraging AWS as a scalable, cost-efficient recovery site for both on-premises and cloud-based applications. This solution enables rapid recovery of SAP applications and reduces costs by eliminating idle recovery resources. For SAP workloads already on AWS, DRS offers enhanced resilience and availability through recovery in a different AWS region.



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

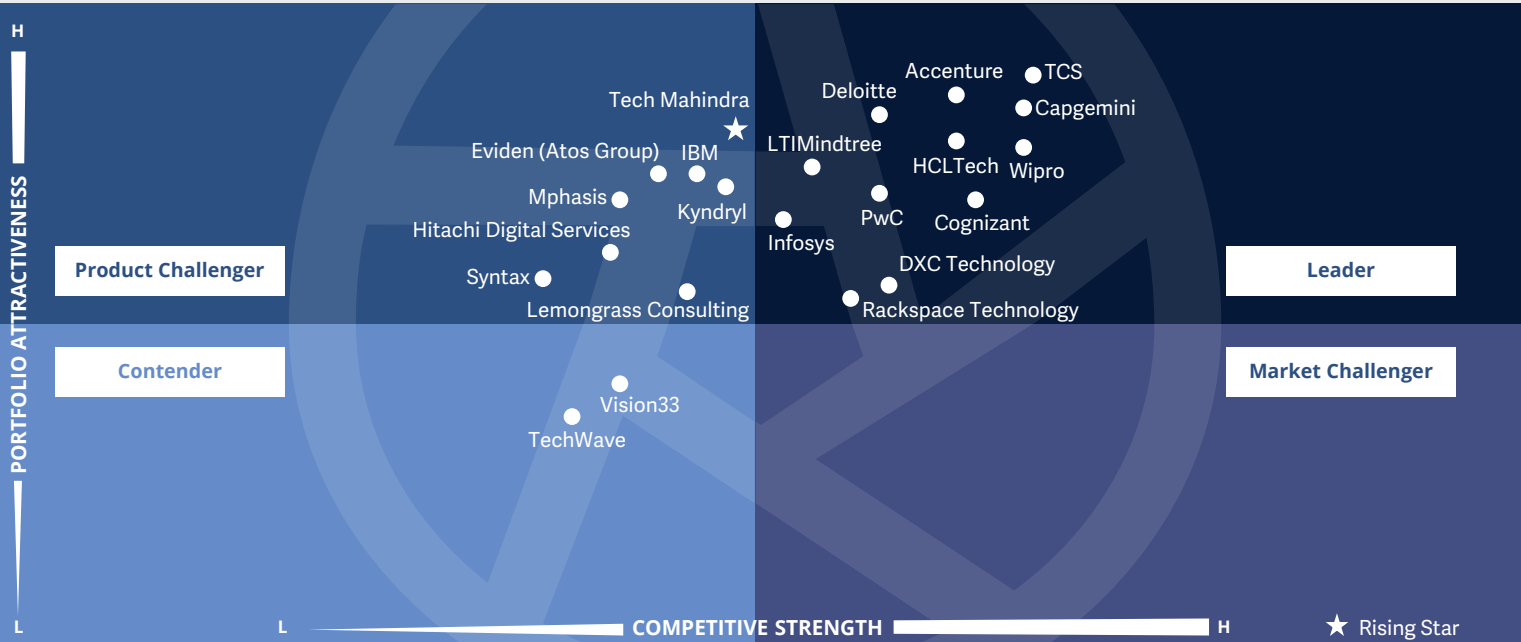


Procurement professionals should read this report to better understand AWS SAP workload service providers' current market positioning in the U.S.



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





This quadrant assesses AWS service providers for **SAP workloads**, emphasizing their **integration capabilities, solution scalability and deployment efficiency** to ensure they meet enterprise requirements for agility and cost-effectiveness in dynamic market conditions.

Ashwin Gaidhani



AWS SAP Workloads

Definition

This quadrant assesses service providers that enable the provisioning and ongoing operation of SAP systems, such as SAP HANA or other platforms on AWS, together with their central management. The service providers in this quadrant help implement AWS as a hardware replacement or hardware extension (IaaS) for enterprises. They optimize, design and develop new processes and business flows as a part of platform management by combining their own services, SAP services and AWS. This select group of service providers is thus responsible for implementing and ensuring subsequent operations.

In addition to having relevant AWS certifications, the service providers in this quadrant require SAP certifications and partnerships to stay updated with SAP products, technologies, licensing and platform developments. They should also be able to demonstrate their impact on customer IT landscapes, applications and business processes.

Eligibility Criteria

1. Breadth and depth of **service portfolio** related to implementing, customizing, provisioning and supporting SAP applications and services
2. Number and locations of **resources** to support SAP offerings on AWS
3. **Awareness** and number of **customers** for SAP applications and services provisioning and support on AWS
4. Number and reputation of **references** for SAP applications, including services provisioning and support on AWS
5. **Experience** and relevant **certifications**, including AWS-certified SAP Competency
6. **Offer pricing models** that are suitable, mature and adaptable
7. **Dedicated resources** (including business units) around DevOps, automation and cloud-native application design



AWS SAP Workloads

Observations

AWS SAP workloads are transforming how enterprises deploy and manage their critical business systems, with a focus on scalability, security and innovative integration. This evolution supports current operational needs and strategically positions companies for future challenges and opportunities.

AWS Scalability and performance optimization: AWS provides an elastic environment that enables businesses to scale their SAP workloads in response to fluctuating demands. This capability is crucial for managing peak loads during critical business periods without requiring extensive physical infrastructure investments. AWS' advanced tools, like Auto Scaling and Elastic Load Balancing, ensure optimal performance, enhancing UX and maintaining continuity in business operations.

Security and compliance enhancements: In response to increasing data security challenges, AWS has enhanced its services with thorough compliance protocols and security measures designed explicitly for SAP applications. These measures encompass identity

and access management and dedicated connections such as AWS Direct Connect. These features guarantee that businesses meet strict regulatory requirements while protecting sensitive data and operations from potential threats.

Innovation through integration: AWS encourages innovation by supporting the integration of SAP with other advanced technologies such as AI, ML and IoT. This integration unlocks new capabilities within traditional SAP environments, enabling businesses to gain deeper insights, automate processes and enhance decision-making. AWS' expansive suite of services facilitates these integrations, making it easier for companies to explore new avenues for growth and efficiency.

From the 65 companies assessed for this study, 22 qualified for this quadrant, with 12 being Leaders and one Rising Star.

accenture

Accenture, one of the largest SAP partners for AWS globally, expedites SAP migrations with proprietary DevOps automation tools. Its SAP solutions on AWS ensure reduced migration time, enhanced compliance and innovative business value.



Capgemini uses migration as a code (MaaS) platform to optimize SAP environments. Recognized for its SAP accelerators, the company ensures efficient, cost-effective and scalable SAP transformations on AWS.



Cognizant excels in SAP on AWS with Cloud Assessment and Transformation (cCAT) framework, delivering seamless SAP migrations and optimizations. With tools like SAP Cloud Fit and Smart Mapper, the company ensures high system availability and productivity improvements.

Deloitte.

Deloitte accelerates finance transformation with SAP solutions on AWS, leveraging SAP Central Finance and SAP S/4HANA ERP. As a leader in SAP on AWS, Deloitte combines AWS technology with its industry expertise to deliver innovative finance solutions.



DXC's expertise in AWS SAP services is highlighted by its robust automation, comprehensive SAP management solutions and extensive experience in large-scale SAP transformations, providing high availability and optimized operations for clients.

HCLTech

HCLTech excels in SAP on AWS transformations with its CloudSMART for SAP offering, providing automated migration frameworks like HANASmart. With over 12,000 SAP consultants and tools such as UpgradeSmart and SMARTScaling, it ensures seamless SAP S/4HANA migrations.



AWS SAP Workloads



Infosys accelerates SAP transformations on AWS with Infosys Cobalt, ensuring seamless, risk-free transitions using Infosys S/4Assist and Cobalt migration library. It optimizes operations with SAP Solution Manager And AWS Data Provider for SAP.



LTIMindtree enhances SAP on AWS with LAMPS accelerator suite. Specializing in greenfield, brownfield and bluefield migrations, it integrates SAP with AWS, delivering enhanced business agility, lower TCO and improved operational efficiency.



PwC, awarded the SAP Partner Champion Program, offers comprehensive SAP and AWS services. Its business, experience and technology (BXT) approach combines industry experience with SAP's innovation, ensuring scalable, efficient and secure SAP transformations on AWS.



Rackspace Technology's SAP services on AWS include modernization and managed support. Using cloud-native application design, it ensures agile SAP transformations, helping clients achieve real-time reliability and focus on core business functions.



TCS, a Global Strategic Services Partner for SAP on AWS, offers end-to-end SAP cloud services, leveraging TCS Crystallus™ and ConvertCore™ for accelerated, industry-specific SAP transformations. Its solutions enhance business continuity and drive innovation at scale.



Wipro's acquisition of Rizing enhances its SAP on AWS offerings, providing a robust *Safe and Fast* migration framework. With over 700 migration experts and tools such as the Well-Architected SAP Lens, it ensures efficient, non-disruptive SAP migrations for clients.



Tech Mahindra (Rising Star) uses frameworks such as ConvertCore and Crystallus™ for SAP migrations and transformations, providing scalable, secure and optimized SAP environments that integrate seamlessly with AWS analytics and cloud-native services.





“PwC excels in SAP on AWS solutions by combining industry-leading business practices, extensive SAP experience and AWS cloud capabilities to drive innovation and maximize business outcomes.”

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. As a Premier Tier Global System Integrator Partner of AWS and a leading SAP consulting partner, PwC offers end-to-end SAP on AWS services, including SAP S/4HANA transformations, SAP Central Finance and SAP Analytics Cloud implementations. PwC’s deep industry expertise and strong AWS partnership position it as a trusted advisor for clients seeking to optimize SAP environments on AWS and drive digital transformation.

Strengths

Holistic transformation approach:

PwC provides comprehensive services from strategy through execution and sustained support, using AWS Cloud for SAP transformations. Its hybrid Agile methodology supports rapid innovation and user adoption, ensuring clients harness the full potential of their data for business differentiation.

Streamlined SAP deployment: PwC leverages infrastructure as code (IaC) templates for consistent and automated deployment of SAP workloads on AWS. This approach reduces SAP system build times and minimizes manual effort, ensuring efficient, reliable and value-driven solutions for clients.


Advanced digital manufacturing solutions:

PwC’s Digital Manufacturing accelerator combines strategy, manufacturing and digital capabilities to help clients implement and configure cloud and IoT platforms. This creates a *factory app store* with tailored solutions that enhance flexibility, efficiency and reliability through analytics and technologies, addressing operational challenges. Its deep industry expertise ensures that the digital solutions are aligned with the specific needs and challenges of the manufacturing sector, driving significant business value and operational excellence.

Caution

Given PwC teams’ expertise in AWS technologies, cloud security and GRC, the company can develop and popularize industry-first best practices on governance-assured SAP and S/4/HANA on AWS. Highlighting case studies with attributable references to business impact will further strengthen its position and expand the client base.





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.



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.



Author & Editor Biographies

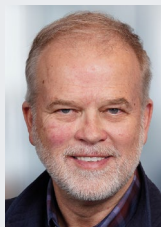


Study Sponsor

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](#).

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