**ISG** Provider Lens™

# AWS Ecosystem Partners

## AWS Internet of Things (IoT) Services

A research report comparing service providers' strengths, challenges and competitive differentiators

Customized report courtesy of:

**HCLTech**

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## Executive Summary

*Report Author: Ashwin Gaidhani*

**AWS is among the most mature hyperscalers in the U.S.**

Digital business transformation has led to dynamic changes and developments in technology strategies around cloud adoption. Currently, the main focus of hyperscalers is the enablement of the adoption of a cloud-first approach by enterprises, reinforcing security controls and infusing automation, serverless computing for performance and DevOps. A few key global trends in this context are enterprise sustainability and service resiliency through cloud solutions, such as the AWS Nitro System, a cluster of building blocks for faster innovation.

The U.S. is among the most mature and advanced markets for AWS, with the maximum density of partnerships, resources and alliances for widening the cloud adoption perimeter. Multicloud and poly-cloud strategies are part of executive discussions to explore new possibilities for optimum enterprise benefits. Industry clouds and specialized use cases, focusing on performance and computing attributes, drive the evaluation of high-performance computing (HPC). Observers see an emphasis on efficient and secure data processing methods and the development of an interactive interface for data insights, using Amazon QuickSight. The U.S. market has a broad and varied range of service providers catering to the scale and magnitude of enterprises with niche cloud capabilities. Enterprises are looking for versatile service partners to help them adopt the best suitable technology, which is a step toward accelerating business transformation as part of their business strategies.

# AWS hastens the creation of technology-agnostic cloud solutions.

This trend continues to be the focus of the U.S. market, as providers are co-innovating and designing new business-aligned solution packages. Furthermore, AWS has launched programs and initiatives to invite talent and expertise from various industries to develop advanced offerings; such initiatives include partnership programs and specific certification courses. AWS is also focusing on expanding its product portfolio, envisioning a vast array of client demands.

### AWS Managed Services

AWS managed services are emerging as the most prominent, mature and fast-growing services in the U.S. The stiff competition in the AWS services market is compelling global service integrators (GSIs) to ramp up their competence in handling AWS managed services by speeding up the development of support software, integration and management tools, and business applications. Their main focus is on devising CloudOps, DevOps, FinOps, MLOps, DataOps and automation solutions.

With the rising demand for AWS managed services, the need for a cloud-tech-stack-centric talent pool to acquire, improvise, adapt and repurpose related knowledge is increasing. The key focus areas in this context include advanced security offered in conjunction with Amazon Virtual Private Cloud (VPC); AWS Key Management Service, which gives users centralized control over the cryptographic keys; server-side encryption; data integrity authentication; networking traffic protection; and DevOps practices for implementation. The leading service providers in the market focus on infusing automation into every phase of cloud management, from monitoring to optimization.

### AWS Consulting Services

Digital transformation has driven the demand for consulting services, with an inclination toward technology-, industry-, management- and implementation-related consulting guidance, all of which will enhance organizations' business outcomes. AWS consulting services are gaining traction and surpassing competitors' offerings by broadening the service scope. AWS and its partners are providing enterprises with a wide array of options by developing industry-specific solutions and service packages.

Consulting providers continue to build a comprehensible and modular approach to AWS consulting services to cater to a wide range of requirements. The rising adoption of cloud computing is encouraging service providers to diversify their AWS consulting service offerings to cater to the requirements of enterprises. Considering this, consulting firms have developed their own global business services faculty to provide the consulting services needed as a single offering.

The AWS ecosystem is generally fast-paced and continues to grow, with more developments, upgrades and innovations. Enterprises are looking to adapt to the growing demands of the modern world quickly.

### AWS SAP Workloads

SAP remains the most preferred ERP platform, and it is often closely integrated with AWS. Enterprises are focusing on making their workloads go cloud native. SAP is working on seamlessly transitioning business modules with AWS through transformation and modernization.

The latest market developments in the ERP space include the new strategic collaboration between SUSE and AWS,

offering a migration acceleration platform for SAP clients looking to move to the cloud. The strategic partnership between SUSE and AWS outlines deliverables and investment areas to help smooth-migrate clients to AWS. The deliverables include joint go-to-market activities across sales, marketing, channel enablement and training.

In addition, Amazon AppFlow, a fully managed integration service that helps clients securely transmit data between AWS services and SaaS applications, now supports data transfers from SAP applications to AWS services using SAP Operational Data Provisioning (ODP) framework. With this launch, AppFlow clients can use the AppFlow SAP OData connector to perform complete and incremental data transfers, including change data capture, using SAP Operational Delta Queue. Use cases combining AWS data lakes, big data

tech stacks and cloud storage such as S3, combined with the predictive data analytics capabilities from S/4 HANA, are becoming mainstream in all strategic enterprises and transformation programs.

**AWS Data Analytics and Machine Learning**

AWS provides a wide array of analytic services that fit data visualization needs, enabling organizations of all sizes and industries to reinvent their business. Data movement, storage, data lakes, big data analytics, log analytics, streaming analytics and business intelligence constitute vital data management activities. AWS provides purpose-built services with the best performance, scalability and reasonable commercial models for all enterprise sizes.

AWS-powered data lakes are supported by the unmatched ability of Amazon S3 to manage the scale, agility and flexibility

required to integrate different data and analytics approaches. Service providers are building prowess in the AWS analytics space to help enterprises gain fast data insights using optimized and appropriate tools such as interactive analytics, big data processing, data warehousing and interactive analytics. The unique perspective of new dimensions of data helps businesses make decisions and explore new possibilities. These embedded components optimize datasets, linguistic AI and visualization of systems. With the advent of new developments and innovation, many businesses realize the importance of incorporating AI and machine learning into applications to analyze and learn from the vast and accessible datasets.

**AWS Internet of Things (IoT) Services**

IoT continues to gain popularity across industries due to its ability to access and capture data that was impossible

to acquire earlier in the physical world. AWS IoT offers services and solutions to connect and manage billions of devices across all physical assets. It has become effective in collecting, storing and analyzing IoT data for industrial, commercial and automotive workloads. AWS IoT solutions cover many technological components, including sensors, devices, networks, security and management systems.

The main characteristic of IoT is that it can be integrated easily with other AWS services, making processes more efficient. AWS IoT services include AWS IoT click, which enables simple devices to trigger AWS Lambda functions that can execute an action, thus allowing the user to perform activities such as notifying technical support, tracking assets, and replenishing goods and services, among others.

# Executive Summary

**AWS Migration Services**

The trend of digitalization has prompted numerous businesses to adapt quickly to the changing times. However, many organizations with complex systems struggle to react swiftly to such changes. This has further pushed to rationalizing, transitioning and modernizing existing software and infrastructure, pointing toward cloud migration. Transitioning data services and systems is a critical and complex task that requires careful regulation and calibration of activities. Considering this space's enormity and potential, the need for innovation and the modernization of technologies is imperative. AWS migration services allow the quick realization of the benefits of migrating applications to the cloud without changes and with minimal downtime or glitches.

AWS is enterprises' most preferred choice for industry cloud services.

## Provider Positioning

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| | AWS Managed Services | AWS SAP Workloads | AWS Data Analytics and Wachine Learning | AWS Internet of Things (IoT) Services | AWS Migration Services | AWS Consulting Services |
|---|---|---|---|---|---|---|
| 1Strategy | Not in | Not in | Contender | Not in | Contender | Not in |
| 2nd Watch | Product Challenger | Not in | Contender | Not in | Not in | Contender |
| Accenture | Leader | Leader | Leader | Leader | Leader | Leader |
| AllCloud | Contender | Not in | Not in | Contender | Contender | Contender |
| Arvato Systems | Contender | Contender | Not in | Not in | Contender | Market Challenger |
| Asavie | Not in | Not in | Not in | Contender | Not in | Not in |
| Aspire Systems | Contender | Not in | Not in | Not in | Contender | Contender |
| Atos | Product Challenger | Not in | Market Challenger | Not in | Market Challenger | Not in |
| Ayla Networks | Not in | Not in | Not in | Contender | Not in | Not in |
| Brillio | Not in | Not in | Not in | Not in | Contender | Contender |

## Provider Positioning

| | AWS Managed Services | AWS SAP Workloads | AWS Data Analytics and Wachine Learning | AWS Internet of Things (IoT) Services | AWS Migration Services | AWS Consulting Services |
|---|---|---|---|---|---|---|
| Capgemini | Leader | Leader | Leader | Leader | Leader | Leader |
| Clearscale | Not in | Not in | Contender | Contender | Contender | Contender |
| Cognizant | Leader | Leader | Leader | Leader | Leader | Leader |
| Deloitte | Leader | Leader | Leader | Leader | Leader | Leader |
| DISYS | Contender | Not in | Not in | Not in | Contender | Not in |
| DLT Solutions | Contender | Not in | Not in | Not in | Not in | Not in |
| DXC Technology | Rising Star ★ | Rising Star ★ | Product Challenger | Leader | Leader | Product Challenger |
| Ensono | Product Challenger | Not in | Contender | Not in | Not in | Not in |
| EPAM | Not in | Not in | Not in | Market Challenger | Not in | Not in |
| Genpact | Not in | Not in | Leader | Not in | Not in | Not in |

# Provider Positioning

| | AWS Managed Services | AWS SAP Workloads | AWS Data Analytics and Wachine Learning | AWS Internet of Things (IoT) Services | AWS Migration Services | AWS Consulting Services |
|---|---|---|---|---|---|---|
| GFT | Not in | Not in | Not in | Not in | Contender | Not in |
| HCLTech | Leader | Leader | Leader | Leader | Leader | Leader |
| Hexaware | Not in | Not in | Rising Star ★ | Leader | Product Challenger | Leader |
| Hitachi Vantara | Market Challenger | Not in | Not in | Not in | Not in | Market Challenger |
| IBM | Market Challenger | Not in | Market Challenger | Market Challenger | Not in | Market Challenger |
| Informatica | Not in | Not in | Product Challenger | Not in | Not in | Not in |
| Infosys | Leader | Leader | Leader | Leader | Leader | Leader |
| Kyndryl | Rising Star ★ | Not in | Not in | Not in | Market Challenger | Not in |
| Lemongrass | Not in | Product Challenger | Not in | Not in | Not in | Not in |
| LTI | Leader | Leader | Leader | Leader | Leader | Leader |

## Provider Positioning

| | AWS Managed Services | AWS SAP Workloads | AWS Data Analytics and Wachine Learning | AWS Internet of Things (IoT) Services | AWS Migration Services | AWS Consulting Services |
|---|---|---|---|---|---|---|
| Mindtree (LTI) | Product Challenger | Product Challenger | Leader | Rising Star ★ | Product Challenger | Rising Star ★ |
| Mphasis | Product Challenger | Product Challenger | Rising Star ★ | Product Challenger | Rising Star ★ | Product Challenger |
| Navisite | Not in | Contender | Not in | Not in | Not in | Not in |
| N-iX | Not in | Not in | Contender | Not in | Contender | Not in |
| NTT DATA | Market Challenger | Not in | Market Challenger | Market Challenger | Market Challenger | Market Challenger |
| Pariveda | Not in | Not in | Not in | Contender | Not in | Not in |
| Persistent Systems | Product Challenger | Not in | Product Challenger | Rising Star ★ | Rising Star ★ | Rising Star ★ |
| Protera | Not in | Contender | Not in | Not in | Not in | Not in |
| PwC | Not in | Leader | Not in | Not in | Not in | Leader |
| Rackspace Technology | Leader | Market Challenger | Leader | Market Challenger | Leader | Leader |

## Provider Positioning

| | AWS Managed Services | AWS SAP Workloads | AWS Data Analytics and Wachine Learning | AWS Internet of Things (IoT) Services | AWS Migration Services | AWS Consulting Services |
|---|---|---|---|---|---|---|
| Reply | Not in | Not in | Not in | Contender | Not in | Not in |
| Slalom | Not in | Not in | Contender | Not in | Contender | Contender |
| TCS | Leader | Leader | Leader | Leader | Leader | Leader |
| Tech Mahindra | Leader | Rising Star ★ | Leader | Leader | Leader | Leader |
| TechEdge | Not in | Contender | Not in | Not in | Not in | Not in |
| Techwave | Not in | Contender | Not in | Not in | Not in | Not in |
| TensorIoT | Not in | Not in | Not in | Product Challenger | Not in | Not in |
| ThingLogix | Not in | Not in | Not in | Product Challenger | Not in | Not in |
| TO THE NEW | Contender | Not in | Product Challenger | Not in | Not in | Product Challenger |
| Trianz | Product Challenger | Not in | Product Challenger | Not in | Product Challenger | Product Challenger |

## Provider Positioning    **Page 6 of 6**
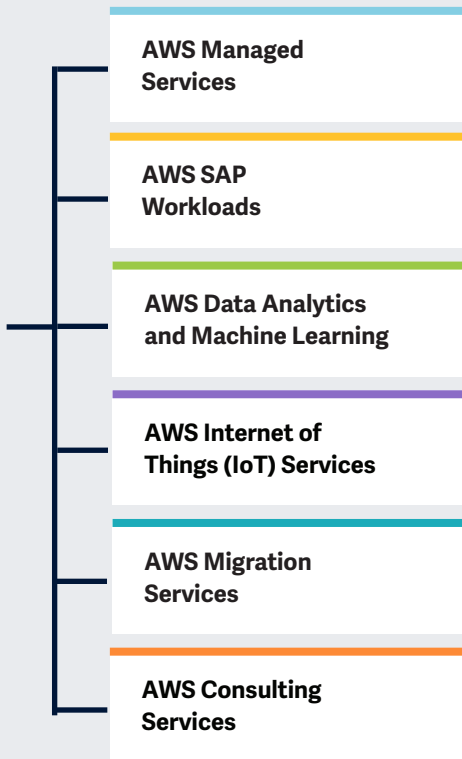
| | AWS Managed Services | AWS SAP Workloads | AWS Data Analytics and Wachine Learning | AWS Internet of Things (IoT) Services | AWS Migration Services | AWS Consulting Services |
|---|---|---|---|---|---|---|
| Unisys | Market Challenger | Not In | Not in | Not in | Not in | Not in |
| Virtusa | Not in | Not in | Product Challenger | Product Challenger | Product Challenger | Product Challenger |
| Vision33 | Not in | Contender | Not in | Not in | Not in | Not in |
| Wipro | Leader | Leader | Leader | Leader | Leader | Leader |
| Zensar | Product Challenger | Product Challenger | Product Challenger | Not in | Product Challenger | Not in |

This study focuses on what ISG perceives as most critical in 2022 for **AWS Ecosystem Partners**.

Simplified Illustration Source: ISG 2022

**AWS Managed Services**

**AWS SAP Workloads**

**AWS Data Analytics and Machine Learning**

**AWS Internet of Things (IoT) Services**

**AWS Migration Services**

**AWS Consulting Services**

## Definition

In 2022, AWS has been introducing major innovations in services related to the cloud, data analytics and machine learning alongside the general mission that is all about supporting clients within their sustainability transformations, digital sovereignty and innovation power. Public cloud usage tends to outstrip traditional infrastructures and therefore known techniques for operations. Therefore this mission depends on sophisticated CloudOps that cover cloud security and governance, resource and cost optimization, event-based or intelligent provisioning of resources, and service availability across delivery models (including the edge), which implies the need for maximum interoperability of services.

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

Some of the main AWS innovations that have contributed to the growth and market for AWS, APN and its end-user enterprise clients, include new high-performance EC2 C7g instances with AWS Gravitron3 processors, new locations for AWS DataSync and AppSync simplified interfaces for Pub/Sub APIs.

For cloud managed services and operations governance, service augmentations such as FedRAMP-compliant Kinesis Data Analytics bring in industry-specific compliance requirements around public cloud adoption. On the cloud security and data privacy protection front, Amazon Comprehend can detect and redact several new personally identifiable information types across the U.S., the U.K., India and Canada.

AWS has also made major contributions in the data, AI and machine learning spaces through additional offerings and enhancements beyond governance, data privacy and protection issues.

According to the first-quarter 2022 ISG Index™, the global managed services market grew by 13 percent to reach $8.6 billion, while the as-a-service market grew by 43 percent to reach $15.6 billion.

AWS partners play a critical role for customers and prospective customers of AWS services to keep up with this pace of innovation and make a meaningful entry into AWS services in the first place. This study examines this important market of AWS partners, and the services they provide, to provide transparency on six selected topics for five countries.

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

- Transparency on the strengths and weaknesses of relevant providers

- Differentiated positioning of providers based on important market segments

- Perspective on markets in Australia, Brazil, France, Germany and the U.S.

This study serves as an important decision-making basis for provider positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their current vendor relationships and potential new engagements.

## Scope of the Report

In this ISG Provider Lens™ quadrant study, ISG includes the following six quadrants: AWS Consulting Services, AWS Data Analytics and Machine Learning, AWS Internet of Things (IoT) Services, AWS SAP Workloads, AWS Migration Services and AWS Managed Services.

## Provider Classifications

The provider position reflects the suitability of IT providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions IT providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

**Midmarket:** Companies with 100 to 4,999 employees or revenues between $20 million and $999 million with central headquarters in the respective country, usually privately owned.

**Large Accounts:** Multinational companies with more than 5,000 employees or revenue above $1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product Challenger, Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens quadrant may include service providers that ISG believes have strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

**Number of providers in each quadrant:** ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

## Provider Classifications: Quadrant Key

**Product Challengers** offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

**Leaders** have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

**Not in** means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

**Contenders** offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/services and follow a sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

**Market Challengers** have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

# AWS Internet of Things (IoT) Services

## AWS Internet of Things (IoT) Services

**Who Should Read This**

This report is relevant to enterprises across industries in the U.S. for evaluating providers of AWS IoT services. In this quadrant report, ISG highlights the current market positioning of providers offering AWS IoT services in the U.S. and how they address the key challenges faced by enterprises in the country.

IoT security and mitigation, computing and analytics at the edge and advanced connectivity are in high demand and gaining popularity among enterprises. IoT is recording strong demand in different industry verticals, including medical technology, telecom and manufacturing. Manufacturing customers are strongly considering moving to the cloud by transforming their product lifecycle management (PLM), ERP and manufacturing execution systems.

In addition, enterprises consider sustainability initiatives as an important parameter when partnering with providers. They aim at becoming green cloud enterprises with IoT integration.

**Technology professionals** should read this report to understand the relative positioning and capabilities of providers, which can help them effectively plan and select IoT products and services. The report highlights the technical and integration capabilities of providers and their partnerships.

**IT leaders** should read this report to better understand the relative strengths and weaknesses of AWS IoT service providers, which would help them lead the digital transformation drive in their enterprises.

**Sourcing, procurement and vendor management professionals** should read this report to develop a better sense of the current landscape of AWS IoT service providers in the U.S.
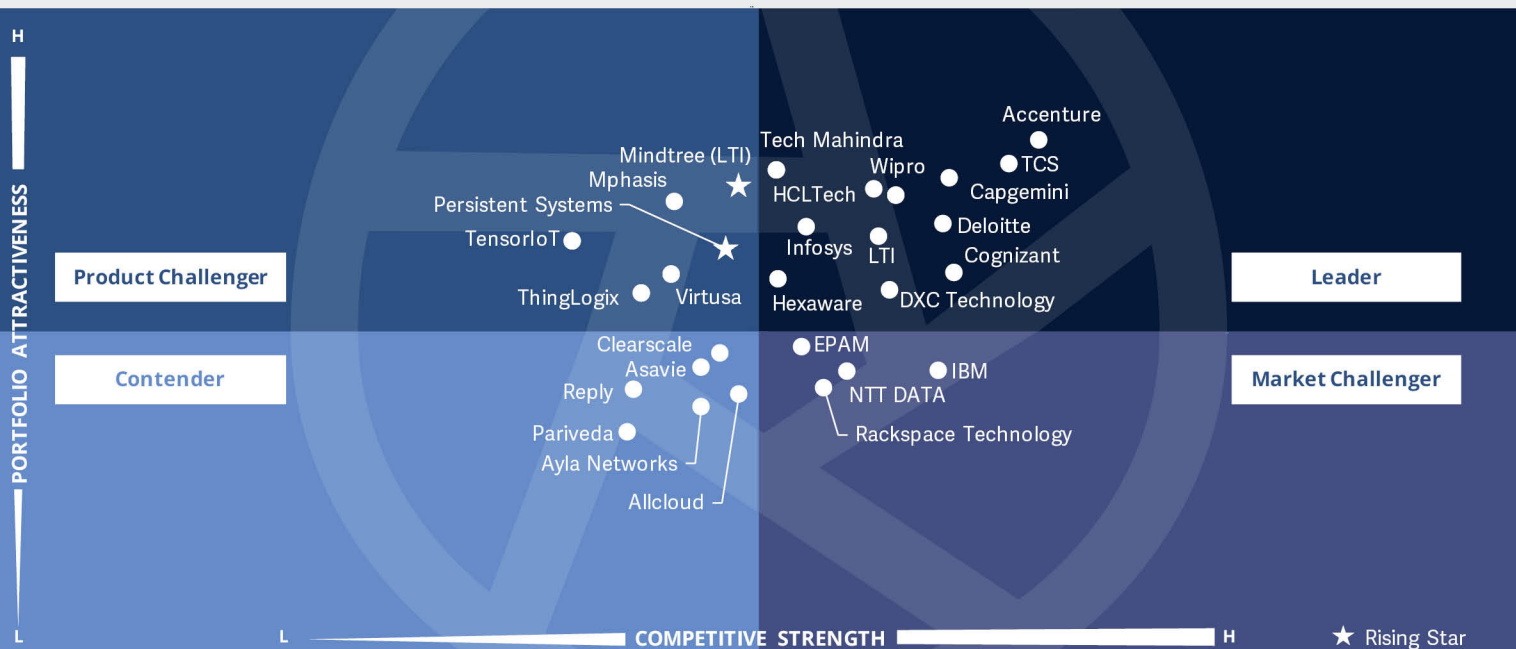
**CIOs and CTOs** should read this report to understand the positioning of IoT providers, learn how their offerings can impact an enterprise's ongoing transformation initiatives and identify the benefits of moving to the cloud.

ISG Provider Lens™
AWS Ecosystem Partners
AWS Internet of Things (IoT) Services

Source: ISG RESEARCH

U.S. 2022

Product Challenger

Contender

Leader

Market Challenger

PORTFOLIO ATTRACTIVENESS

COMPETITIVE STRENGTH

★ Rising Star

Accenture
Tech Mahindra
Mindtree (LTI)
Mphasis
Persistent Systems
TensorIoT
Wipro
TCS
HCLTech
Capgemini
Deloitte
Infosys
LTI
Cognizant
ThingLogix
Virtusa
Hexaware
DXC Technology
Clearscale
EPAM
Asavie
IBM
Reply
NTT DATA
Pariveda
Rackspace Technology
Ayla Networks
Allcloud

This quadrant assesses the **management capabilities and competency** of providers that offer AWS IoT services. With the **growing popularity of AWS IoT services,** providers are improving their capabilities to meet the demand.

*Ashwin Gaidhani*

## AWS Internet of Things (IoT) Services

### Definition

IoT specialist partners support the use of applications for monitoring, managing and controlling connected devices based on AWS solutions (including device software or control services). The essential functions include remote data collection from connected devices, secure connection between devices, sensor management and integration with third-party systems. IoT platforms serve as the main interface for device communication (measurement, control and regulation), data management tasks (device data storage, integration, analysis and visualization), device management (security and functional software updates on devices) and process management. The ability to enable and extend edge computing for IoT environments is crucial as enterprise IoT scenarios are expanding and becoming more business critical.

### Eligibility Criteria

1. **Availability, experience and certification** of the staff provisioning and supporting AWS IoT offerings

2. Use of **relevant tools, technologies and partners for AWS IoT** solutions and services provision

3. **Support for edge computing scenarios**

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

5. Deliver an **AWS-focused IoT offering roadmap and innovations** (current and planned)

6. **Market awareness and number of customers** regarding IoT offerings on AWS

7. Number and **reputation of references for IoT services and solutions** on AWS

8. **Pricing model suitability, maturity and adaptability**

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

10. Scope of security tools, technology and services utilized

## Observations

AWS IoT is gaining momentum in the U.S. market, with a wide range of services connecting and managing billions of devices. The key differentiators of these services are their ability to easily integrate with other AWS solutions and cover a wide array of technological components, including sensors, devices, networks, security and management systems. In addition, IoT enables the ability to capture data, which was not easy before. Enterprise clients and service providers in the market are aggressively investing in IoT, as it helps integrate interfaces, in addition to other capabilities. The industrial, manufacturing, and supply chain and logistics verticals are heavily adopting IoT solutions to optimize the workflow. Digital twins, 5G and edge computing are some of the ideal technologies that can be converged with IoT, which can be done through AWS

offerings like TwinMaker. Enterprises are also combining AI with IoT for the seamless integration of different solutions. Some developments include:

- One of the major trends in the U.S. market is the development of advanced solutions, such as complex device software, 5G and control devices, that are integrated with IoT.

- Businesses also combine IoT, edge computing and blockchain technologies for cloud reinvention. IoT devices transfer large amounts of data to edge locations, which can be used for various applications with the support of analytics.

- The retail and healthcare industries are aggressively using IoT to understand customer behavior and personalize products accordingly. Digital

engineering consolidates the hardware and software spaces to enable smarter, data-backed businesses.

From the 50 companies assessed for this study, 28 have qualified for this quadrant, with 12 being Leaders and two Rising Stars.

### accenture

**Accenture** offers industry-specific, AWS-native IoT solutions that uniquely combine DevOps capabilities with data lake consolidation, data security and unified data governance.

### Capgemini

**Capgemini's** IoT capabilities have helped it develop the Smart Hub Cropping solution, which provides an interface for farmers to provide data and insights about moisture levels in fields by utilizing a moisture-sensor- and GPS-enabled IoT device.

### cognizant

**Cognizant** integrates digital connectivity and IoT to create industry-specific solutions such as smart buildings, with a focus on yielding lower overhead and improved customer experience.

### Deloitte

**Deloitte** leverages AWS cloud services to help enterprises manage and analyze massive amounts of geological data produced by super-sensitive seismic sensors. These services are used extensively in the oil and gas industry to scan large areas to identify oil fields.

### DXC TECHNOLOGY

**DXC Technology** and AWS collaborate on IoT platforms that support automated sensors, edge computing and advanced

analytics. An example is the DXC SPARK IoT for consumer packaged goods solutions.

**HCLTech**

**HCLTech** uses AWS IoT Core and AWS IoT Analytics to handle supply chain operations to deliver transformational benefits such as reduced losses, cost control and improved customer satisfaction rates.

**HEXAWARE**

**Hexaware** offers comprehensive IoT solutions, covering consulting, strategy implementation and operational support, cloud data intelligence, real-time data integration, and analysis and reporting services.

**Infosys**

**Infosys**, with industrial IoT, product IoT and smart spaces as the core pillars of IoT, partners with AWS to deliver human-centric solutions that catalyze the doption of IoT to create more developed software and applications beneficial to enterprises.

**LTI**
Let's Solve

**LTI** leverages the AWS IoT ecosystem to design and deliver cutting-edge IoT solutions for smart manufacturing and intelligent products such as Digital Command Center, Cyber Physical Convergence, Opera Water, Quality Inspection and Smart Energy.

**tcs** TATA CONSULTANCY SERVICES

**TCS** has combined its IoT solutions with AWS to deliver innovative and developed platforms and applications to drive transformation across businesses and operations in the manufacturing, consumer packaged goods, utilities, transportation and logistics industries. These solutions include TCS IP2, TCS Digital Manufacturing Platform and TCS DigiFleet.

**Tech Mahindra**

**Tech Mahindra's** unique approach to AWS IoT and adjacent tech stacks completes the digital value delivery spectrum for enterprise clients, enabling them to leverage Industry 4.0, 5G capabilities, and the netOps.ai- and AWS-powered network cloud (NANC).

**wipro**

**Wipro** leverages IoT and cloud technologies to track different assets and monitor the assets' real-time location to increase visibility, reduce theft and misplacement and increase operational efficiency. Wipro's end-to-end solution includes a sensor tag, an IoT gateway and a secured cloud-hosted track.

**LTIMindtree**

Rising Star **Mindtree's** joint venture with AWS can enable IoT-enabled connected operations to improve manufacturing operations through overall equipment effectiveness (OEE) improvement and predictive maintenance, the monitoring and optimization of remotely deployed equipment, and the optimization of workforce efficiency and customer traction.

**Persistent Systems**

Rising Star **Persistent Systems'** partnership with AWS has enabled it to develop and integrate IoT-related products and services such as connected devices, with a focus on the manufacturing and industrial sectors.

# HCLTech

**Leader**

*"HCLTech focuses on training employees and ensuring top talent for AWS IoT, to maintain its edge."*

*Ashwin Gaidhani*

## Overview

HCLTech is headquartered in Noida, India, and operates in 52 countries. It has more than 208,900 employees across 215 global offices. In FY22, the company generated $11.5 billion (+12.8 percent YoY) in revenue, with IT and business services as its largest segment. HCLTech is a premier and managed services partner for six AWS competencies.

## Strengths

**AWS IoT Core delivery services:** HCLTech offers full-scale AWS IoT Core services, including managed cloud services that allow connected devices to easily and securely interact with cloud applications and other devices. As an AWS IoT Core delivery partner, HCLTech has developed connected device solutions on AWS IoT Core to optimize cost and improve reliability and performance for clients.

**AWS IoT analytics competencies:** HCLTech has multiple AWS IoT competencies, along with solid market positioning, deep industry knowledge across verticals and innovation-led sales.

**Collaboration of IoT WoRKS™ and AWS on talent growth:** HCLTech and AWS collaborate extensively to solve clients' complex business problems by bringing complementary skills through AWS centers of excellence and training academies.

## Caution

HCLTech traditionally has a strong talent base and experience in IoT and related technology areas. This also poses a challenge to the company in terms of talent retention, as there is a huge demand for such technology talent in various emerging technology domains in the U.S. market. HCLTech must innovate on talent attraction, retention and employer branding, by better showcasing its thought leadership in the market.

# Appendix

# Methodology & Team

The ISG Provider Lens 2022 – AWS Ecosystem Partners analyses the relevant software vendors/service providers in the U.S. market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology

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The research and analysis presented in this report includes research from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of November 2022, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

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

The study was divided into the following steps:

1. Definition of AWS Ecosystem Partners marke

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 has a comprehensive view of IT shared-managed services portfolio and digital business transformation initiatives with approximately two decades of experience. As an ISG Research Partner and subject matter expert in the field of enterprise services and digital technologies, he is presently contributing as a Lead Author with the ISG Provider Lens™ team. Ashwin comes to this work with business and technology experience revolving around service management, digital governance, emerging capabilities (artificial intelligence and intelligent automation), work design methodologies, and implementation frameworks. He is a highly qualified and experienced ITIL Expert with lifecycle experience in operations, delivery, consulting, and advisory for large corporations, including enduser, ITSP, and Technology product companies. He effectively partners with C-Level executives and tactical leaders to institutionalize digital business transformation and strategic initiatives.

### *Lead Author*

**Dr. Tapati Bandopadhyay**
**Lead Analyst**

Dr. Tapati Bandopadhyay has been an inventor, builder, practitioner and researcher in AI, intelligent automation and related domains, for 25+ years. She has been a global practice leader and executive-level advisor & consultant, in AI-automation-cloud and services management, covering MLOps, AIOps, CloudOps, DataOps, ModelOps & DevOps metrics-driven practices and data and AI story-building and storytelling practices and tools. As an ISG Lead Analyst on AWS and in AI-ML, consulting & managed services, she is responsible for defining and leading the ISG Provider Lens branded research projects, for the US market. Prior to working at ISG as a Lead Analyst and Research Partner, Dr. Tapati served in senior positions as Vice President, General Manager and Senior Director Research, at HFS, Wipro, Gartner, respectively.

# Author & Editor Biographies

## Enterprise Context and Global Overview Analyst

### Srinivasan PN
**Research Specialist**

Srinivasan PN is a senior research analyst at ISG and is responsible for supporting and co-authoring ISG Provider Lens™ studies on AWS & Google Ecosystem, Digital Engineering, Manufacturing and Mainframe. His area of expertise lies in the space of engineering services and digital transformation. Srinivasan comes with 8 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 each of his expertise areas. Along with this, he supports the advisors with his research skills and writes papers about latest market developments in the industry.

## IPL Product Owner

### Jan Erik Aase
**Partner and Global Head – ISG Provider Lens™**

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor. Now as a partner 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.

## About Our Company & Research

### 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.

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### ISG

ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 800 clients, including more than 75 of the world's top 100 enterprises, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis.

Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,300 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 www.isg-one.com.

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**REPORT: AWS ECOSYSTEM PARTNERS**