ISG Provider Lens™

AWS Ecosystem Partners

AWS SAP Workloads

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

Customized report courtesy of: HCLTech

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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.

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

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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
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

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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
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

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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
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

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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
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**.

- **AWS Managed Services**
- **AWS SAP Workloads**
- **AWS Data Analytics and Machine Learning**
- **AWS Internet of Things (IoT) Services**
- **AWS Migration Services**
- **AWS Consulting Services**

Simplified Illustration Source: ISG 2022

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.

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.

★ **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

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

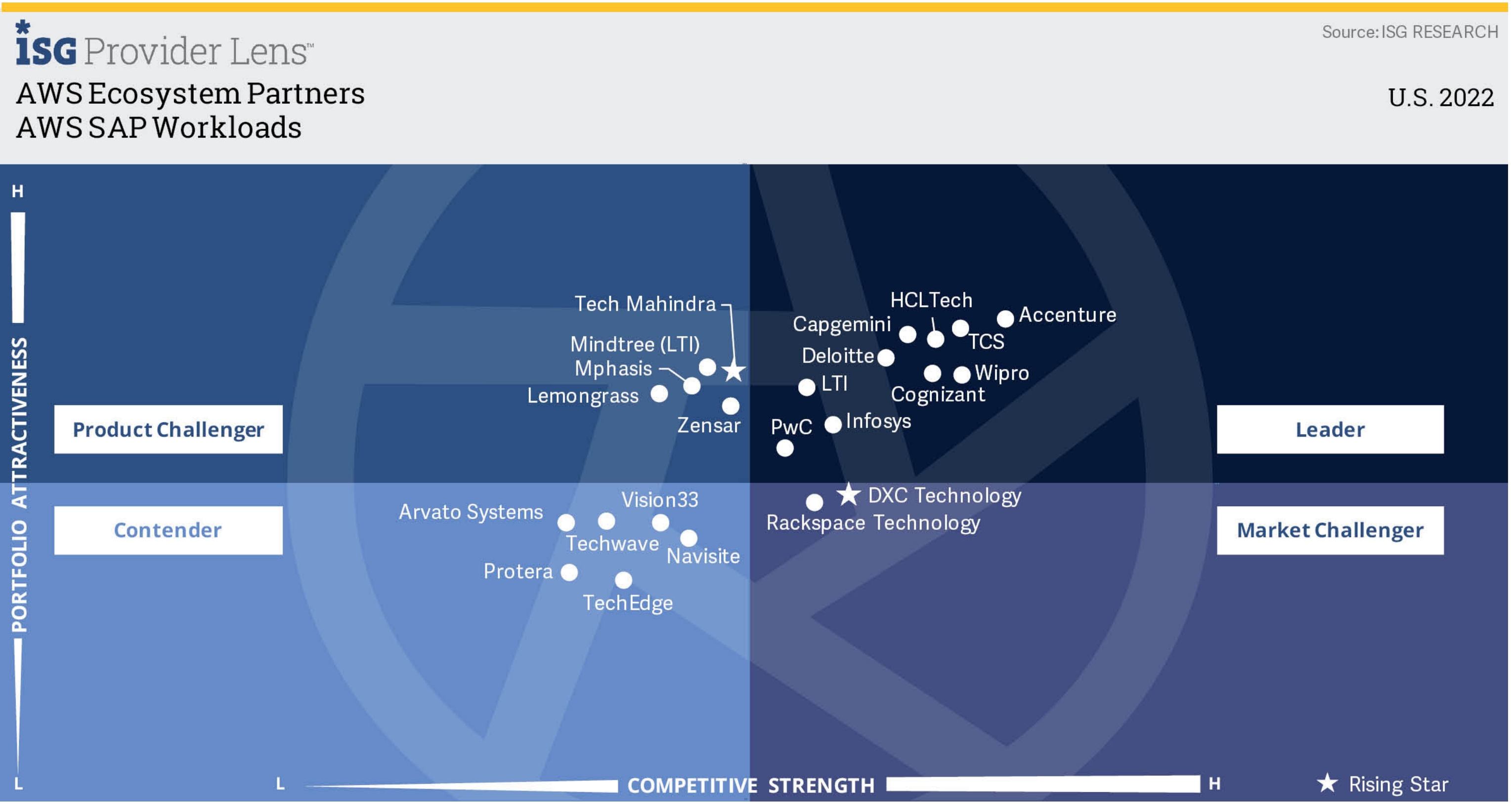
In recent years, the implementation of SAP S/4HANA has been one of the critical milestones, either as a greenfield or brownfield implementation.

RISE with SAP is considered and assessed as one of the prominent options for S/4 HANA. SAP promotes it as the preferred hosting approach for SAP systems. Enterprises prefer partners that work with SAP and AWS on the adoption of RISE with SAP and develop an optimal target model to support both SAP and non-SAP applications. Providers should partner with AWS to assist and determine the value of selecting RISE with SAP on AWS and integration with clients' non-SAP AWS ecosystem.

IT Leaders should read this report to better understand the relative strengths and weaknesses of the providers of SAP workloads on AWS that would help them lead the digital transformation drive in their enterprises.

SAP leaders should read this report to understand the positioning of SAP workload providers, learn how those providers' offerings can impact an enterprise's ongoing transformation initiatives and discover the benefits they can achieve by moving to the cloud.

Sourcing, procurement, and vendor management professionals should read this report to develop a better understanding of the current landscape of SAP workload service providers in the U.S.



This quadrant evaluates the service providers' expertise in **migrating and transitioning the SAP services** and applications to the AWS environment. SAP is one of the **fastest moving ERP platforms** on AWS.

Ashwin Gaidhani

Definition

This quadrant assesses service providers that enable the provision and ongoing operation of SAP systems such as SAP HANA or platforms on AWS as well as their central management. These service providers not only help implement AWS as a sheer hardware replacement or hardware extension (IaaS) in the customer companies. They also optimize, design and develop new processes and business flows as part of platform management through a combination of their own services, SAP services and AWS. This select group of professional IT service providers is thus responsible for implementing and ensuring subsequent operation.

Service providers in this category not only need AWS-provided certifications, but also SAP certifications or partnerships to stay current with SAP products, technologies, licensing and platform changes. They should also demonstrate their effects on customer IT landscapes, applications and business processes.

Eligibility Criteria

1. Breadth and depth of service portfolio related to **the implementation, customization, provisioning and Support** of SAP application and services
2. Number and locations of resources to **support SAP offerings on AWS**
3. Awareness and number of customers of the service provider 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 number of **relevant certifications, including AWS-certified SAP Competency**
6. **Pricing model suitability, maturity and adaptability**
7. Dedicated resources (including business units) around **DevOps, automation and cloud-native application design**

Observations

Service providers are leveraging their partnership with AWS to attain DevOps capabilities, which can help accelerate innovation. They also focus on integrating new SAP technologies, such as SAP SuccessFactors, SAP Ariba and SAP C/4HANA, to drive innovation. With such technologies, service providers help clients have a seamless and fast migration of SAP workloads to AWS. Due to this, there has been an increase in the demand for services supporting the migration of SAP workloads to AWS. Some trends include:

- Process optimization is critical to achieving key SAP cloud migration benefits like cost reduction, higher efficiency and improved customer service. Considering this, enterprises prioritize process mining throughout their cloud migration process.
- SAP RISE is being advocated by SAP as the best hosting strategy for SAP systems. Most of the service providers have been collaborating with SAP and AWS to drive the adoption of SAP RISE by enterprises and develop an appropriate operating model to support both SAP and non-SAP applications on AWS. For example, Capgemini and AWS have worked with clients to determine the value of selecting SAP RISE on AWS (such as the zero-RPO capability) and its integration with clients' non-SAP AWS estates.
- AWS is perceived as the most suitable option for extending SAP workloads with automation, predictive resource scaling and consumption, and intelligent technical monitoring. In addition, clients seek to upgrade and develop their SAP workloads with AWS native services, which they perceive as a critical differentiation for themselves in the market.

From the 45 companies assessed for this study, 23 have qualified for this quadrant, with 10 being Leaders and two Rising Stars.

accenture

Accenture enables end-to-end SAP workload migrations and solutions on the AWS cloud to help clients handle complex, heterogenous data and achieve analytical competencies.

Capgemini

Capgemini remains one of the first global system integrators that associate with the AWS Migration Acceleration Program (MAP) that focuses on SAP Integrated Intelligent Suite and cloud-ready ERP solutions such as SAP S/4 HANA.

cognizant

Cognizant helps clients engineer robust, secure cloud-based digital platforms on AWS that can transform them into modern digital enterprises. This enables clients to increase innovation, scale business services and improve operational agility.

Deloitte

Deloitte supports the SAP S/4 HANA core ERP system that allows enterprises to easily adapt to business models, handle changes at an optimum speed and maximize resources. It also supports SAP Business Technology Platform, which provides a hosting environment for analytics-based intelligent technologies, app development and integration.

HCLTech

HCLTech capitalizes on the advantages of running SAP applications on AWS to enable businesses to be more agile, cost-effective and secure. For instance, Amazon EC2 X1 and X1e instances can support memory-intensive applications such as SAP HANA.

Infosys

Infosys supports SAP on AWS, as part of Infosys Cobalt, to enable a secure and risk-free transition to AWS, covering all phases from planning and execution to managed services. The services offered include SAP S/4HANA transformation on AWS and anyDB migration to SAP HANA on AWS.

LTI Let's Solve

LTI specializes in migrating SAP production and non-production workloads to AWS. Accelerators such as AWS Launch Wizard enable LTI, with its unique skillsets, to drive digital transformation for enterprises.

PwC

PwC combines its expertise and business-led approaches with SAP's innovative technologies to deliver value addition to clients. PwC's Business, Experience and Technology (BXT) strategy aligns technology investments with business priorities and educates clients on how technology can drive strategic advantages.

TCS Tata Consultancy Services

TCS Crystallus™ on AWS offers a set of proven solutions powered by assets and accelerators, leveraging SAP S/4HANA as its digital core and SAP intelligent technologies to jump-start transformation journeys on the cloud.

Wipro

Wipro and AWS offer end-to-end services for SAP application migration, including assessment and discovery and cloud migration on the AWS cloud, through innovation accelerators such as Wipro AWS Launch Pad.

DXC Technology

Rising Star **DXC Technology's** full-stack SAP delivery capabilities offer enterprises predefined SAP blueprints, access to certified, skilled resources and an advanced support system for AWS SAP migration.

Tech Mahindra

Rising Star **Tech Mahindra's** SAP on AWS offering provides services to unlock the value of AWS. The services include comprehensive SAP digital transformation to AWS with accelerators such as mPAC, and SAP-certified Epselon, as well as the AWS migration toolset (AWS Launch Wizard for SAP and AWS Quick Start for SAP S/4 HANA).

HCLTech

Leader

"HCLTech uses AWS EC2 and data services to augment the value realization from SAP transition."

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

Focus on business-relevant innovations: While transitioning SAP workloads to AWS, HCLTech focuses on business-relevant innovations, cost efficiency, security, agility and regulation-compliant best practices. HCLTech provides a combination of traditional and emerging technologies to support clients with running SAP applications on AWS.

Futureproofing clients' business with an SAP strategy on AWS: HCLTech enables a strategic, long-term partnership with its clients for SAP migration to AWS, for instance, using Amazon EC2 X1 and X1e instances that can support memory-intensive applications, such as SAP HANA, with automated resource provisioning, single-pane-of-glass visibility and optimal application availability.

Extensive experience: HCLTech is well experienced in SAP landscape transformation, system conversion and new implementations on AWS. This acts as a differentiator for the company in the competitive U.S. market.

Caution

HCLTech's unique technology capabilities and strong partnership with AWS need to be better communicated to the U.S. market by leveraging all available third-party thought leadership platforms, along with its own websites.

Appendix

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

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

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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.

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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.

ISG Provider Lens™

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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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