ISG Provider Lens™

AWS Ecosystem Partners

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

QUADRANT REPORT | DECEMBER 2022 | U.S.

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Executive Summary

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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.

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   **Page 1 of 6**

	AWS Managed Services	AWS SAP Workloads	AWS Data Analytics and Machine 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 Machine 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 Machine 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 Machine 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 Machine Learningg	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

	AWS Managed Services	AWS SAP Workloads	AWS Data Analytics and Machine 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).

iSG Provider Lens™   AWS ECOSYSTEM PARTNERS QUADRANT REPORT | DECEMBER 2022 **15**

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 Managed Services

Who Should Read This

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

In the present digital environment, enterprises must take a combined approach to their technical infrastructure. ISG notes that although enterprises in the U.S. are taking the lead in cloud adoption, their counterparts in other countries are not far behind.

Enterprises strategize their adoption of cloud native solutions, such as container-based solutions. Solutions such as Elastic Kubernetes Service (EKS), Elastic Container Service (ECS) and microservices are in high demand. Enterprises also partner with providers that can offer the highly sought-after distributed cloud experience along with edge, thus replacing internal private cloud. Providers are expected to not only offer as-a-service solutions rather than just managed services but also industry-specific cloud solutions and environments that fulfil security, compliance and regulatory requirements.

IT Leaders should read this report to better understand the relative strengths and weaknesses of managed service providers that 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 understanding of the current landscape of managed service providers in the U.S.

Software development and technology leaders should read this report to understand the positioning of managed service providers and how the providers' offerings can impact an enterprise's ongoing transformation initiatives, while identifying the benefits of moving to the cloud.

ISG Provider Lens™

AWS Ecosystem Partners
AWS Managed Services

Source: ISG RESEARCH

U.S. 2022

PORTFOLIO ATTRACTIVENESS

H

L

Product Challenger

Contender

DXC Technology

Atos
2nd Watch
Persistent Systems
Mindtree (LTI) — Kyndryl ★
Trianz
Mphasis
Zensar
Ensono

TO THE NEW
Aspire Systems
Arvato Systems
DISYS
DLT Solutions
Allcloud

Tech Mahindra
Accenture
Infosys   HCLTech
Deloitte   TCS
LTI   Capgemini
Cognizant
Wipro
Rackspace Technology

Leader

NTT DATA
Unisys   IBM
Hitachi Vantara

Market Challenger

L   COMPETITIVE STRENGTH   H   ★ Rising Star
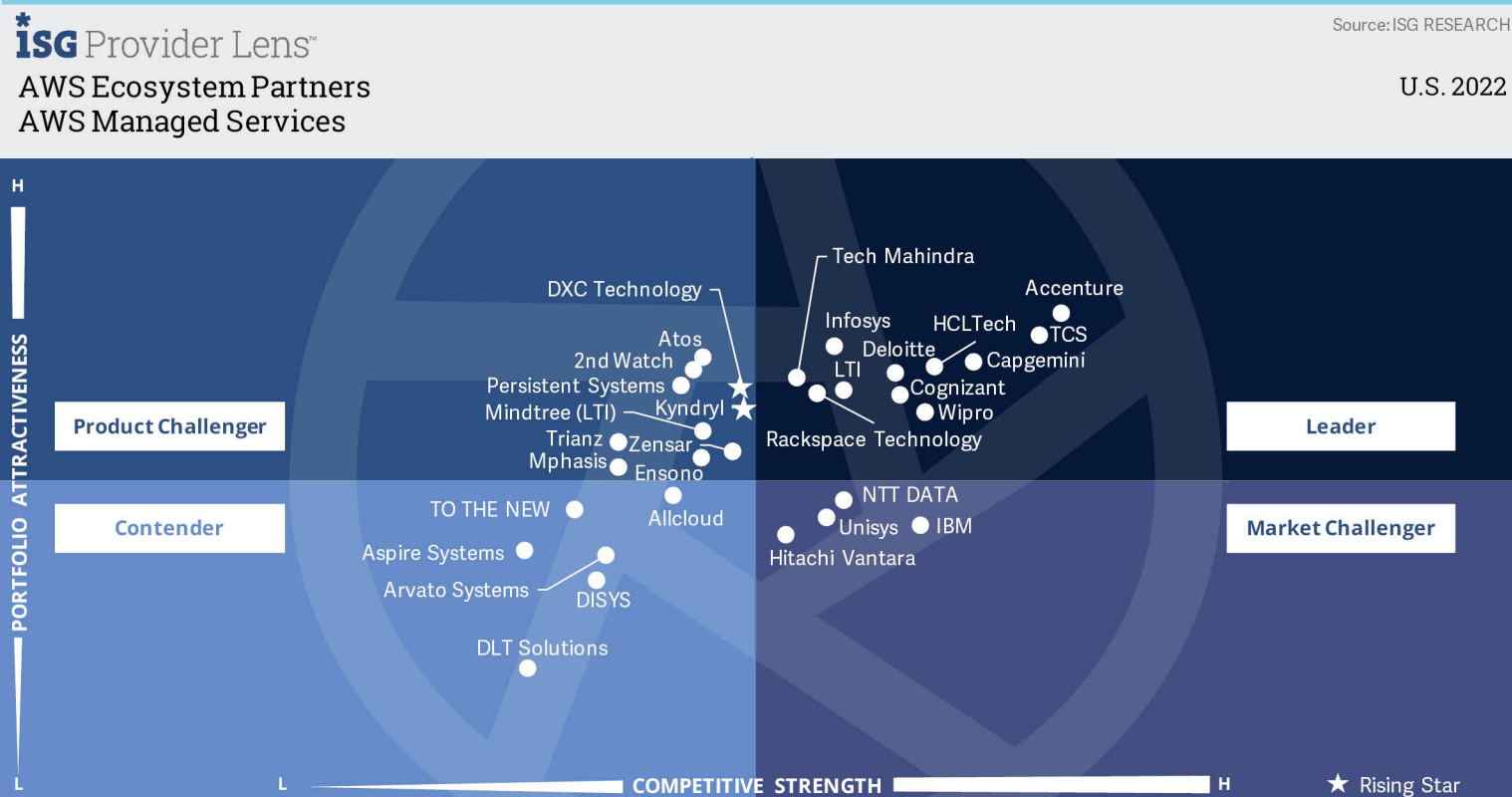
This quadrant assesses how service providers help manage clients' cloud infrastructure by **orchestrating, provisioning and monitoring** their public cloud and multicloud environments.

Ashwin Gaidhani

AWS Managed Services

Definition

In addition to IaaS and PaaS hyperscale platforms for public clouds from third-party service providers, managed services providers (MSPs) offer professional and managed services that include orchestration, provisioning, monitoring and operational management of a customer's public cloud and multicloud environment. The aim is to maximize the work performance in the cloud, reduce costs and ensure compliance and security. Typically, developed or licensed cloud management platforms and tools are used to provide customers with the highest level of automation and the necessary transparency over the managed cloud resource pool in terms of capacity utilization and costs, including independent management.

Eligibility Criteria

1. AWS Managed Service **Program certification**

2. Expertise in autonomous **machine learning-driven** orchestration and configuration management of platforms/systems

3. Experience in **designing, building and managing** public and multicloud environments

4. Ability to support **big data** and multiple database solutions and analytics

5. Experience in **DevOps** engineering

6. Scope and availability of **security resources** and services

7. Experience in solutions architecture

8. Experience in **server migration** experience and availability of resources

Observations

AWS has established itself as one of the top hyperscalers globally, as it can easily integrate with enterprises' software and products. Business transformation initiatives are on the rise to meet the pace of technology adoption, and cloud migration is one of the important strategic plans currently on business leaders' agendas. Furthermore, service virtualization by enterprises makes business leaders focus on areas such as resource competency, technology awareness and infusion of new capabilities. With these trends, enterprises are leveraging AWS to develop cloud-based software and technologies, covering CloudOps, DevOps, FinOps, MLOps, DataOps, AI and automation. Some additional trends:

- Observability, tracking and constant digital asset diagnosis are in high demand with the rise in cloud transformation volume. Hence, enterprises are seeking stronger partnerships with service providers to ensure reliable managed services. Managing digital assets depends on the human resource competency of an enterprise and its software and technological capabilities, which can be empowered by service providers to proactively control and manage their hybrid IT landscape.

- Service modernization, application personalization and operation customization are increasingly gaining traction, which can be supported by the providers of AWS managed services. Security, intelligent automation and data analytics are also being integrated into AWS managed services.

- Sustainability is becoming a focus area for AWS, enterprise clients and service providers. As a result, enterprises' governance teams, with the support of service providers, are working on designing appropriate frameworks and methodologies to track and analyze the improvements in their sustainability initiatives.

From the 58 companies assessed for this study, 31 have qualified for this quadrant, with 11 being Leaders and two Rising Stars.

accenture

Accenture offers industry-leading AWS managed services by combining its deep domain knowledge with its internal proprietary solutions, such as myNav®, along with assets from partner platforms.

Capgemini

Capgemini's Digital Cloud Platform (DCP) helps enterprise clients overcome the limitations of legacy IT systems and develop and migrate solutions faster and with greater agility, thus reducing time-to-market and improving the ROI.

cognizant

Cognizant intelligent Cloud Management Platform (iCMP) leverages third-party-driven API tools and platforms for multicloud environments, maximizing the benefits of automation.

Deloitte

Deloitte OpenCloud platform is a library of automated playbooks created to help accelerate the time to build and configure new clients' environments.

AWS Managed Services

HCLTech

HCLTech's ACloud Services Factory automates processes and platforms to enable organizations to plan, execute and support modernization.

Infosys

Infosys adoption framework for managed services is a structured way to transform technologies and processes with the least intrusion possible.

LTI

LTI's Canvas is an AI-based platform to push the correct set of behaviors and collaboration and integrates CI/CD pipelines to enable the DevOps model of working.

Rackspace Technology

Rackspace Technology elastic engineering provides access to pods of cloud engineers who act as an extended team to shape business outcomes.

TCS

TCS' SAVIOR framework enables clients to design a complete range of AWS services, including Virtual Private Cloud (VPC), Landing Zone, AWS Directory Service, Amazon Cloud Directory, Route 53, Elastic Block Store (EBS) and AWS Snapshot.

Tech Mahindra

Tech Mahindra's iCOPS solution integrates different services, including TechOps, DevOps, FinOps and SecOps.

Wipro

Wipro's Enterprise Digital Operations Center (EDOC) delivers hybrid multicloud managed services through Boundaryless Enterprise (BLE). These include managing, monitoring, remediating, automating, securing, provisioning, scaling, optimizing, reporting and decommissioning services.

DXC TECHNOLOGY

Rising Star **DXC Technology's** Cloud Right™ approach and application modernization solutions support the transformation of clients' applications using AWS-native services to unlock full benefits of the AWS cloud.

Kyndryl

Rising Star **Kyndryl's** enterprise landing zone architecture is flexible by design, scalable and supported by the AWS Cloud Adoption Framework.

HCLTech

Leader

"With its managed services expertise, HCLTech supports large-scale, complex cloud transformation."

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

Investment in talent pool: HCLTech significantly invests in the expansion of its skilled resource pool, capitalizing on continuous training on the latest cloud concepts, tools and frameworks around AWS. More than half of the company's total number of employees are AWS-certified professionals.

ElasticOps suite of services: This empowers enterprises to manage their AWS environment efficiently and realize cloud benefits at a rapid pace. This AI-driven suite uses smart algorithms to provide zero-touch automation of tasks and processes. It also helps enterprises implement industry-leading best procedures to sustain cloud infrastructure.

Cloud security as a service (CSaaS): HCLTech, being part of the Cloud Security Alliance (CSA), provides enterprises with comprehensive cloud security services through its CSaaS framework. This framework offers comprehensive security to all kinds of cloud applications, including SaaS and IaaS, hosted anywhere.

Caution

HCLTech should improve its focus on large-scale engagements and invest more in joint go-to-market strategies to develop industry-specific solutions.

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.

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.

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.

ISG Provider Lens™

**AWS Ecosystem Partners
AWS SAP Workloads**

Source: ISG RESEARCH

U.S. 2022

H

PORTFOLIO ATTRACTIVENESS

Product Challenger

Contender

Tech Mahindra
Mindtree (LTI)
Mphasis
Lemongrass
Zensar

HCLTech
Capgemini   Accenture
Deloitte   TCS
LTI   Wipro
Cognizant
PwC   Infosys

Leader

Vision33
Arvato Systems
Techwave
Protera   Navisite
TechEdge

DXC Technology
Rackspace Technology

Market Challenger

L

L   **COMPETITIVE STRENGTH**   **H**

★ Rising Star

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

AWS SAP Workloads

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.

AWS Data Analytics and Machine Learning

Who Should Read This

U.S. for evaluating providers of data analytics and machine learning services. In this quadrant report, ISG highlights the current market positioning of providers in the U.S. and how they can address the key challenges of enterprises.

Enterprises are embracing modern data strategies that aim at tangible, effective and efficient data usage using various methods such as Data Mesh and Data Fabric. They are working toward hybridization and unification of IT strategies that emphasize on functionality and capability with technological toolsets or specific ecosystems.

Machine learning concepts, including AI ethics everywhere, that bolster trust by targeting on responsible AI and AI ethics, ESG for AI workloads and NLP has been the foremost one in AI-powered solutions as language models are more proficient than ever.

Enterprises are focused on partnering with providers with exemplary capabilities, talented professionals and a strong partner network.

IT Leaders should read this report to better understand the relative strengths and weaknesses of data analytics and machine learning service providers, which would help them lead the digital transformation drive in their enterprises.
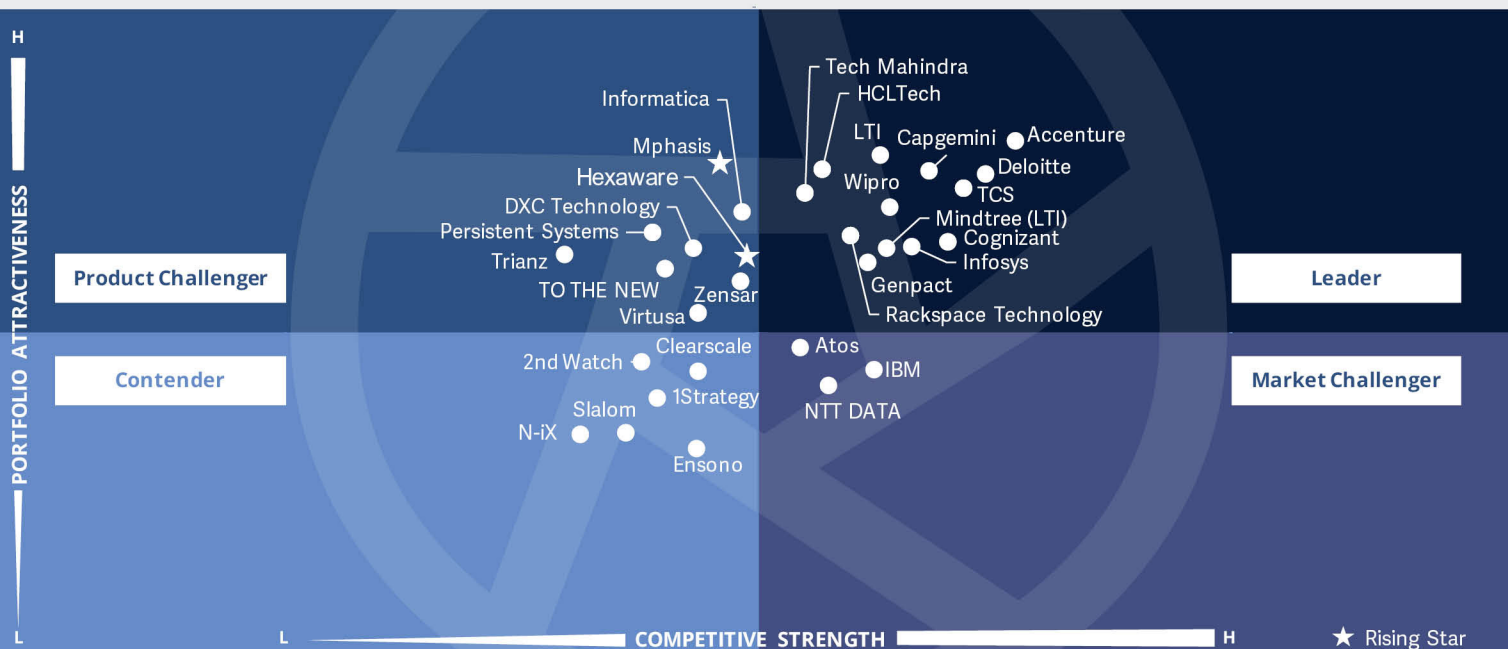
Sourcing, procurement, and vendor management professionals should read this report to develop a better understanding of the current landscape of providers of data analytics and machine learning in the U.S.

Analytics leaders should read this report to understand the positioning of data analytics and machine learning service providers, learn how the providers' 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 Data Analytics and Machine Learning

Source: ISG RESEARCH

U.S. 2022

H

PORTFOLIO ATTRACTIVENESS

Product Challenger

Contender

Informatica

Mphasis
Hexaware
DXC Technology
Persistent Systems
Trianz
TO THE NEW
Virtusa
Zensar

Clearscale
2nd Watch
Slalom   1Strategy
N-iX
Ensono

Tech Mahindra
HCLTech
LTI   Capgemini   Accenture
Wipro   Deloitte
TCS
Mindtree (LTI)
Cognizant
Infosys
Genpact
Rackspace Technology

Atos
IBM
NTT DATA

Leader

Market Challenger

L

L   COMPETITIVE STRENGTH   H   ★ Rising Star

This quadrant evaluates the providers of **AWS machine learning and data analytics** solutions and services. Aligning the right models and components for **insights and data visualization** are the key attributes focused on in this quadrant.

Ashwin Gaidhani

AWS Data Analytics and Machine Learning

Definition

This quadrant covers providers of two increasingly intertwined sets of IT capabilities: the ability to collect and analyze a widening array of data types and amounts, and ability to demonstrate machine learning capabilities that enable faster and more efficient analysis of various types of data within and across a growing range of systems and applications. Providers in this group must demonstrate capabilities and experience in data science (including big data and advanced analytics), database and solution architecture, machine learning and related AI development and implementation, software development, networking and data privacy and security. Most of them use an adaptive portfolio of tools and technologies to develop and deliver solutions.

Eligibility Criteria

1. Scope and **use of relevant tools and technologies** (for example, Hadoop, NoSQL, Spark, MXNet and TensorFlow)

2. **Service/solution integration capabilities** and offerings

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

4. **Availability, experience and certification** of analytics, data science and machine learning experts

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

6. **Number and reputation of references** for machine learning and analytics services and solutions on AWS

7. Suitability, maturity and adaptability of pricing models with a go-to-market strategy

8. Breadth and depth of partner and channel relationships

AWS Data Analytics and Machine Learning

Observations

Enterprises are adopting cloud-based solutions to secure, manage, analyze and store data. Data management has become imperative because of the rising data volumes and complexities due to technological advances. Machine learning and data analytics have proven to be instrumental in presenting various dimensions and combinations of data to acquire business intelligence. The increased demand for AWS data analytics and machine learning is attributed to its purpose-built services that provide performance optimization, scalability guidance and business resiliency. Quick extraction of data can be enabled with the use of improvised and appropriate tools, with the support of AI and visualization systems. Providers are focusing on data GRC and privacy while building proprietary solutions and accelerators. Some trends include:

- The inclusion of machine learning into workloads using APIs provides the ability to build powerful, intelligent applications with capabilities such as computer vision, speech, natural linguistics, chatbots, predictions and recommendations.

- AI and machine learning are rapidly growing in demand in various industries. Companies are largely utilizing SageMaker to simplify the development of machine learning models. This three-part solution provides a no-code platform for creating models and turnkey solutions.

- Enterprises are constructing a centralized data security platform based on attribute-based access control (ABAC), which enables data access decisions based on the attributes of resources, actions and people involved. ABAC can also manage and encrypt sensitive data.

From the 55 companies assessed for this study, 31 have qualified for this quadrant, with 13 being Leaders and two Rising Stars.

accenture

Accenture provides data services such as database migration, transformation, and data lake design and implementation. Accenture Insights Platform (AIP), which is integrated with AWS, has been delivering value to enterprise clients.

Capgemini

Capgemini's collaboration with AWS has led to the development of 890 by Capgemini, an activator of data analytics. It informs users to speed up decision-making, grow at scale, increase efficiency, automate processes, and make products and services that connect with clients.

cognizant

Cognizant in collaboration with AWS, has built the Cognizant MLOps Model Lifecycle Orchestrator solution. It has also increased its focus on revenue generation through acquisitions in the data analytics space.

Deloitte

Deloitte's partnership with AWS has helped it develop innovative DAML services. Deloitte develops and delivers AWS DAML solutions that can be scaled quickly and managed cost efficiently.

Genpact has developed a data-driven finance office reference architecture using a data lake and analytics. One of the key services utilized was Amazon SageMaker, which helps data scientists and developers build and deploy high-quality machine learning models quickly by bringing a broad set of capabilities purpose-built for machine learning.

HCLTech

HCLTech's uses AWS for everyday customer experience enhancement, real-time speech-to-text conversion, NLP, translation, and recommendation, all of which are managed over a serverless architecture. The main solutions used are Lex, Transcribe, CloudWatch, CloudTrail and CloudFormation.

Infosys' and AWS have collaborated to develop the Infosys Life Sciences Commercial Insights Platform. This is used to generate faster insights and enable rapid customization to suit clients' needs and is scalable across markets. It is highly beneficial for pharmaceutical enterprises that need AI capabilities.

LTI's combines its innovation-centered, automation-first approach to delivering AWS services with various innovative tools and frameworks to ensure its clients get the desired business outcomes.

Mindtree (LTI) continues to evolve and has adopted AWS data services successfully. Its AWS services portfolio covers AWS Glue ETL, AWS Glue Data Catalog, AWS Athena (Presto compliant), AWS Elasticsearch and AWS QuickSight.

Rackspace Technology's has extensive expertise in AWS DAML applications. With its large resource base, it offers large-scale data analytics and machine learning services in the U.S. market.

TCS offers AI, machine learning and user experience enhancement solutions on AWS that help enterprises unlock the potential of AI at scale. With AWS SageMaker, TCS enables enterprises to optimize, build and manage their AI and machine learning workflows.

Tech Mahindra's InfoWise is a metadata management tool that connects various data sources to extract metadata, usage and audit data and operational data to enable and accelerate data modernization. Metadata governance, data analytics support operations and data observability services are critical focus areas for Tech Mahindra.

AWS Data Analytics and Machine Learning

Wipro's AWS AI solution team helps clients across industries overcome challenges and take advantage of the benefits of AWS SageMaker. Wipro also has a dedicated AWS AI and machine learning center of excellence lab and an MLOPs framework.

Hexaware, a Rising Star, delivers globally recognized DAML services on AWS, with its Amaze automation platform that transforms clients' on-premises data ecosystems and big data sources to the cloud effectively.

Mphasis

Rising Star **Mphasis'** PACE-ML uses workflows, collaboration platforms and monitoring tools for improving efficiency and streamlining model selection, reproducibility, versioning, auditability, explainability, packaging, reusability, validation, deployment and monitoring so that machine learning modelsed efficiently in production environments at scale.

Leader

"HCLTech offers a comprehensive set of DAML capabilities on AWS across diverse architectures."

Ashwin Gaidhani

HCLTech

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 applications and use cases: HCLTech delivers its strong AWS DAML capabilities in an application-focused way that addresses customer challenges in a direct, context-aware manner, for example, by using conversational AI. The company's solution stacks share components from Amazon Lex, Transcribe, Polly, AWS Comprehend, Translate, etc.

Leveraging the serverless architecture to fit the need for speed and resource efficiency in DAML: For data- and compute-intensive AI and machine learning use cases, such as applications that deal with big data and real-time data, HCLTech supports flexible solution architectures. Examples include serverless computing with AWS Lambda, Kinenis and S3, and DynamoDB.

Focus on AI operations: AI and machine learning use cases in large customer landscapes require strong governance, monitoring, visibility and operations management. HCLTech meets these requirements with AWS CloudWatch, CloudTrail, etc.

Caution

HCLTech's technical assets can be marketed more effectively in the U.S. market with frequent, impactful communications. The company can also share its success stories on third-party platforms that promote best practices.

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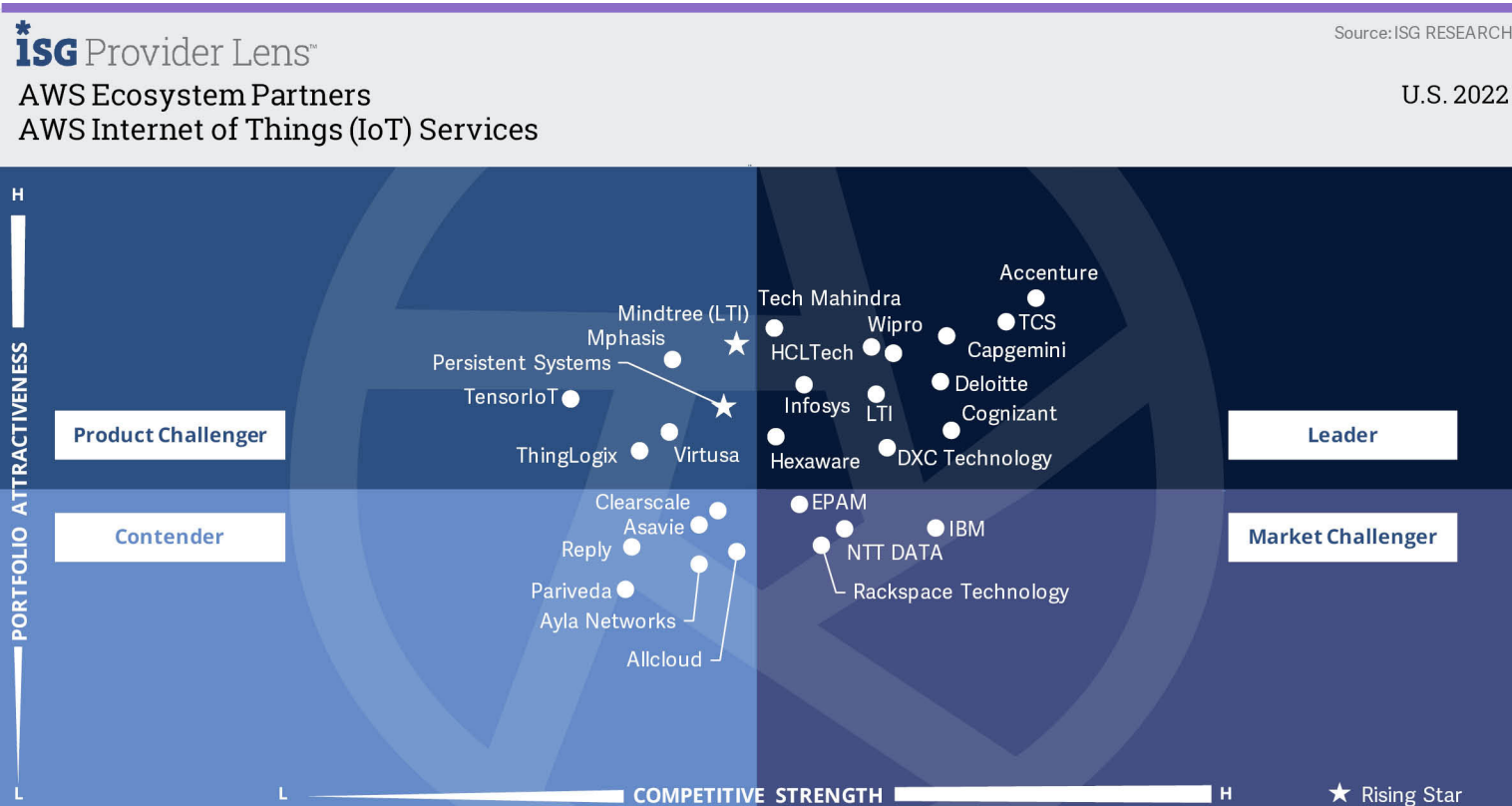
Sourcing, procurement and vendor management professionals should read this report to develop a better sense of the current landscape of AWS IoT service providers in the U.S.

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

PORTFOLIO ATTRACTIVENESS

H

Product Challenger

Contender

Mindtree (LTI) ★
Mphasis
Persistent Systems
TensorIoT

ThingLogix Virtusa

Clearscale
Asavie
Reply
Pariveda
Ayla Networks
Allcloud

Tech Mahindra
HCLTech   Wipro
Infosys LTI
Hexaware   DXC Technology

Accenture
● TCS
Capgemini
● Deloitte
Cognizant

EPAM
● IBM
NTT DATA
Rackspace Technology

Leader

Market Challenger

L

L   COMPETITIVE STRENGTH   H

★ Rising Star

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**

AWS Internet of Things (IoT) Services

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.

AWS Migration Services

Who Should Read This

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

Enterprises are actively considering migration and modernization of their legacy mainframe applications to cloud native counterparts. Hyperscalers, including AWS, have made huge investments in acquiring and offering several solutions in this space. ISG notes that the demand for lift-and-shift migration is decreasing significantly among enterprises as there are latency and performance issues, increased risk after migration. Enterprises are highly cautious of the investments in

and steps taken by service providers to promote decarbonization and sustainable development. They seek providers that use serverless architectures and other solutions that reduce the cloud carbon footprint during migration. Enterprises partner with service providers that prioritize sustainability and have a broad portfolio on 6Rs (rethink, refuse, reduce, reuse, recycle, repair). They also prefer engaging providers with global talent and delivery ecosystems and custom pricing models

Marketing and sales leaders should read this report to understand the relative positioning and capabilities of service partners that can help them build and manage complex business management software integrations and data flows for improved business data analysis and decision-making.
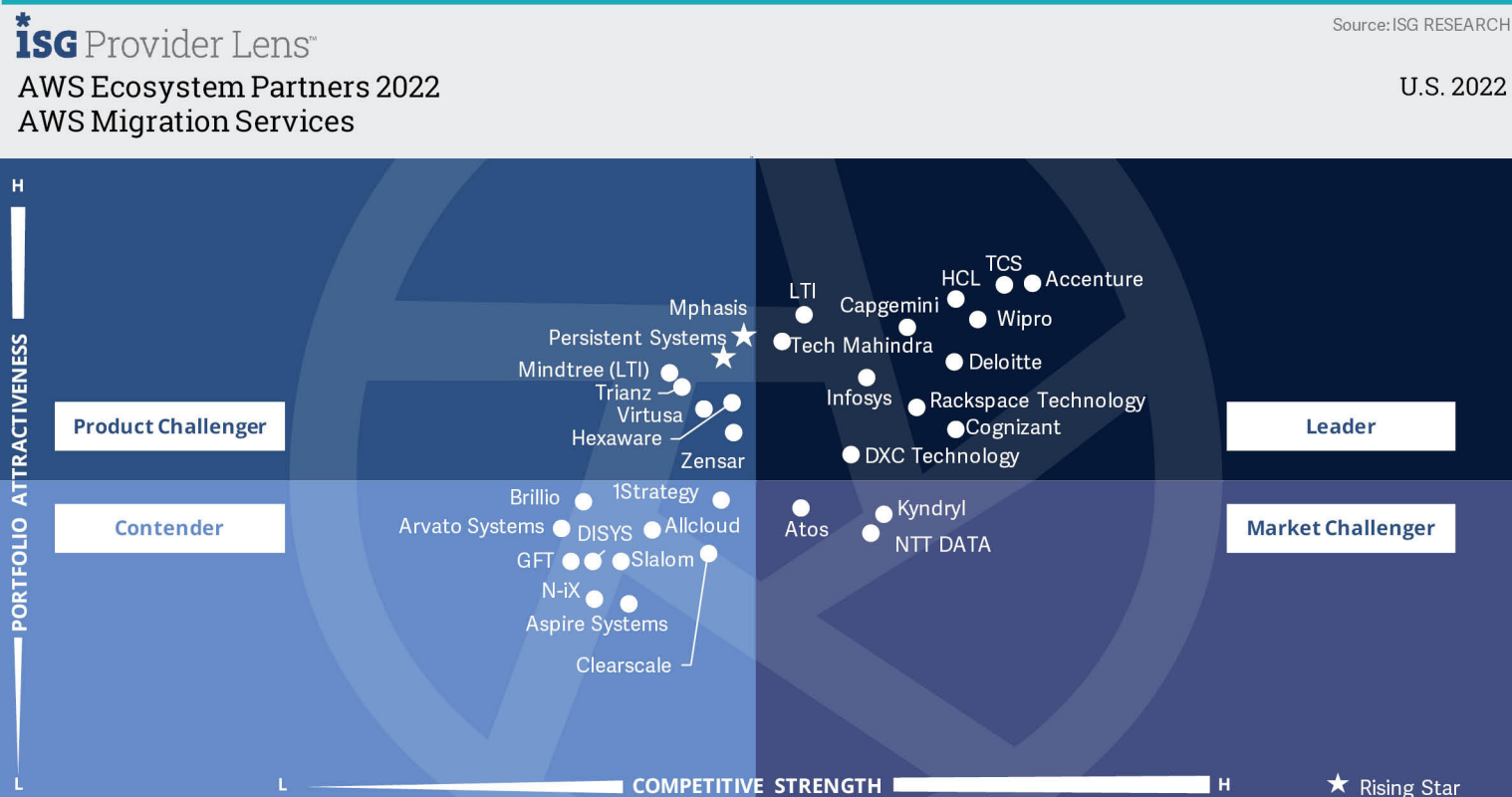
Sourcing, procurement, and vendor management professionals should read this report to develop a better understanding of the current landscape of migration service providers in the U.S.

IT and technology leaders should read this report to understand the strengths and weaknesses of AWS migration service providers, including their offerings, capabilities and market presence. The report will highlight their relationships with AWS and how they employ the latest technologies and capabilities to deliver reliable offerings.

ISG Provider Lens™

AWS Ecosystem Partners 2022
AWS Migration Services

U.S. 2022

H

PORTFOLIO ATTRACTIVENESS

Product Challenger

Contender

Mphasis
Persistent Systems ★
Mindtree (LTI)
Trianz
Virtusa
Hexaware
Zensar

LTI
Capgemini
Tech Mahindra
Infosys

HCL TCS Accenture
Wipro
Deloitte
Rackspace Technology
Cognizant
DXC Technology

Leader

Brillio 1Strategy
Arvato Systems DISYS Allcloud
GFT Slalom
N-iX
Aspire Systems

Clearscale

Atos Kyndryl
NTT DATA

Market Challenger

L

L COMPETITIVE STRENGTH H

★ Rising Star

This quadrant assesses how service providers enable clients to carry out their **cloud transformation and modernization** journeys by **migrating their workloads to AWS.**

Ashwin Gaidhani

AWS Migration Services

Definition

The AWS provider partners in this quadrant offer technology, products or services that support workload operation and migration. Providers participating in this quadrant should excel in automated testing, migration and deployment, and they typically work closely with clients over requirements such as readiness assessments and continuous change management. Typical provider skills and expertise include software architecture, software development (including DevOps), application and workload migration and modernization, and related consulting and technological capabilities to build, enable and support robust, scalable applications and services. Some AWS partners can qualify as members of the AWS Migration Acceleration Program for their special migration competence.

Eligibility Criteria

1. **Availability, experience and certification** of staff supporting and delivering services

2. **Scope and use of relevant tools and technologies** (for example, Kubernetes, Docker, Istio and Envoy)

3. **Participation and support in the Cloud Native Computing Foundation (CNCF)**

4. Scope of **business-critical applications migrated** for customers using AWS

5. **Platform/PaaS and channel partnerships**

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

7. **AWS-focused container offering** roadmap and innovations (current and planned)

8. **Scope of security tools, technology and services utilized**

9. **Number and reputation of references** for containerization and migration services and solutions on AWS

10. **Suitability, maturity and adaptability of pricing model**

Observations

Cloud migration is a complex task, and both enterprises and service providers are trying to simplify it. Enterprises partner with service providers for AWS migration services, which cover assessment, remediation/re-platforming and data migration, which, in turn, helps drive a high level of automation. Automation and machine learning are some of the main attributes of AWS migration services, which can enable enterprises to transfer their complex data to AWS, with security. Some trends include:

- Many businesses are leveraging AWS's Container Orchestration and Management tool to run their legacy applications on cloud; it aids in efficiently migrating applications devoid of any complexities.

- Enterprises in the banking, insurance and manufacturing industries are increasingly adopting AWS modernization competency and associated tools to migrate mainframe workloads at a reduced modernization cost, with a shorter project duration and lower project risks.

- Enterprises are moving from commercial databases to purposeful cloud databases built on open-source platforms. They are also considering cloud-native databases as an alternative option, such as Amazon DynamoDB and MariaDB. AWS also offers tools and services such as Schema Conversion Tool (SCT) and Database Migration Service (DMS) to accelerate migration from commercial databases to purposeful, cloud-native databases, and to use these tools/services, enterprises need the support of capable service providers.

From the 50 companies assessed for this study, 31 have qualified for this quadrant, with 12 being Leaders and two Rising Stars.

accenture

Accenture's Accelerate for Cloud (A4C) is a state-of-the-art migration factory that automates 50 percent of common tasks, with the capacity to migrate 1,200 workloads per month.

Capgemini

Capgemini's eAPM secures clients' move to AWS by delivering a project plan, along with a business case, that includes the target run cost and post-cloud assessment custom report for an accelerated migration.

cognizant

Cognizant offers Cloud Steps, an AI and machine learning-based transformational framework covering the entire cloud lifecycle, from strategy to operation, with a set of reusable accelerators for rapid cloud adoption.

Deloitte

Deloitte's innoWake product suite and application modernization studio enable clients to modernize their core systems by optimizing investments and adopting new technologies.

DXC TECHNOLOGY

DXC Technology Cloud Right™ approach and application modernization solutions support the transformation of clients' applications using AWS-native services to unlock full benefits of the AWS cloud.

HCLTech

HCLTech's Cloud Works platform focuses on the possibilities of automation to hasten and ease the deployment and management of microservices applications.

Infosys

Infosys' WLM suite supports the entire migration lifecycle of applications, including discovery, assessment, migration and validation.

LTI
Let's Solve

LTI's Infinity platform is a unified multicloud platform powered by the latest engineering tools and processes, covering the entire cloud lifecycle.

rackspace
technology.

Rackspace Technology's Fabric™ integrates the whole set of security, billing, operations and management together for consistent and automated cloud delivery.

tcs TATA CONSULTANCY SERVICES

TCS Cloud Migration Services use a factory-based, automation-first model for the migration of enterprise applications, including database and end-user workspace, to the cloud.

Tech Mahindra

Tech Mahindra's MAC toolkit enables clients to migrate their applications to cloud through migration accelerators.

wipro

Wipro's BoundaryLess Enterprise (BLE) drives enterprise-wide cloud migration by integrating and operating multicloud services.

Mphasis

Rising Star **Mphasis'** KRYPTON™ is a composable cloud migration and modernization platform that enables enterprises to achieve large-scale migration with an automation-first and DevSecOps-led approach.

Persistent Systems

Rising Star **Persistent Systems'** Persistent Intelligent Operations (PIOps) is a framework comprised of infrastructure, applications, collaboration and the cloud for the transformation of enterprise cloud operations.

HCLTech

Leader

"HCLTech's global delivery model and engineering expertise make it a Leader in this quadrant."

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

Advantages of DPrizm™: This is a comprehensive assessment tool for cloud and application modernization. It is used as an advisor and decision-making assistant and can measure the correct cloud fit of applications and gaps, if any, for the codification journey. The tool uses machine learning for data gathering and analysis and the planning of large-scale migrations. It complements several commercial tools and integrates information from multiple sources.

HCLTech ADvantage Migrate: This is a one-stop solution that helps enterprises modernize their entire data and analytics landscape. The solution assists in achieving unified analytics and governance, amplified human output and faster business outcomes by leveraging automation with pre-engineered products.

Platform-first transformation journey: HCL has a strong focus on developing a plethora of platforms for clients' cloud transformation journeys. It has solutions to reduce the costs incurred by digital transformation, while improving efficiency. It also helps clients migrate cloud-ready workloads to AWS by leveraging its migration factory, using standardized and automated frameworks.

Caution

HCLTech should improve its capabilities in delivering well-architected cloud landing zones to clients.

AWS Consulting Services

Who Should Read This

This report is relevant to enterprises across industries in the U.S. for evaluating the ability of providers offering consulting services for the transformation of client's cloud ecosystem to meet unique enterprise and customer demands.

In this quadrant report, ISG highlights the current market positioning of AWS consulting providers in the U.S. and how they address the key challenges in the country. Our assessment is based on the depth and breadth of providers' service offerings and market presence.

Enterprises in the U.S. are adapting to the changes rising from their cloud journeys and migration to the cloud ecosystem. However, they face several challenges such as inadequate evaluation of capabilities, issues in change management, shortage of talented professionals and uncertainties about

integration with legacy infrastructure. With AWS consulting services, enterprises will have access to expertise on workload assessment, transformational strategy, advisory, re-architecture of legacy applications and integration of automation capabilities.

With enterprises focusing on the adoption of multicloud platforms and service integration, leveraging and integrating AWS plus X is gaining interest. Service providers should also have FinOps expertise along with AWS optimization capabilities as these are gaining strong traction among enterprises. Enterprises are hesitant to being advised by providers on the selection of hyperscalers and are particular before engaging in any partnerships. They tend to partner with a provider only when a successful pilot is executed before any wider portfolio partnership.

IT Leaders should read this report to better understand the relative strengths and weaknesses of consulting service providers, which would help them lead the digital transformation drive in their enterprises.
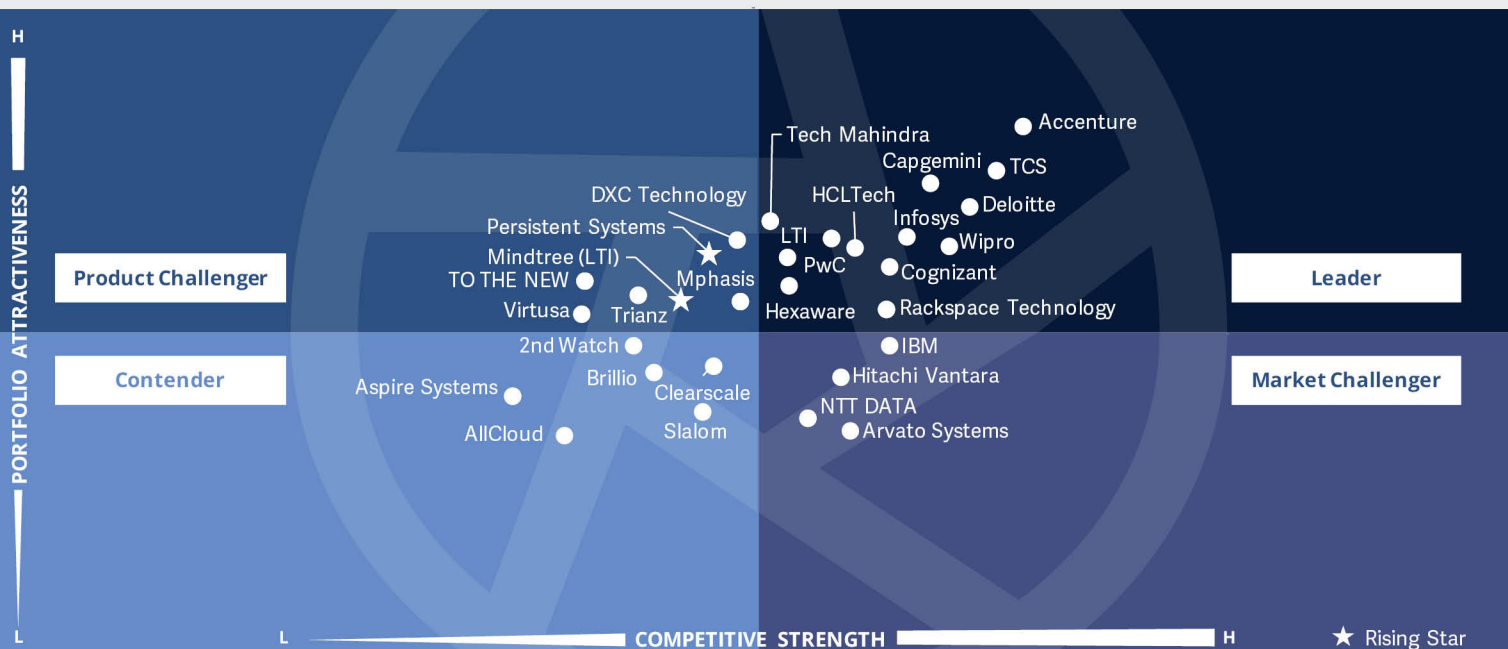
Sourcing, procurement, and vendor management professionals should read this report to develop a better understanding of the current landscape of consulting service providers in the U.S.

Software development and technology leaders should read this report to understand the positioning of consulting service providers and how the providers' offerings can impact an enterprise's ongoing transformation initiatives, while identifying the benefits of moving to the cloud.

ISG Provider Lens™

AWS Ecosystem Partners
AWS Consulting Services

Source: ISG RESEARCH

U.S. 2022

PORTFOLIO ATTRACTIVENESS (H / L)

Product Challenger

Contender

Leader

Market Challenger

COMPETITIVE STRENGTH (L / H)

★ Rising Star

Accenture
Tech Mahindra
Capgemini
TCS
HCLTech
Deloitte
DXC Technology
Infosys
Persistent Systems
LTI
Wipro
Mindtree (LTI)
PwC
Cognizant
TO THE NEW
Mphasis
Virtusa
Trianz
Hexaware
Rackspace Technology
2nd Watch
IBM
Aspire Systems
Brillio
Hitachi Vantara
Clearscale
NTT DATA
AllCloud
Slalom
Arvato Systems

This quadrant assesses how service providers **guide and consult enterprise clients** to adopt the AWS cloud for their business, technology and functional processes. This section covers the **mapping the right transition model** and AWS services.

Ashwin Gaidhani

AWS Consulting Services

Definition

Consulting partners form the single-largest group in the AWS Partner Network. Providers in this quadrant offer training, analysis, insight and guidance to address a wide range of business and IT needs, including cloud strategy, business case development and support, and client needs for (and delivery of) governance, risk and compliance support. They must not only offer critical technologies, architecture, security and industry-specific solutions, but also demonstrate business value to be delivered through consulting services

Eligibility Criteria

1. **Availability, experience and certification** of the staff supporting and delivering relevant offerings

2. Scope of **AWS competency and service delivery offerings** and certifications

3. **AWS-focused consulting roadmap** and innovations (current and planned)

4. Demonstrate client **value through business outcomes** or other measurable improvement

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

6. Scope of **security tools, technology and services** utilized

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

8. Suitability, maturity and **adaptability of pricing model**

Observations

Enterprises are rapidly adopting technological advances by developing expertise in their specific industry verticals. Business transformation advisory services typically comprise virtualization and business optimization objectives. AWS consulting can be the foundation of business engagements, as it carefully assesses the present landscape and suggests the right approach. Choosing the suitable process and mapping the right cloud capabilities are crucial for cloud transformation initiatives.

Providers are designing services, encompassing sustainability, application modernization and data monetization. They are also strengthening their AWS portfolio to survive the competition in the market. The prominent feature of AWS consulting is Perspective Guidance, which provides time-tested strategies, guidelines and patterns to accelerate cloud migration. Some trends in consulting include:

- The AWS Ambassador program, curated by AWS, certifies technology experts from the global community of AWS partners. These AWS ambassadors educate enterprise clients on AWS services and their benefits, as well as recommend the best-suited strategy.

- Consulting guidance on multicloud solutions, to build resiliency, is in high demand now. However, poly-cloud solutions are still in the evaluation and discussion phase, as the use cases are distinctive and industry reliant, requiring a high degree of technological maturity. However, the poly-cloud approach is gaining traction in niche industry solutions.

- Service providers are significantly investing in digital innovation, as they are keen on understanding the use of AWS services to accelerate the time-to-market for new and innovative products. Furthermore, AWS platform engineering skills and capabilities are a consistent requirement for enterprise clients to facilitate self-service, which can enhance developers' productivity.

From the 56 companies assessed for this study, 30 have qualified for this quadrant, with 13 being Leaders and two Rising Stars.

accenture

Accenture, with its proven track record of delivering advanced AWS consulting solutions, combines its domain knowledge and technological capabilities to serve clients in the U.S. market, covering all major industries.

Capgemini

Capgemini's collaboration with AWS enables its clients to keep track of employee movements within the premises, predict employee sentiments, and help their facility management teams monitor and utilize resources efficiently. Furthermore, the AWS Solution Provider Program enables the company to manage, service, support, and bill AWS accounts for enterprise clients.

cognizant

Cognizant focuses on finding the right balance of public, private and hybrid clouds for clients based on their specific requirements. One of the key strengths of the company is its cloud consulting services.

Deloitte

Deloitte integrates AWS services such as Amazon CloudWatch and AWS Systems Manager with its OpenCloud platform to help clients achieve optimal strategic outcomes from integrated technology and service value chains, with a focus on governance, risk management and sustainability.

HCLTech

HCLTech's AWS business unit leverages an innovative cloud inception framework. This helps establish, adopt and manage complex and hybrid IT environments, combining people, advisory services, processes and technologies, making HCLTech AWS's Premier consulting partner.

Hexaware, with Amaze, Mobiquity and Tensai, makes AWS consulting and client journey mapping a holistic, multidimensional approach across various functions.

Infosys combines intellectual property with advanced tools for realizing the potential of cloud deployment and migration. This helps clients discover and integrate enterprise software, services and processes to make them cloud ready and cloud enabled for high-performance digital businesses.

LTI's consulting and advisory services are strategically segregated and positioned by design. It explicitly focuses on building state-of-the-art accelerators and developing industry-specific AWS solutions and service offerings.

PwC

PwC and AWS combine deep industry knowledge with a vast network of cloud engineering resources to guide clients in building agile, purpose-built solutions powered by the AWS cloud, with a focus on cloud consulting.

Rackspace Technology has significant expertise in cloud migration and adoption, application modernization and cloud security. Its services portfolio covers assessment, evaluation and recommendation, with a focus on ideation and innovation.

TCS seeks to expand its AWS capabilities through research and co-innovation on the TCS Pace Port™ platform. It leverages its Machine First Delivery Model and automation assets for large organizations in multiple domains, focusing on delivering AWS consulting services.

AWS Consulting Services

Tech Mahindra

Tech Mahindra has a wide range of consulting services, from assessing client landscapes and planning the migration of applicable and appropriate workloads to strategizing modernization initiatives.

Wipro

Wipro AWS consulting services range from consulting to implementation and operation, enabling clients to achieve targeted business outcomes.

LTIMindtree

Rising Star **Mindtree's** AWS consulting services cover microservices, technology applications, cloud consulting and security. With its knowledge in sustainability-focused practices, the company drives modernization initiatives for enterprise clients.

Persistent Systems

Rising Star **Persistent Systems** and AWS combine domain knowledge and technology expertise with a business-first approach to accelerate cloud transformation tailored to each client's needs.

HCLTech

Leader

"HCLTech's CloudSMART enables clients to have a long-term, predictable cloud modernization journey."

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

Differentiated, industry-leading approach of AWS cloud continuum: HCLTech and AWS have been working on a unique partnership program to ensure success in clients' cloud journeys in a continuum. This is an industry best practice from HCLTech's AWS consulting services, given that strategic cloud journeys of any enterprise are to be planned and executed in a long-term, sustained approach, rather than planning for point projects on the cloud.

CloudSMART: continuous cloud modernization solution stacks and services: In line with this evolving partnership theme, HCLTech has augmented AWS consulting services and industry-focused strategic programs offering continuous cloud modernization solutions in CloudSMART, for AWS. In these programs, HCLTech and AWS experts work alongside customer teams to create a long-term strategic cloud implementation plan and associated milestones.

Accelerated pace of cloud-based digital transformation: The cloud continuum approach ensures that clients' overall ongoing digital transformation programs are driven at a consistent, yet accelerated pace and scale.

Caution

The HCLTech and AWS partnership has flourished over the years. Currently, with strategic joint initiatives like CloudSMART, HCLTech must elevate its cloud strategies to top-level enterprise executives. This will require drastically different and long-term, industry-first thought leadership from HCLTech in mature markets, such as the U.S., on its cloud continuum approach and associated solutions and benefits.

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

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.

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™

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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.

DECEMBER 2022

REPORT: AWS ECOSYSTEM PARTNERS