

AWS Ecosystem Partners

A research report highlighting the significance of AWS partners to the success of AWS and its customers

Customized report courtesy of:

DXC TECHNOLOGY

Executive Summary	03
Provider Positioning	06
Introduction	
Definition	10
Scope of Report	11
Provider Classifications	12
Appendix	
Methodology & Team	43
Author & Editor Biographies	44
About Our Company & Research	46
Star of Excellence	40
Customer Experience (CX) Insights	41

AWS Professional Services	13 – 19
Who Should Read This Section	14
Quadrant	15
Definition & Eligibility Criteria	16
Observations	17
Provider Profile	19

AWS Managed Services	20 – 26
Who Should Read This Section	21
Quadrant	22
Definition & Eligibility Criteria	23
Observations	24
Provider Profile	26

AWS Data Analytics, AI and ML	27 – 33
Who Should Read This Section	28
Quadrant	29
Definition & Eligibility Criteria	30
Observations	31
Provider Profile	33

AWS SAP Workloads	34 – 39
Who Should Read This Section	35
Quadrant	36
Definition & Eligibility Criteria	37
Observations	38
Provider Profile	39

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Expanding AWS footprint and provider capabilities drives innovation and delivers business outcomes

Rapid economic growth in the APAC region in recent decades has driven the demand for efficient and scalable business solutions. This region is witnessing a rise in managed services, increased containerisation and adoption of serverless technologies, and a growing emphasis on data analytics and AI. The APAC region comprises countries with varying maturity levels and unique business and regulatory requirements. AWS recognises this diversity and has expanded its regional presence through Availability Zones, Edge Locations and Regional Edge Locations. The company has cultivated a strong partner ecosystem, fostering collaboration with service providers and system integrators (SIs). Thus, AWS and other providers focus on expanding their reach, capabilities and capacity

to align with region-specific requirements. APAC is also home to providers geographically focused on one or two countries and those specialised in a single solution set.

Market growth and demand: The APAC region is experiencing significant growth in cloud adoption, driven by increasing digitalisation across industries such as manufacturing, finance, healthcare and the public sector. This trend has contributed to the demand for AWS-related professional and managed services, such as cloud migration services. Digitalisation is also driving application modernisation and use cases. Additionally, service providers are increasingly adopting profit-sharing models for outcome-based pricing.

Largest talent pool: Apart from being the most populous region, APAC also boasts a large talent pool specialised in cloud, SAP, and AI and ML. While the initial development of this talent pool was driven by cost arbitrage for large global corporations and SIs, it now serves as a model to drive rapid learning and innovation at scale.

APAC's diverse
economy offers
unique opportunities
and challenges for
AWS service provider.



Competitive environment: The APAC region is experiencing a surge in demand for cloud services, driven by digital transformation initiatives and increased adoption of cloud-native technologies. This trend has intensified competition among service providers and SIs.

Rapidly evolving ecosystem and specialisation: The AWS ecosystem in APAC is highly competitive, featuring a blend of global, regional and local service providers. Global SIs maintain a strong market presence, leveraging their global experience and local resources. However, regional and local players are gaining traction by offering specialised solutions tailored to specific industries or markets.

Data analytics and ML: Service providers are building solutions specialising in data analytics and ML by leveraging AWS tools and technologies. They are building industry-specific solutions and workflows using the AWS platform for data ingestion, processing, analysis and model development. These solutions help customers extract valuable insights from their data and drive data-driven decision-making.

SAP modernisation: SAP has a substantial presence in APAC across key industry segments such as manufacturing, financial services and the public sector. These industries are major contributors to the region's economy. SAP is encouraging its customers running SAP ERP Central Component (ECC) or S/4 HANA on-premises systems to migrate to the cloud by December 31, 2027. This deadline for SAP's RISE initiative has created a significant opportunity for service providers to transition their customers to the cloud, with AWS being one of the three certified solutions. Providers with strong SAP practice, skillsets and accelerators are synergising their competence with AWS SAP tools and techniques to accelerate customer migration to SAP RISE.

Managed services: The AWS managed services market is anticipated to grow significantly. Automation and AI integration will majorly affect future managed services offerings. A few of the trends in managed services are listed as follows:

- Concerns over data privacy and evolving regulations are driving the need for robust security solutions and compliance frameworks. Providers are developing in-depth cybersecurity practices to enhance security measures.
 - Cloud spending optimisation is a significant concern for enterprises. Managed service providers (MSPs) can help identify and eliminate inefficiencies and implement cost-saving strategies.
 - Automation and DevOps: Enterprises embrace automation and DevOps practices to streamline their AWS operations. These practices include using tools such as continuous integration and continuous deployment (CI/CD) pipelines and infrastructure as code (IaC).
 - Hybrid and multicloud adoption: Many organisations are adopting hybrid or multicloud strategies to leverage the benefits of different platforms and avoid vendor lock-in.
 - Generative AI (GenAI): AI is integrated into managed services for workload management, anomaly detection and security enhancements.
- Professional services:** Professional services are gaining momentum across regional enterprises as they seek a one-stop-shop partner experience with local providers. A few key trends gaining importance in the market are listed as follows:
- Legacy system modernisation: Migrating to microservices architectures and containerised environments using AWS Elastic Kubernetes Service (EKS) and AWS App2Container
 - Advanced data analytics and ML: Leveraging Amazon SageMaker and AWS Data Lakes
 - Serverless computing: Adopting AWS Lambda and AWS Fargate for scalable and cost-effective solutions
 - Platform agnosticism: Focusing on platform-agnostic solutions due to similar offerings across cloud providers




Executive Summary

- Evolving skillsets: Growing demand for multiskilled professionals with expertise in development, DevOps and cloud environments
- Segmented modernisation: Analysing modernisation efforts into specific segments for targeted strategies
- Industry-specific solutions: Offering tailored approaches to address the unique needs of different sectors


AWS has built a strong partner ecosystem in the APAC region to address unique customer needs, including geographical reach and regulatory requirements. The region boasts the largest talent pool skilled in cloud technologies, SAP, AI and ML. This talent pool is driving innovation and services at scale.



 Provider Positioning


	AWS Professional Services	AWS Managed Services	AWS Data Analytics, AI and ML	AWS SAP Workloads
AC3	Not In	Product Challenger	Not In	Not In
Accenture	Leader	Leader	Leader	Leader
Birlasoft	Contender	Contender	Not In	Contender
Blazeclan	Product Challenger	Not In	Contender	Not In
Capgemini	Leader	Leader	Leader	Product Challenger
Cloud4C	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Coforge	Contender	Contender	Contender	Not In
Cognizant	Leader	Leader	Leader	Leader
Deloitte	Product Challenger	Product Challenger	Product Challenger	Leader
DXC Technology	Leader	Leader	Leader	Leader



 Provider Positioning


	AWS Professional Services	AWS Managed Services	AWS Data Analytics, AI and ML	AWS SAP Workloads
Encora	Contender	Contender	Contender	Not In
FPT Software	Market Challenger	Not In	Not In	Not In
Genpact	Not In	Not In	Product Challenger	Not In
GFT	Product Challenger	Not In	Not In	Not In
HCLTech	Leader	Leader	Leader	Leader
Hitachi Digital Services	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Infosys	Product Challenger	Product Challenger	Leader	Product Challenger
Kyndryl	Rising Star ★	Product Challenger	Product Challenger	Product Challenger
LTIMindtree	Product Challenger	Product Challenger	Product Challenger	Product Challenger



 Provider Positioning

	AWS Professional Services	AWS Managed Services	AWS Data Analytics, AI and ML	AWS SAP Workloads
NCS	Market Challenger	Market Challenger	Not In	Not In
NTT DATA	Not In	Product Challenger	Not In	Not In
Orange Business	Product Challenger	Product Challenger	Not In	Not In
Persistent Systems	Product Challenger	Product Challenger	Product Challenger	Not In
PwC	Leader	Leader	Product Challenger	Product Challenger
Quantiphi	Not In	Not In	Rising Star ★	Not In
Rackspace Technology	Product Challenger	Rising Star ★	Not In	Product Challenger
Slalom	Not In	Product Challenger	Not In	Not In
Tata Communications	Contender	Product Challenger	Not In	Contender



 Provider Positioning

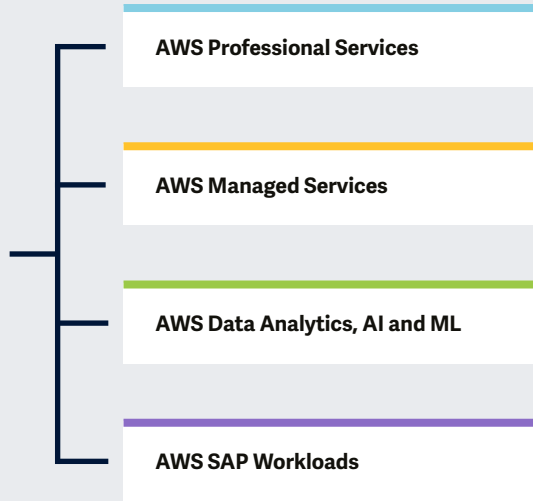
Page 4 of 4

	AWS Professional Services	AWS Managed Services	AWS Data Analytics, AI and ML	AWS SAP Workloads
TCS	Leader	Leader	Leader	Leader
Tech Mahindra	Leader	Leader	Product Challenger	Rising Star ★
Telstra Purple	Market Challenger	Market Challenger	Not In	Not In
ThoughtWorks	Product Challenger	Not In	Not In	Not In
Wipro	Leader	Leader	Leader	Leader



Key focus areas for AWS Ecosystem Partners 2024.

Simplified Illustration Source: ISG 2024



Definition

In 2024, AWS introduced major innovations in services related to the cloud, data analytics and ML alongside a general mission that supports clients in their transformation toward sustainability, focusing on digital sovereignty and enhanced innovation power. Public cloud usage tends to outpace traditional infrastructures and known operational techniques. The success of AWS' mission depends on sophisticated CloudOps that cover cloud security and governance, resource and cost optimisation, provisioning resources intelligently and service availability across delivery models (including the Edge). This strategy implies the need for maximum interoperability among services.

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

AWS continues solidifying its leadership and commitment to technological innovation, which is emphasised by various strategic alliances and pioneering developments. Partnerships are pivotal for cutting-edge innovation, future-proofing the technology service providers' road map and defining their strategies. The industry focus continues to strengthen the collaboration between global system integrators and AWS in developing solutions. These developments, coupled with AWS' ongoing commitment to product innovation and strategic foresight, signal a future where digital transformation is not just about technological advancement but also sustainable and responsible growth. AWS is paving the way for next-generation cloud services through its latest partnerships and product initiatives, reinforcing its role as a catalyst for industry-wide innovation and ethical technological practices.



Scope of the Report

This ISG Provider Lens™ quadrant report covers the following four quadrants for services/solutions: AWS Professional Services, AWS Managed Services, AWS Data Analytics, AI and ML, and AWS SAP Workloads.

This ISG Provider Lens™ study offers IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers/software vendors
- A differentiated positioning of providers by segments (quadrants)
- Focus on the regional market

Our study serves as the basis for important decision-making by covering providers' positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing vendor relationships and potential engagements.

Provider Classifications

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

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

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

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

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





Provider Classifications: Quadrant Key

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

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

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

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

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

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





AWS Professional Services

Who Should Read This Section

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

The AWS cloud ecosystem is experiencing rapid evolution, driven by enterprises' accelerated transition to cloud-native architectures. Organisations prioritise cost efficiency through FinOps, bolster security and compliance postures, and harness the power of AI and ML, including generative AI (GenAI), to drive innovation. As industry-specific cloud adoption increases, the demand for specialised AWS expertise and solutions surges.

Providers that become go-to partners should have comprehensive experience in professional services and consulting capabilities, a robust talent ecosystem and domain expertise. They should also possess strong delivery capabilities within the APAC region.



IT professionals should read this report to understand AWS professional service providers' relative strengths and weaknesses, which can help them drive digital transformation within their enterprises.

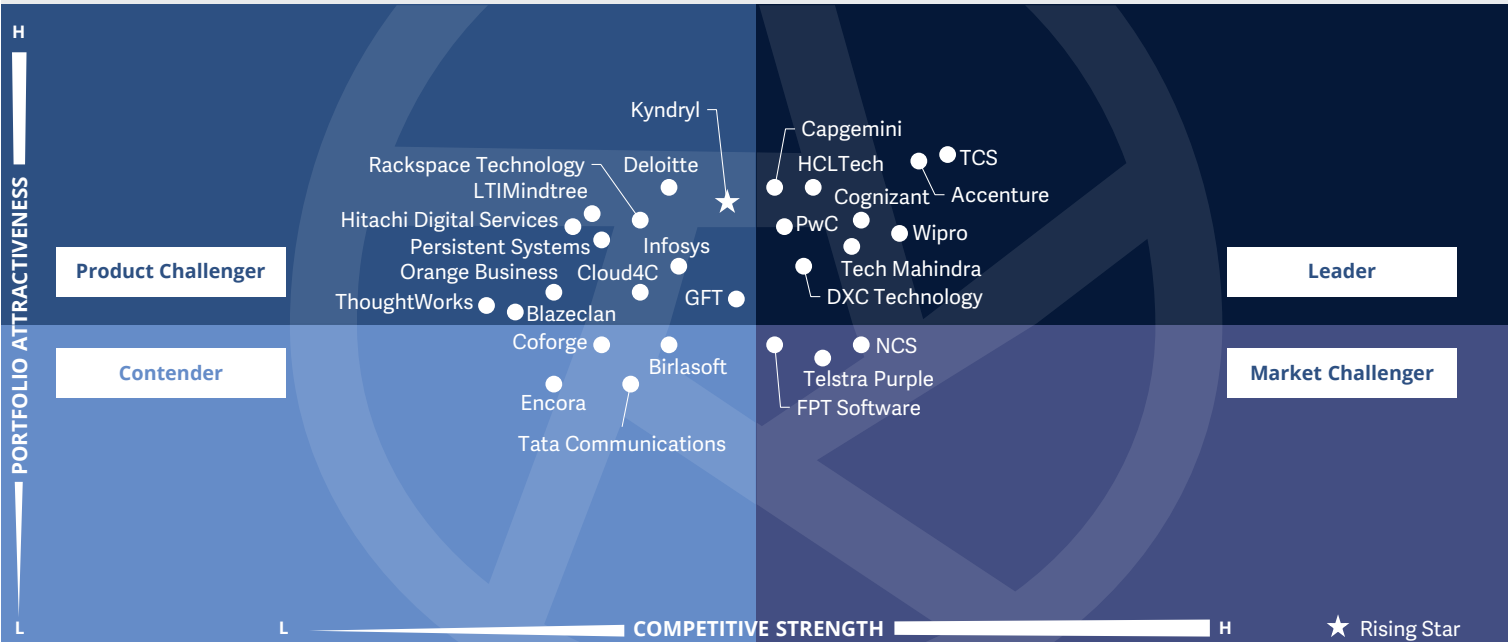


Procurement professionals should read this report to comprehend the current landscape of AWS professional service providers in APAC.



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





This quadrant evaluates service providers' **technical capabilities** in **managing data** and executing **pre and postmigration tasks**. A strong **migration competency** is crucial for a successful cloud transition.

Srinivasan PN



AWS Professional Services

Definition

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

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

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

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

Eligibility Criteria

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



Observations

The cloud adoption landscape is rapidly evolving. Enterprises are increasingly transitioning to multicloud strategies to optimise costs and reduce reliance on single providers. Industry cloud platforms are gaining traction to support modernisation initiatives across various sectors. Enterprises are adopting microservices architectures for agility and scalability. Expertise in containerisation technologies such as AWS Elastic Container Service (ECS), Elastic Kubernetes Service (EKS) and Fargate are becoming crucial. Listed below are some of the prominent trends observed in the market:

Focus beyond cost savings: The purpose of cloud migration is no longer restricted to cost reduction. Enterprises are leveraging the cloud to modernise technologies, IT operations and overall business functions. Cloud is becoming the foundation of digitalisation strategies.

Segmented modernisation: Modernisation efforts are targeted at specific areas such as application re-engineering, platform

engineering and DevOps practices. This approach allows for more focused and effective improvements.

Increase in skillsets: The demand for multiskilled professionals with expertise in cloud development, DevOps, networking and administration is growing. Automation is increasing the need for versatility and cross-functional capabilities.

Data governance and compliance: With stricter data privacy regulations, businesses are focusing on data governance and compliance. Services such as AWS Lake Formation, AWS Glue and AWS Identity and Access Management (IAM) are in demand to enable data security and regulatory adherence.

Providers in the APAC region are increasingly investing in partnering with AWS to meet and exceed customers' evolving expectations. They are building the right set of intellectual property, accelerators and platforms while acquiring the necessary skillset and talent and developing capabilities to deliver large, complex engagements.

From the 45 companies assessed for this study, 28 qualified for this quadrant, with nine being Leaders and one Rising Star.

accenture

Accenture's technology solutions such as secure cloud foundation, next-generation migration and data lake fabric offer seamless transformation experience and desired business outcomes.

Capgemini

Capgemini's Move to Cloud offering is designed to enable accelerated migrations for enterprise customers. It also includes competitor analysis and a value-driven pricing structure for enterprises.

cognizant

Cognizant's in-depth expertise in 500 successful AWS customer launches in over 40 countries highlights its capabilities in guiding businesses through the complexities of AWS migration and implementation, thereby facilitating a smooth transition.

DXC TECHNOLOGY

DXC Technology, a trusted AWS partner, exhibits technological and domain expertise. With over 27 specializations, it empowers clients with intelligent business solutions. It is an AWS Premier consulting partner with over 9,500 certified FTEs.

HCLTech

HCLTech's ADvantage Cloud accelerates modernising and migrating on-premises applications and databases to modern architectures by utilising cloud-native services and containers.

pwc

PwC's Cloud Consumption and Financial Optimization (CFO) solution provides enterprise clients with the required tools, processes, controls and skills to efficiently manage and optimise their cloud spending.



AWS Professional Services



TCS' Cloud Migration Factory is designed to meet the specific requirements of each enterprise. It integrates agility and process rigour, enabling the seamless execution of complex migration programs.



Tech Mahindra provides tailored solutions for industries such as telecom, manufacturing and healthcare and leverages its domain expertise to address unique industry challenges.



Wipro's Enterprise Futuring offers clients forward-looking solutions for large-scale enterprise transformation by combining intelligent insights, enterprise data and applications platforms, digital operations, cybersecurity risk services and advanced technologies.



The Rising Star **Kyndryl's** consulting arm, Kyndryl Consult, accelerates transformation by positioning business outcomes with technologies underpinned by decades of mission-critical experiences and a shared culture of continuous modernisation.





“DXC Technology’s strong full-stack capabilities along with migration, application modernisation and consulting capabilities, driven by its robust regional focus and internal intellectual property, make it a Leader in this quadrant.”

Srinivasan PN

DXC Technology

Overview

DXC Technology is headquartered in Virginia, US. It has more than 129,900 employees across over 130 offices in 70 countries. In FY23 the company generated \$14.4 billion in revenue, with Global Infrastructure Services as its largest segment. DXC and AWS collaborate to modernise the IT services industry and accelerate client transformations on AWS through the SaaS Factory program. DXC has migrated over 30 clients to AWS and maintains a strong partnership as a Premier AWS Partner Network (APN) member. This partnership spans over five years, during which DXC has accumulated over 3,000 AWS-certified individuals.

Strengths

In-depth migration capabilities: DXC’s robust migration capabilities are driven by its Precision Guided Modernization approach. The company has facilitated the migration of over 65,000 workloads to the cloud, including more than 27,000 to the public cloud. DXC serves over 800 managed cloud customers and offers innovative full-stack managed platform services for SAP, Oracle, Contact Centre, GenAI and custom applications, supporting more than 2,000 users.

Data-driven intelligent automation platform:

DXC uses its Platform X™ that enables enterprises to accelerate their journey to resilient, self-healing IT across their entire IT estate. It helps IT teams detect and resolve issues quickly and automatically predict and prevent future problems.

Optimised infrastructure as code (IaC) for streamlined cloud deployment:

DXC’s IaC asset library, known as Nucleus, follows industry and cloud best practices to automate the deployment of cloud services and ensure consistency, compliance and efficiency across enterprises. It uses the latest IaC capabilities to help reduce errors, minimise costs and respond rapidly to market demands. The assets are built across various capabilities, from regulated landing zone designs to AI and ML, contact centres, databases, application stacks, identity and access management (IAM) and data platforms.

Caution

DXC should focus on investing in and expanding its presence and acquiring customers beyond a few countries in APAC, including Australia, India, Singapore, Greater China, the Philippines and Japan. The provider should also create compelling customer use cases and success stories to expand its regional customer base.





AWS Managed Services

Who Should Read This Section

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

Cloud operations and management are critical for businesses of all sizes to succeed in today's digital world. AWS offers numerous solutions; however, many enterprises lack the internal expertise to leverage their potential completely. This gap has created a demand for external service providers to manage cloud infrastructure and achieve business goals.

With cloud environments becoming more complex with hybrid and multicloud setups, the emphasis on cost optimisation, sustainability and security is growing. Service providers are responding by expanding their offerings to include financial management, governance and compliance tools. The focus on sustainability has led to the emergence of green cloud solutions.

The cloud services market is evolving rapidly, driven by increasing enterprise demands and technological advancements. Service providers are helping businesses navigate this complex landscape and maximise the benefits of cloud adoption.



IT professionals should read this report to understand AWS managed service providers' relative strengths and weaknesses, which can help them drive digital transformation in their enterprises.

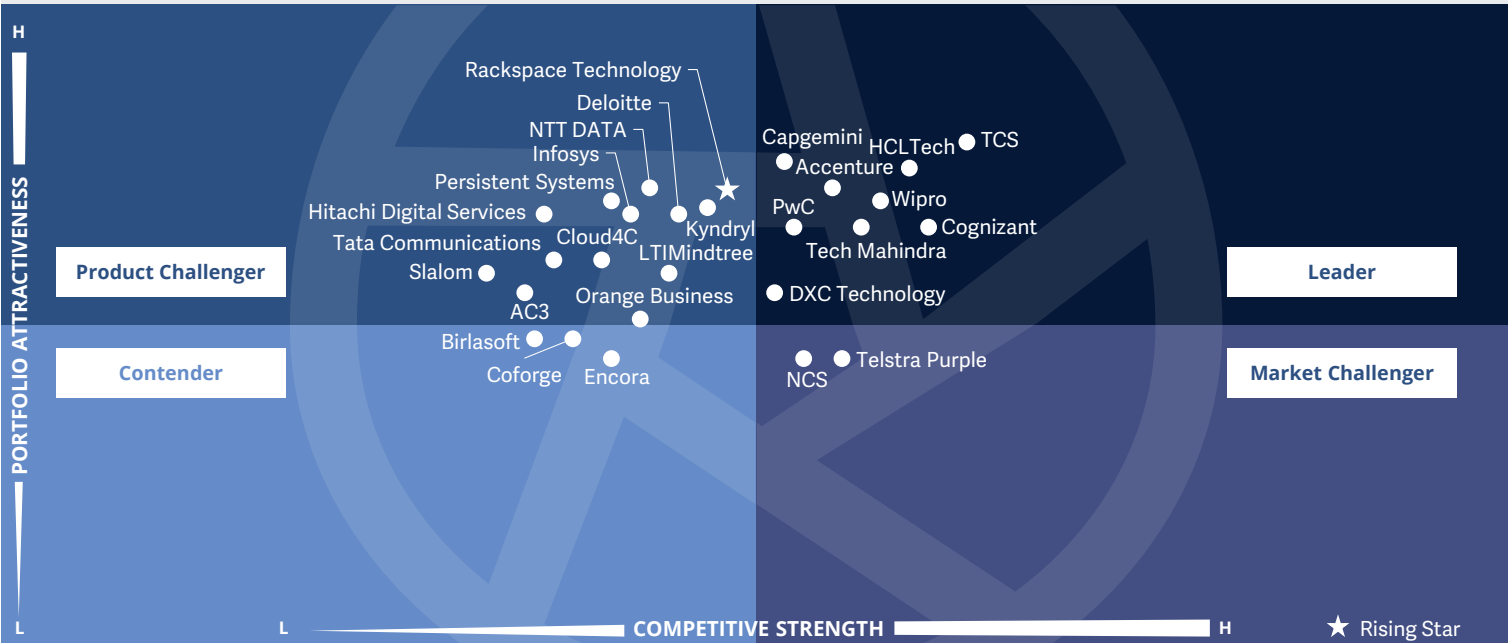


Procurement professionals should read this report to comprehend the current landscape of AWS managed service providers in APAC.



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





This quadrant evaluates service providers' ability to effectively **manage and operate public and multicloud environments**, emphasising the **integration of new technologies and FinOps for cost optimisation**.

Srinivasan PN



AWS Managed Services

Definition

This quadrant covers MSPs offering professional services that encompass orchestrating, provisioning, monitoring and managing operations of a customer's public cloud and multicloud environment. The services are in addition to IaaS and PaaS hyperscale platforms for public clouds from third-party service providers. The aim is to maximise performance in the cloud, reduce costs and ensure compliance and security. The providers typically use developed or licensed cloud management platforms (CMPs) and tools to deliver customers with the highest level of automation and the necessary transparency over the managed cloud resource pool in terms of capacity utilisation, costs and independent management.

Eligibility Criteria

1. Have AWS Managed Service Program **certification**
2. Expertise in autonomous **ML-driven** orchestration, configuration and management of platforms and 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 and cost optimisation (FinOps)**
8. Experience in **server migration** and handling resource availability



Observations

Cloud operations and management have become an integral component of any cloud transformation initiative by enterprises, irrespective of the scale and region. The investment and expansion of the AWS portfolio across different horizontals and verticals, including GenAI, has encouraged enterprises to embrace and expand their horizons with AWS. This approach has created a demand for service providers with strong AWS capabilities, talent community and domain expertise, making them the go-to partners for enterprises seeking a seamless transformation experience.

With the emergence of cost optimisation and value realisation, enterprises are becoming cautious while selecting providers, prioritising those with FinOps as a core element of their transformation journey. Providers are increasingly investing in developing in-house FinOps tools to help enterprises monitor cost and resource utilisation.

The importance of adhering to compliance and regulatory standards is continuously increasing. The demand for these regulations across industries is also soaring, and providers

supporting enterprises to obtain and adhere to these standards are considered vital during transformation engagements.

Besides Europe, APAC enterprises are also emphasising sustainability components as part of their cloud journey. This approach is particularly crucial and regulated for enterprises in New Zealand. Recently, this trend has gained momentum, with a strong traction towards including sustainability in the cloud journey. Thus, enterprises are seeking service providers with GreenOps as one of the core elements.

With GenAI becoming a major subject of discussion, AIOps is also gaining momentum among enterprises as it could help them improve their business focus, resolve incidents quickly, improve cost optimisation and enhance security capabilities. Such advantages are compelling providers to invest in building competency and capabilities around AIOps. Providers are increasingly investing in expanding their horizons in the APAC region by building innovation and delivery centres, increasing their acquisition investments and targeting large customers with substantial deal sizes.

From the 45 companies assessed for this study, 27 qualified for this quadrant, with nine being Leaders and one Rising Star.



Accenture's Velocity innovation engine drives accelerated cloud adoption with secured, repeatable and automated environments embedded with industry-specific solutions at the core.



Capgemini's cloud maturity model offers a comprehensive cloud governance lifecycle, policy-driven risk management, and business and application availability delinked from infrastructure.



Cognizant's Neuro platform provides AIOps for ITSM use cases, including observability, automatic self-healing, preventative incident detection, event correlation, and resolution for traditional infrastructure and cloud management.



DXC Technology's X™ platform enables data-driven intelligent automation and self-healing ITSM. It empowers IT teams to detect and resolve issues quickly and automatically predict and prevent future catastrophes.



HCLTech's AI and Cloud Native Labs, located in Dallas and Noida, India, are integral extensions of the Cloud Native Labs, which are focused on building strategic partnerships to deliver AI enablement.



PwC utilises an iterative, test-and-learn approach to transform technologies, teams and processes into integrated units that enhance awareness and enable a faster, more automated enterprise.



AWS Managed Services



TCS' Cloud Exponence FinOptimizer module simplifies the allocation of cloud costs to business groups, facilitating efficient cost tracking. It also maintains a comprehensive historical record of utilised cloud resources.



Tech Mahindra's AWS jump-start kit is a guidance document designed to quickly initiate solution designs on AWS, detailing AWS services and best practices tailored to specific use cases, tools, development methodologies and testing guidelines.



Wipro's FullStride Cloud initiative offers cloud capabilities as part of an integrated, full-stack offering, creating an end-to-end cloud services delivery engine.



Rackspace Technology's (Rising Star) launch of Rackspace Managed Cloud delivers seamless managed services for customers across multi or hybrid clouds, coupled with IT Information Library (ITIL) frameworks and ITSM methodologies.





“DXC Technology’s in-depth automation, compliance and governance capabilities and end-to-end AWS expertise position it as a preferred partner in the APAC region.”

Srinivasan PN

DXC Technology

Overview

DXC Technology is headquartered in Virginia, US. It has more than 129,900 employees across over 130 offices in 70 countries. In FY23 the company generated \$14.4 billion in revenue, with Global Infrastructure Services as its largest segment. DXC’s joint GTM strategy with AWS targets 1,000 of the largest ITO customers to accelerate customer, workforce and asset transformation. It has built industry clouds to accelerate the transformation journey for insurance, financial services, manufacturing and automotive industries, incorporating GenAI at scale. It established a new Cloud Innovation Center in Bangalore in 2023 to showcase AWS Cloud services to customers.

Strengths

Automation and scalability at the core:

DXC has invested in and developed intellectual property for IT automation, including the automation of enterprise landing zones, security controls, AWS account deployments and AWS workloads. Its in-house Platform X is a data-driven automation platform that helps enterprises quickly build resilient, self-healing IT systems across their entire IT estate.

Cost and performance optimisation:

Customers continuously focus on cost, performance and service optimisation through integrated third-party FinOps tools, offering cost savings recommendations such as eliminating unused resources, transitioning to new cost-optimised instances and right-sizing.

Robust managed container services:

DXC provides managed services for native container-based solutions such as AWS Fargate, Elastic Container Service (ECS) and Red Hat OpenShift Service on AWS (ROSA), including patching, observability, logging, networking, persistent storage, backup and disaster recovery. The provider leverages internal platforms such as DXC Container DevOps platform; an end-to-end, cloud-agnostic, enterprise-grade platform for next-generation application lifecycle management; and DXC DOKS Kubernetes platform that uses open-source tools to modernise, automate and digitalise applications, infrastructure and operations.

Caution

DXC primarily utilizes third-party FinOps to support customers’ cost optimisation initiatives. Considering that FinOps is gaining prominence among enterprises, the provider should continue expanding its existing in-house tools.





AWS Data Analytics, AI and ML

Who Should Read This Section

This report is relevant to enterprises across industries in APAC for evaluating providers of AWS data analytics, AI and ML services. In this quadrant, ISG highlights the current market positioning of providers in APAC and assesses how they address challenges that enterprises face in the context of AWS data analytics, AI and ML.

Effective utilisation of data analytics and ML is becoming a key differentiator for businesses across industries. Enterprises are seeking to increase accessibility by leveraging AutoML tools and platforms such as AWS SageMaker. These solutions empower organisations of all sizes to utilise AI and ML capabilities without extensive data science expertise. They are adopting serverless solutions such as AWS Glue to streamline data processing and ML workloads, improving efficiency and cost-effectiveness.

Focus on security is gaining prominence as enterprises prioritise data privacy and protection due to the tremendous growth in data volumes. Enterprises using AWS services such as Macie and PrivateLink for SageMaker are able to address concerns faced during their data journey.



IT professionals should read this report to understand the relative strengths and weaknesses of AWS data analytics, AI and ML service providers for driving digital transformation in enterprises.

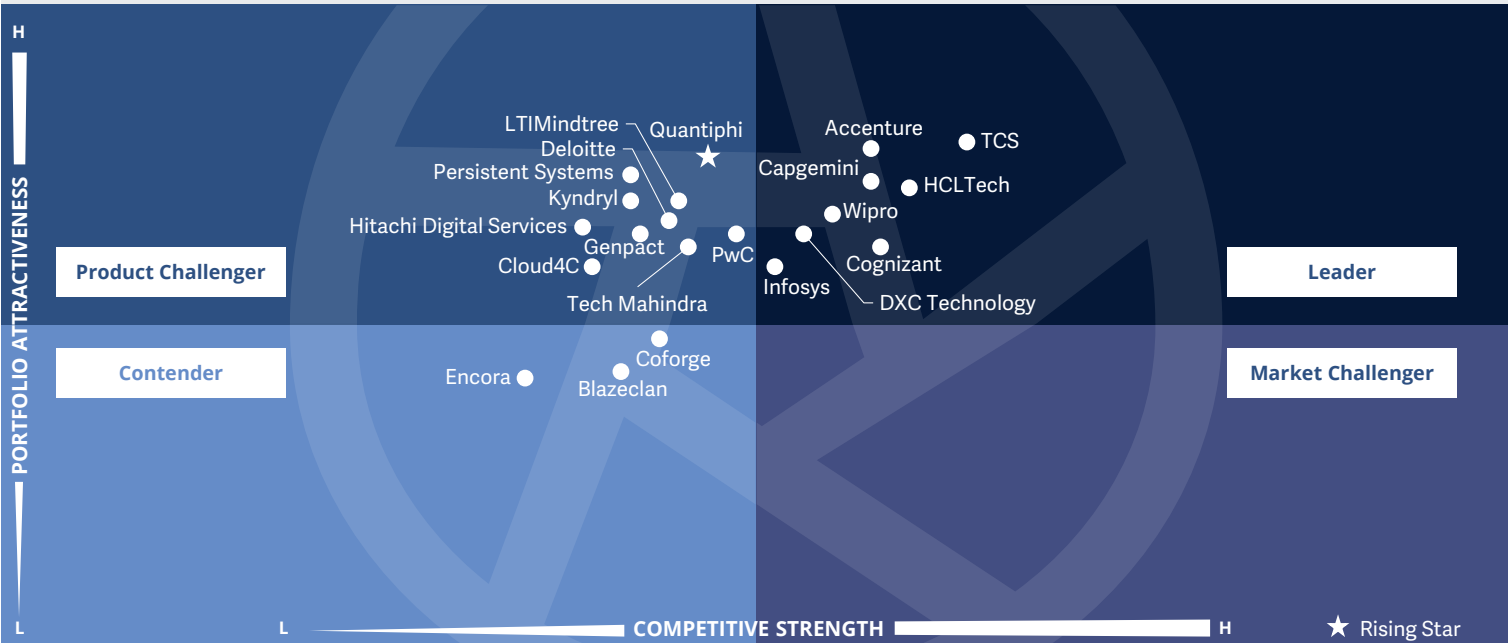


Procurement professionals should read this report to comprehend the current landscape of AWS data analytics, AI and ML service providers in APAC.



Analytics professionals should read this report to understand AWS data analytics, AI and ML service providers' positioning and their impact on enterprise transformations, alongside cloud migration benefits.





This quadrant assesses service providers offering **AI, ML and data analytics services** and leveraging **AWS platforms and tools** such as **Amazon Bedrock and Amazon Q**. It also focuses on evaluating providers offering intellectual property and accelerators.

Rajesh Janey



Definition

This quadrant covers providers of two increasingly intertwined sets of IT capabilities — the ability to collect and analyse an array of data types and amounts and the ability to demonstrate ML capabilities that enable faster and more efficient analysis of various kinds of data within and across a growing range of systems and applications. The providers in this space must demonstrate capabilities and experience in data science (including big data and advanced analytics), database and solution architecture, ML and related AI development (including generative AI), IoT data processing, solutions and implementation, software development, networking and data privacy and security. Most of these providers use an adaptive portfolio of tools and technologies to develop and deliver solutions.

Eligibility Criteria

1. Scope and use of **relevant tools** and technologies
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 **experts** in analytics, data science and ML
5. Ability to provide an AWS-focused offering **road map** and innovations (current and planned)
6. Number and reputation of **references** for ML and analytics services and solutions on AWS
7. Suitability, maturity and adaptability of **pricing model** with a go-to-market (GTM) strategy
8. Breadth and depth of **partner and channel** relationships
9. Competency and capability in **deploying and managing IoT solutions** on AWS



AWS Data Analytics, AI and ML

Observations

The APAC market for AWS data analytics, AI and ML cannot be seen as a single, homogeneous market. It combines countries with different maturity levels and data localisation regulations, which are serviced by AWS Availability Zones, Edge Locations and Regional Edge Locations. As service providers in this market have a strong relationship with AWS, they are able to tailor their solution sets based on AWS availability and customer needs. APAC has robust service providers that often focus on one country and a single segment or solution set.

The APAC region has a vast pool of AI and ML talent, with most service providers operating in India and other APAC countries and offering services globally. This talent pool, combined with rapid evolution in AI, drives innovation. Considering APAC's manufacturing capabilities and large population, service providers have found success and built use cases in government-to-citizen services, healthcare, manufacturing, BFSI, and travel and transportation.

From the 45 companies assessed for this study, 21 qualified for this quadrant, with eight being Leaders and one Rising Star.

accenture

Accenture's over 5,000 data scientists, data and ML capabilities, and 15-year AWS partnership, including over 40 competencies, have led to the creation of the Accenture Intelligence Platform and accelerators such as Artemis, driving actionable insights and innovation at scale.

Capgemini

Capgemini, committed to APAC through its acquisition of BTC Corporation in Japan, is expanding its strategic collaboration with AWS to embrace GenAI enterprisewide. It is also building AWS-led technologies, such as Carbon Sustainability Data Hub and GenAI accelerators.

cognizant

Cognizant's 16-year partnership with AWS has resulted in solutions and accelerators that enable data-driven decisions at scale. Its Data and Intelligence Toolkit allows enterprises to accelerate their data and analytics modernisation.

DXC TECHNOLOGY

DXC Technology is expanding its capacity and capability with AWS in the APAC region. It harnesses AWS technologies to create analytics and engineering offerings, including Industry 4.0 accelerators powered by GenAI, ML and IIoT.

HCLTech

HCLTech is expanding its presence in APAC, targeting large customers in ANZ and ASEAN markets. It has multiple AWS delivery centres and offers a comprehensive data analytics portfolio, including AWS native solutions such as Intelligent Ingestion and DataPatrol architecture.

Infosys

Infosys leverages AWS AI to provide scalable, AI-driven insights and forecasting. Utilising Amazon Comprehend and SageMaker, the company offers secure, cost-effective big data solutions across industries, enhancing decision-making and business automation.

TCS TATA CONSULTANCY SERVICES

TCS, with 43,000 associates across 12 delivery locations in APAC and a robust AWS partnership, holds AWS competencies related to data and AI and service delivery validation on data and analytics. It offers a comprehensive solution set built on Data for AI.

wipro

Wipro was recognised by AWS as the 2023 GSI Partner of the Year for APJ and India. It continues to invest in AI and ML through HOLMES and ai360, developing industry-related offerings, intelligent fraud detection and GenAI-based marketing solutions.



AWS Data Analytics, AI and ML

Quantiphi

Quantiphi (Rising Star) leverages AWS technologies to build solutions for IT and business process management (BPM). Its Contact Center Transformation solution uses conversational AI to enhance output and efficiency. It has pioneered an MLOps framework on Amazon SageMaker.





“DXC Technology is expanding its AWS capacity in APAC, using advanced tools, automation, AI, factory models and transformation studios. It operates 54 data centres to augment hyperscaler locations and address workload requirements.”

Rajesh Janey

DXC Technology

Overview

DXC Technology is headquartered in Virginia, US. It has more than 129,900 employees across over 130 offices in 70 countries. In FY23 the company generated \$14.4 billion in revenue, with Global Infrastructure Services as its largest segment. It offers analytics and AI platform solutions leveraging the latest technologies and methodologies to deliver superior results. Its trademarked approach to innovation combines human-centred design with digitalised assets, automation, traditional AI, GenAI, DataOps and MLOps to deliver innovative solutions that drive business value. DXC's resources are experts in handling large-scale and complex projects. It has a robust presence in APAC.

Strengths

Comprehensive services suite: DXC's AWS data ingestion, data governance, data analytics, and AI and ML services are designed to meet the growing demand for agility, enabling real-time access to data and advanced analytics in organisations. These services help businesses scale in an accelerated and efficient manner.

Transformation of legacy EDW and BI environments:

DXC's Analytics Modernization and Migration Factory addresses the challenges of ageing enterprise data warehouse (EDW) and business intelligence (BI) environments. This solution assists organisations in identifying, prioritising and transforming data workloads and modernising organisations' data analytics and AI fabric.

Platform for digital transformation:

DXC's Analytics and AI Platform deploys enterprise-grade data, analytics and AI at scale for data science, agile development and production. This modernised platform supports enterprises' digital transformation initiatives.

Streamlined production and distribution:

DXC's SPARK is a smart platform designed to optimise smart production and distribution processes. It includes prebuilt solution accelerators that reduce transformation costs while reducing customers' time-to-market.

Caution

Contrary to the slow revenue generation globally, in APAC, DXC has achieved a 30 percent revenue generation, showcasing its commitment to expanding its presence in the region. The company could share more case studies to demonstrate the best practices stemming from APAC to help further bolster its growth.





AWS SAP Workloads

Who Should Read This Section

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

Businesses are rapidly migrating their SAP applications to cloud-based platforms, particularly AWS. They are embracing greenfield and brownfield transformations driven by the need for modernisation and innovation. The impending decommissioning of legacy SAP systems is accelerating this migration. Enterprises are using automation tools and AI to streamline SAP operations, improve decision-making and reduce costs.

Despite the potential benefits of a full AWS suite, many enterprises choose a hybrid approach for SAP workloads, retaining critical functions on-premises. SAP's robust efforts towards promoting the RISE with SAP initiative challenge this preference, which, in turn, encourages integration with hyperscale cloud providers to drive digital transformation and leverage cloud scalability.

Service providers are developing in-depth partnerships with AWS and SAP to meet the growing demand for digital transformation. Overcoming complexities and skill shortages and managing high costs are key focus areas for enterprises and service providers.



IT professionals should read this report to understand AWS SAP implementation and integration service providers' relative strengths and weaknesses for driving digital transformation in enterprises.



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



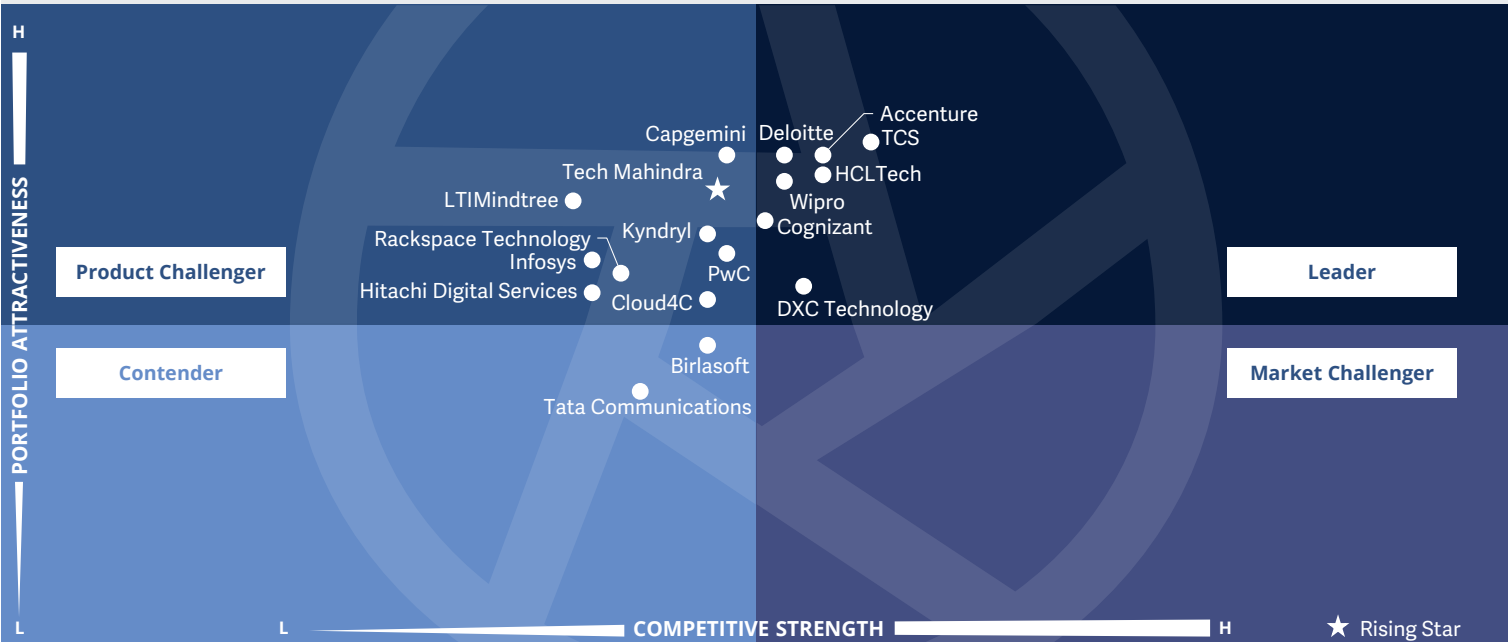
Procurement professionals should read this report to better comprehend the current landscape of AWS SAP implementation and integration service providers in APAC.



ISG Provider Lens™
AWS Ecosystem Partners
AWS SAP Workloads

Source: ISG RESEARCH

APAC 2024



This quadrant assesses service providers of **SAP workloads on AWS**, their **migration accelerators, team size, customer base** and ability to leverage the **AWS platform** for code remediation. It evaluates their **GenAI integration** capabilities in accelerators and services.

Rajesh Janey



AWS SAP Workloads

Definition

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

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

Eligibility Criteria

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



Observations

SAP has a significant installed base in APAC and a robust partner network to deliver implementation, migration and modernisation services. The deadline for SAP ECC 6.0 maintenance, expiring on December 31, 2027, has accelerated the need for customers to switch to RISE with SAP and SAP S/4HANA Cloud benefits. This shift is also driving customer transition from on-premise infrastructure and services to SAP-approved hyperscalers, including AWS.

SAP service providers have decades of expertise and have built various accelerators. They leverage their SAP capabilities and AWS offerings (such as CodeWhisperer, Amazon Q and Amazon Bedrock) to help customers migrate their data and codes efficiently to the cloud. This transition integrates data analytics into business and enables its transformation.

From the 45 companies assessed for this study, 18 qualified for this quadrant, with seven being Leaders and one Rising Star.

accenture

Accenture, the largest SAP partner for AWS globally, expedites SAP migrations using proprietary DevOps automation tools. Its SAP on AWS solutions reduce the migration time, enhance regulatory compliance and improve business value.

cognizant

Cognizant offers seamless SAP migrations to AWS and optimisations with its Cloud Assessment and Transformation (cCAT) framework. It enhances system availability and improves productivity using tools such as SAP Cloud Fit and Smart Mapper.

Deloitte.

Deloitte enables clients' financial transformation with SAP on AWS solutions, such as SAP Central Finance and SAP S/4HANA ERP. As a leader in SAP on AWS, Deloitte combines AWS' technology and its industry expertise to deliver innovative finance solutions.

DXC TECHNOLOGY

DXC Technology's expertise in SAP on AWS services is highlighted through its robust automation capabilities, comprehensive SAP management solutions and extensive experience in large-scale SAP transformations. The company provides high-availability systems and optimised operations for clients.

HCLTech

HCLTech offers top-tier SAP transformations with its CloudSmart offering, leveraging automated migration frameworks such as HANASmart. It has more than 12,000 SAP consultants that use tools such as UpgradeSmart and SMARTScaling to ensure seamless SAP S/4HANA migrations.

TCS

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



Wipro's acquisition of Rizing enhanced its SAP on AWS offerings, providing a robust, Safe and Fast migration framework. Wipro offers efficient, non-disruptive SAP migrations with more than 700 migration experts and tools, such as the Well-Architected SAP Lens.

TECH mahindra

Tech Mahindra (Rising Star) has extensive expertise in SAP and offers SAP on AWS services as part of its SAP Digital Transformation practice. It leverages its global expertise and customer momentum to drive client wins in APAC.



DXC Technology



“DXC Technology offers comprehensive SAP services, including consulting, integration and S/4HANA migration, and supports services for RISE with SAP on AWS. Its practices comply with the AWS Well-Architected Framework (WAF) and SAP guidelines.”

Rajesh Janey

Overview

DXC Technology is headquartered in Virginia, US. It has more than 129,900 employees across over 130 offices in 70 countries. In FY23 the company generated \$14.4 billion in revenue, with Global Infrastructure Services as its largest segment. DXC has developed a market-leading automation solution that enables the provisioning and lifecycle management of SAP systems on AWS. The company also provides SAP application management and S/4 advisory and transformation services. Additionally, DXC provides a full-stack PaaS for SAP® applications.

Strengths

Innovative technology: DXC uses the Amazon Virtual Private Cloud (VPC), Amazon Elastic Compute Cloud (EC2), Amazon Simple Storage Service (S3), Lambda function, Transit Gateway and networking services in all its SAP on AWS deployment and run projects. It has extensive experience in AWS-native compute, storage and networking features. It has developed automation solutions using Lambda, Ansible and other services to accelerate its deployment and run services.

Unique approach: DXC’s PathWay assessment methodology, tools and partner services (with SAP, smartShift, SNP, Qualtrics, LeanIX and others) help customers assess, plan and analyse the various people, processes, technology and metrics involved

in the SAP business processes, their implementation, orchestration, automation, continuous improvement and costs.


Subject expertise: DXC has over 25 years of experience in SAP Basis, managing the infrastructure for hundreds of enterprises with over 5 million users. It manages over 6,800 SAP environments in more than 60 countries and operates 39 delivery centres.

Robust delivery: SAP audits DXC deliveries every two years, with the most recent audit completed in November 2022; DXC achieved Excellent and Advanced ratings for SAP platform activities. It has also obtained SAP on AWS certifications and Migration and SAP Consulting competencies, among others.

Caution

With the largest workforce in APAC and a significant client base, DXC must focus on a strong engagement with its customers to defend against declining global revenue and growth. It could further expand its SAP on AWS offerings, along with integrating AI and ML tools.





Star of Excellence

A program, designed by ISG, to collect client feedback about providers' success in demonstrating the highest standards of client service excellence and customer centricity.



Appendix

Methodology & Team

The ISG Provider Lens 2024 AWS Ecosystem Partners study analyses the relevant software vendors/service providers in the APAC market, based on a multiphased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this study will include data from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. ISG recognizes the time lapse and possible market developments between research and publishing, in terms of mergers and acquisitions, and acknowledges that those changes will not reflect in the reports for this study.

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

The study was divided into the following steps:

1. Definition of AWS Ecosystem Partners market
2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & use cases
4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)
5. Use of Star of Excellence CX-Data
6. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
7. Use of the following key evaluation criteria:
 - * Strategy & vision
 - * Tech Innovation
 - * Brand awareness and presence in the market
 - * Sales and partner landscape
 - * Breadth and depth of portfolio of services offered
 - * CX and Recommendation



Author & Editor Biographies

Lead Author



Rajesh Janey
Lead Analyst, APAC

Rajesh is a transformational leader with four decades of experience in the technology industry across hardware, software, and services and expertise in leading cross-cultural, multi-geo teams, managing P&L in complex matrix organisations and leading transformation during three of the largest tech mergers. He has held leadership positions in sales and services delivery and global alliances in the tech industry. In his prior roles, Rajesh was Sr. Vice President at Dell, President – India & SAARC at EMC and NetApp, and Advisor at Tech Mahindra. Currently, he advises iValue InfoSolutions and Swirl.

He is an eloquent speaker at industry events, has published several articles, and has served on many industry bodies, including as Chairman of the CII Cloud Computing subcommittee, Member of SNIA and Executive Board member of AMCHAM.

Co-Author - Enterprise Context and Global Overview Analyst



Srinivasan P N
Lead Analyst, APAC

Srinivasan PN is a Senior Lead Analyst at ISG and is responsible for supporting and co-authoring ISG Provider Lens™ studies on AWS and Digital Engineering. His area of expertise lies in engineering services and digital transformation. Srinivasan has 10 years of experience in the technology research industry, and in his prior role, he carried out research delivery for both primary and secondary research capabilities.

Srinivasan also authors enterprise context reports and global summary reports for his expertise. He also supports the advisors with his research skills and writes papers about the latest market developments in the industry.



Study Sponsor

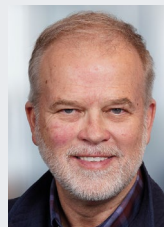


Aman Munglani
Director: Hyperscalers, Digital Innovator Series
and Custom Research

Aman Munglani leads the ecosystems and custom research practice for ISG. He brings over twenty years of expertise in emerging technologies and industry trends. His career is marked by significant contributions in guiding top executives from Global 2000 companies, offering strategic advice on digital transformation, start-up partnerships, driving innovation, and shaping technology strategies. In his tenure exceeding

twelve years at Gartner, Aman focused on providing CIOs and IT executives across Asia Pacific and Europe with insights on the practical implementation and advancement of new technologies, the evolution of infrastructure, and detailed vendor assessments.

IPL Product Owner



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

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

Now as a research director, principal analyst and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.



ISG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens™ research, please visit this [webpage](#).

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ISG

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Founded in 2006, and based in Stamford, Conn., ISG employs 1,600 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.

For more information, visit isg-one.com.





OCTOBER, 2024



REPORT: AWS ECOSYSTEM PARTNERS