ISG Provider Lens™

# AWS Ecosystem Partners

## AWS Managed Services

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

Customized report courtesy of:

DXC TECHNOLOGY

**QUADRANT REPORT | OCTOBER 2024 | APAC**

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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

  

- 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

**Page 1 of 4**

| | 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

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| | 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

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| | 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

- **AWS Professional Services**
- **AWS Managed Services**
- **AWS Data Analytics, AI and ML**
- **AWS SAP Workloads**

**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 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.

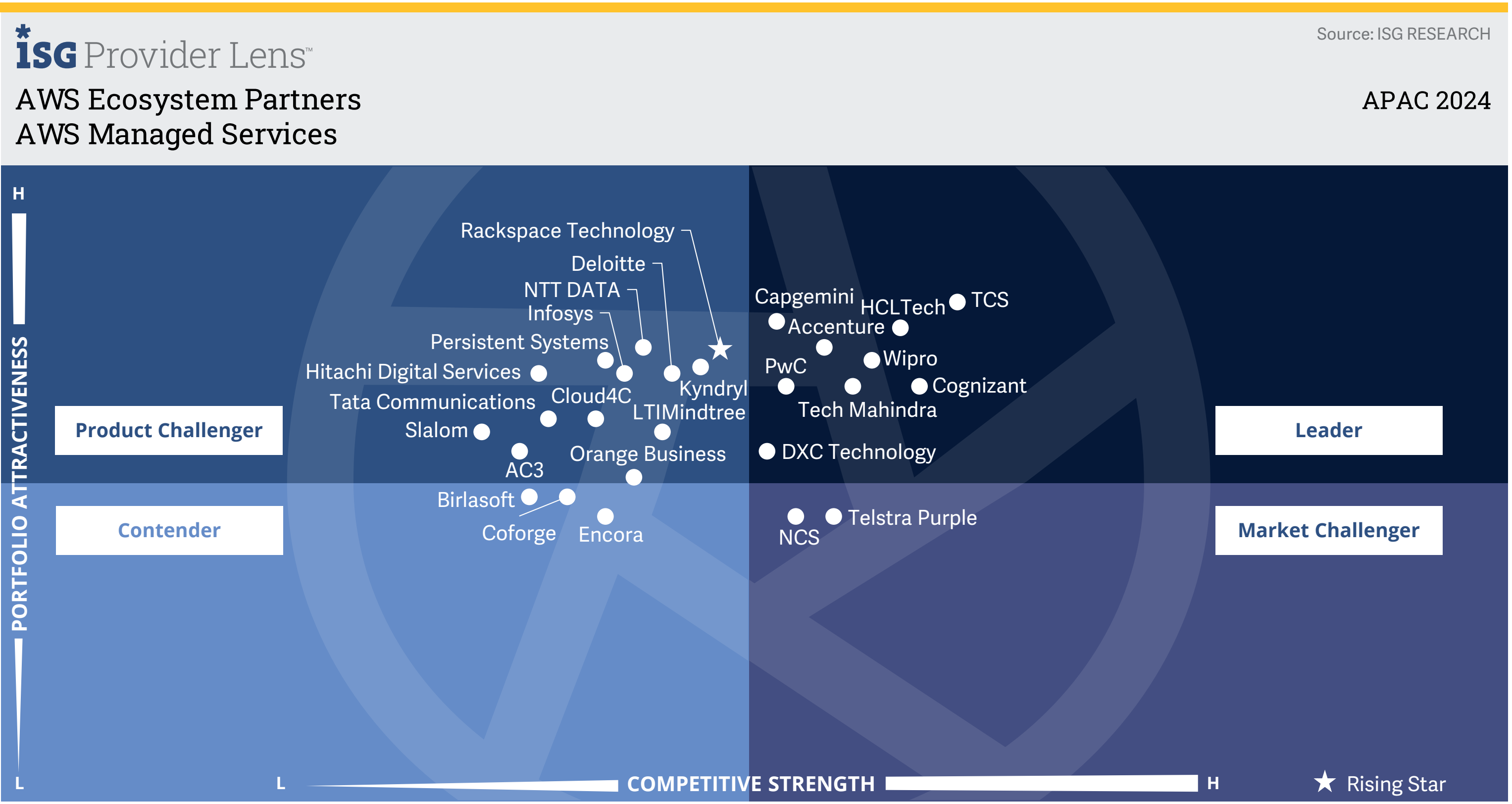
With cloud environments becoming more complex with hybrid and multicloud setups, the emphasis on cost optimisation, sustainability and security is growing. Service providers are responding by expanding their offerings to include financial management, governance and compliance tools. The focus on sustainability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

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

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




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*

### 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

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

Capgemini

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

cognizant

**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

**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

**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

**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.

**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

Leader

"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*

**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.

# 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.

Source: ISG Star of Excellence™ research program, Insights till October 2024

In the ISG Star of Excellence™ research on enterprise customer experience (CX), clients have given feedback about their experience with service providers for their **AWS Ecosystem Partners** services.

Based on the direct feedback of enterprise clients, below are the key highlights:

## Client Business Role

▲ **Most satisfied**
Shared Services Operations

▼ **Least satisfied**
Finance

## Region

▲ **Most satisfied**
Central/South America

▼ **Least satisfied**
North America

## Industry

▲ **Most satisfied**
Chemicals

▼ **Least satisfied**
Public Sector

## Industry Average CX Score


▲ Highest CX: 95
▼ Lowest CX: 50

*CX Score: 100 most satisfied, 0 least satisfied*
*Total responses (N) = 1220*

## Most Important CX Pillar

Business Continuity and Flexibility

| Service Delivery Models | Avg % of Work Done |
|---|---|
| Onsite | 59.2% |
| Nearshore | 18.3% |
| Offshore | 22.5% |

# Appendix

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

*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.

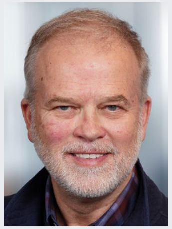
*Study Sponsor*

## 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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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.

ISG Provider Lens™

**OCTOBER, 2024**

**REPORT: AWS ECOSYSTEM PARTNERS**