

# AWS Ecosystem Partners

## AWS Professional Services

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

Customized report courtesy of:

**DXC** TECHNOLOGY

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and Srinivasan P N*

### **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

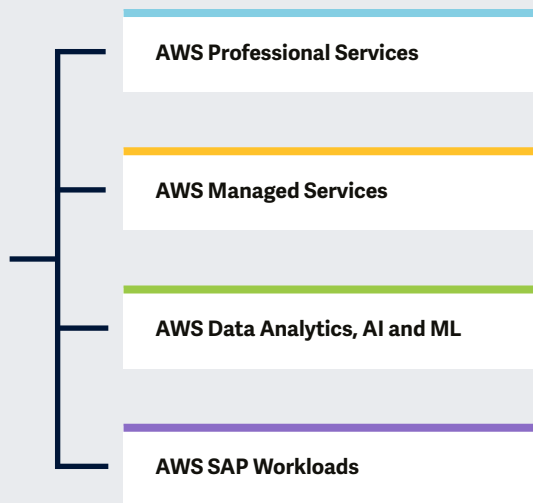
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	AWS Professional Services	AWS Managed Services	AWS Data Analytics, AI and ML	AWS SAP Workloads
TCS	Leader	Leader	Leader	Leader
Tech Mahindra	Leader	Leader	Product Challenger	Rising Star ★
Telstra Purple	Market Challenger	Market Challenger	Not In	Not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



### 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.

**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.

**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.

**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.

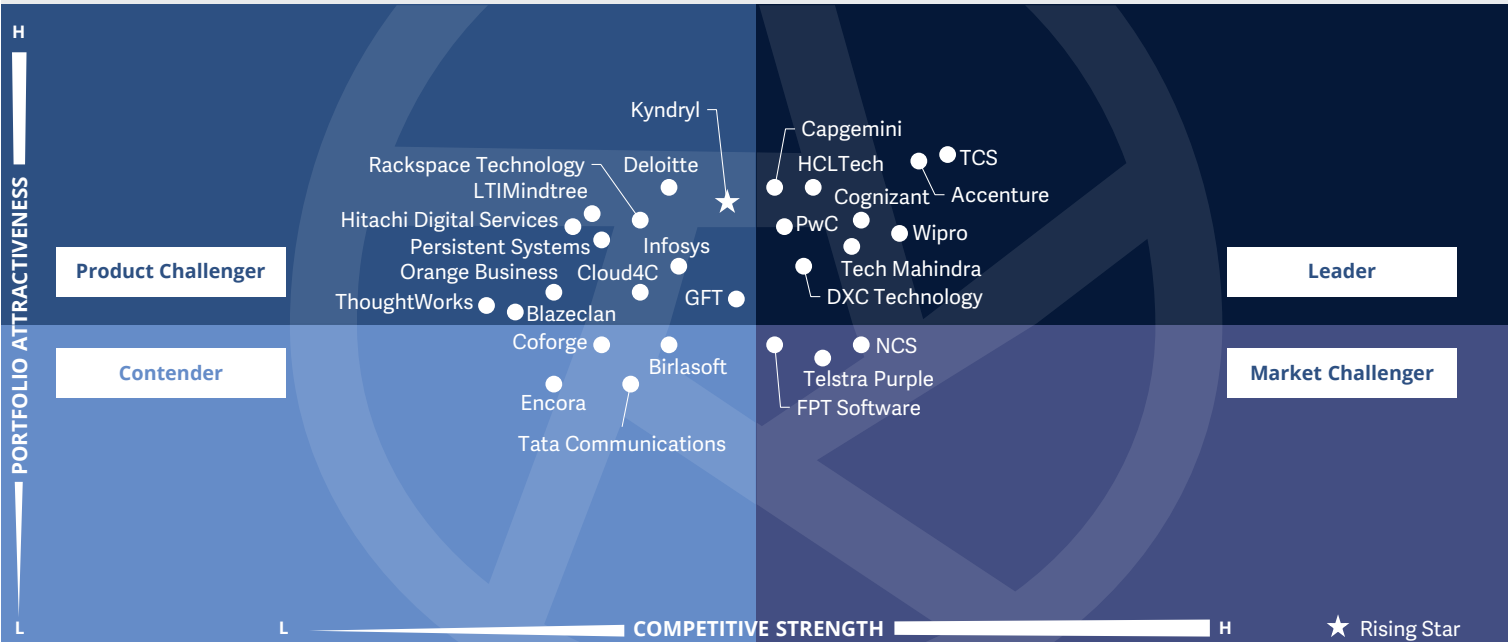


**Procurement professionals** should read this report to comprehend the current landscape of AWS professional service providers in APAC.



**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.





# 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.

## Customer Experience (CX) Insights

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:

### Industry Average CX Score



- ▲ Highest CX: 95
- ▼ Lowest CX: 50

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

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

### Client Business Role

- ▲ **Most satisfied**  
Shared Services Operations
- ▼ **Least satisfied**  
Finance

### Region

- ▲ **Most satisfied**  
Central/South America
- ▼ **Least satisfied**  
North America

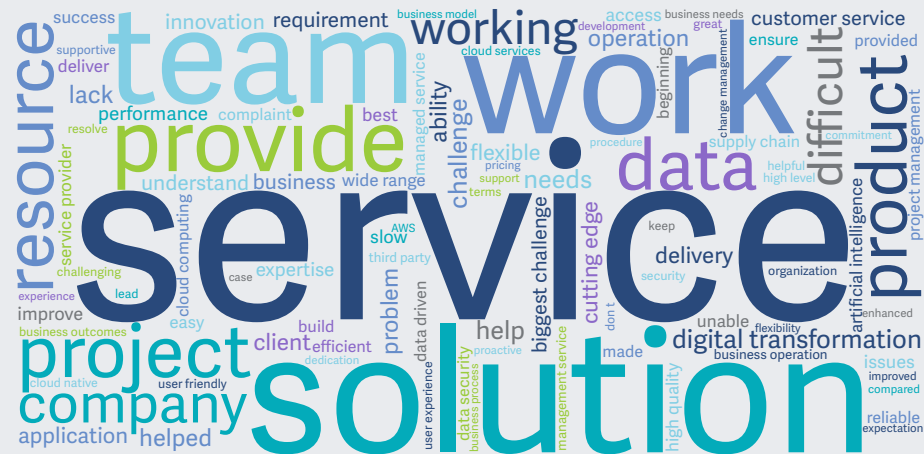
### Industry

- ▲ **Most satisfied**  
Chemicals
- ▼ **Least satisfied**  
Public Sector

### 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

## 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.

**Study Sponsor:**

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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.





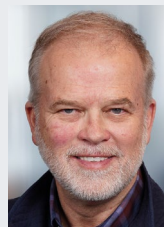


*Study Sponsor*

**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](#).

### ISG Research™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

ISG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: [Public Sector](#).

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### ISG

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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](https://isg-one.com).





**OCTOBER, 2024**

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**REPORT: AWS ECOSYSTEM PARTNERS**