ISG Provider Lens™

AWS Ecosystem Partners

AWS SAP Workloads

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

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	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

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	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.

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

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 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.

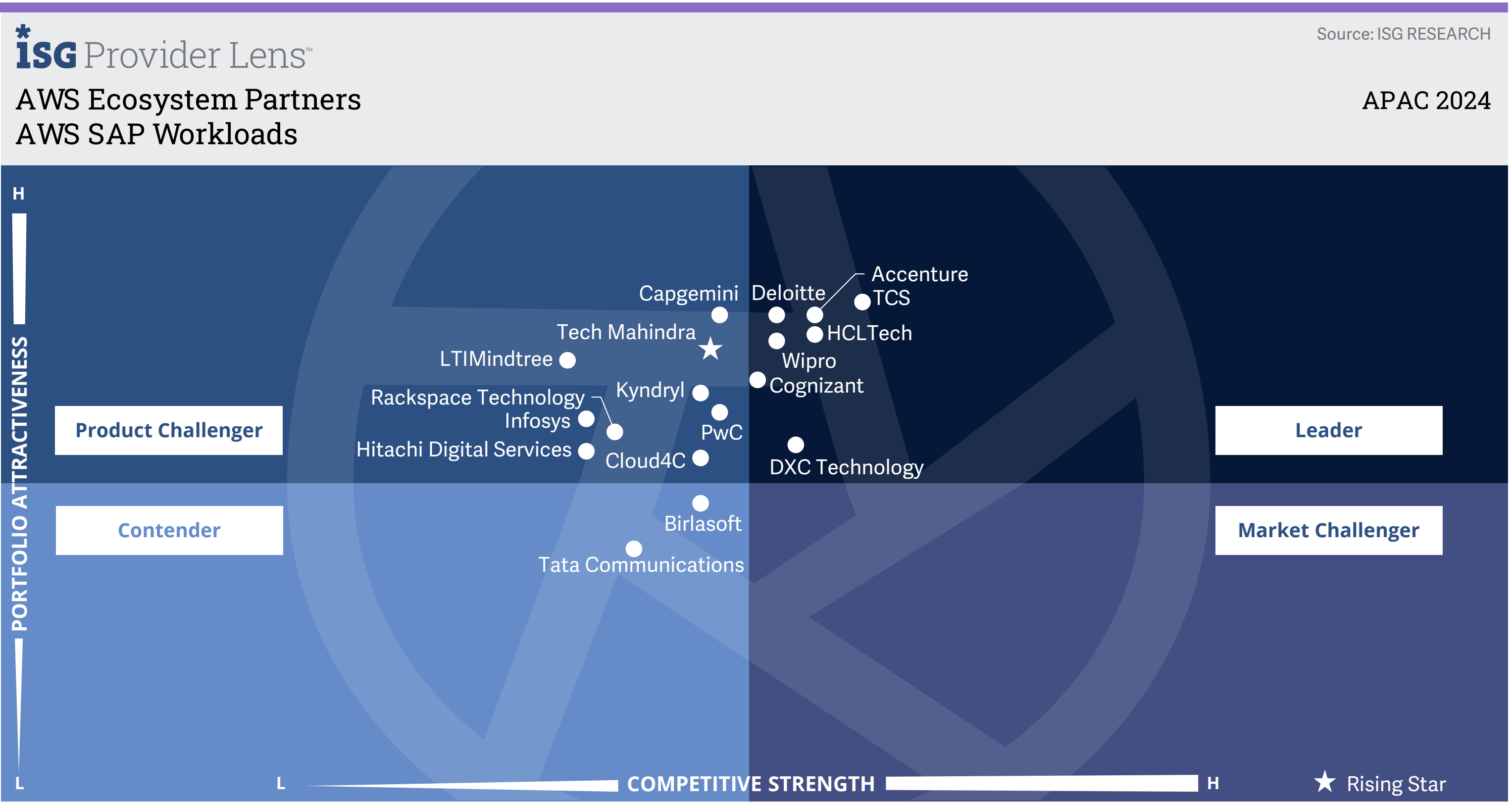
Despite the potential benefits of a full AWS suite, many enterprises choose a hybrid approach for SAP workloads, retaining critical functions on-premises. SAP's robust efforts towards promoting the RISE with SAP initiative challenge this preference, which, in turn, encourages integration with hyperscale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



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

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 S4/HANA 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, 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 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 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'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 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, 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 (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

Leader

"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.

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

73.6

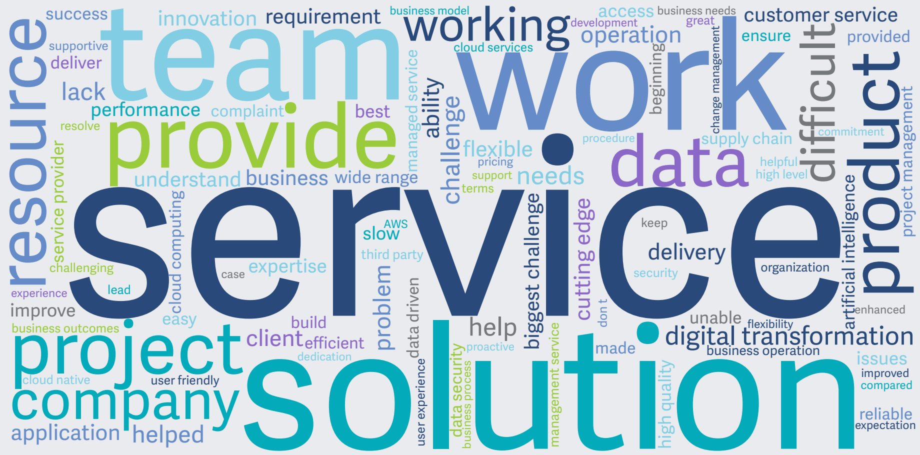
▲ Highest CX: 95
▼ Lowest CX: 50

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.

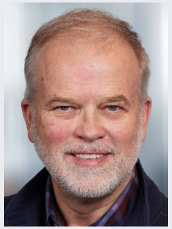
Study Sponsor

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.

ISG Research™

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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.

ISG Provider Lens™

OCTOBER, 2024

REPORT: AWS ECOSYSTEM PARTNERS