ISG Provider Lens™

AWS Ecosystem Partners

AWS Professional Services

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

DXC TECHNOLOGY

QUADRANT REPORT | OCTOBER 2024 | U.K.

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Report Author: Mark Purdy

GenAI drives enterprise IT and business transformation on the AWS Cloud

Generative AI (GenAI)-powered solutions, growing demand for data modernisation, the rise of green FinOps and a pivot to hybrid and multicloud architectures are some of the key trends shaping the AWS ecosystem of providers in the UK at the midpoint of 2024.

GenAI dominates the strategic plans and road maps for most of the leading providers in the UK AWS ecosystem. As one of the largest hyperscalers, AWS provides an array of AI-powered services and tools to help enterprises and technology service providers advance their GenAI business goals. For building GenAI applications, enterprises can turn to AWS Bedrock, a fully managed service that enables ML developers to toggle across various foundation models — Anthropic, Cohere and Meta — with various built-in security and governance features. Amazon Q provides a set of AI-powered digital assistants that can help human workers with increasingly complex tasks such as software code writing and testing (Amazon Developer), data summarisation and trend extraction, business intelligence (BI) dashboard creation, data visualisation and customer contact interaction support (Amazon Connect).

AWS ecosystem providers have begun to integrate GenAI into many aspects of their portfolio offerings, from professional services to data analytics. GenAI is increasingly being infused across the cloud migration and implementation lifecycle, with uses in application discovery and deployment, cloud architecture design and intelligent automation of IAC templates. AWS GenAI tools are also being deployed to quicken and improve GenAI application processes such as prototyping GenAI use cases and checking models against governance criteria. GenAI tools are also used to enhance managed services. For example, GenAI-powered virtual agents are used to scan cloud infrastructure and applications for security vulnerabilities.

AWS ecosystem providers are pioneering a plethora of **GenAI-driven business** use cases.

Beyond the IT modernisation and implementation sphere, GenAI now seems to have an unstoppable force, with AWS ecosystem providers pioneering many GenAI-driven business use cases. Many of these aim to supercharge employees, processes or organisational productivity levels. Examples include better decision-making in manufacturing, profiling and screening of candidates in recruitment processes and virtual assistants for pharmaceutical processes. Others address consumer experience and top-line growth such as intelligent automation of insurance claims processing, AI-led contact centre transformation and conversational analytics for CX engagement.

The rise of generative AI is given added momentum by a second trend: the push towards data modernisation using the AWS cloud and related AWS tools. AWS provides several data modernisation services, including Amazon Redshift, an AI-powered managed service that analyses and corrals structured and semi-structured data from different sources such as databases and data lakes. AWS Glue uses ML to integrate data from disparate sources to be categorised and deployed in ML applications. Most leading AWS providers offer data modernisation services to help enterprises bring structure and order to their data, both for data analytics and BI applications and for enhancing GenAI and ML pipelines. Providers help enterprises gain fine-grained access to their organisational data, whether structured, semi-structured or unstructured. Others highlight how data modernisation and AWS tools can help drive better business insights and decision-making. Some providers are extending their data modernisation capabilities beyond databases into storage and edge computing. AWS ecosystem providers must also pay close attention to data sovereignty requirements, ensuring that data is processed and stored within the geographic parameters set by local, national and regional authorities such as the EU.

The third trend is the rise of green FinOps, which optimises cloud spending in tandem with carbon and broader sustainability impacts. Hyperscaler cloud costs have been of mounting concern to UK enterprises for some time. Most leading providers now offer well-developed FinOps services and solutions with granular organisational views of cloud consumption, spending and capacity for chargebacks. However, providers and enterprises recognise that simply optimising cloud costs ignores the important carbon impacts of their cloud operations. Several providers now provide green or sustainable FinOps as a service, which integrates carbon impacts into the FinOps framework and provides best-practice recommendations (for example, around cloud provisioning) to help promote sustainable cloud use.

The fourth trend is the growing reality of hybrid and multicloud enterprise architectures, with enterprises looking to configure their workloads and functions according to the relative strengths of different cloud platforms. While lift and shift cloud migrations continue to occur, they are often viewed as costly due to reduced flexibility and potentially higher costs in the long run. AWS ecosystem providers, therefore, play a crucial role in helping enterprises map their current IT infrastructure and architect the right hybrid or multicloud approach. Some providers observe a growing demand for cloud repatriation services, whereby enterprises seek to move part of their workloads onto private clouds for control, cost or regulatory reasons. For this purpose, providers often turn to AWS Outposts, a managed service for hybrid cloud that extends the AWS environment to data centres or on-premise facilities.

A fifth and important trend is the growing enterprise demand for moving from VMware to the AWS Cloud. This trend particularly stems from concerns about future licensing costs following Broadcom's acquisition of VMware and partly from AWS' incentives to encourage VMware users to migrate. Many providers reported that they are actively offering services to support these migrations, whether through AWS-cloud native migrations or containerisation.

ISG discussions with providers indicate that the UK market for AWS services is reasonably resilient. Several providers have a strong strategic focus on AWS in the UK, with associated investments in talent, innovation centres and key UK clients. Some are forging AWS-related connections with UK universities and several are deeply involved in AWS-related events and activities. While demand seems relatively broad across industries — including energy, pharmaceuticals and manufacturing — public sector demand is a notable hotspot, with extensive work being done across different UK departments and agencies. The recent election of a new UK government — with plans for extensive reforms in areas such as energy, planning, justice and infrastructure — may, in time, give a further fillip to the demand for enterprise cloud and AI services.

GenAI is increasingly being infused across the cloud migration and implementation lifecycle, with uses in application discovery and deployment, cloud architecture design and intelligent automation of IAC templates.

Provider Positioning

	AWS Professional Services	AWS Managed Services	AWS Data Analytics, AI and ML	AWS SAP Workloads
Accenture	Leader	Leader	Leader	Leader
Birlasoft	Contender	Product Challenger	Not In	Not In
BJSS	Product Challenger	Product Challenger	Product Challenger	Not In
Capgemini	Leader	Leader	Leader	Leader
Coforge	Product Challenger	Not In	Not In	Not In
Cognizant	Leader	Leader	Leader	Leader
Deloitte	Product Challenger	Product Challenger	Market Challenger	Product Challenger
DXC Technology	Leader	Leader	Leader	Leader
Endava	Not In	Not In	Contender	Not In
Eviden (Atos Group)	Leader	Leader	Leader	Product Challenger

Provider Positioning

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	AWS Professional Services	AWS Managed Services	AWS Data Analytics, AI and ML	AWS SAP Workloads
Fujitsu	Market Challenger	Market Challenger	Not In	Not In
GFT	Leader	Not In	Product Challenger	Not In
HCLTech	Leader	Leader	Leader	Product Challenger
Hexaware	Leader	Not In	Not In	Not In
Hitachi Digital Services	Not In	Not In	Product Challenger	Not In
Infosys	Market Challenger	Market Challenger	Market Challenger	Market Challenger
Kainos	Product Challenger	Product Challenger	Contender	Not In
Kyndryl	Product Challenger	Product Challenger	Product Challenger	Product Challenger
LTIMindtree	Rising Star ★	Product Challenger	Product Challenger	Product Challenger
Mphasis	Product Challenger	Contender	Contender	Not In

Provider Positioning

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	AWS Professional Services	AWS Managed Services	AWS Data Analytics, AI and ML	AWS SAP Workloads
N-iX	Product Challenger	Not In	Product Challenger	Not In
Noventiq	Product Challenger	Product Challenger	Product Challenger	Contender
NTT DATA	Market Challenger	Market Challenger	Market Challenger	Not In
Persistent Systems	Product Challenger	Product Challenger	Product Challenger	Not In
PwC	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Quantiphi	Not In	Not In	Leader	Not In
Rackspace Technology	Product Challenger	Product Challenger	Product Challenger	Contender
Rebura	Contender	Contender	Not In	Not In
Runibex Technology UK	Not In	Not In	Not In	Contender
Softcat	Contender	Contender	Not In	Not In

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	Leader	Leader
Transact Technology Solutions	Contender	Not In	Not In	Not In
Version 1	Leader	Leader	Leader	Not In
Wipro	Leader	Leader	Leader	Product Challenger
Zensar Technologies	Not In	Not In	Rising Star ★	Not In

Key focus areas for the **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 optimization, 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 emphasized by various strategic alliances and pioneering developments. Partnerships are pivotal for cutting-edge innovation, future-proofing the technology service providers' roadmap 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, AWS SAP Workloads.

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

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

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

Provider Classifications

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

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between $20 million and $999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above $1 billion, with activities worldwide and globally distributed decision-making structures.

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

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

Provider Classifications: Quadrant Key

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

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

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

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

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

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

AWS Professional Services

Who Should Read This Section

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

AWS is rapidly integrating GenAI into its services to boost automation, enhance CX and drive innovation. This trend underscores the growing reliance on AI to streamline operations and create intelligent solutions.

Sustainability is a top priority for AWS. By optimising resource use and expanding its renewable energy infrastructure, AWS is helping enterprises reduce their carbon footprint and achieve environmental goals.

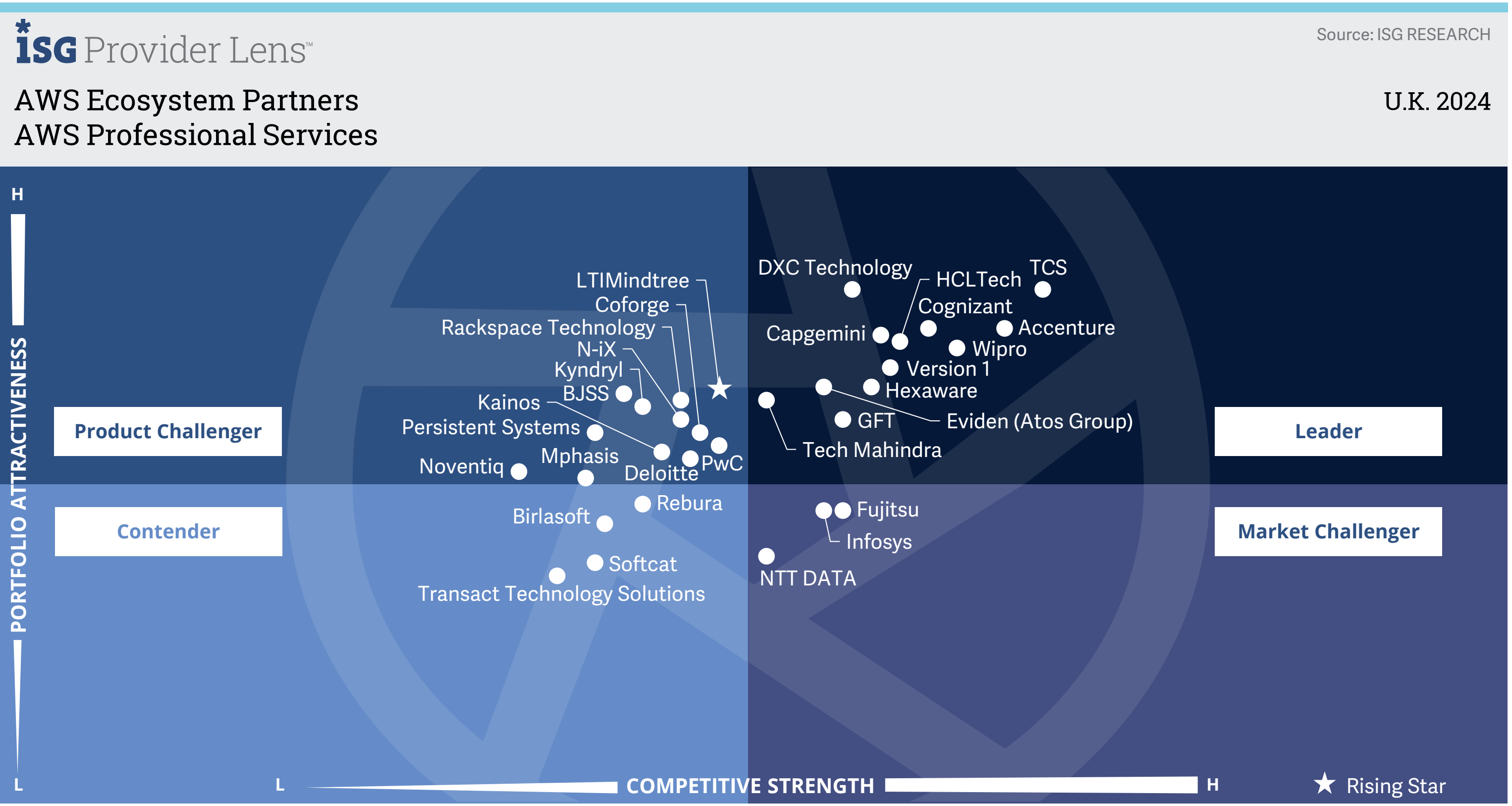
As enterprises migrate sensitive data to cloud, AWS is strengthening its security and compliance offerings. Advanced threat detection, robust data protection and comprehensive compliance controls help safeguard sensitive information and meet regulatory standards.

AWS is committed to helping enterprises maximise their cloud investments. Through transparent pricing, cost management tools and automation, AWS empowers enterprises to optimise cloud spending and improve efficiency.

IT professionals should read this report to understand AWS professional 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 professional service providers' positions and their impact on enterprise transformations and cloud migrations.

Procurement professionals should read this report to better understand the current landscape of AWS professional service providers in the UK.



This quadrant assesses providers that offer **consulting, implementation, integration** and **modernisation** services for the AWS Cloud. Providers emphasise their ability to bring **proprietary accelerators** and **industry expertise** to AWS engagements.

Mark Purdy

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, modernization, 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 organizations can achieve accelerated innovation, enhanced operational efficiencies and substantial business value in their cloud endeavors.

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 **roadmap 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 modernizing integrated cloud architecture** — to lead migration and multicloud integration
7. Being part of the AWS **Migration Acceleration Program** (MAP) is advantageous

Observations

The UK has a well-developed and sophisticated ecosystem of providers — both large GSI and a cohort of strong local providers — offering professional services for AWS,. These providers have vast experience in providing implementation, migration and modernisation services on the AWS Cloud, contributing to the intense competitiveness of the professional services market. ISG notes several trends in this market. First, leading providers extensively use proprietary accelerators to assess clients' current IT landscape and speed up the migration to the AWSCcloud. Second, GenAI tools are fast becoming an established feature of the AWS Cloud lifecycle, with service providers leaning heavily on AWS Bedrock and AWS Developer for architecture design, IAC development and software creation and testing. Third, talent is key, and many providers are investing significantly in AWS certifications and industry and client-specific skills. Lastly, several providers have industry-specific expertise for the AWS Cloud such as in financial services, telecommunications or manufacturing sectors.

From the companies assessed for this study, 31 qualified for this quadrant, with 12 being Leaders and one Rising Star.

accenture

Accenture has vast experience in implementing migrations to the AWS Cloud and offers an impressive set of cloud accelerators. In October 2023, it acquired 6Point6, a technology and cloud consultancy with significant experience in the public and commercial sectors in the UK.

Capgemini

Capgemini's AWS Cloud Migration Factory takes an industrialised approach and offers consulting capabilities to speed up migrations to the cloud. Its Digital Cloud Platform offers industry-aligned microservices blueprints for the AWS Cloud.

cognizant

Cognizant offers an extensive range of migration, implementation and modernisation services for the AWS Cloud. It has recently developed an AWS-specific Cloud Modernisation and Migration Factory as part of its Move and Modernise co-initiative with AWS.

DXC TECHNOLOGY

DXC Technology provides professional services for AWS through its AWS Integrated Practice, a collaborative effort with AWS. The company has an innovation centre in London and has plans to ramp up AWS certifications over the next five years.

EVIDEN

Eviden has introduced significant enhancements to its Cloudamize Studio and Cloud Migration Centre, to reinforce the role of intelligent automation in accelerating cloud migrations to AWS.

GFT

GFT in the UK is almost exclusively focused on the financial services sector and its AWS Cloud requirements. It has notable expertise in mainframe modernisations and high-performance computing on the AWS Cloud.

HCLTech

HCLTech brings a distinct digital and data engineering mindset to its implementation and modernisation services atop the AWS Cloud. It has significant client traction for modernisation projects on AWS in the UK.

HEXAWARE

Hexaware emphasises high levels of automation in its approach to migration and modernisation on the AWS Cloud, notably through its Amaze® platform.

TCS offers an extensive range of consulting frameworks and accelerators for migrations to AWS, with a strong focus on automation tools to measure the benefits and costs of cloud migrations. As a company, it is deeply embedded in the UK AWS ecosystem.

Tech Mahindra takes an AWS-Cloud-native approach to migration and modernisation, with a focus on four industries — telecommunications, manufacturing and automotive, enterprise technology and semiconductors and healthcare and life sciences.

Version 1 offers a full lifecycle approach to cloud migration and modernisation on AWS, with notable expertise in Oracle to AWS migrations. In April 2024, it acquired Farsight Consulting, a digital consulting company with significant experience in the UK public sector.

Wipro offers an extensive range of professional services for the AWS Cloud, with a focus on enhanced security services. It is a launch partner for the AWS Security Lake.

LTIMindtree, a Rising Star, has invested significantly in the infusion of productivity-enhancing GenAI features across the cloud development lifecycle for AWS. It also emphasises its migration from VMware to the AWS Cloud services.

DXC Technology

Leader

"DXC Technology is a leader in professional AWS services in the UK, owing to its extensive experience in enterprise migrations and modernisations on the AWS Cloud."

Mark Purdy

Overview

DXC Technology is headquartered in Virginia, U.S. 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 Technology has ten AWS Competencies, including Migration Consulting, IoT Consulting, Mainframe Modernisation Consulting and Security Consulting. It is a member of the AWS Well-Architected Partner Program. In 2023, it signed a strategic agreement with AWS to collaborate with 1,000 clients on technology innovation. DXC Technology has a significant client base for its AWS professional services in the UK.

Strengths

Extensive expertise: DXC Technology is a seasoned provider of AWS professional services. It has more than 10,000 active AWS certifications and has migrated over 25,000 servers to AWS globally. For AWS migrations and modernisations, it works through its dedicated AWS Integrated Practice, a collaborative initiative with AWS designed to marshal the right expertise, resources and support for enterprise digital transformations on the AWS Cloud. DXC also strongly emphasises a systematic, user-focused, data-driven approach to cloud assessments and planning via its precision-guided modernisation methodology.

Talent expansion: As part of its strategic partnership with AWS, DXC Technology's AWS Academy has ambitious plans to equip 15,000 practitioners with role-based AWS certifications over the next five years, with a strong focus on industry and customer-specific skills.

Fosters collaboration through innovation labs: DXC Technology has established Digital Innovation Labs in several locations to encourage ideas and co-innovation around emerging technologies. Its London Innovation Center convenes customers, partners and startups to come up with new business solutions for the AWS Cloud and related technologies. It focuses on developing PoC, prototypes and minimum viable product solutions that can ultimately be transformed into enterprise-scale solutions.

Caution

DXC Technology should consider introducing a greater element of risk-sharing and gain-share into its overall pricing model for AWS professional services. It should also seek to showcase more client credentials in the UK.

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 Partner 2024 study analyzes the relevant software vendors/service providers in the U.K. market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

Study Sponsor:
Aman Munglani

Lead Author:
Mark Purdy

Research Analyst:
Srinivasan PN

Data Analyst:
Akshay Rathore

Project Manager:
Shailendra More

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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

Mark Purdy
Principal Analyst

Mark Purdy is a PrincipalAnalyst for Europe at ISG Provider LensTM and brings more than 29 years of experience working on economics and technology research in business and government. Mark has a particular focus on next-generation technologies, especially artificial intelligence and intelligent automation, digital twins, digital olfaction, machine learning, virtual reality and edge computing. Before joining ISG, Mark was chief economist at a major consulting firm for 20 years, leading work on the economic impact of AI and business futures, among other topics.

He has published widely in tier-1 media and business publications such as Harvard Business Review and Sloan Management Review on subjects such as the metaverse, digital twins, emotional AI, digital olfaction, the social impact of AI and techno-nationalism.

Research Analyst

Srinivasan P N
Lead Analyst

Srinivasan PN is a Research 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.

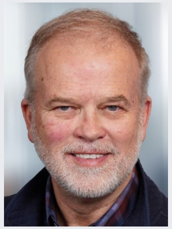
Study Sponsor

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