

AWS Ecosystem Partners

A research report comparing provider strengths,
challenges and competitive differentiators

Customized report courtesy of:

DXC TECHNOLOGY

Executive Summary	03
Provider Positioning	06
Introduction	
Definition	11
Scope of Report	12
Provider Classifications	13
Appendix	
Methodology & Team	44
Author & Editor Biographies	45
About Our Company & Research	47
Star of Excellence	41
Customer Experience (CX) Insights	42

AWS Professional Services	14 – 20
Who Should Read This Section	15
Quadrant	16
Definition & Eligibility Criteria	17
Observations	18
Provider Profile	20

AWS Managed Services	21 – 27
Who Should Read This Section	22
Quadrant	23
Definition & Eligibility Criteria	24
Observations	25
Provider Profile	27

AWS Data Analytics, AI and ML	28 – 33
Who Should Read This Section	29
Quadrant	30
Definition & Eligibility Criteria	31
Observations	32

AWS SAP Workloads	34 – 40
Who Should Read This Section	35
Quadrant	36
Definition & Eligibility Criteria	37
Observations	38
Provider Profile	40

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Accelerating innovation with AWS ecosystem - Integrating cloud capabilities for strategic advantage

Maximizing AWS investments: AWS services growth has been driven by the increasing adoption of cloud services across various industries. Businesses are seeking to leverage AWS' robust, scalable and secure infrastructure to enhance their operations, innovate and remain competitive. Several key trends have emerged in the professional and consulting services space, reflecting businesses' evolving needs and priorities.

One of the most prominent trends is the heightened demand for cloud migration services. As enterprises continue to recognize cloud migration benefits, such as cost savings, improved agility and scalability, there has been a significant uptick in projects to move on-premises infrastructure to AWS. Post migration, organizations are increasingly focusing on optimizing their cloud environments. This trend

has led to a surge in demand for services that help businesses maximize the value of their AWS investments. These services include cost optimization, performance tuning and architecture reviews.

Security and compliance remain top priorities for businesses operating in regulated industries such as finance, healthcare and government. The complexity of maintaining robust security postures in the cloud has led to a growing need for specialized consulting services. These services focus on implementing best practices, such as the AWS Well-Architected Framework, and ensuring compliance with industry standards and regulations.

Embracing hybrid and multicloud strategies with AWS: While AWS remains a dominant player in the cloud market, there is a noticeable trend toward hybrid and multicloud strategies. Businesses seek consulting services to design and implement architectures spanning multiple cloud providers and on-premises environments. This trend is driven by the desire for flexibility, risk mitigation and the ability to leverage the best services from different providers. The rapid growth of the AWS ecosystem has

AWS is transforming the enterprise landscape by offering unmatched scalability, security and agility for business success.



led to a talent shortage, with a high demand for skilled professionals. Consulting firms are addressing this challenge by investing in upskilling programs for their employees and leveraging AWS training and certification programs. The AWS Partner Network (APN) is also crucial in enabling partners to develop the necessary skills and competencies to meet market demands.

AWS continues to lead the data infrastructure and enterprise cloud-ready AI services market with its comprehensive data analytics and AI services suite, including notable tools like AWS Bedrock, Code Whisperer and Q Developer. These services are shaping the future of data-driven decision-making and intelligent automation. The trend toward real-time analytics is also gaining momentum, with services like Amazon Kinesis enabling companies to process streaming data and derive immediate insights, enhancing their responsiveness to market changes. There is also a significant focus on democratizing AI, making it accessible to a broader range of businesses. This is evident in the growing popularity of pre-built models and automated

ML tools, which simplify the development and deployment processes.

Generative AI has been one of the most exciting developments in the AI landscape since 2023. AWS Bedrock, a foundational service for GenAI, allows users to create sophisticated models for various applications, including content creation, design, and drug discovery. For instance, companies in the media industry use AWS Bedrock to generate realistic images and videos, reducing production costs and time. Researchers are leveraging this technology in the pharmaceuticals sector to simulate and develop new molecular structures, accelerating drug development processes. AWS Code Whisperer and Q Developer, along with the recent partnerships with Anthropic for Claude advanced LLMs and the APIs curated on the Huggingface platform, are also revolutionizing software development and Python-based data and ML coding by providing real-time code suggestions powered by ML. This service enhances developer productivity and code quality by offering context-aware recommendations as developers write code. For instance, a software development firm might

use Code Whisperer to assist in writing complex algorithms, reducing the time spent on coding and minimizing errors. This tool is precious for novice programmers and can significantly shorten the learning curve.

Integrating AI with data analytics creates new opportunities for enhanced decision-making. Businesses are combining predictive analytics with AI models to forecast trends, optimize operations and improve CX. AWS services, such as Amazon Forecast and Amazon Personalize, enable companies to harness the power of AI-driven predictions and recommendations. Retailers, for example, are using these tools to anticipate inventory demand and personalize shopping experiences, resulting in increased customer satisfaction and reduced operational costs.

Transforming enterprise IT with AWS for SAP workloads: As enterprises seek to modernize their IT landscapes and enhance operational efficiencies, AWS has become a preferred platform for running SAP workloads. Several trends are shaping the landscape of AWS SAP services, driven by the need for agility, scalability and innovation. One of the primary

trends is the migration of SAP workloads to AWS. This trend is particularly pronounced among large enterprises with complex SAP landscapes. AWS provides a range of migration tools and services, such as AWS Migration Hub, AWS Application Migration Service and the AWS Migration Acceleration Program (MAP) for SAP, to facilitate seamless transitions. The push toward SAP S/4HANA, SAP's next-generation ERP suite, is a significant driver for AWS adoption. Enterprises are leveraging AWS to support their SAP S/4HANA transformation journeys, benefiting from AWS' high-performance computing capabilities, scalable storage solutions and comprehensive security features.

Elevating enterprise services portfolio productivity with AWS managed services:

The adoption of AWS Managed Services is on the rise as more organizations seek to outsource their cloud management tasks. Businesses realize that managing a cloud environment requires specialized skills and resources, which can be costly and challenging to maintain in-house. By leveraging AWS Managed Services, companies can offload




routine tasks, such as monitoring, patching, backups and disaster recovery, to AWS experts, allowing their IT teams to focus on strategic initiatives. Security and compliance remain top priorities for organizations, particularly those in regulated industries such as finance, healthcare and government. AWS Managed Services provides a comprehensive approach to security, including continuous monitoring, threat detection and incident response. The service also helps organizations meet compliance requirements by providing governance, risk and compliance (GRC) frameworks tailored to industry standards. This focus on security and compliance drives increased adoption of managed services as businesses seek to ensure their cloud environments are secure and compliant without having to manage these aspects themselves.

Cost optimization and efficiency gains are critical concerns for businesses using cloud services. AWS Managed Services includes tools and practices to help organizations optimize their cloud spend. Services like AWS Cost Explorer, AWS Budgets and AWS Trusted Advisor are integrated into managed services

to provide insights into cloud usage and identify opportunities for cost savings. This trend is particularly important in the current economic climate, where businesses are pressured to maximize the return on their cloud investments while minimizing costs. The demand for managed DevOps on the cloud grows as companies seek to accelerate their software development and deployment processes. AWS Managed Services offers a range of DevOps solutions, including continuous integration and continuous deployment (CI/CD) pipelines, infrastructure as code (IaC) and automated testing and deployment. The trend toward managed DevOps is driven by the need for faster time-to-market, improved software quality and reduced operational complexity.


Clients can utilize the AWS cloud ecosystem to enhance business growth and drive effective operations. With AWS, enterprise clients can leverage scalable infrastructure, robust security measures and unparalleled agility to drive innovation and efficiency across their organizations. By harnessing the advanced capabilities of AWS services, clients can accelerate growth, optimize performance and stay competitive in a rapidly evolving market.



 Provider Positioning

	AWS Professional Services	AWS Managed Services	AWS Data Analytics, AI and ML	AWS SAP Workloads
Accenture	Leader	Leader	Leader	Leader
Agilisium	Not In	Not In	Product Challenger	Not In
AllCloud	Contender	Product Challenger	Not In	Not In
Apexon	Product Challenger	Not In	Product Challenger	Not In
Arvato Systems	Not In	Contender	Not In	Not In
Aspire Systems	Not In	Contender	Not In	Not In
Atos	Product Challenger	Product Challenger	Product Challenger	Not In
Autoverse	Contender	Not In	Not In	Not In
Birlasoft	Product Challenger	Product Challenger	Contender	Not In
Capgemini	Leader	Leader	Leader	Leader



 Provider Positioning

	AWS Professional Services	AWS Managed Services	AWS Data Analytics, AI and ML	AWS SAP Workloads
Cascadeo	Not In	Contender	Not In	Not In
Coforge	Contender	Product Challenger	Contender	Not In
Cognizant	Leader	Leader	Leader	Leader
Deloitte	Leader	Leader	Leader	Leader
Dexian	Product Challenger	Product Challenger	Not In	Not In
DXC Technology	Leader	Leader	Product Challenger	Leader
Encora	Contender	Contender	Contender	Not In
Ensono	Not In	Not In	Contender	Not In
Eviden (Atos Group)	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Genpact	Rising Star ★	Not In	Leader	Not In



Provider Positioning

Page 3 of 5

	AWS Professional Services	AWS Managed Services	AWS Data Analytics, AI and ML	AWS SAP Workloads
GFT	Contender	Not In	Not In	Not In
HCLTech	Leader	Leader	Leader	Leader
Hexaware	Leader	Not In	Leader	Not In
Hitachi Digital Services	Product Challenger	Product Challenger	Not In	Product Challenger
IBM	Not In	Leader	Leader	Product Challenger
Impetus	Contender	Contender	Product Challenger	Not In
Infosys	Leader	Leader	Leader	Leader
Kyndryl	Rising Star ★	Leader	Product Challenger	Product Challenger
Lemongrass Consulting	Not In	Not In	Not In	Product Challenger
LTIMindtree	Leader	Leader	Leader	Leader




Provider Positioning

Page 4 of 5

	AWS Professional Services	AWS Managed Services	AWS Data Analytics, AI and ML	AWS SAP Workloads
Mphasis	Product Challenger	Product Challenger	Product Challenger	Product Challenger
N-iX	Contender	Not In	Contender	Not In
NTT DATA	Market Challenger	Market Challenger	Market Challenger	Not In
Persistent Systems	Leader	Product Challenger	Rising Star ★	Not In
PwC	Leader	Rising Star ★	Leader	Leader
Quantiphi	Product Challenger	Not In	Rising Star ★	Not In
Rackspace Technology	Leader	Leader	Leader	Leader
Slalom	Product Challenger	Not In	Contender	Not In
Syntax	Product Challenger	Product Challenger	Product Challenger	Product Challenger
TCS	Leader	Leader	Leader	Leader



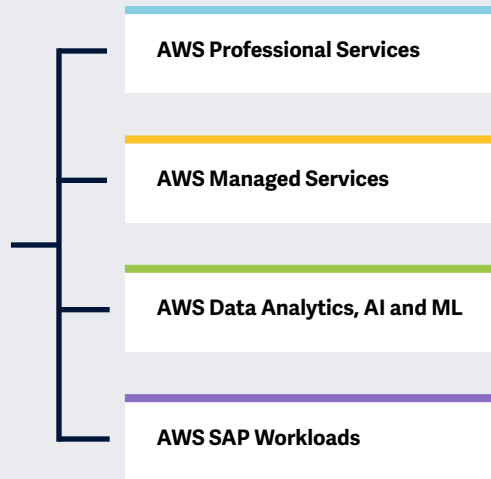
 Provider Positioning

	AWS Professional Services	AWS Managed Services	AWS Data Analytics, AI and ML	AWS SAP Workloads
Tech Mahindra	Leader	Leader	Leader	Rising Star ★
TechWave	Not In	Not In	Not In	Contender
TO THE NEW	Not In	Contender	Product Challenger	Not In
Trianz	Not In	Contender	Not In	Not In
Version 1	Contender	Not In	Not In	Not In
Virtusa	Product Challenger	Product Challenger	Contender	Not In
Vision33	Not In	Not In	Not In	Contender
Wipro	Leader	Leader	Leader	Leader
Zensar Technologies	Product Challenger	Product Challenger	Product Challenger	Not In



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



Scope of the Report

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

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

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

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

Provider Classifications

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

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

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

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

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





Provider Classifications: Quadrant Key

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

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

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

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

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

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





AWS Professional Services

Who Should Read This Section

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

The cloud computing landscape is undergoing a significant transformation. Enterprises are adopting a more strategic approach to cloud adoption by focusing on specific modernization initiatives such as platform engineering, DevOps and application refactoring. This targeted approach, combined with the increasing interchangeability of cloud platforms, is driving a shift toward platform-agnostic architectures.

As the cloud continues to mature, security, resiliency and cost optimization are becoming paramount. Dedicated teams and specialized partnerships are essential for effectively managing these critical areas. The demand for versatile professionals with a blend of

development, operations and cloud expertise is surging. In essence, the cloud is evolving into a sophisticated environment where segmented modernization, platform independence, robust security and a skilled workforce are key components of success. These trends are reshaping the cloud ecosystem and creating new opportunities for AWS professional service providers.



IT professionals should read this report to understand AWS professional service providers' relative strengths and weaknesses to drive digital transformation.

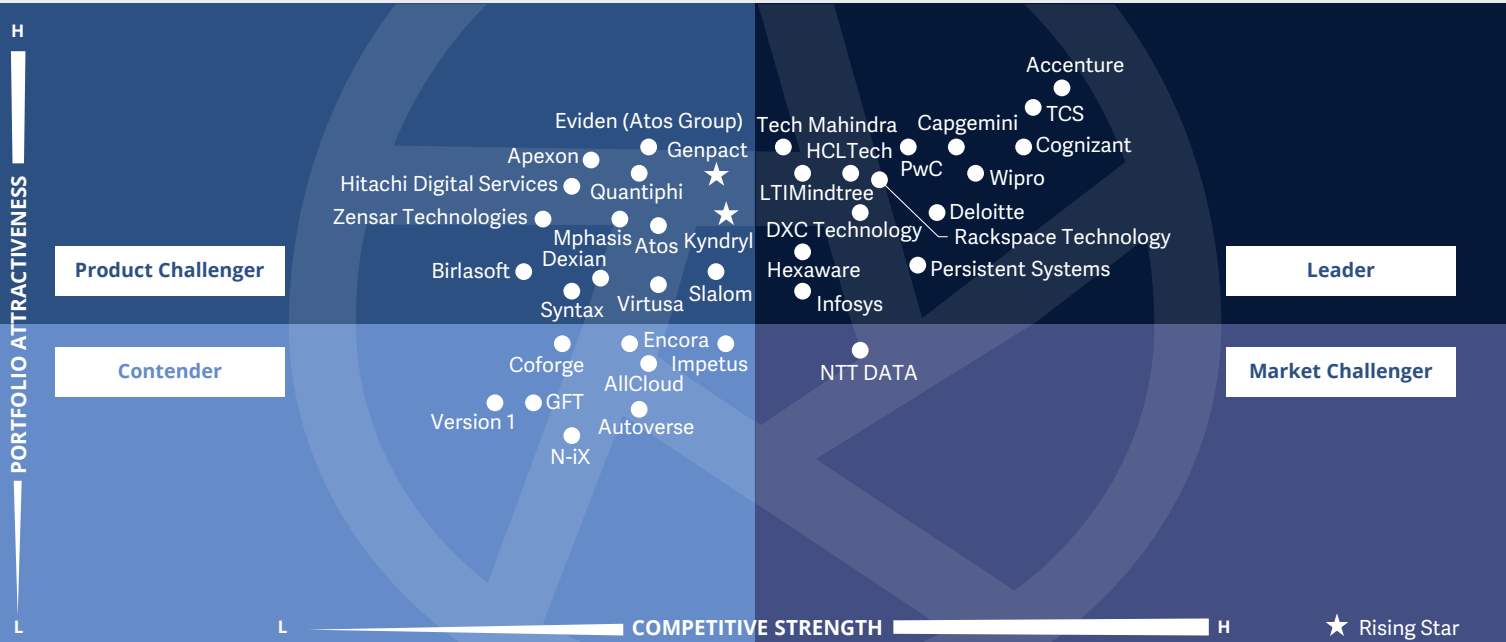


Procurement professionals should read this report to better understand AWS professional service providers' current market positioning in the U.S.



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





This quadrant assesses service providers that **manage and operate AWS cloud environments**, with a particular focus on embedding the latest technologies and **FinOps principles to enhance cost efficiency and optimize cloud utilization.**

Ashwin Gaidhani



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



Observations

Service providers are leveraging AWS' extensive suite of offerings to provide technical expertise and industry-specific solutions to navigate the dynamic AWS landscape, optimize costs and implement robust security measures. GSIs leverage AWS Outposts, AWS Direct Connect and AWS Landing Zone accelerator to analyze existing workloads and identify patterns and dependencies to facilitate a smooth transition to AWS.

Some of the trends observed in the market are as follows:

Customized vertical-specific offerings:

Service providers have developed a suite of industry-specific solutions, such as AWS HealthLake and AWS for Financial Services, addressing unique use cases. They mainly target industries such as retail, financial services, manufacturing, telecommunications, media and entertainment, healthcare and life sciences, education, government sectors, and supply chain and logistics to provide differentiated solutions.

GenAI reshaping code writing and enhancing SDLC phases:

GenAI-powered solutions such as Amazon CodeWhisperer have significantly reduced the complexity of migrating workloads to the cloud. Amazon Q Developer empowers developers by accelerating the development process while improving code quality and upgrading applications.

Surge in AWS migration consulting:

Architecture design and performance optimization advisory services are vital in guiding organizations' migration journey. Skilled consultants help organizations develop tailored cloud strategies that meet their unique data requirements and compliance needs. Consulting partners help identify cost-effective placement for workloads, implement robust security measures across the hybrid environment and orchestrate seamless migrations with minimal disruption.

From the 65 companies assessed for this study, 38 qualified for this quadrant, with 15 being Leaders and two Rising Stars.

accenture

Accenture accelerates end-to-end cloud adoption and transformation with over 30 AWS competencies and 33,000 AWS certifications, utilizing advanced accelerators and centers of excellence for strategy, migration and managed services.



Capgemini has been partnering with AWS for over 15 years, delivering end-to-end cloud services. With more than 15,500 AWS certifications and dedicated AWS technical teams, Capgemini offers robust capabilities in cloud migration, modernization and managed services.



Cognizant boasts over 70 AWS-specific transformation blueprints and more than 145 well-architected associates. With proprietary platforms such as Skygrade and NeuroIT, Cognizant delivers comprehensive cloud strategy, migration and modernization services tailored to enterprise needs.

Deloitte.

Deloitte offers comprehensive cloud cybersecurity managed services as an AWS Level 1 MSSP. With 10 MSS specializations, the company provides 24/7 security protection and monitoring. It integrates AI and ML for threat detection, ensuring clients' seamless cloud transformation.



DXC Technology, with over 2,000 AWS certifications and specialized methodologies such as Precision-Guided Modernization™, accelerates cloud migrations and modernizations, ensuring secure, scalable and cost-effective solutions for enterprises.

HCLTech

HCLTech leverages its CloudSMART portfolio to deliver scalable cloud transformations. It offers comprehensive cloud strategy, governance and security services, utilizing proprietary tools such as DPrizm™ for continuous modernization and operational excellence.



AWS Professional Services

HEXAWARE

Hexaware excels in cloud and data migration with Amaze®. With over 2,000 cloud-certified consultants and more than 900 AWS certifications, the company accelerates cloud adoption and digital transformation. AI- and ML-driven analytics and AWS-native services ensure reduced TCO and enhanced CX.

Infosys

Infosys, an AWS Premier Consulting Partner, drives cloud transformations with Infosys Cobalt. It offers end-to-end consulting, migration and managed services and ensures secure, optimized cloud ecosystems using advanced tools such as Infosys ValuePLUS and BOM Optimizer.

LTIMindtree

LTIMindtree drives AWS transformations with C=BT2 framework and Infinity platform. Over 1,500 AWS-certified professionals and tools such as Infinity Applens and Canvas AIOps ensure rapid, scalable and secure cloud migrations and modernization.

Persistent

Persistent Systems leverages its IP-based tools and accelerators, such as ExtenSURE.AI and PiCAS, to ensure efficient cloud migrations and modernization. It drives seamless cloud transformations and operational excellence across industry verticals.

pwc

PwC leverages its 16 AWS competencies and over 7,100 global accreditations to drive cloud transformations. Its Cloud Transformation services minimize roadblocks and expedite processes using AWS accelerators, enhancing business agility, productivity and security.

rackspace technology

Rackspace Technology, with over 2,800 certifications, excels in application modernization and cloud-native development. Its Elastic Engineering model delivers scalable, cost-effective and agile cloud transformations using advanced tools and accelerators.

tcs TATA CONSULTANCY SERVICES

TCS, with more than 40,000 AWS certifications, leverages proprietary tools such as iCMC and Cloud Mason for efficient cloud migrations. Its comprehensive AWS services, including FinOps and DevOps COE, drive holistic cloud transformations for clients.

TECH mahindra

Tech Mahindra leverages proprietary solutions such as NetOps.ai and BlueMarble to accelerate digital transformation for industries such as telecommunication, manufacturing and healthcare, ensuring minimal downtime and seamless transitions.

wipro

Wipro leverages its FullStride Cloud Services to deliver end-to-end cloud transformations. With 13 AWS competencies, the company integrates advanced solutions such as Mainframe A to Z and ProServe Strategic Delivery, ensuring efficient cloud migrations and modernizations.



Genpact (Rising Star) offers comprehensive AWS Professional services, leveraging unique AI-based solutions such as Cora GenCodeY. With a strong emphasis on AWS' Well-Architected Framework and industry-specific solutions, Genpact drives scalable business outcomes for clients across various sectors.

kyndryl

Kyndryl (Rising Star) accelerates digital transformation through its Cloud Native Services for AWS and rigorous application modernization strategies. Leveraging its Cloud CoE and Kyndryl Bridge platform, it offers enhanced application release cycles and reduced integration complexities.





“DXC Technology excels in AWS Professional Services by leveraging comprehensive cloud migration strategies and ensuring secure, innovative and efficient cloud transitions for clients.”

Ashwin Gaidhani

DXC Technology

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's proprietary methodologies, such as precision-guided modernization, provide enterprises with a tailored approach to cloud adoption, ensuring optimal ROI and minimized risks. DXC's robust security and compliance frameworks, coupled with its innovative solutions such as DXC Platform X™, enable clients to achieve secure, efficient and sustainable cloud transformations.

Strengths

Advanced automation and incident resolution: DXC excels in automation, with 75 percent of incidents automatically diagnosed or resolved without human intervention, ensuring minimal downtime and high efficiency. DXC's QTE Mainframe modernization automation and low-code/no-code platforms enhance application performance and agility.

Tailored migration and modernization: DXC's migration, modernization and multicloud integration services leverage automated tools and proprietary frameworks to optimize performance and reduce operational overhead. Its program management and governance provide comprehensive support, enhancing IT investments and business outcomes.

Comprehensive cloud solutions and expertise:

DXC Technology offers extensive AWS Professional Services with over 10,000 cloud-certified professionals. Its cloud operating model and strategy, tailored assessments and cloud security controls framework ensure secure and efficient transitions. DXC's services include custom and enterprise applications, hybrid and multicloud solutions, data center consolidation, edge computing, and AI and ML integration, driving innovation and operational excellence.

Caution

DXC has acquired significant knowledge assets in application modernization across several enterprise technologies stacks, including AWS and hybrid cloud platforms. It must focus on monetizing these assets by incorporating them into best practice frameworks and delivering them as differentiating capabilities in AWS consulting services and application landscape assessments.





AWS Managed Services

Who Should Read This Section

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

The U.S. market is increasingly outsourcing cloud infrastructure management and operations to external partners. Enterprises are carefully selecting providers capable of securely delivering comprehensive managed services. The demand for tools that optimize cloud spending and usage is growing as enterprises prioritize cost efficiency. With the surge in containerization and microservices, cloud-native strategies are becoming essential. Providers must offer global services, a strong talent pool and a robust portfolio aligned with these emerging trends to secure partnerships.



IT professionals should read this report to understand AWS managed service providers' relative strengths and weaknesses to drive digital transformation.

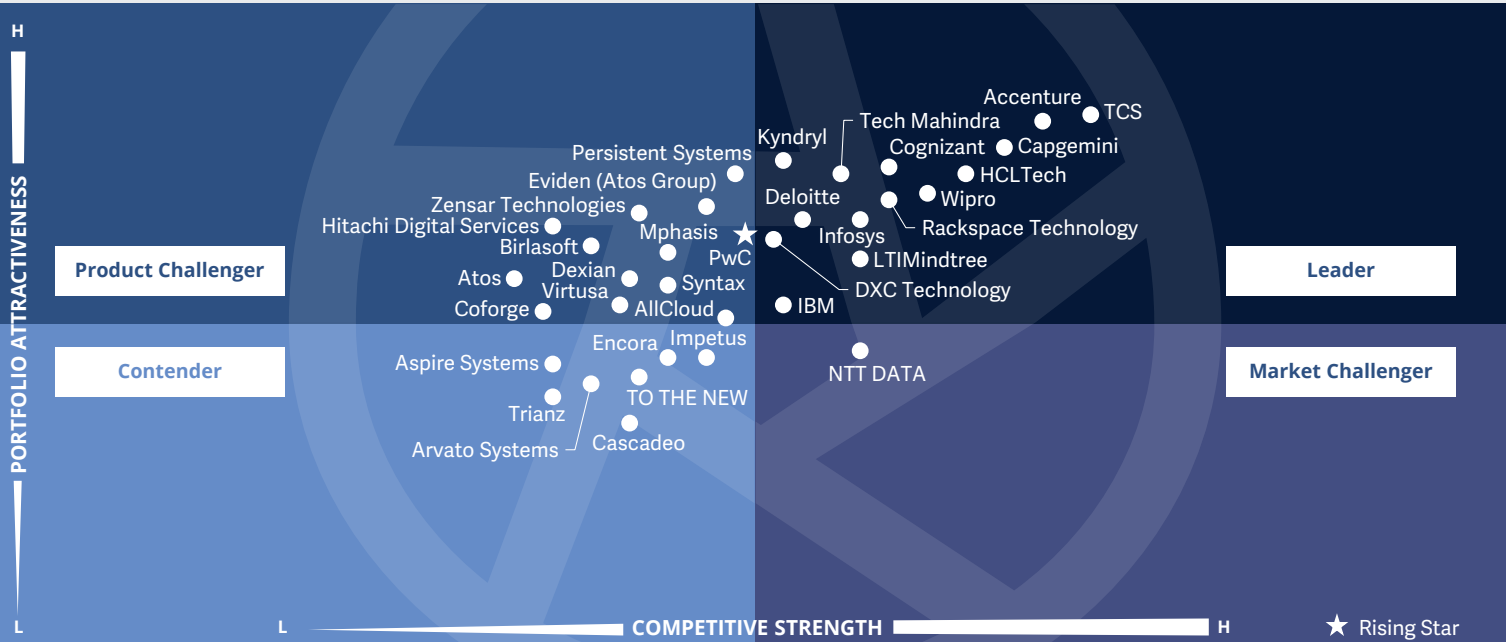


Procurement professionals should read this report to better understand the current landscape of AWS managed service providers in the U.S.



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





This quadrant assesses service providers that offer **managed services for public and private cloud environments**, leveraging **ML for the orchestration**, configuration and management of platforms combined with **FinOps and security**.

Ashwin Gaidhani



AWS Managed Services

Definition

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

Eligibility Criteria

1. Have AWS Managed Service Program **certification**
2. Expertise in autonomous **ML-driven** orchestration, configuration and management of platforms and systems
3. Experience in designing, building and managing **public and multicloud** environments
4. Ability to **support** big data and multiple database solutions and analytics
5. Experience in **DevOps** engineering
6. Scope and availability of **security** resources and services
7. Experience in **solutions architecture and cost optimization (FinOps)**
8. Experience in **server migration** and handling resource availability



Observations

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

- With the emergence of cost optimization and value realization, enterprises are becoming cautious in selecting providers that could have FinOps as a core element of their transformation journey. Providers are investing heavily in developing in-house FinOps tools that could help enterprises monitor cost and resource utilization.

- With GenAI taking the mainstream in every discussion, AIOps is gaining momentum among enterprises. It could help them improve their focus, resolve incidents faster, improve cost optimization and enhance security capabilities. Thus, providers are investing in building competencies and capabilities around AIOps.
- Compared to European countries, U.S. enterprises are less mature in sustainability. However, this trend has been changing recently, and there has been strong traction toward including sustainability as a component in their cloud journey, with GreenOps as one of the core elements of service providers.

From the 56 companies assessed for this study, 35 qualified for this quadrant, with 14 being Leaders and one Rising Star.

accenture

Responsible AI blueprint by **Accenture** will make it easier and faster to navigate and develop AI that minimizes unintended bias, improves transparency and provides end-to-end governance.



With its adaptive cloud operations, **Capgemini** provides multicloud support, integration with hybrid and edge use cases, an adaptable cloud operations framework and embedded cloud-native security features for continuous improvement at the core.



Cognizant's NeuroAIOps solution suite supports enterprises in continuous monitoring and advanced requirements such as site reliability engineering (SRE) and chaos engineering, resulting in optimal performance.

Deloitte.

The AWS Cloud Garage at **Deloitte** provides businesses with a dynamic team of innovative designers and developers, who can quickly turn impactful business concepts into functional prototypes.



DXC Technology's GenAI solution for managed services enables customers to improve productivity, SLAs and platform visibility. It allows users to interact with log data through a chatbot and get insights on issues, status and possible recommended improvements by optimizing the time and effort.

HCLTech

HCLTech is one of the premier partners of the FinOps foundation. It has over 150 certified FinOps professionals who bring complete consistency, visibility and control to cloud operations.



AWS Managed Services



IBM's AI-powered application management for AWS, native and hybrid cloud environments improve application resiliency and performance of the enterprise cloud environment.



Infosys utilizes its Cloud Cobalt platform with a set of services, solutions and platforms that accelerate the cloud journey in a resilient manner.



Kyndryl guides enterprises by integrating cloud-native services with over 50 in-house regulatory frameworks to maintain compliance standards and industry regulations across cloud environments.



LTIMindtree's Canvas CloudXperienz platform offers comprehensive visibility into business and IT environments. It enables users to monitor performance, identify peak and off-peak business needs and benchmark enterprise applications, infrastructure and cloud resources.



Rackspace Technology's Optimizer+ is a robust service that includes CloudHealth analytics and best practice guidance on architecture, monitoring and cost optimization.



TCS utilizes its Machine First Delivery Model (MFDM™)-based cloud operations to efficiently manage cloud resources and full-stack environments on hybrid cloud platforms.



Tech Mahindra has created an AWS jump-start kit as a guidance document. It features various AWS services and best practices tailored to specific use cases, emphasizing tools, development methodologies and testing guidelines to facilitate quick solution designs on AWS.



Wipro's Full Stride Cloud initiative brings the entire gamut of cloud capabilities under a fully integrated, full-stack offering, creating an end-to-end cloud services delivery engine.



PwC's (Rising Star) responsive resolution approach facilitates complete ownership of managed services through a centralized command center to promote seamless communication and visibility.





“DXC Technology leverages best practices, native tools and automation capabilities through AIOps and FinOps models to deliver cost-efficient and secure managed cloud services to its clients.”

Ashwin Gaidhani

DXC Technology

Overview

DXC Technology is headquartered in Virginia, U.S. It has over 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's joint GTM with AWS targets 1,000 of the largest ITO customers to accelerate customer, workforce and asset transformation. The provider has built industry clouds to accelerate the transformation journey for the insurance, financial services, manufacturing and automotive industries, embedded with GenAI at scale.

Strengths

Increased investment in AWS talent: With its new GTM approach, DXC has been ramping up its investment in its talent base, with its AWS certifications growing from 10,000 to more than 15,000 DXC professionals using role-based training and learning experiences.

Multiaccount strategy for secure and scalable landing zone: DXC Technology uses the AWS Well-Architected Framework's best practices to offer various business advantages such as improved system reliability and agility, enabling autonomy and enhancing billing and cost allocation. The DXC reference architecture supports multiple customers in design decisions built on the guiding principles with a secure and scalable landing zone.

Enhanced focus on AWS: DXC technology has accelerated its go-to-market model to ensure greater alignment with AWS. The result has been an increased focus on key areas such as GenAI, ESG and FinOps/GreenOps and a joint go-to-market approach with AWS to drive awareness, deepen customer relationships and develop collaborative solutions. This accelerated approach would deliver enhanced client benefits through innovative solutions and a strong focus on business transformation efforts.

Caution

With deep expertise in AWS, DXC Technology must start focusing on targeting large deals with new and existing accounts. It should leverage its localized GTM strategies for each region to gain more traction in the market.





AWS Data Analytics, AI and ML

Who Should Read This Section

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

The growing demand for rapid decision-making is driving a surge in real-time data analytics. Enterprises are leveraging tools such as Amazon Kinesis and AWS MSK to extract immediate insights from streaming data. Simultaneously, enterprises are accumulating massive datasets in cloud-based data lakes using Amazon S3. AWS Lake Formation simplifies the management of these data repositories, enabling efficient data analysis.

AI and ML are becoming more accessible to a broader audience. Cloud-based platforms such as Amazon SageMaker streamline the development and deployment of ML models. Pre-built AI services, such as Amazon Comprehend, Rekognition and Translate, empower non-technical users to integrate AI into their applications.

Enterprises are increasingly developing custom AI and ML models aligned with specific business objectives to gain a competitive edge. Advanced hardware accelerators such as AWS Trainium and Inferentia are being employed to optimize model training and inference for specialized applications.



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

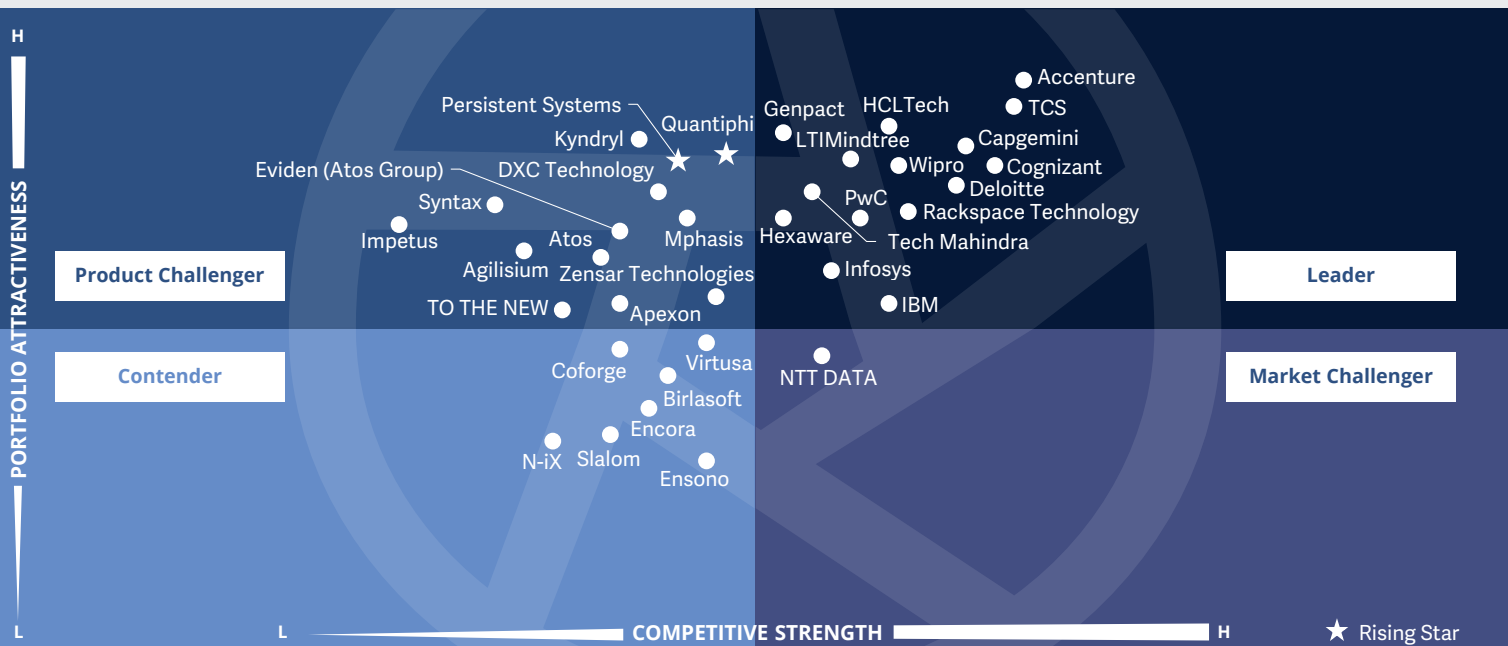


Procurement professionals should read this report to understand AWS data analytics, AI and ML service providers' current positioning in the U.S.



Analytics professionals can understand AWS data analytics, AI and ML service providers' current market positioning and their impact on enterprise transformations, alongside cloud migration benefits.





This quadrant assesses **AWS data analytics, ML and AI service providers** for their ability to utilize analytics and ML to **convert data into insights**, driving innovation and efficiency in client operations – a key area for innovation among service providers.

Ashwin Gaidhani



Definition

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

Eligibility Criteria

1. Scope and use of **relevant tools** and technologies
2. Service/solution **integration capabilities** and offerings
3. Scope and availability of **enabling programs** for customer success (for example, planning workshops and training)
4. Availability, experience and certification of **experts** in analytics, data science and ML
5. Ability to provide an AWS-focused offering **road map** and innovations (current and planned)
6. Number and reputation of **references** for ML and analytics services and solutions on AWS
7. Suitability, maturity and adaptability of **pricing model** with a go-to-market (GTM) strategy
8. Breadth and depth of **partner and channel** relationships
9. Competency and capability in **deploying and managing IoT solutions** on AWS



Observations

The U.S. market for data analytics, AI and ML on AWS is highly competitive, driven by the increasing demand for data-driven decision-making. Global system Integrators deploy solutions encompassing big data analytics, ML, IoT data processing and security, utilizing a range of AWS services such as Amazon S3, Amazon Redshift, Amazon SageMaker and AWS IoT. Global system integrators (GSIs) harness various AWS services, including advanced data analytics and GenAI tools, to deliver comprehensive solutions that provide enterprises with real-time operational insights and predictive analytics.

Below are some of the key strategies and offerings from global system integrators in this space:

Delivering comprehensive data-driven solutions: Global system integrators utilize a wide range of AWS services, including data visualization tools like Amazon QuickSight and IoT analytics platforms such as AWS IoT Analytics, to create integrated solutions that empower businesses to gain a complete

view of their operations, allowing real-time insights, predictive analytics and proactive decision-making.

Democratizing GenAI with a focus on responsible implementation: Global system integrators are developing expertise in AWS GenAI offerings and providing services such as consulting, implementation, training and support to guide enterprises in integrating these solutions within their operations.

Recognizing the importance of ethical implications, AWS and its partner network incorporate responsible AI principles, explainability tools and bias detection mechanisms into their offerings.

Deploying high-impact AI and ML solutions: Global system integrators help businesses identify significant use cases and support serverless architecture for AI and ML tasks, develop custom models tailored to specific needs and operationalize solutions like Amazon SageMaker, Amazon Comprehend and Amazon Rekognition for continuous value generation.

From the 65 companies assessed for this study, 36 qualified for this quadrant, with 15 being Leaders and two Rising Stars.

accenture

Accenture harnesses AWS capabilities to deliver AI-powered customer engagements through its ACE accelerators. It integrates AWS native solutions for data lakes via the Accenture Insights Platform and scales business insights with 40 AWS competencies in data and analytics.



Capgemini leverages its over 15-year partnership with AWS to deliver end-to-end cloud services. With more than 15,500 AWS certifications and dedicated AWS technical teams, Capgemini offers robust capabilities in cloud migration, modernization and managed services.



Cognizant's Data and Intelligence Toolkit, powered by GenAI, drives data modernization and AI-driven solutions on AWS. With tools such as DatalQ and the ETL Conversion Tool, Cognizant accelerates client transformation, achieving significant performance improvements.

Deloitte.

Deloitte drives business value with AI and ML on AWS, using MLOps and solutions such as TrueServe™. From data consolidation to computer vision, Deloitte and AWS deliver practical, industry-specific AI innovations, transforming enterprises into AI-powered organizations.



Genpact's strength in AWS AI and data analytics is demonstrated by its ability to accelerate cloud transitions using Cora GenCodeY, ensuring seamless AWS integration and optimized operations.

HCLTech

Recognized as an AWS Generative AI Competency Partner, **HCLTech** drives innovation with AI and ML solutions, such as the AI marketplace, Amazon EMR implementations and GenAI-led transformations across various industries.



AWS Data Analytics, AI and ML

HEXAWARE

Hexaware offers comprehensive AI, ML and data analytics services, including over 20 deployable GenAI solutions. It also has partnerships with DataSwitch and Leaplogic. Leveraging Amazon SageMaker and Redshift, it delivers industry-specific solutions such as Paymatix and Elevate360 Hub.



IBM, with 20 AWS competencies, demonstrates exceptional capability in leveraging AWS' AI, ML and data analytics services. Its advanced solutions enable clients to drive significant business transformation, optimize operations and enhance decision-making.



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



LTIMindtree boosts AI and ML capabilities with the Scarlet accelerator for seamless migration to AWS. Using Amazon SageMaker, it offers end-to-end AI solutions, including complex pattern detection and AI-driven automation, for data-driven decisions and operational efficiency.



PwC's Analytics and AI Transformation, integrated with AWS' cloud architecture, delivers AI-driven insights and automation. With tools such as Amazon QuickSight and AWS Redshift, PwC enhances operational efficiency and CX at scale.



Rackspace Technology delivers AI, ML and data analytics, leveraging AWS Code Whisperer and LLMs. Its expertise in data analytics and ML drives solutions through conversational AI and natural language processing (NLP), boosting customer satisfaction, productivity and revenue.



TCS employs the DATOM™ framework and tools such as DEER and MasterCraft™ Data Plus to deliver advanced AI, ML and data analytics solutions. TCS provides domain-led solutions such as financial spreading and intelligent document processing (IDP), enhancing data governance and accelerating innovation.



Tech Mahindra employs advanced AI and ML solutions on AWS, utilizing tools such as InfoWise and Sprinter for data migration and governance. It delivers industry-specific AI solutions for enhanced customer engagement, predictive analytics and operational efficiencies.



Wipro's Data Intelligence Suite accelerates AI, ML and data analytics on AWS, utilizing AWS Glue and Redshift. With GenAI solutions such as PolicyGPT and Digital Telco, Wipro enhances business insights and automation across BFSI, retail, healthcare and communications.



Persistent Systems (Rising Star) delivers comprehensive AI, ML and data analytics solutions. Recognized for its GenAI capabilities, it integrates tools like PiCloud and GenAI Hub to drive innovation and operational efficiency for clients across industries.



Quantiphi's (Rising Star) Contact Center Transformation solutions, recognized by AWS for Conversational AI competency, enhance customer service through AI-driven automation. Its GenAI solution, Baioniq, utilizes LLMs to extract actionable insights, boosting operational efficiency.





AWS SAP Workloads

Who Should Read This Section

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

Enterprises are actively migrating SAP workloads to cloud. SAP and AWS are collaborating to streamline the transition of business modules through modernization and transformation. The IT landscape is evolving with the growing adoption of multicloud strategies and a focus on verticalized solutions. Enterprises are incorporating advanced analytics and intelligence into their SAP workloads to drive business value. Given the current economic climate, cost optimization is a top priority for enterprises running SAP workloads on AWS. Enterprises are actively seeking strategies to reduce costs without compromising performance or reliability.

Enterprises are increasingly turning to AWS Elastic Disaster Recovery (DRS) as a safeguard against disruptions caused by natural disasters, power outages, application failures or data loss. DRS simplifies disaster recovery by automating the process and leveraging AWS as a scalable, cost-efficient recovery site for both on-premises and cloud-based applications. This solution enables rapid recovery of SAP applications and reduces costs by eliminating idle recovery resources. For SAP workloads already on AWS, DRS offers enhanced resilience and availability through recovery in a different AWS region.



IT professionals should read this report to better understand AWS SAP workload service providers' relative strengths and weaknesses to drive digital transformation.

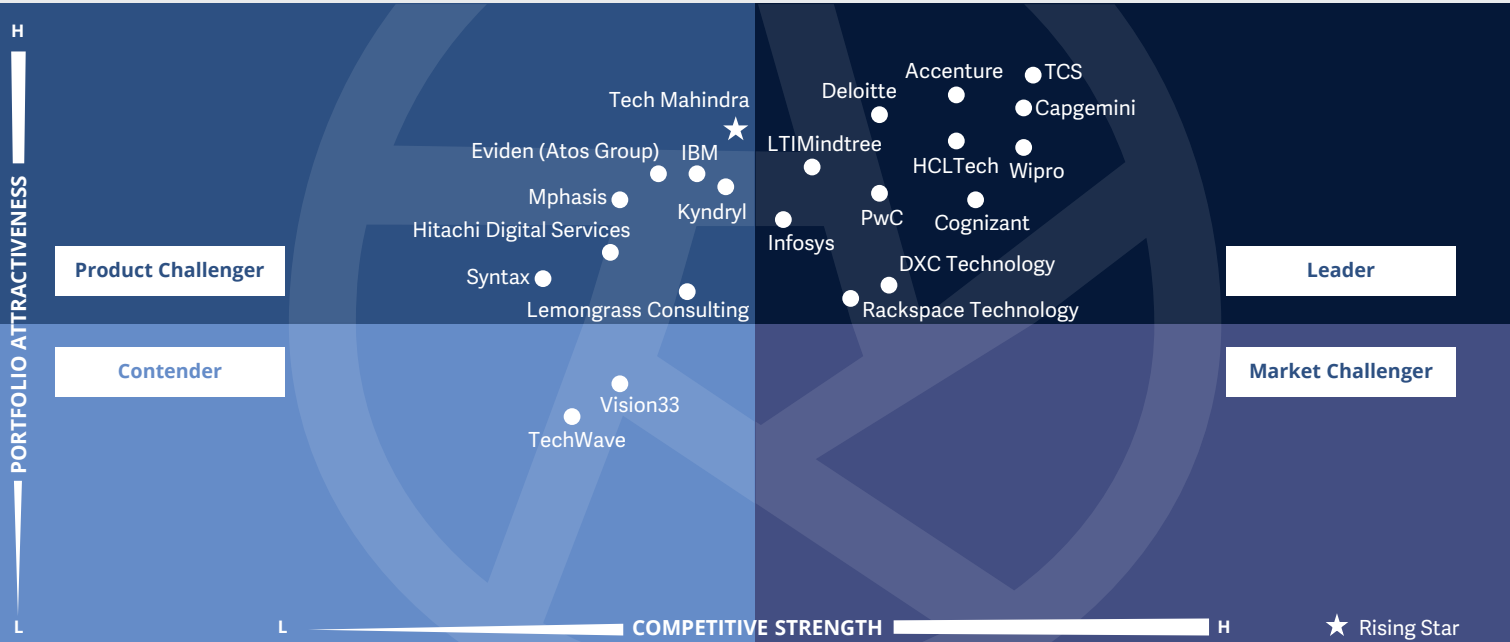


Procurement professionals should read this report to better understand AWS SAP workload service providers' current market positioning in the U.S.



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





This quadrant assesses AWS service providers for **SAP workloads**, emphasizing their **integration capabilities, solution scalability and deployment efficiency** to ensure they meet enterprise requirements for agility and cost-effectiveness in dynamic market conditions.

Ashwin Gaidhani



AWS SAP Workloads

Definition

This quadrant assesses service providers that enable the provisioning and ongoing operation of SAP systems, such as SAP HANA or other platforms on AWS, together with their central management. The service providers in this quadrant help implement AWS as a hardware replacement or hardware extension (IaaS) for enterprises. They optimize, 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, licensing 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, customizing, 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



AWS SAP Workloads

Observations

AWS SAP workloads are transforming how enterprises deploy and manage their critical business systems, with a focus on scalability, security and innovative integration. This evolution supports current operational needs and strategically positions companies for future challenges and opportunities.

AWS Scalability and performance optimization: AWS provides an elastic environment that enables businesses to scale their SAP workloads in response to fluctuating demands. This capability is crucial for managing peak loads during critical business periods without requiring extensive physical infrastructure investments. AWS' advanced tools, like Auto Scaling and Elastic Load Balancing, ensure optimal performance, enhancing UX and maintaining continuity in business operations.

Security and compliance enhancements: In response to increasing data security challenges, AWS has enhanced its services with thorough compliance protocols and security measures designed explicitly for SAP applications. These measures encompass identity

and access management and dedicated connections such as AWS Direct Connect. These features guarantee that businesses meet strict regulatory requirements while protecting sensitive data and operations from potential threats.

Innovation through integration: AWS encourages innovation by supporting the integration of SAP with other advanced technologies such as AI, ML and IoT. This integration unlocks new capabilities within traditional SAP environments, enabling businesses to gain deeper insights, automate processes and enhance decision-making. AWS' expansive suite of services facilitates these integrations, making it easier for companies to explore new avenues for growth and efficiency.

From the 65 companies assessed for this study, 22 qualified for this quadrant, with 12 being Leaders and one Rising Star.

accenture

Accenture, one of the largest SAP partners for AWS globally, expedites SAP migrations with proprietary DevOps automation tools. Its SAP solutions on AWS ensure reduced migration time, enhanced compliance and innovative business value.



Capgemini uses migration as a code (MaaS) platform to optimize SAP environments. Recognized for its SAP accelerators, the company ensures efficient, cost-effective and scalable SAP transformations on AWS.



Cognizant excels in SAP on AWS with Cloud Assessment and Transformation (cCAT) framework, delivering seamless SAP migrations and optimizations. With tools like SAP Cloud Fit and Smart Mapper, the company ensures high system availability and productivity improvements.

Deloitte.

Deloitte accelerates finance transformation with SAP solutions on AWS, leveraging SAP Central Finance and SAP S/4HANA ERP. As a leader in SAP on AWS, Deloitte combines AWS technology with its industry expertise to deliver innovative finance solutions.



DXC's expertise in AWS SAP services is highlighted by its robust automation, comprehensive SAP management solutions and extensive experience in large-scale SAP transformations, providing high availability and optimized operations for clients.

HCLTech

HCLTech excels in SAP on AWS transformations with its CloudSMART for SAP offering, providing automated migration frameworks like HANASmart. With over 12,000 SAP consultants and tools such as UpgradeSmart and SMARTScaling, it ensures seamless SAP S/4HANA migrations.



AWS SAP Workloads



Infosys accelerates SAP transformations on AWS with Infosys Cobalt, ensuring seamless, risk-free transitions using Infosys S/4Assist and Cobalt migration library. It optimizes operations with SAP Solution Manager And AWS Data Provider for SAP.



LTIMindtree enhances SAP on AWS with LAMPS accelerator suite. Specializing in greenfield, brownfield and bluefield migrations, it integrates SAP with AWS, delivering enhanced business agility, lower TCO and improved operational efficiency.



PwC, awarded the SAP Partner Champion Program, offers comprehensive SAP and AWS services. Its business, experience and technology (BXT) approach combines industry experience with SAP's innovation, ensuring scalable, efficient and secure SAP transformations on AWS.



Rackspace Technology's SAP services on AWS include modernization and managed support. Using cloud-native application design, it ensures agile SAP transformations, helping clients achieve real-time reliability and focus on core business functions.



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



Wipro's acquisition of Rizing enhances its SAP on AWS offerings, providing a robust *Safe and Fast* migration framework. With over 700 migration experts and tools such as the Well-Architected SAP Lens, it ensures efficient, non-disruptive SAP migrations for clients.



Tech Mahindra (Rising Star) uses frameworks such as ConvertCore and Crystallus™ for SAP migrations and transformations, providing scalable, secure and optimized SAP environments that integrate seamlessly with AWS analytics and cloud-native services.





“DXC Technology’s expertise in AWS SAP services is highlighted by its robust automation, comprehensive SAP management solutions and extensive experience in large-scale SAP transformations.”

Ashwin Gaidhani

DXC Technology

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’s methodology emphasizes rigorous testing and optimization, ensuring that SAP environments are agile and reliable. Their frameworks facilitate seamless transitions to SAP S/4HANA, incorporating best practices for scalability and security. Its extensive experience and strategic partnerships drive secure, efficient and innovative SAP deployments on AWS, ensuring high availability and optimized operations for diverse industries.

Strengths

Innovative automation and AI integration: DXC leverages AI and automation to enhance SAP operations on AWS. Its AI-based search and assistance, automated lifecycle actions (LCAs) for SAP on AWS and BTP-based DevOps innovation services streamline operations and reduce manual effort. Its industry-focused accelerators, like DXC Spark, enable rapid deployment of AI/ML solutions for retail and manufacturing, driving significant business value.

Extensive SAP experience and expertise: DXC’s experience spans over 25 years in SAP Basis and infrastructure management, managing more than 6,800 SAP environments globally. The company holds SAP on AWS certification and migration competencies. DXC’s comprehensive support


for RISE with SAP on AWS and disaster recovery options, including AWS Elastic DR and ransomware recovery, further enhance its service offerings.

Robust SAP management and operations: DXC provides a full suite of AWS SAP services, including consulting, integration and S/4HANA migration. Its SAP management solutions comply with the AWS Well-Architected Framework and SAP standards, supporting all SAP OS, DB and application server types.

Caution

DXC has been building its AWS on SAP practice with a focus on industry awareness and business outcomes. This is reflected in its customer case studies and success stories, which can be further regionalized — for instance, with specific outcomes achieved in mid to large client landscapes in the U.S. market.





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

Client Business Role

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

Region

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

Industry

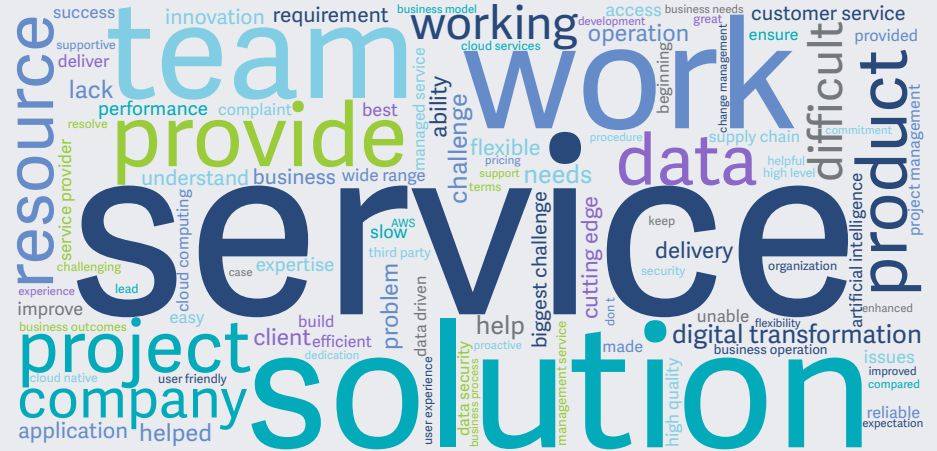
- ▲ **Most satisfied**
Chemicals
- ▼ **Least satisfied**
Public Sector

Most Important CX Pillar

Business Continuity and Flexibility

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

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





Appendix

The ISG Provider Lens 2024 – AWS Ecosystem partners study analyzes the relevant software vendors/service providers in the U.S. market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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

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

The study was divided into the following steps:

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



Author & Editor Biographies



Lead Author

Ashwin Gaidhani
Research Partner

Ashwin Gaidhani is an enterprise governance and digital business transformation expert. He is a research partner at ISG and has extensive experience in enterprise service management and transformative technologies. Ashwin's business technology expertise revolves around technology business management, work design methodologies and enterprise governance.

He is a creative leader who designs, describes and implements strategies to drive digital transformation. With over 22 years of experience,

he is a practice leader, executive-level advisor and influencer. Ashwin leads the Enterprise Service Management (platforms and services), Intelligent Automation (Platforms and Services), AWS Ecosystem, ServiceNow and Workday Ecosystem studies. Ashwin is highly qualified and experienced in service management, with lifecycle experience in technology operations, business consulting and advisory roles for large global system integrators (GSIs), independent software vendors (ISVs) and technology product companies.



Research Analyst

Srinivasan P N
Senior 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.



Author & Editor Biographies

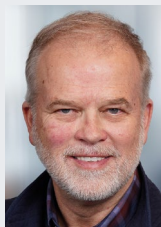


Study Sponsor

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](#).

For more information about ISG Research™ subscriptions, please email contact@isg-one.com, call +1.203.454.3900, or visit research.isg-one.com.

ISG

ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 900 clients, including more than 75 of the world's top 100 enterprises, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including AI and automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis.

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

For more information, visit isg-one.com.





OCTOBER, 2024



REPORT: AWS ECOSYSTEM PARTNER 2024