

AWS Ecosystem Partners

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

Customized report courtesy of:

DXC TECHNOLOGY

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GenAI and agentic AI are transforming enterprises to become more autonomous, intelligent and data-driven

Cloud continues to be a critical and foundational component of any digital transformation initiative for any organisation, irrespective of its size, region or industry. This was called out in the recently concluded ISG Index, where we observed the growth of infrastructure as a service (IAAS) with 34 percent ACV Y-o-Y, driven by cloud hyperscalers with native AI, data platforms and agentic AI advancements.

Cloud is the cornerstone of any innovation. AWS' innovation and investment over the last 12 months have made it a market leader. A few key innovations progressed in segments that include GenAI (with Amazon Bedrock and Sage maker AI), cloud hardware and chips (Graviton and Trainium) and Amazon Q Business.

Beyond innovations in product and solution portfolios, AWS' focus on the APAC region has

thickened over the last few quarters, driven by a series of investments across countries in the region. The region is characterised by rapidly evolving economies and diverse industries, leading to the launch of a cloud region in Thailand, a commitment of AU\$20 billion investment in Australia and the establishment of a new headquarters in Singapore.

Over the past year, enterprises across APAC have accelerated their adoption of cloud technologies, harnessing the power of innovation and scalability to redefine business models and enhance competitive edges. The integration of GenAI marks a significant shift, as companies transition from exploratory phases to deploying scalable solutions that enhance automation and personalization.

AWS Professional Services

The pursuit of cloud modernisation is evident across APAC countries, with businesses embracing cloud-native architectures to achieve agility and resilience amid dynamic regulatory environments. Serverless computing and microservices are pivotal in this transformation, empowering enterprises to remain nimble. Heightened regulatory

APAC thrives on
adaptability and
innovation, fuelled
by technologies
such as **GenAI**
and **agentic AI**.



expectations, such as data sovereignty laws and stringent financial compliance in Australia, Indonesia, the Philippines and Singapore, underscore the necessity for robust security protocols.

Industry-specific solutions are crucial for APAC's diverse industrial landscape, necessitating tailored AWS services to meet localised challenges. Hybrid and multicloud architectures have emerged as strategic imperatives for APAC businesses seeking to avoid vendor lock-in while ensuring seamless operations.

AWS Managed Services

In navigating persistent macroeconomic headwinds, enterprises are strategically using GenAI to fuel continuous improvement and innovation while simultaneously driving down costs. During the COVID-19 pandemic recovery, these enterprises gained significant competitive edges that they are eager to maintain. The evolution in their expectations for managed services has led to the demand for genuine collaborative partnerships, transcending traditional cloud environment management. Enterprises now require

trusted extensions of their internal teams, reliable partners capable of autonomously managing operations.

Recent trends in AWS Managed Services have fuelled the demand for next-generation managed services providers (MSPs) as enterprises shift from on-premises data centres to cloud environments. These modern MSPs focus on creating high-value services, streamlining operations and optimising cost structures while fostering DevOps practices and encouraging a culture of experimentation. Hybrid cloud adoption sees enterprise integration of public cloud services, such as AWS, with existing on-premises infrastructure, requiring managed service providers to orchestrate and secure these hybrid environments.

Cloud security has gained focus as managed services now bundle beyond vulnerability assessments, accentuating robust security and compliance measures. Amid soaring cloud adoption, robust security protocols, including a zero trust security model, are becoming indispensable. Simultaneously, MSPs leverage AI and ML to enhance monitoring, automate

tasks, improve incident response and align managed services with clients' business goals, emphasising outcomes such as improved performance, scalability and agility.

Enterprises are adopting FinOps-driven cloud governance, focusing on optimising costs and accountability across teams. Automation and orchestration of cloud resources are essential for scalability, resilience and operational efficiency. Next-generation AWS Managed Services prioritise intelligent automation and specialisation in enterprise workloads, centre around AI integration for service enhancement and foster sustainability practices through GreenOps frameworks.

AWS Enterprise Modernisation and AI Services

In the AWS sphere of enterprise data modernisation and AI services, the past year has marked significant strategy and execution transformations for enterprises seeking to leverage the inherent power of data and AI to gain a competitive edge. The initial phase of experimentation with GenAI has swiftly evolved into full-scale deployment, with companies integrating advanced offerings

such as Amazon Bedrock and SageMaker into their data ecosystems. This evolution underscores a crucial shift from AI being a supplementary capability to becoming central to business operations, driving automation and reimagining customer engagement and decision-making processes.

Moreover, the trend of merging data operations with MLOps reveals a deeper commitment to operationalise AI at scale. This convergence is driven by the need for consistent data governance that blends security, compliance and integrity into a streamlined package, enabling enterprises to maintain robust oversight across vast data landscapes. As enterprises advance in their AI maturity, initiatives are increasingly targeted at industry-specific solutions, further driving the demand for tailored AI models that meet unique business needs.

Beyond technology, enterprises are investing in AI literacy and fostering cross-functional collaboration, embedding resources into corporate culture to unlock the full potential of AI and data modernisation initiatives. The migration from legacy systems to AWS-powered



Executive Summary

solutions accompanies a concerted effort to adopt a holistic, outcome-based approach to data modernisation. This reflects the growing enterprise recognition that sophisticated, business-aligned AI and data platforms are critical to maintaining a competitive advantage while ensuring AI development is aligned with core business strategies.

The emphasis on system integration, enhanced observability and refined compliance frameworks defines emerging best practices within data modernisation and AI service spaces. As the AI landscape matures, enterprises are pursuing advanced solutions and seeking to embed them within broader organisational frameworks that ensure sustainability, cost-effectiveness and strategic alignment across various industry sectors.

AWS SAP Workloads

In the unfolding landscape of AWS SAP Workloads, the past year has experienced a dynamic shift as enterprises are prioritising the modernisation of SAP environments on AWS platforms to leverage scalability, flexibility and cost-efficiency. Central to this transformation is the accelerated migration to SAP S/4HANA

on AWS, driven by the underlying benefits of enhanced operational efficiencies, cost management and the seamless integration offered by cloud infrastructure. This trend is particularly pronounced among large organisations that navigate complex SAP ecosystems, opting to move to cloud-native paradigms that support evolving business needs and technological innovations.

A notable uptick in the adoption of RISE with SAP illuminates a strategic pivot towards a unified and streamlined ERP modernisation journey. Enterprises are gravitating towards this service model that integrates software, infrastructure and support in a cohesive package, simplifying complex modernisation efforts and facilitating a smooth transition to S/4HANA. With AWS as a partner, SAP's cloud-first strategy is increasingly appealing, with its capacity to address the unique challenges of hybrid and multicloud environments. The adoption of RISE with SAP is growing as organisations strive to mitigate vendor lock-in and bolster resilience.

Despite swift adoption, APAC's growth is tempered by challenges such as a notable

shortage of AWS-skilled professionals. Providers are addressing this gap through extensive training and certification programs, aiming to elevate expertise within the workforce.

APAC businesses are setting clear expectations from AWS service providers, seeking transformative cloud engagements that align with overarching business objectives. Innovation and agility are paramount, with enterprises demanding cutting-edge solutions that adapt to rapid market changes. Reliability in support and adherence to local and international compliance standards are equally critical, ensuring operational continuity. APAC enterprises favour outcome-based engagements, where tangible business results such as cost reductions and enhanced time-to-value define the success of cloud services.

The APAC market presents unique opportunities where AWS Professional Services play a pivotal role in facilitating digital transformation. By aligning strategies with regional needs and challenges, providers can deliver innovative and sustainable solutions that propel enterprises forward. As the APAC cloud ecosystem continues to thrive, strategic

collaboration between enterprises and AWS service providers will be key in sustaining competitive advantages and driving regional economic development.

AWS' laser focus on the APAC region and a robust regional partner ecosystem help enterprises to seamlessly overcome challenges during their transformation and modernisation initiatives. This is coupled with a strong talent base, innovative mindset and strong investment pipeline from enterprises that are open to embracing change.





Provider Positioning

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	AWS Professional Services	AWS Managed Services	AWS Enterprise Data Modernization and AI Services	AWS SAP Workloads
AC3	Not In	Product Challenger	Not In	Not In
Accenture	Leader	Leader	Leader	Leader
Aspire Systems	Not In	Product Challenger	Product Challenger	Not In
Atos	Not In	Not In	Product Challenger	Not In
Birlasoft	Contender	Contender	Product Challenger	Contender
Blazeclan	Rising Star ★	Product Challenger	Product Challenger	Not In
Capgemini	Leader	Leader	Leader	Leader
Cloud4C	Product Challenger	Product Challenger	Contender	Contender
CloudKeeper	Not In	Product Challenger	Not In	Not In
Coforge	Contender	Contender	Contender	Not In





Provider Positioning

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	AWS Professional Services	AWS Managed Services	AWS Enterprise Data Modernization and AI Services	AWS SAP Workloads
Cognizant	Leader	Leader	Leader	Leader
Deloitte	Product Challenger	Product Challenger	Product Challenger	Product Challenger
DXC Technology	Leader	Leader	Leader	Leader
Encora	Contender	Contender	Contender	Not In
FPT Software	Market Challenger	Not In	Not In	Not In
Genpact	Not In	Not In	Product Challenger	Not In
GFT	Product Challenger	Not In	Not In	Not In
HCLTech	Leader	Leader	Leader	Leader
Hitachi Digital Services	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Infosys	Product Challenger	Product Challenger	Leader	Product Challenger





Provider Positioning

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	AWS Professional Services	AWS Managed Services	AWS Enterprise Data Modernization and AI Services	AWS SAP Workloads
Kyndryl	Product Challenger	Product Challenger	Product Challenger	Product Challenger
LTIMindtree	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Mantel Group	Contender	Not In	Contender	Not In
Minfy	Not In	Contender	Not In	Not In
Mphasis	Not In	Product Challenger	Not In	Not In
NCS	Market Challenger	Market Challenger	Not In	Not In
NTT DATA	Rising Star ★	Rising Star ★	Not In	Product Challenger
Orange Business	Product Challenger	Product Challenger	Not In	Not In
Persistent Systems	Product Challenger	Product Challenger	Rising Star ★	Not In
PwC	Leader	Leader	Leader	Product Challenger





Provider Positioning

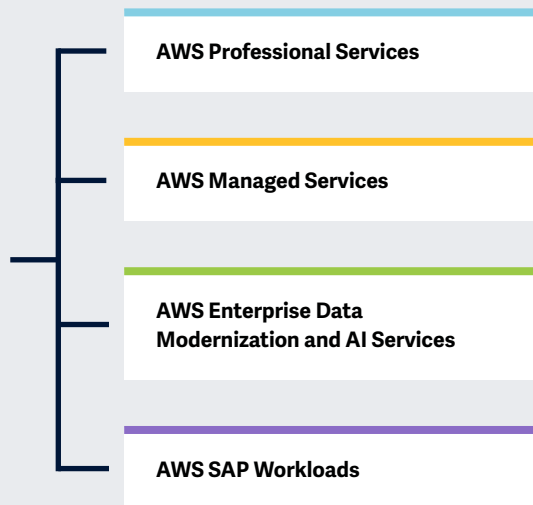
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	AWS Professional Services	AWS Managed Services	AWS Enterprise Data Modernization and AI Services	AWS SAP Workloads
Quantiphi	Not In	Not In	Rising Star ★	Not In
Rackspace Technology	Product Challenger	Product Challenger	Not In	Product Challenger
Slalom	Not In	Product Challenger	Not In	Not In
Tata Communications	Contender	Product Challenger	Not In	Contender
TCS	Leader	Leader	Leader	Leader
Tech Mahindra	Leader	Leader	Product Challenger	Rising Star ★
Telstra Purple	Market Challenger	Market Challenger	Not In	Not In
ThoughtWorks	Product Challenger	Not In	Not In	Not In
Wipro	Leader	Leader	Leader	Leader



Key focus areas for AWS Ecosystem Partners 2025 study.

Simplified Illustration Source: ISG 2025



Definition

In 2025, the AWS partner ecosystem is witnessing unprecedented growth driven by strategic investments and technological advancements. A key focus is democratizing AI and generative AI (GenAI), notably through Amazon Bedrock and Amazon Q. AWS has strengthened its relationship with AI innovators by introducing Nova foundation models and agentic AI builder services, enabling partners to deliver AI-powered solutions across industries. AWS empowers partners to develop industry-specific solutions using its robust platform. Infrastructure investments to expand AWS' physical footprint enhance services, benefiting partners and enterprise clients. Investments in new Tranium chips and Graviton4 processors demonstrate AWS' commitment to providing the foundational resources necessary for high-performance computing and scalable applications, creating opportunities for partners specializing in data-intensive workloads and cloud-native development. Data-driven decision-making drives the adoption of advanced analytics and database services.

AWS enables partners to address key customer needs with a focus on security by introducing new specializations for building Zero Trust and compliance solutions. The company is also developing solutions to help customers meet stringent regulatory requirements, underscoring its commitment to delivering secure and compliant cloud environments globally. This evolution toward sovereign cloud offerings is crucial for organizations operating in regions with strict data protection laws and for firms in regulated industries such as defence. Expanded Migration Acceleration Program (MAP) incentives by AWS amplify these efforts to accelerate cloud modernisation.



Scope of the Report

This ISG Provider Lens® quadrant report covers the following four (spell out the number of quadrants; do not use a digit) quadrants for services/solutions: AWS Managed Services, AWS Enterprise Data Modernization and AI Services and AWS SAP Workloads.

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

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

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

Provider Classifications

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

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

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

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

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





Provider Classifications: Quadrant Key

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

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

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

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

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

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





AWS Professional Services

Who Should Read This Section

This report is valuable for service providers offering **AWS Professional Services** in **APAC** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence. The report highlights the rapid evolution of the AWS cloud ecosystem driven by the accelerated shift to cloud-native architectures and emphasizes the increasing demand for Generative AI expertise.

Digital professionals

Should read this report to understand AWS professional service providers' relative strengths and weaknesses, which can help them drive digital transformation within their enterprises. Key areas involve their expertise in crafting, developing, and modernizing intricate cloud architectures, including hybrid and multicloud integrations, as well as AWS security, software development, application migration, and AI/ML deployments.

Technology professionals

Should read this report to understand AWS professional service providers' positions and their impact on enterprise transformations, alongside cloud migration benefits. The report details providers' skills in application migration and modernization, utilizing DevOps, and designing scalable, resilient cloud-native solutions. Assessing expertise in AWS tech, automated testing, deployment, and change management is crucial.

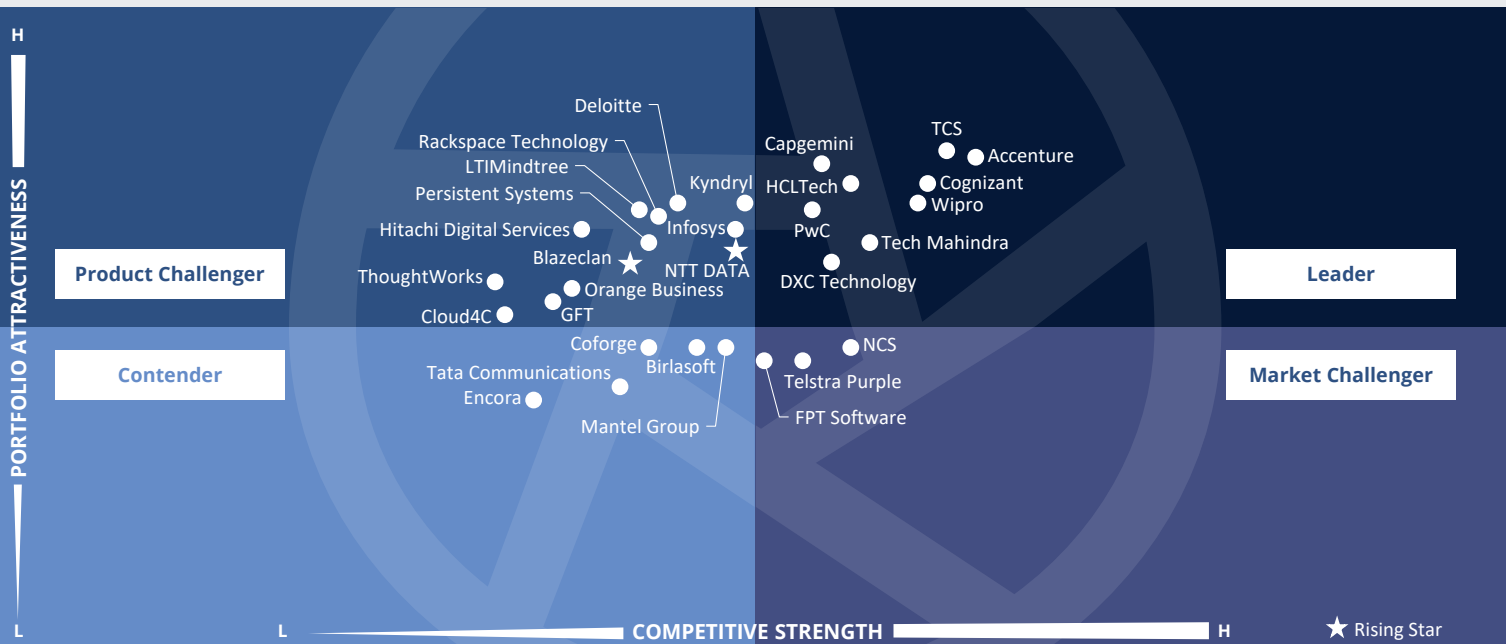
Procurement professionals

Should read this report to comprehend the current landscape of AWS professional service providers in APAC. This report enables procurement teams to effectively compare providers, evaluate potential partnerships, and negotiate contracts with a clear understanding of the providers' market positions and capabilities.



AWS Ecosystem Partners AWS Professional Services

APAC 2025



AWS Professional Services is powering APAC's cloud transformation, scaling **GenAI**, aligning automation with strategy and embedding responsible AI to unlock innovation and drive enterprise impact at scale.

Srinivasan P N



Definition

This quadrant evaluates providers offering a robust suite of consulting and migration services to guide and support businesses through their AWS cloud journeys. These providers deliver a wide range of services tailored to meet diverse business and IT needs, including business and technology consulting, migration and modernisation. The offerings encompass cloud strategy formulation, compelling business case development and support for ESG and GRC needs.

Providers should offer advanced technologies and solutions tailored to architecture, security and specific industry needs. Migration involves automated testing, thorough planning, execution, deployment strategies and change management to ensure smooth transitions.

AWS partners possess extensive expertise in software architecture, software development (including DevOps principles), application migration and modernisation, enabling them to architect, deploy and manage scalable, resilient applications and services in the cloud environment.

Eligibility Criteria

1. Offer a wide range of **AWS competencies** and service delivery offerings and related certifications with consulting and migration expertise
2. Develop an AWS-focused consulting **road map and innovations** (current and planned)
3. Deploy and manage **hybrid and multicloud environments**, ensuring seamless integration and operational consistency
4. Demonstrate **value for clients** through perceptible business outcomes or other measurable improvements driving business-technology transformation
5. Offer **ESG and GRC guidance**, tools, technologies and services
6. Migrate **business-critical applications** for customers using AWS
7. Design, build and modernise **integrated cloud architecture** to lead migration and multicloud integration
8. Being part of the AWS **Migration Acceleration Program** (MAP) is advantageous
9. Demonstrate rigorous **AWS security capabilities**, including advanced threat protection and compliance framework implementation
10. Showcase a strong portfolio of AI- and ML-driven innovations, including expertise in deploying **GenAI and modernizing enterprise workloads** for operational efficiency
11. Support for **sovereign cloud solutions**, especially in Europe



Observations

In 2025, APAC enterprises are increasingly leveraging AWS Professional Services to drive strategic cloud transformation and innovation. Service providers are evolving to meet these demands by aligning solutions with broader business goals.

A key focus is scaling GenAI from pilots to enterprisewide integration, using custom frameworks and advanced data models to enhance workflows and decision-making. Providers are also expanding hyperautomation across business processes, improving efficiency and CX.

Responsible AI is gaining prominence, with providers helping enterprises implement governance frameworks and meet regional compliance standards. To support high-stakes analytics and GenAI workloads, providers are investing in data quality, observability and trust frameworks.

These trends reflect a shift in APAC's cloud dynamics, where service providers are becoming strategic enablers of transformation,

delivering tailored, ethical and efficient solutions that drive measurable business outcomes.

From the 39 companies assessed for this study, 30 qualified for this quadrant, with nine being Leaders and two Rising Stars.



Accenture offers an extensive range of migration, implementation and modernisation services for AWS Cloud. Bagging AWS' Global Consulting and Migration Partner of the Year award in 2024 adds credibility to Accenture's capabilities.



Capgemini's secure, compliant cloud infrastructure supports data sovereignty and regulatory needs, helping clients navigate complex compliance landscapes with confidence.



Cognizant's strong investment focus has helped the provider to extensively build over 50 joint offerings across industries, offering innovative solutions that address specific architectural, security and industry challenges.



DXC Technology's focus on strategic solutions, cost modelling and comprehensive integration strategies provides a competitive advantage.



HCLTech's professional services emphasise large-scale migration and modernisation projects, supported by proprietary AI tools such as AI force, facilitating seamless adaptation of advanced technologies for clients.



PwC exhibits significant competency in migrating complex enterprise systems such as Guidewire to AWS, bolstered by its AI and data capabilities that optimise and enhance migration outcomes.



TCS excels in migration initiatives, employing AWS' capabilities alongside strategic partnerships for streamlined modernisation processes.



Tech Mahindra's professional services emphasise transformative migrations and consulting engagements that leverage AWS' breadth, deeply rooted in industry-specific expertise and collaborative frameworks.



AWS Professional Services



Wipro's professional services enable large-scale migrations and transformations, leveraging strategic initiatives like the Vault program to drive innovation and modernisation.



Blazeclan (Rising Star) exhibits strong AWS Professional Service Provider capabilities with a comprehensive approach to automation and security integration, ensuring streamlined operations for clients in the region.



NTT DATA's (Rising Star) professional migration services are distinguished by advanced AI integration and significant cost advantages, coupled with collaborative efforts alongside AWS ProServe teams.





“DXC has a track record in transitioning clients from legacy systems to AWS cloud, achieving cost efficiency and modernising operations. Initiatives integrating GenAI for FinOps signal a forward-thinking strategy.”

Srinivasan P N

DXC Technology

Overview

DXC Technology is headquartered in Virginia, U.S. It has more than 127,200 employees across over 70 countries. In FY24, the company generated \$13.7 billion in revenue, with Global Infrastructure Services as its largest segment. DXC provides a portfolio of industry-specific solutions on AWS, designed to address the distinct operational and regulatory challenges faced by sectors such as healthcare, financial services, and manufacturing. These tailored solutions, clients can benefit from industry-standard best practices to achieve superior outcomes during their modernisation initiatives.

Strengths

Modular architecture and automation:

DXC leverages modular, composable architectures and automation-led frameworks to accelerate AWS migrations. Using intelligent platforms, AWS-native tools and reusable blueprints, it ensures scalable, low-risk transitions. Automated discovery, assessment and orchestration drive efficiency, while its AWS Premier Tier partnership and migration competency validate its robust cloud transformation expertise.

Industry-specific solutions:

DXC focuses on prebuilt solutions aligned to industry needs, offering bespoke solutions that support sector-specific challenges, such as the government, manufacturing and finance sectors, ensuring operational

integrity and compliance. Some of the AWS solutions offered include DXC Assure for insurance core systems, SPARK for smart manufacturing and Robotic Drive for autonomous vehicle development. Its Regulatory AI Engine supports compliance automation, while DXC's platform-as-a-service (PaaS) offering accelerates SAP modernisation.

AI-driven intelligence platform:

DXC's products, such as Oasis, provide real-time visibility into operations coupled with predictive analytics, allowing clients to anticipate operational shifts and optimise workflows.

Caution

DXC should focus on building enhanced cloud migration frameworks to accelerate the cloud migration process. It could work on hybrid and multicloud strategies to enhance enterprise customers' flexibility.





AWS Managed Services

Who Should Read This Section

This report is valuable for service providers offering **AWS Managed Services** in **APAC** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence. The report emphasizes the rise of green cloud solutions in response to the growing demand for cost optimization, sustainability, and security within increasingly complex hybrid and multicloud environments.

IT professionals

Should read this report to understand AWS managed service providers' relative strengths and weaknesses, which can help them drive digital transformation in their enterprises. Evaluating their utilization of advanced cloud management platforms (CMPs), automation tools, and proficiency in areas like MLOps and DataOps is essential to ensure the managed infrastructure supports the development, deployment, and scaling of digital services and applications effectively.

Technology professionals

Should read this report to understand AWS managed service providers' positions and their impact on enterprise transformations, alongside cloud migration benefits. This encompasses their skills in autonomous, machine learning-driven orchestration and management, expertise in designing and managing secure public and multicloud architectures, as well as the range and availability of their security resources and services.

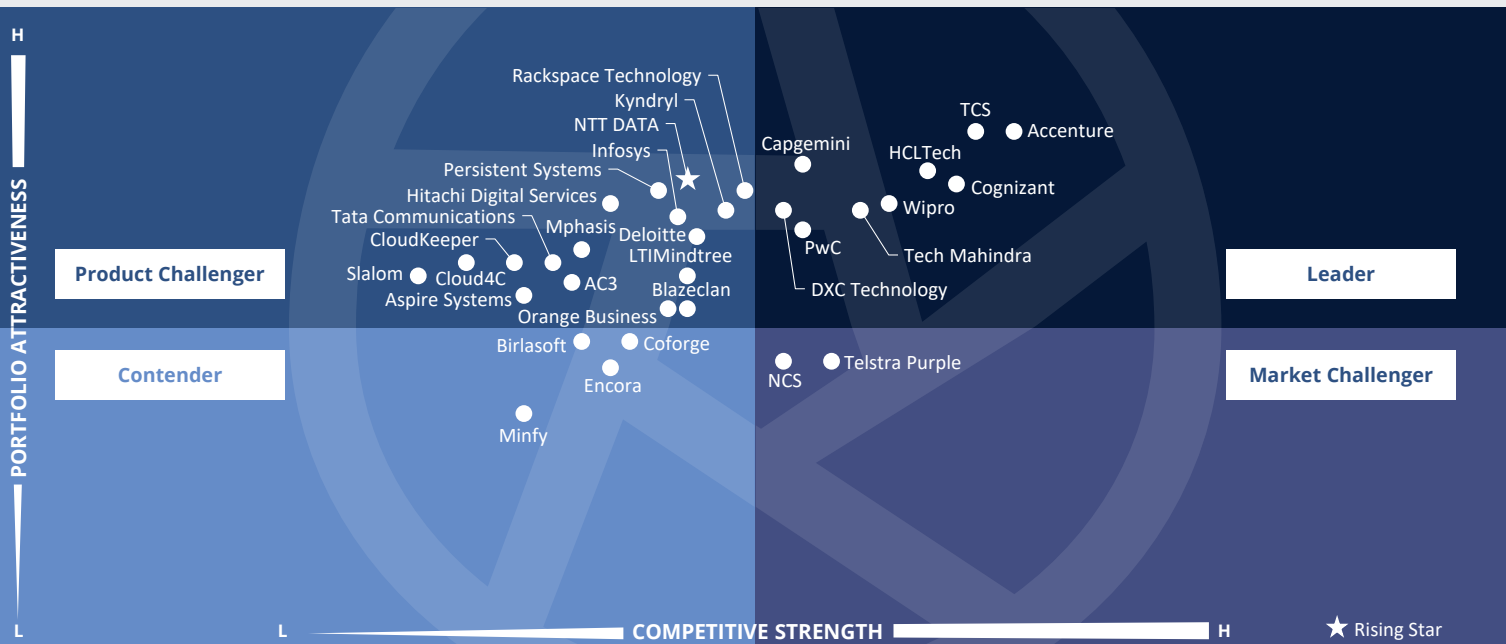
Procurement professionals

Should read this report to understand how providers use automation and CMPs, integrate DataOps, MLOps and AIOps, and align with operational best practices to compare service offerings, evaluate value propositions and negotiate SLAs for effective cloud operations management



AWS Ecosystem Partners AWS Managed Services

APAC 2025



AWS Managed Services is redefining cloud operations in APAC, **scaling GenAI, embedding FinOps and zero trust** and **enabling intelligent, secure and sustainable** transformation through automation-first, platform-driven delivery.

Srinivasan P N



AWS Managed Services

Definition

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

These providers proactively integrate DataOps, FMOps, MLOps and AIOps, coupled with innovative intellectual property such as FinOps methodologies and automated security frameworks, to build resilient, compliant and well-governed cloud environments.

Eligibility Criteria

1. Obtain AWS Managed Service Program **certification**
2. Demonstrate expertise in autonomous **ML-driven orchestration, configuration and management** of platforms and systems
3. Design, build and manage **public and multicloud** environments
4. **Support** big data and multiple database solutions and analytics
5. Engineer **DevOps** solutions
6. Provide **security** resources and services with scope and availability
7. Ability to **measure and optimise cloud-related carbon** emissions on AWS is advantageous
8. Apply AWS' operational best practices, including those aligned with **site reliability engineering (SRE)** principles
9. Experience in **solutions architecture and cost optimisation (FinOps)**
10. **Migrate servers** and manage resource availability



AWS Managed Services

Observations

AWS Managed Services have become central to cloud transformation, with enterprises demanding automation, FinOps and security-first operations. Providers are embedding FinOps tools for real-time cost visibility, optimisation and governance. Security and compliance frameworks, including Zero Trust and continuous monitoring, are critical in regulated sectors.

Sustainability is gaining traction, especially in New Zealand, with GreenOps becoming a core requirement. GenAI and AIOps are reshaping operations, enabling intelligent triage, auto-remediation and self-healing environments. Enterprises are also adopting platform-led delivery models with unified dashboards and hybrid cloud governance.

Providers with deep AWS expertise, automation-first capabilities, and AI-driven managed services are emerging as preferred partners for scalable, secure and resilient cloud operations.

From the 39 companies assessed for this study, 32 qualified for this quadrant, with nine being Leaders and one Rising Star.



Accenture provides domain-focused modernisation solutions, as seen in industries such as steel manufacturing and public transport authorities, proving its capability in handling mission-critical transformation projects.



Capgemini's managed services leverage a deep understanding of cloud operations to optimise costs and enhance visibility, utilising AWS technologies to streamline operations for clients, especially in APAC.



Cognizant leverages AI-infused platforms to streamline IT operations through automation, proactive remediation and enhanced observability across multicloud environments.



DXC Technology's managed services are comprehensive, with a clear focus on industry cloud solutions and continuous security updates. This makes it capable of handling diverse client requirements in the region.



HCLTech's shift from cost-centric to innovation-driven managed services highlights its adaptability. Its focus on AI-enhanced infrastructure solutions positions it as a leader in digital transformation.



PwC has developed a robust multiagent orchestration solution in Agent OS, which adds significant value in managing complex service environments, reducing integration time and increasing operational efficiency.



TCS delivers streamlined managed services that efficiently respond to evolving technological needs by prioritizing proactive engagement and investment.



Tech Mahindra showcases robust capabilities in AWS Managed Services, providing a comprehensive range of solutions that optimise cloud operations and manage infrastructure efficiently for large enterprises.



AWS Managed Services



Wipro's approach to AWS Managed Services emphasises compliance and efficiency, as demonstrated by significant outcomes such as reduced vulnerabilities and increased patch management efficiency.



NTT DATA (Rising Star) offers cost-effective AWS-native managed services, complemented by its global delivery model that adheres to geopolitical and legal requirements, demonstrating adaptability and reach.





"DXC Technology's (DXC) AWS managed services emphasise modularity and flexibility, catering to diverse client requirements and focusing on automation and regional adaptability."

Srinivasan P N

DXC Technology

Overview

DXC Technology is headquartered in Virginia, U.S. It has more than 127,200 employees across over 70 countries. In FY24, the company generated \$13.7 billion in revenue, with Global Infrastructure Services as its largest segment. DXC Managed Services offers highly adaptable solutions that encompass everything from modular multicloud operations to comprehensive industry solutions that cover infrastructure, security, applications and data. It brings together a distinctive blend of expertise to achieve technical and business outcomes.

Strengths

AI-led Operations: DXC brings AI-driven operations, self-healing infrastructure and auto-remediation to AWS environments, reducing manual intervention, improving uptime and enabling faster and more efficient cloud operations that free employees to focus on innovation.

Modular architecture and automation: DXC's modular cloud architecture enables seamless integration with client-preferred tools, platforms and processes, offering flexibility without vendor lock-in. Combined with intelligent automation, it streamlines service delivery, optimises resource utilisation and simplifies complex multicloud management, helping enterprises scale with consistency and control.

Industry-specific solutions: DXC

emphasises prebuilt automation aligned to industry needs, offering bespoke solutions that support sector-specific challenges, such as those in the government and finance sectors, ensuring operational integrity and compliance.

AI-driven intelligence platform: Products such as Oasis provide real-time visibility into operations coupled with predictive analytics, allowing clients to anticipate operational shifts and optimise workflows.

Caution

DXC should focus on ensuring the evolution of automation frameworks to meet emerging challenges in AI security and data governance, which will be crucial in maintaining market leadership.





AWS Enterprise Data Modernization and AI Services

Who Should Read This Section

This report is valuable for service providers offering **AWS Enterprise Data Modernization and AI Services** in **APAC** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence. The report highlights APAC enterprises' use of AWS services for data analytics and ML, leveraging AutoML and serverless tools for efficiency, while prioritizing data security with Macie and PrivateLink.

IT professionals

Should read this report to understand the relative strengths and weaknesses of AWS data analytics, AI and ML service providers for driving digital transformation in enterprises. This will allow them to effectively drive digital transformation initiatives, optimize cloud investments, and strategically select the right tools and partners to modernize infrastructure, enhance data-driven decision-making, and accelerate the adoption of AI, GenAI and agentic AI technologies.

Procurement professionals

Should read this report to comprehend the current landscape of AWS data analytics, AI and ML service providers in APAC. These insights enable a structured comparison of providers based on qualifications, experience and potential value delivery, facilitating better contract negotiations and partner selection.

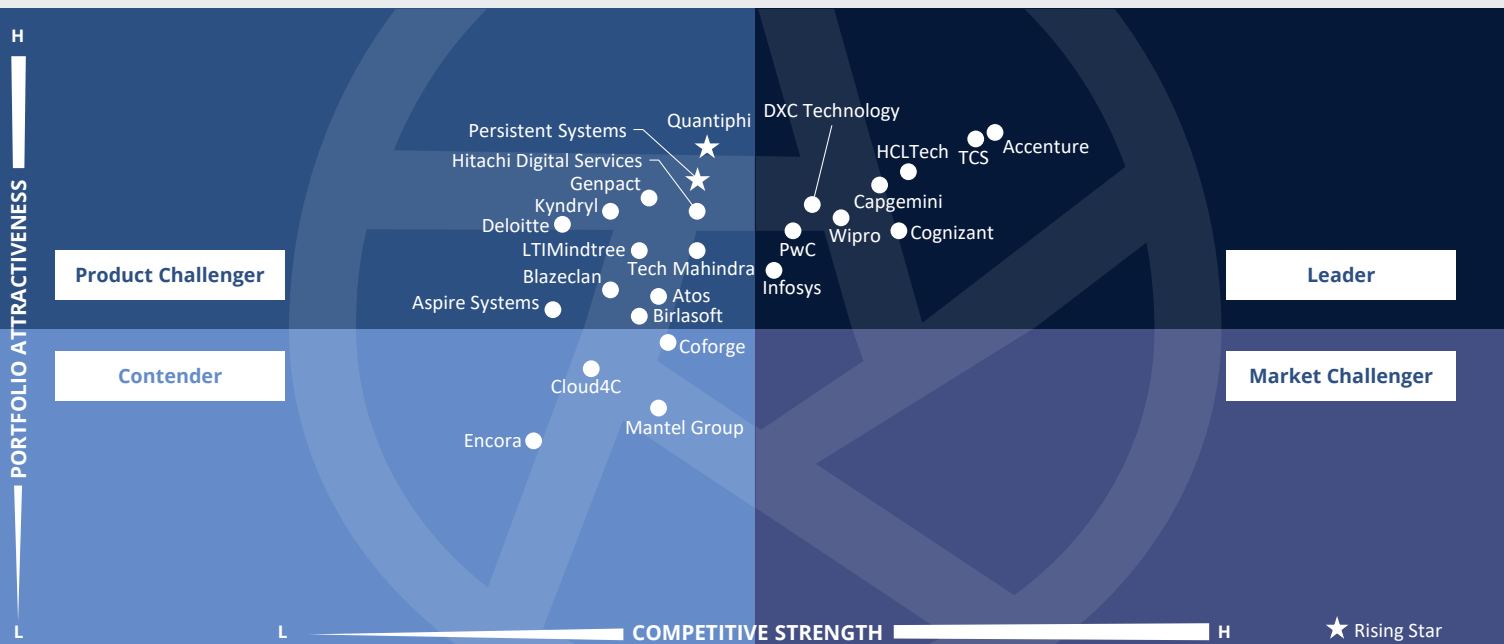
Analytics professionals

Should read this report to understand AWS data analytics, AI and ML service providers' positioning and their impact on enterprise transformations, alongside cloud migration benefits. The report highlights key trends, best practices and emerging technologies, equipping analytics professionals to lead successful data initiatives and deliver actionable insights.



AWS Ecosystem Partners AWS Enterprise Data Modernization and AI Services

APAC 2025



AWS' data and AI services are accelerating APAC's modernisation, powering **scalable, secure and localised** platforms with **GenAI, data mesh and industry-specific AI** to drive intelligent and verticalised transformation.

Srinivasan P N



Definition

This quadrant evaluates service providers' capabilities across four essential domains: enterprise data ecosystem, insights and decision-making, agentic AI and GenAI with AWS and customised ML solutions.

Enterprise data ecosystems relate to providers' proficiencies in implementing and optimising data platforms such as Amazon Redshift, Amazon RDS and Amazon Glue, emphasising data sovereignty, scalability and metrics. Analytics and insights relate to providers' capabilities in delivering predictive analytics and real-time dashboards that transform data into actionable insights. Agentic AI and GenAI include innovative services and solutions developed using Amazon Bedrock, Amazon Q, Titan and Nova. Customised ML solutions include industry-specific, functional and domain solutions developed using the AWS suite of AI and ML tools.

Eligibility Criteria

1. Maintain AWS Select, Advanced or Premier Tier **partnership with data and analytics and ML competencies**
2. Develop, deliver, maintain and scale enterprise-grade hybrid/mixed-model **LLMs and agentic AI solutions**
3. Identify and utilise **relevant tools and technologies**
4. Employ **AWS-certified professionals with specific data engineering, ML and cloud architecture certifications**, including professional-level certifications
5. Demonstrate successful **enterprise-scale AWS data modernisation or AI implementation projects** involving data modernisation and AI components
6. Offer comprehensive services with **documented methodologies and accelerators**, demonstrating the ability to address the full spectrum of client needs
7. Exhibit specialised **expertise in industry verticals** with documented case studies highlighting measurable business outcomes achieved through AWS data and AI implementations
8. Demonstrate **experience utilising AWS GenAI services** to address and resolve business problems
9. Maintain an active **AWS-focused innovation program**
10. Deploy and manage **IoT solutions on AWS** with competency and capability



AWS Enterprise Data Modernization and AI Services

Observations

The APAC AWS ecosystem is rapidly evolving, driven by diverse digital maturity, regulatory needs and an increasing demand for AI-led transformation. Enterprises are embracing AWS-native platforms such as Data Mesh, Lakehouse and AI-ready pipelines to modernise their data estates.

Providers are leveraging services such as Amazon Redshift, SageMaker, Glue and Bedrock to build scalable, secure and compliant platforms. India and Southeast Asia lead in AI talent, driving innovation in GenAI and agentic AI. Use cases span banking, financial services and insurance (BFSI), healthcare, manufacturing and public services, reflecting the diverse impact across industries. Strategic programs such as Migration Acceleration Program (MAP), Well-Architected Framework Review (WAFR) and co-sell motions are helping partners scale adoption. Providers with vertical expertise, proprietary accelerators and deep AWS alignment are emerging as key enablers of intelligent, secure and outcome-driven transformation across the APAC region.

From the 39 companies assessed for this study, 25 qualified for this quadrant, with nine being Leaders and two Rising Stars.



Accenture's innovative solutions such as AI Refinery showcase its commitment to pioneering data modernisation with AI, redefining enterprise data strategies.



Capgemini harnesses AWS technologies to embed advanced AI solutions within industry applications, fostering innovation and transformation through GenAI and agentic AI integration.



Cognizant advances AI-focused solutions by integrating GenAI and agentic AI frameworks, fostering innovation across data modernisation and industry-specific applications.



DXC Technology's data modernisation services employ advanced AI tools and frameworks to drive operational efficiencies and strategic insights across industries.



HCLTech leads in leveraging AI for data modernisation, with a commitment to cloud-native solutions that unlock business value and drive operational transformation.



Infosys emphasises a strong data-driven transformation strategy, integrating AI-driven processes supported by comprehensive accelerators.



PwC invests in AI-driven data strategies and leverages AWS platforms to deliver comprehensive data modernisation solutions, significantly enhancing organisational decision-making ability and insights accuracy.



TCS' investment in and emphasis on developing mainframe modernisation capabilities, powered by GenAI technology, enable the company to assist enterprises in their modernisation efforts, ultimately delivering significant business value.



AWS Enterprise Data Modernization and AI Services



Wipro's focus on AI and data modernisation integrates advanced data storage solutions, facilitated by partnerships with AWS, resulting in unique industry use cases.



Persistent Systems (Rising Star) drives significant advancements in AWS data modernisation and AI services, leveraging agentic AI and GenAI frameworks for enterprise advantages.



Quantiphi (Rising Star) is at the forefront of leveraging advanced AI and cognitive technologies to drive business transformation, delivering precise, vertical-specific solutions that enhance operational efficiency and innovation.





"Innovation in AI, including quantum computing, highlights DXC's readiness to adapt to cutting-edge technologies, reinforcing its competence in data handling and AI deployment."

Srinivasan P N

DXC Technology

Overview

DXC Technology is headquartered in Virginia, US. It has more than 127,200 employees across over 70 countries. In FY24, the company generated \$13.7 billion in revenue, with Global Infrastructure Services as its largest segment. DXC has built a set of prebuilt accelerators, governance frameworks and AWS MLOps Quickstarts and templates that reduce time to value by 30-50 percent. The company's compliance by design approach automates data sovereignty, encryption and role-based access across AWS regions.

Strengths

Strong set of accelerators and intellectual property: DXC has invested in developing a strong suite of accelerators and intellectual property offerings, including RIM.AI and the MaCS Platform for the automotive industry, which provides comprehensive visibility into the material composition of customers' products. It applies intelligent automation and spend analytics to optimise sourcing strategies and eliminate waste, potentially saving hundreds of millions of dollars in overlooked tail-end expenditures.

Responsible AI and compliance-driven implementations: DXC embeds Responsible AI practices using AWS tools such as SageMaker Clarify and AWS Artifact, ensuring transparency, bias detection and regulatory compliance. In APAC, it supports

sectors such as financial services and public institutions with explainable AI and compliant AI deployments, helping clients meet evolving data privacy norms and ethical standards.

Investment in future AI tools: DXC's investment road map includes creating LLMOps and model standardisation, enhancing the lifecycle management of AI models across various business scenarios. Additionally, the provider is also focused on launching AI platforms for AWS infrastructure and services.

Caution

DXC should focus on scaling its industry libraries and maintaining momentum in AI advancements. This approach will allow the company to capitalise on its innovative capabilities in new sectors.





AWS SAP Workloads

Who Should Read This Section

This report is valuable for service providers offering **AWS SAP Workloads** in **APAC** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence. APAC enterprises are migrating SAP apps to AWS for modernization, using automation and AI. While opting for hybrid solutions, partnerships with AWS and SAP address transformation challenges.

Technology professionals

Should read this report to understand AWS SAP implementation and integration service providers' relative strengths and weaknesses for driving digital transformation in enterprises. The expertise in applying DevOps, automation and cloud-native design principles within the SAP context is critical for improving agility and integrating SAP data and processes with broader digital transformation initiatives.

SAP professionals

Should read this report to understand AWS SAP implementation and integration service providers' positioning and their impact on enterprise transformations, alongside cloud migration benefits. Key technical criteria include possessing both AWS and SAP certifications and partnerships, experience with provisioning and operations, and the ability to provide end-to-end security and compliance support that meets industry standards.

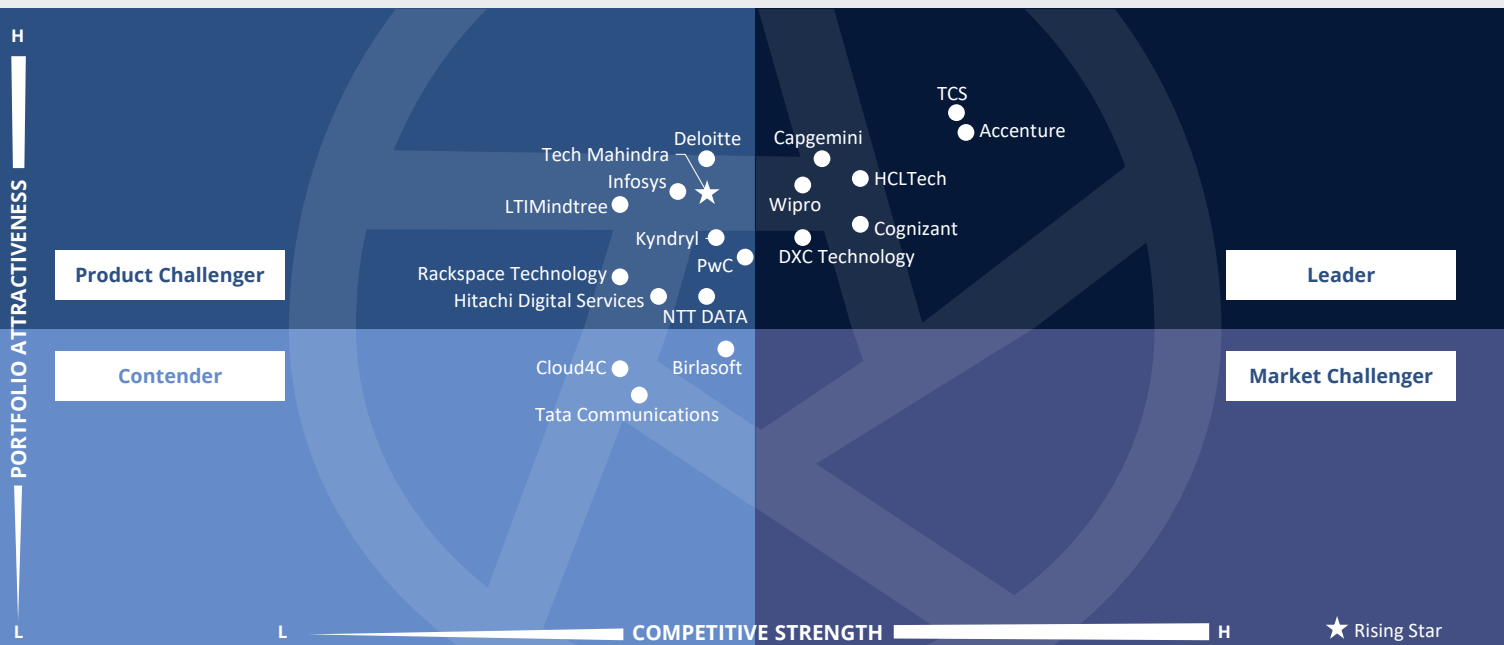
Procurement professionals

Should read this report to better comprehend the current landscape of AWS SAP implementation and integration service providers in APAC. It is essential to evaluate the breadth and depth of their service portfolio, customer references, maturity of their pricing models and their ability to support specific SAP applications and services on AWS to select the most suitable partner.



AWS Ecosystem Partners AWS SAP Workloads

APAC 2025



As APAC enterprises pivot to **S/4HANA** and **RISE with SAP**, AWS is emerging as the ERP modernisation backbone, infusing **GenAI, FinOps** and **secure cloud-native agility** to future-proof SAP landscapes.

Srinivasan P N



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, along with their central management. These providers help enterprises implement AWS as a hardware replacement or extension to support IaaS. Service providers in this quadrant also explore AWS for RISE with SAP, which has gained increased traction as enterprises migrate toward cloud-first strategies. They optimise, design and develop new processes and business flows as a part of platform management by combining their services such as SAP and AWS. This select group of service providers is responsible for implementing and ensuring subsequent operations.

In addition to having relevant AWS certifications, 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. Implement, customise, provision and support SAP applications services through a **breadth and depth of service portfolio**
2. Provide **resources** to support SAP offerings on AWS, including number and locations
3. Increase **awareness** and support SAP applications and services provisioning on AWS, including customer base
4. Offer **references** with a strong reputation for SAP applications, including services provisioning and support on AWS
5. Gain **experience** and relevant **certifications**, including AWS-certified SAP Competency
6. Offer suitable, mature and **adaptable pricing models**
7. **Allocate dedicated resources** (including business units) for DevOps, automation and cloud-native application design
8. Provide **end-to-end security and compliance support**, ensuring that SAP workloads on AWS meet industry regulations and standards



AWS SAP Workloads

Observations

In APAC, SAP workloads on AWS are accelerating due to the upcoming SAP ECC 6.0 End-of-Support and the shift to RISE with SAP and S/4HANA Cloud. Enterprises are moving from on-premises to AWS for scalability, innovation and compliance. Providers are leveraging AWS tools such as Bedrock, Q and CodeWhisperer to streamline migrations and modernise ERP landscapes.

AI and GenAI are being embedded into SAP operations, enabling smarter automation and analytics. FinOps, security and sustainability (GreenOps) are becoming key priorities, especially in regulated industries. Providers with in-depth SAP expertise and AWS-native capabilities are emerging as strategic partners for cloud ERP transformation.

From the 39 companies assessed for this study, 19 qualified for this quadrant, with seven being Leaders and one a Rising Star.

accenture

Accenture exploits AWS capabilities to optimise SAP workload management, ensuring scalable and cost-effective operations for enterprises.



Capgemini specialises in optimising SAP workloads using AWS, providing innovative solutions for seamless transitions and operational efficiencies in complex ERP landscapes.



Cognizant showcases prowess in SAP workload management on AWS, developing tailored solutions and strategic partnerships that expedite SAP transformations and optimisations.



DXC Technology provides premier SAP workload management solutions on AWS, emphasising automation and client advisory practices to ensure seamless integration and management.



HCLTech's extensive experience in SAP on AWS illustrates its capability to manage end-to-end transformations, reinforcing its position as an industry leader in SAP ecosystems.



TCS' expertise in SAP workloads enables it to deliver comprehensive enterprise solutions that leverage AWS capabilities, even as organisations focus on broader modernisation initiatives.



Wipro's SAP services on AWS demonstrate proficiency in handling large-scale SAP transformations with a particular focus on intricate separations and migrations.



Tech Mahindra's (Rising Star) approach to managing SAP workloads on AWS reflects deep expertise and an innovative alignment, supporting strategic transformations of legacy ERP systems.





Leader

"With a factory model approach and industry-leading automation, DXC's SAP workload solutions on AWS guarantee high performance and aid clients in evolving within SAP's shifting landscape."

Srinivasan P N

DXC Technology

Overview

DXC Technology is headquartered in Virginia, U.S. It has more than 127,200 employees across over 70 countries. In FY24, the company generated \$13.7 billion in revenue, with Global Infrastructure Services as its largest segment. DXC supports enterprises with a service factory model for Managed SAP Platform Services, which would allow for a high degree of automation and self-service capabilities, including AI and ML. The provider also has proprietary platforms such as OASIS and Nucleus IaC asset library, enabling intelligent automation, self-healing IT and compliance-driven cloud deployment.

Strengths

Industry-leading automated factory model:

DXC leverages a robust automated factory model for its managed SAP solutions, recognised for high SLAs and client satisfaction. With more than 25 years of SAP Basis expertise and 6,800 SAP environments managed globally, DXC ensures operational excellence and reliability, backed by SAP certifications and commendations.

Comprehensive advisory practices: DXC's advisory services support clients' transition from outdated SAP products to modern AWS infrastructures. Using over 40 AWS services, the company crafts custom road maps and lifecycle management plans, ensuring seamless client evolution on AWS with minimal business disruption.

Custom management solutions and accelerators:

DXC offers tailored management solutions with accelerators and scripting frameworks, empowering clients to establish autonomous SAP management practices. Its SAP Business Technology Platform (BTP) solutions, such as AI Augmented Analytics, facilitate enhanced decision-making and operational agility.

Strategic partnerships and innovations:

As a key partner with SAP for the RISE (SAP Cloud ERP) initiative, DXC combines AWS capabilities to deliver comprehensive full-stack solutions. It drives business value through innovations in AI, ML and IoT, showcasing its commitment to emerging technologies for real-time analytics, smarter operations and swift cloud migrations.

Caution

DXC should expand AI solutions within SAP transformations to drive predictive insights and operational efficiencies. It should also focus on leveraging AWS Bedrock and ML tools to further innovate with advanced analytics, reinforcing its position as a leader in digital transformation.





Appendix

The ISG Provider Lens® 2025 – AWS Ecosystem Partners study analyzes the relevant software vendors/service providers in the APAC 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 report includes research 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. The data collected for this report represent information that ISG believes to be current as of August 2025 for providers that actively participated and for providers that did not. ISG recognizes that many mergers and acquisitions may have occurred since then, but this report does not reflect these changes.

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

The study was conducted in 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 and use cases
4. Leverage ISG's internal databases and advisor knowledge & experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts & figures received from providers and other sources.
6. Use of the following key evaluation criteria:
 - * Strategy and vision
 - * Innovation
 - * Brand awareness and presence in the market
 - * Sales and partner landscape
 - * Breadth and depth of portfolio of services offered
 - * Technology advancements



Author and Editor Biographies



Lead Author

Srinivasan P N
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Srinivasan PN is a Senior Lead Analyst at ISG and is responsible for supporting and co-authoring ISG Provider Lens® studies on AWS and Digital Engineering. His area of expertise lies in engineering services and digital transformation. Srinivasan has 10 years of experience in the technology research industry, and in his prior role, he carried out research delivery for both primary and secondary research capabilities.

Srinivasan also authors enterprise context reports and global summary reports for his expertise. He also supports the advisors with his research skills and writes papers about the latest market developments in the industry.



Enterprise Context and Global overview Analyst

Srinivasan P N
Lead Analyst, ISG

Srinivasan PN is a Senior Lead Analyst at ISG and is responsible for supporting and co-authoring ISG Provider Lens® studies on AWS and Digital Engineering. His area of expertise lies in engineering services and digital transformation. Srinivasan has 10 years of experience in the technology research industry, and in his prior role, he carried out research delivery for both primary and secondary research capabilities.

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Author and Editor Biographies



Study Sponsor

Aman Munglani
Senior Director and Principal Analyst

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.

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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ISG

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The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.

For more information, visit isg-one.com.





OCTOBER, 2025

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