ISG Provider Lens™

AWS Ecosystem Partners

AWS SAP Workloads

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

DXC TECHNOLOGY

QUADRANT REPORT | OCTOBER 2023 | U.S.

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The AWS ecosystem - A strategic advantage for business transformation

AWS has introduced significant developments in 2023, propelling cloud operations and computing into a new era of digital transformation initiatives. These developments have enhanced the competitive landscape, task efficiency and economies of scale. Additional factors contributing to an elevated pace of digital transformations include quick adaptability to changes, socioeconomic and geopolitical circumstances and rapidly evolving enterprise expectations. Hybrid and multicloud strategies have emerged to utilize cloud solutions for varied end-user specializations and industry use cases and technology capabilities. These strategies facilitate efficient integration of applications on platforms from various cloud providers, consolidating cross-platform solutions such as serverless architecture and industry-defined computing environments.

Furthermore, the poly-cloud strategy is growing, particularly in unique and complex use cases that demand high-performance computing (HPC). Such providers are evaluating and formalizing these strategies for deployment in client environments. However, enterprise users are cautious about this approach due to concerns related to cloud-to-cloud connectivity, the expanse of geographic coverage and potential disruptions affecting multiple stakeholders' application performance.

The global cloud market spans various regions, including North America, Asia Pacific, Europe, Latin America and the Middle East and Africa. AWS stands out as the leading hyperscaler across all the regions, with a sizeable market share in the cloud IaaS and PaaS markets. The AWS cloud spans 99 Availability Zones across 31 geographic regions and has over 100,000 partners from over 150 countries, contributing to its extensive market penetration. While AWS has a significant presence in North America, it has expanded its reach further. Aligning governance processes to keep workloads in tandem with cloud framework policies aided its ongoing expansion

AWS is at the forefront of transforming business verticals **by driving Industry-focused cloud solutions.**

initiatives in 2023 to Melbourne (Australia - AWS Asia Pacific), Hyderabad (India - AWS Asia Pacific), and Aragón (Spain - AWS Europe).

AWS builds a symbiotic relationship with its partner ecosystem, collaborating on strategic offerings, technological innovation and industry-focused areas. The company continually realigns and expands its programs to fit the right track and segment service providers based on their core competencies and focus areas. AWS also adds certification, training and partnership programs, such as AWS Ambassador Partner Program, enabling service providers to deliver sustainable solutions to enterprise clients that adhere to market standards. AWS actively promotes partnerships and co-branding initiatives within its partner network to drive joint go-to-market (GTM) efforts. Service providers gain credibility through their association with AWS and contribute to generating higher revenue. Amazon Marketplace is gaining popularity by democratizing novel industry solutions offered by service providers, allowing enterprise clients to access and utilize them easily. Also, AWS' CSR (corporate social responsibility) initiatives, such as the free educator enablement program by AWS Machine Learning University, provide self-paced AI and ML digital courses to developers globally.

AWS leverages its extensive experience and partner network to provide industry-specific services for the finance, healthcare, industrial and manufacturing industries. Global system integrators are exploring a product segmentation strategy of modifying existing products into new versions to suit industry requirements. The financial services industry relies on data security and resilience. Financial services institutions realizing the importance of end-to-end data integration, have started implementing them through holistic services bundles provided by global system integrators to achieve this. Notable examples include Nasdaq's migration of the first U.S. options market to AWS and the U.S. Securities and Exchange Commission's approval of OCC's (Open Cloud Consortium) cloud infrastructure proposal with AWS. Such measures are transforming the financial landscape in the U.S., encouraging other institutions to follow suit in their cloud migration strategies.

There is increased awareness about climate change that has led enterprises to embrace sustainable practices. AWS and its partner network mandate the implementation of measures for a sustainable future. For example, AWS Well-Architected Framework helps enterprises efficiently manage their cloud resources, reducing resource consumption compared to the private cloud. This, in turn, lowers the cost of ownership and carbon footprint. The scalable and cost-optimized designs promoted by AWS contribute to these sustainability efforts. Aligning governance processes with cloud architecture frameworks and policies has further aided in tracking enterprises' progress toward sustainability initiatives.

Newly-defined Emerging focus areas of global system integrators and enterprise clients

Global system integrators are introducing financial engineering programs that depart from the traditional FinOps model. These programs offer immediate cost-saving opportunities by optimizing AWS technological platforms, allowing clients to save on compute capacity and manage virtual machine capacity efficiently.

Financial engineering programs to expedite cost efficiency

Financial engineering programs proposed by global system integrators have enabled them to gain traction in the market. They represent a shift from the traditional FinOps model of managing economic costs within the purview of the organizational requirements. Financial engineering programs enable clients to save on the AWS technological platform by providing immediate cost-saving opportunities. Global system integrators purchase and manage compute capacity and transfer required virtual machine capacity to the clients daily. This optimization technique helps in the client's long-term financial sustainability.

Integrating IT asset management (ITAM) and FinOps for comprehensive advantage

Cloud financial management has extended its reach from the IaaS and PaaS markets into the cloud infrastructure market. IT asset management (ITAM) is an organizational discipline that tracks and reports the lifecycle of IT assets such as software, hardware, software licenses and other tangible and intangible assets. FinOps teams have the expertise to enhance the cost-efficiency of their cloud resources. However, applying FinOps methodology on software resources and their licensing mobility is niche. Expanding FinOps usage necessitates the inclusion of ITAM. This integration aids FinOps practices by optimizing license considerations across TSVs (technology software vendors), such as AWS, GCP and Microsoft Azure.

Cloud adoption has proportionately increased the number of service providers. Hyperscalers tailor their value proposition to meet the specific requirements of end-user specialization, use case and geographic locations. Thus, enterprises have realized the potential benefits of using multiple and hybrid cloud solutions for varied purposes. However, adopting a multicloud strategy creates governance and management challenges for enterprise clients. These challenges encompass maintaining consistent cloud security and compliance and addressing the challenges of automating and controlling cloud infrastructure. AWS Cloud Operations services and AWS Systems Manager helps to seamlessly integrate applications running across AWS, Google Cloud and Microsoft Azure through a single panel. AWS Cloud Operations services provide a unified operational view, effectively managing portability and orchestration challenges across different cloud environments.

AWS focuses on time to value by enforcing small and incremental changes that are simple to test, deploy and minimize risk. For instance, the Amazon SageMaker shadow test facilitates enterprise clients to configure errors and rectify performance issues before final delivery, reinforcing customer confidence with an error-free interface. Additionally, AWS introduces a DevSecOps solution by amalgamating security capabilities into the DevOps methodology. This approach aids in the early identification and resolution of security issues during the initial stages of the development lifecycle, ultimately enhancing productivity. The newly launched. AWS Config, which supports proactive compliance, represents another time-to-value capability by this leading technology vendor. AWS's unwavering emphasis on business agility for faster deployment of new features and applications enables swift adaptation to evolving market conditions. As businesses incline toward data-driven business models, AWS identifies market potential in enterprises struggling to establish data ingestion pipelines. AWS has the first-mover advantage by introducing advanced Redshift capabilities to simplify data ingestion.

Beyond its core compute and storage services, AWS has also tapped into the cloud security market, consistently releasing resilient network connectivity models. AWS' latest networking capabilities described at re:Invent are geared toward safeguarding corporate applications. Features such as VPC Lattice, Verified Access and ENA Express prioritize secure networking solutions. Through collaborative efforts, such as Open Cybersecurity Schema Framework (OCSF) project involving AWS and 17 security vendors, AWS actively contributes to services that monitor, detect and mitigate security issues. Similarly, many partners provide security analytics on Security Lake to cater to the various security needs of enterprise clients.

AWS keeps pace in a rapidly evolving technological landscape by developing cloud offerings and democratizing them for enterprise use.

Provider Positioning

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	AWS Consulting Services	AWS Migration Services	AWS Managed Services	AWS Data Analytics and Machine Learning	AWS SAP Workloads
1Strategy	Not In	Not In	Not In	Contender	Not In
2nd Watch	Contender	Not In	Product Challenger	Contender	Not In
Accenture	Leader	Leader	Leader	Leader	Leader
Agilisium	Not In	Contender	Not In	Product Challenger	Not In
AllCloud	Contender	Contender	Contender	Not In	Not In
Apexon	Not In	Product Challenger	Not In	Not In	Not In
Arvato Systems	Market Challenger	Contender	Contender	Not In	Contender
Aspire Systems	Contender	Not In	Product Challenger	Not In	Not In
Atos	Product Challenger	Product Challenger	Product Challenger	Not In	Not In
Capgemini	Leader	Leader	Leader	Leader	Leader

Provider Positioning

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	AWS Consulting Services	AWS Migration Services	AWS Managed Services	AWS Data Analytics and Machine Learning	AWS SAP Workloads
Cascadeo	Not In	Not In	Contender	Not In	Not In
Clearscale	Contender	Not In	Not In	Contender	Not In
Cognizant	Leader	Leader	Leader	Leader	Leader
Deloitte	Leader	Leader	Leader	Leader	Leader
Dexian	Product Challenger	Contender	Contender	Not In	Contender
DXC Technology	Product Challenger	Leader	Leader	Product Challenger	Leader
Ensono	Not In	Not In	Contender	Not In	Not In
Eviden (Atos)	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Genpact	Not In	Not In	Not In	Leader	Not In
GFT	Not In	Contender	Not In	Not In	Not In

Provider Positioning

	AWS Consulting Services	AWS Migration Services	AWS Managed Services	AWS Data Analytics and Machine Learning	AWS SAP Workloads
HCLTech	Leader	Leader	Leader	Leader	Leader
Hexaware	Leader	Product Challenger	Not In	Rising Star ★	Not In
IBM	Leader	Product Challenger	Leader	Market Challenger	Product Challenger
Impetus	Contender	Not In	Not In	Not In	Not In
Infosys	Leader	Leader	Leader	Leader	Leader
Kyndryl	Rising Star ★	Product Challenger	Rising Star ★	Product Challenger	Rising Star ★
Lemongrass	Not In	Not In	Not In	Not In	Product Challenger
LTIMindtree	Leader	Leader	Leader	Leader	Leader
Mphasis	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Navisite	Not In	Not In	Not In	Not In	Contender

Provider Positioning

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	AWS Consulting Services	AWS Migration Services	AWS Managed Services	AWS Data Analytics and Machine Learning	AWS SAP Workloads
N-iX	Not In	Contender	Not In	Contender	Not In
NTT DATA	Market Challenger	Market Challenger	Market Challenger	Market Challenger	Not In
Persistent Systems	Rising Star ★	Rising Star ★	Rising Star ★	Product Challenger	Not In
PwC	Leader	Rising Star ★	Product Challenger	Product Challenger	Leader
Quantiphi	Not In	Product Challenger	Not In	Rising Star ★	Not In
Rackspace Technology	Leader	Leader	Leader	Leader	Market Challenger
Slalom	Contender	Contender	Not In	Contender	Not In
Syntax	Not In	Product Challenger	Not In	Not In	Product Challenger
TCS	Leader	Leader	Leader	Leader	Leader
Tech Mahindra	Leader	Leader	Leader	Leader	Rising Star ★

Provider Positioning

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	AWS Consulting Services	AWS Migration Services	AWS Managed Services	AWS Data Analytics and Machine Learning	AWS SAP Workloads
Techwave	Not In	Not In	Not In	Not In	Contender
TO THE NEW	Product Challenger	Not In	Product Challenger	Product Challenger	Not In
Trianz	Contender	Product Challenger	Product Challenger	Not In	Not In
Unisys	Not In	Not In	Market Challenger	Not In	Not In
Virtusa	Not In	Product Challenger	Not In	Contender	Not In
Vision33	Not In	Not In	Not In	Not In	Contender
Wipro	Leader	Leader	Leader	Leader	Leader
Zensar Technologies	Not In	Product Challenger	Product Challenger	Product Challenger	Product Challenger

Key focus areas for **AWS Ecosystem Partners** in 2023.

- **AWS Consulting Services**
- **AWS Migration Services**
- **AWS Managed Services**
- **AWS Data Analytics and Machine Learning**
- **AWS SAP Workloads**

Simplified Illustration; Source: ISG 2023

Definition

In 2022, AWS introduced major innovations in services related to the cloud, data analytics and machine learning (ML) alongside a general mission that is all about supporting clients in their transformation toward sustainability, focusing on digital sovereignty and the objective of enhanced innovation power. Public cloud usage tends to outstrip traditional infrastructures and, therefore, known techniques for operations. The success of AWS' mission depends on sophisticated CloudOps that cover cloud security and governance, resource and cost optimization, intelligent provisioning of resources and service availability across delivery models (including the edge) – all this implies the need for maximum interoperability of services.

Consequently, AWS has several engagement models to enable its strategic service provider partners to train and upskill their cloud workforces in leveraging the latest platform innovations through its AWS Partner Network (APN). The partnerships have matured in terms of AWS opportunities, including migration, consulting, data and artificial intelligence (AI), SAP services and managed services.

Some of the main innovations that have contributed to AWS' growth and market expansion, including APN and enterprise clients, are new high-performance EC2 C7g instances with AWS Gravitron3 processors, new locations for AWS DataSync and AppSync simplified interfaces for Pub/Sub APIs. AWS has also made major contributions in the data, AI and ML spaces through additional offerings and enhancements.

AWS partners play a critical role in ensuring that customers and prospective customers of AWS can keep up with its pace of innovation and make a meaningful entry into the AWS services space, respectively.

Scope of the Report

In this ISG Provider Lens™ quadrant report, ISG covers the following five quadrants for services/solutions: AWS Consulting Services, AWS Migration Services, AWS Managed Services, AWS Data Analytics and Machine Learning, AWS SAP Workloads

This ISG Provider Lens™ study offers IT decision makers with the following:

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

Our study serves as the basis for important decision-making in terms of 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 IT providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT 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 IT 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 Challenger, Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens™ quadrant may include service providers that ISG believes have strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

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

Provider Classifications: Quadrant Key

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

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

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

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

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

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

AWS SAP Workloads

Who Should Read This Section

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

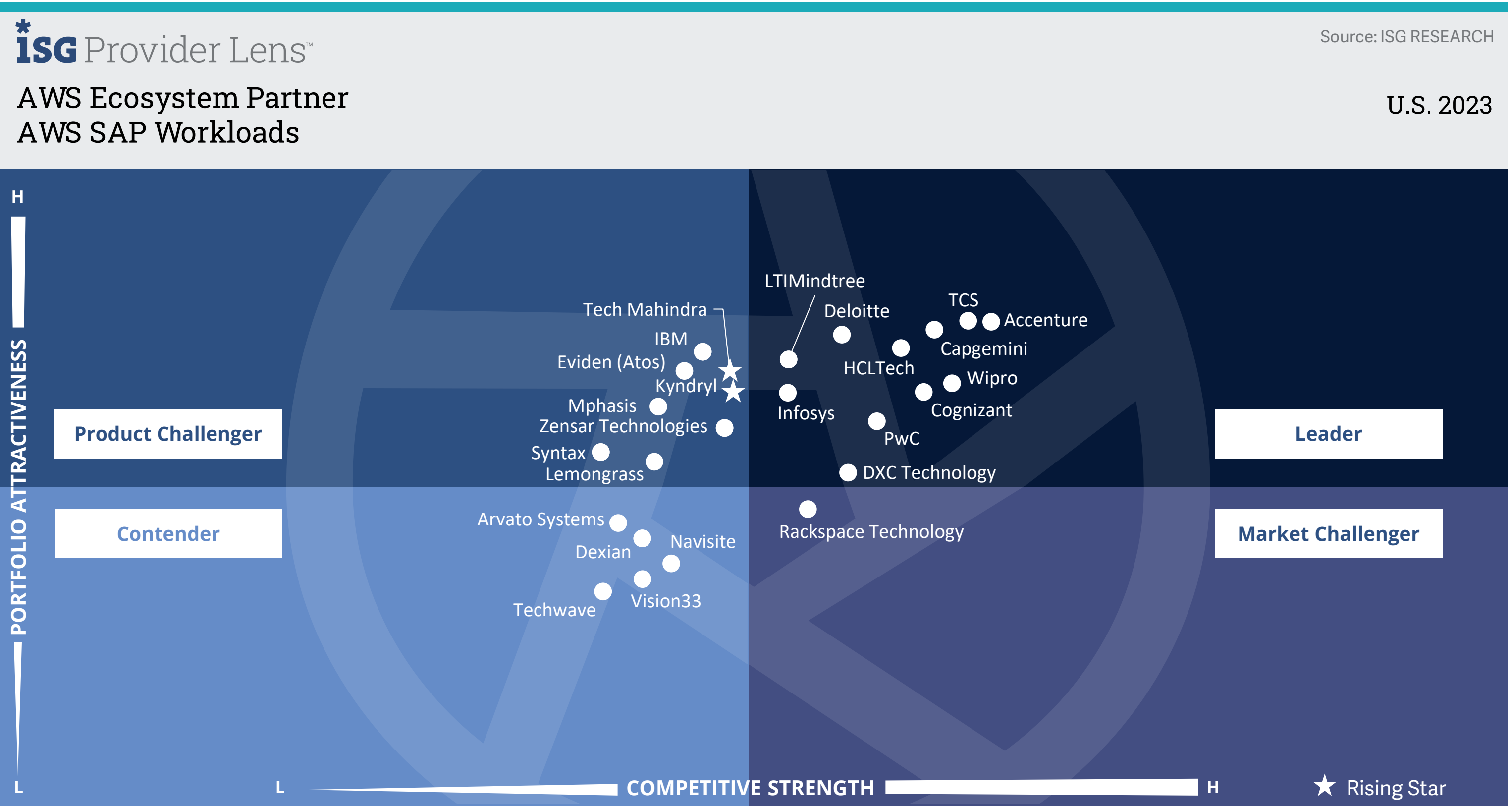
The enterprise-wise transformation of business processes using the SAP system is gaining importance through BU-specific transformation models. Enterprises now embrace the SAP systems in a public cloud environment over the private cloud model. The demand for industry cloud is rising, mainly supporting ERP innovation on the cloud.

The tremendous push for RISE with SAP prompts providers to enhance their AWS and SAP ecosystems capabilities to deliver significant, complex and critical SAP workloads. Providers must develop an optimal business model to support SAP and non-SAP applications on AWS. They should gain hands-on experience in streamlining SAP system management, reducing operational overhead, and automating risk management. Given substantial data inflow, building a data model for impactful insights affecting business outcomes is highly sought after by enterprises.

IT professionals should read this report to better understand AWS SAP implementation service providers' relative strengths and weaknesses that can help them drive digital transformation in their enterprises.

SAP professionals should read this report to understand the positioning of AWS SAP service providers and their impact on enterprise transformations and cloud migration benefits.

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



This quadrant evaluates providers' competencies to migrate **SAP workloads from non-SAP and SAP environments** to AWS with a focus on RISE with SAP and the use of technologies such as automation and analytics.

Ashwin Gaidhani

Definition

This quadrant assesses service providers that enable the provisioning and ongoing operation of SAP systems, such as SAP HANA or platforms on AWS, together with their central management. These service providers not only help implement AWS as a hardware replacement or hardware extension (IaaS) for enterprises but also 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.

Service providers in this quadrant need not only relevant AWS certifications but also SAP certifications and/or 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 the implementation, customization, provisioning and support of SAP application and services
2. Number and locations of **resources** to support SAP offerings on AWS
3. **Awareness** and number of **customers** of the service provider 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 a number of relevant **certifications**, including AWS-certified SAP competency
6. Offer **pricing models** that are suitable, mature and adaptable
7. **Dedicated resources** (including business units) around DevOps, automation and cloud-native application design

Observations

Across business verticals, there is an increased enterprise focus on modernizing application workloads by moving them onto an SAP infrastructure. There has been a significant rise in the adoption of greenfield and brownfield transformation on hyperscaler platforms, and enterprises have been increasingly considering AWS as a platform to develop innovative solutions to ensure seamless SAP workload migration. The push for adopting RISE with SAP creates immense pressure on service providers to strengthen their relationships with AWS and SAP, develop tailored operating models, and improve and train their AWS and SAP talent pools.

Some of the key observations for this quadrant are presented below.

- **Inclusion of automation to streamline business processes:** Providers are expected to have experience and expertise in automation tools and services, such as AWS CloudFormation, to automate SAP workload deployment and management.
- **ML and AI are vital in improving SAP operations:** Enterprises are adopting ML and AI to automate tasks, improve decision-making and gain business insights around SAP processes using predictive analysis, aiming at enhancing the quality of their offerings, reducing costs and delivering desired business outcomes.
- **End-of-life spurs market:** Because there is an end of support for SAP Business Suite 7 and ERP 6.0, enterprises are focusing on migrating their workloads to SAP S/4HANA Cloud. However, both enterprises and service providers face certain challenges, such as the complexity associated with migrating large, mission-critical workloads, lack of technological know-how, shortage of skilled labor and high cost. To reduce the impact of these challenges and facilitate smooth migration, enterprises and providers should strengthen their partnerships with both AWS and SAP.

From the 62 companies assessed for this study, 25 have qualified for this quadrant, with 11 being Leaders and two Rising Stars.

accenture

Accenture has expertise in providing comprehensive SAP offerings on AWS, and it helps clients handle complex, diverse data and achieve desired analytical outcomes.

Capgemini

Capgemini's association with AWS' MAP for SAP provides it with access to a prescriptive migration framework and investments to support its customers to migrate and modernize SAP workloads on AWS.

cognizant

Cognizant's AWS experience center provides clients with a walk-through experience with innovative AWS services, including Alexa, Polly, Rekognition, DeepLens and Sumerian.

Deloitte.

Deloitte's ATADATA, an automation platform, helps enterprises rapidly increase the volume and complexity of data and applications necessary for the future of their business.

DXC TECHNOLOGY

DXC Technology's flexible commercial and technical models help global and regional clients embrace RISE with SAP-focused transformation.

HCLTech

HCLTech's CloudSMART for AWS SAP offers enterprises a combination of cost optimization, resiliency, security and operational excellence.

Infosys

Infosys' Cobalt accelerates customers' cloud journey with 35,000 cloud assets and over 300 industry cloud solution blueprints.

LTIMindtree

LTIMindtree specializes in migrating SAP production and non-production workloads to AWS. With its unique skill sets and accelerators such as AWS Launch Wizard, the company drives digital transformation for enterprises.

PwC's substantial experience in SAP enables it to help enterprises achieve consistent business outcomes, supported by continuous and automated deployments of SAP workloads on AWS using infrastructure-as-code (IaC) templates.

TCS' Cyrstallus™ is a preconfigured set of solutions that focuses on various industries and business processes and integrates different industry solutions and SAP cloud offerings.

Wipro's longstanding relationship with AWS enables it to provide enterprises with end-to-end migration service offerings across industry verticals.

Kyndryl's (Rising Star) significant experience in SAP Build on AWS enables it to help clients improve the use of automation, backed by its capabilities in managing apps that run on AWS.

Tech Mahindra (Rising Star) stands out in the market with its comprehensive AWS SAP services portfolio and associated competencies and certifications. It is a global player that works closely with AWS.

DXC Technology

Leader

"DXC Technology's expertise in AWS services and its recognition from AWS as a Migration Acceleration Program (MAP) partner make it a Leader in this quadrant."

Ashwin Gaidhani

Overview

DXC Technology is headquartered in Virginia, U.S. and operates in 70 countries. It has more than 132,800 employees across over 130 global offices. In FY23 the company generated $14.4 billion in revenue, with Global Infrastructure Services as its largest segment. DXC is a leading provider of cloud services for SAP workloads on AWS. The company has many AWS certifications that serve as proof of its proficiency and track record in delivering AWS SAP solutions. By leveraging the benefits of AWS and SAP, DXC helps customers optimize their business processes, minimize expenses and stimulate innovation in the U.S. region.

Strengths

DXC premier services for RISE with SAP on AWS: This single customer governance and operating model helps enterprises accelerate their SAP deployments and offers a corridor to develop new business models encompassing resilience and maintaining agility. DXC can advance customers' SAP transformation journey and simplify their SAP landscapes, along with modernizing their business applications and optimizing their operations. Enterprises can benefit from the RISE bundle by using software subscriptions (SAP-consumption-based license) and technical managed services with their choice of cloud that best suits their demand.

AWS MAP for SAP: DXC is part of the MAP for SAP program that supports enterprises with their cloud journey. With its expertise in SAP workload migration on AWS, DXC helps enterprises achieve cost-effective SAP migration with minimal business disruption. The company covers the entire lifecycle of SAP migration, from value-driven consulting to developing solution roadmaps and executing the migration in a secured manner; it offers these services in the forms of IaaS, PaaS and SaaS.

Caution

DXC should build its talent base and invest in developing innovative solutions and frameworks that offer seamless SAP workload migrations to attract more clients and ensure further growth in the U.S. market.

Appendix

The ISG Provider Lens™ 2023 – 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 report includes research from the ISG Provider Lens™ program, ongoing ISG Research™ programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of August 2023, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

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

The study was divided into the following steps:

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

Lead Author

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.

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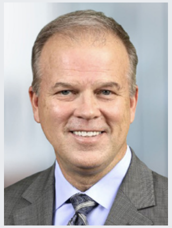
Dr. Tapati Bandopadhyay has been an inventor, builder, practitioner and researcher in AI, intelligent automation and related domains, for 27+ years. She has been a global practice leader and executive-level advisor & consultant in AI-automation-cloud and services management, covering MLOps, AIOps, Colugos, DataOps, ModelOps & DevOps metrics-driven practices and data and AI story-building and story-telling practices and tools. As an ISG Lead Analyst on AWS and in AI-ML, consulting & managed services, she is responsible for defining and leading the ISG Provider Lens branded research projects for the US market. With more than 25 years of experience focused on AI, ML, data sciences and intelligent automation technology development, strategy and adoption practices across key industries, including BFSI, manufacturing & FMCG, retail, media, hi-tech & telco's, governments and healthcare services.

Research Analyst

Srinivasan PN
Research Specialist

Srinivasan PN is a Research Specialist at ISG and is responsible for supporting and co-authoring ISG Provider Lens™ studies on AWS & Google Ecosystem, Digital Engineering, Manufacturing, and Mainframe. His area of expertise lies in engineering services and digital transformation. Srinivasan has close to 9 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 in the industry.



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.

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ISG Research™

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