

# AWS Ecosystem Partners

## AWS SAP Workloads

A research report comparing provider strengths,  
challenges and competitive differentiators

Customized report courtesy of:

**Infosys**  
Public Services



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*Report Author: Bruce Guptill*

### **Service providers scramble to meet emerging public sector needs**

U.S. public sector organizations, including state, local and educational (SLED) organizations, must cost effectively improve what they do and how they do it. Otherwise, they must deliver lower levels and fewer types of services. AWS offers a cloud foundation for rapidly emerging, next-generation digital public sector IT systems, services and business operations. And it has a large services partner ecosystem capable of enabling the changes needed by SLED organizations.

This ISG Provider Lens™ U.S. Public Sector research study examines service providers that partner with AWS to develop, enable and deliver capabilities needed

by these public sector organizations in the U.S. Together, they work to improve operations, reduce costs, address digital change and improve their ability to serve constituencies and internal users alike.

This study assesses AWS partners that provide development, consulting, outsourcing and other IT services. These cover ERP workload provisioning and migration, advanced analytics and machine learning, IoT, software migration and modernization, managed services, and consulting among others.

ISG clients use these studies for provider and vendor consideration, evaluation and selection. ISG's advisory and consulting teams can also help clients understand the scope of capabilities and offerings suitable to clients' requirements. The reports also provide competitive insights for vendor and provider positioning, key relationships and go-to-market considerations.

# Rapid digital transformation became a de facto mandate



## Executive Summary

### Key U.S. public sector trend: Talent shortages led to outsourcing and cloud

U.S. public sector organizations, especially SLED entities, have been more disrupted by recent events than most other large organizations in the U.S. The pandemic-driven shift to remote work shift was particularly disruptive for government agencies as most lacked remote work policies and capabilities, and adequate IT security measures. Government agencies at all levels have long faced concerns about their inability to attract and retain skilled workers, especially in IT; the “great resignation of 2021” has only worsened this scenario. According to the U.S. Department of Labor, state and local government experienced the greatest percentage of staff loss among U.S. employers in the fourth quarter of 2021.

Meanwhile, tax and licensing revenues that fund government agencies were drastically reduced, further limiting their

ability to attract and retain staff, or to invest in additional, better IT to mitigate some staffing issues.

In late 2021, U.S. SLED organizations began receiving significant funding from the federal government to not only mitigate revenue shortfalls, but also, and more importantly, to modernize operations and IT. Rapid digital transformation became a de facto mandate for organizations that had restructured only gradually over decades, or even centuries.

As a result, by mid-2022, ISG saw most U.S. SLED organizations actively pursuing an approach that relatively few had previously considered – shifting critical software to cloud and outsourcing IT – and outsourcing some business operations.

This approach requires significant education, training and consulting, as agencies need to learn what digital transformation is and how it can be

achieved in their heavily regulated organizations and operations. Most SLED organizations have learned already that relatively few of their existing IT providers have extensive digital transformation expertise.

### Why AWS?

AWS is one of the two largest hyperscale cloud services platforms – the other being Microsoft Azure. Google Cloud Platform, IBM and several smaller providers also compete, but AWS and Azure are the major cloud influencers with the largest partner ecosystems.

AWS’s partner ecosystem includes many more IT tools and business services providers than does Azure. Azure is more inclined towards software vendors and developers. Hence, many organizations first turn to the AWS platform and ecosystem for IT and business transformation.

AWS itself is heavily involved in the development and refinement of services for government agencies and other public sector organizations. It has pioneered GovCloud services in the U.S. and was an important force in the development and adoption of the U.S. FedRAMP security classification for cloud services.

### What makes leaders?

ISG positions providers’ suitability in ISG Provider Lens™ studies based on the relative attractiveness of their portfolios and on the relative competitive strength that each exhibits in the market(s) under consideration.

“Portfolio attractiveness” does not only mean having the best or most capabilities, tools and technologies. Providers must also have portfolios suited to clients’ current and emerging business requirements. The relative value of providers’ offerings to client business and



## Executive Summary

IT needs is an important aspect.

In ISG's U.S. public sector studies, portfolio attractiveness frequently mirrors what is seen in our U.S. regional studies, with differences based on how well providers adapt their capabilities to the ways in which SLED and other public sector organizations use them.

"Competitive strength" considers such factors as market presence, expertise and client and partner relationships. The largest providers are not always the most competitive. The most competitive providers include those with the strongest influence and delivery of the most value within client organizations.

In ISG's U.S. public sector studies, competitive strength assessment also relies a great deal on the depth and breadth of providers' existing sector presence and relationships and proven expertise in how the sector works. They

are also assessed on their ability to work well within public sector contracting environments, and having capable partner ecosystems to supplement and improve their delivery of value to clients.

Many providers have excellent portfolios but limited (or no) active presence and experience in the U.S. public sector; some providers have excellent sector presence but with portfolios that do not meet current and emergent needs. Leaders demonstrate both.

### **What's next? Widespread growth in a fragmented marketplace**

The greatest challenge for service providers selling into and supporting SLED and similar public sector organizations is the relative fragmentation of the marketplace. The U.S. federal market can be simpler to access because it builds around a singular contracting template – the General Services Administration

(GSA) Alliant governmentwide acquisition contract (GWAC).

Governments often use multiple contracting vehicles, sometimes even within a single department. Efforts by organizations such as the National Association of State Purchasing Officials (NASPO) have helped to develop and streamline contracting for many types of IT and business services. However, most states that rely on NASPO's ValuePoint solution still also use other vehicles – including copying those from other states.

Even with such fragmentation in contracting for services, ISG sees widespread growth in the demand for business and IT transformation services, BPO services, and new software platforms that enable rapid transformation toward cost-saving organizational and operational improvements. The ability to do more with less is too important for SLED organizations to ignore cloud use

and business transformation. Change management will become a highly critical capability within transformation consulting services portfolios.

Widespread demand for these capabilities will accelerate through 2025 as more sector entities reap related rewards. This should draw more competitive providers into the sector and create a better climate for M&A among providers that lack key portfolio capabilities and/or competitive presence.

**Rapid digital transformation has become a de facto mandate.**



## Provider Positioning

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	AWS Managed Services	AWS SAP Workloads	AWS Data Analytics and Machine Learning	AWS Internet of Things (IoT) Services	AWS Migration Services	AWS Consulting Services
1Strategy	Not in	Not in	Product Challenger	Not in	Contender	Not in
2nd Watch	Product Challenger	Not in	Product Challenger	Not in	Not in	Contender
Accenture	Leader	Leader	Leader	Leader	Leader	Leader
ActionNet	Not in	Not in	Not in	Not in	Not in	Contender
AllCloud	Not in	Not in	Not in	Contender	Contender	Not in
Atos	Product Challenger	Product Challenger	Contender	Not in	Product Challenger	Product Challenger
Blue Sentry	Not in	Not in	Not in	Not in	Contender	Not in
BoozAllen	Not in	Not in	Not in	Not in	Not in	Product Challenger
Brillio	Not in	Not in	Not in	Not in	Contender	Not in
Capgemini	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger





## Provider Positioning

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	AWS Managed Services	AWS SAP Workloads	AWS Data Analytics and Machine Learning	AWS Internet of Things (IoT) Services	AWS Migration Services	AWS Consulting Services
CGI	Not in	Leader	Not in	Not in	Not in	Leader
Clearscale	Not in	Not in	Contender	Contender	Contender	Not in
Cloudreach	Contender	Not in	Not in	Not in	Contender	Not in
Cloudticity	Not in	Not in	Contender	Not in	Not in	Not in
Cognizant	Not in	Product Challenger	Rising Star ★	Product Challenger	Product Challenger	Contender
Deloitte	Leader	Leader	Leader	Leader	Leader	Leader
DXC Technology	Product Challenger	Contender	Not in	Product Challenger	Contender	Product Challenger
Ensono	Not in	Not in	Contender	Not in	Not in	Not in
General Dynamics Information Technology	Rising Star ★	Not in	Not in	Not in	Not in	Not in
HCLTech	Product Challenger	Product Challenger	Not in	Product Challenger	Product Challenger	Product Challenger





## Provider Positioning

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	AWS Managed Services	AWS SAP Workloads	AWS Data Analytics and Machine Learning	AWS Internet of Things (IoT) Services	AWS Migration Services	AWS Consulting Services
Hexaware	Not in	Not in	Not in	Product Challenger	Product Challenger	Not in
Hitachi Vantara	Contender	Not in	Not in	Not in	Not in	Product Challenger
HPE	Contender	Not in	Not in	Not in	Not in	Contender
IBM	Market Challenger	Leader	Market Challenger	Leader	Market Challenger	Leader
Infosys	Leader	Leader	Leader	Leader	Leader	Leader
Kyndryl	Product Challenger	Not in	Not in	Not in	Not in	Not in
Leidos	Rising Star ★	Not in	Not in	Not in	Not in	Rising Star ★
Lemongrass	Not in	Rising Star ★	Not in	Not in	Not in	Not in
Mindtree (LTI)	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Not in
Mindtree	Not in	Not in	Product Challenger	Not in	Not in	Not in





## Provider Positioning

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	AWS Managed Services	AWS SAP Workloads	AWS Data Analytics and Machine Learning	AWS Internet of Things (IoT) Services	AWS Migration Services	AWS Consulting Services
Mphasis	Not in	Product Challenger	Product Challenger	Not in	Product Challenger	Product Challenger
Navisite	Not in	Contender	Not in	Not in	Not in	Not in
nClouds	Not in	Not in	Contender	Not in	Contender	Not in
NTT DATA	Not in	Not in	Market Challenger	Contender	Contender	Contender
PwC	Not in	Product Challenger	Not in	Not in	Not in	Contender
Rackspace Technology	Leader	Market Challenger	Leader	Market Challenger	Leader	Leader
Reply	Not in	Not in	Not in	Contender	Not in	Not in
Slalom	Not in	Not in	Contender	Not in	Contender	Contender
Smartronix/SMX	Not in	Not in	Product Challenger	Not in	Not in	Not in
Syntax Systems	Not in	Contender	Not in	Not in	Not in	Not in





# Provider Positioning

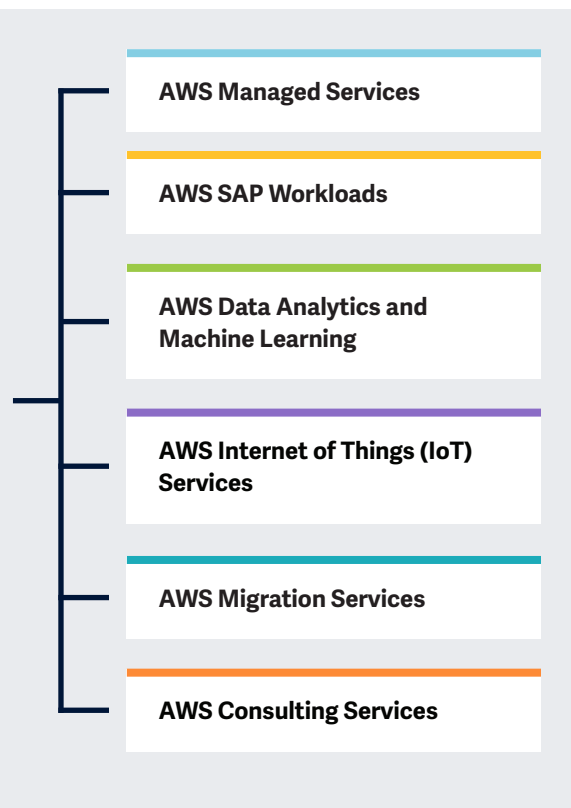
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	AWS Managed Services	AWS SAP Workloads	AWS Data Analytics and Machine Learning	AWS Internet of Things (IoT) Services	AWS Migration Services	AWS Consulting Services
TCS	Product Challenger	Product Challenger	Not in	Rising Star ★	Rising Star ★	Product Challenger
Tech Mahindra	Leader	Product Challenger	Rising Star ★	Not in	Leader	Market Challenger
Techwave	Not in	Contender	Not in	Not in	Not in	Not in
TensorIoT	Not in	Not in	Not in	Product Challenger	Not in	Not in
TO THE NEW	Not in	Not in	Product Challenger	Not in	Not in	Not in
Unisys	Product Challenger	Not in	Leader	Not in	Leader	Leader
Wipro	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger
YASH Technologies	Not in	Contender	Not in	Not in	Not in	Not in
Zensar	Not in	Leader	Not in	Not in	Not in	Leader



This study focuses on **AWS services** for U.S. public sector organizations.

Simplified Illustration Source: 2023



### Definition

This study examines software and services providers that partner with Amazon Web Services (AWS) to develop, enable and deliver capabilities needed by public sector entities in the U.S. as they work to improve operations, reduce costs, address digital change and improve their ability to serve constituencies and internal users alike.

Public sector organizations face immense pressure to improve operations, reduce costs and modernize for digital reality – all in a climate of uncertain funding and diminished staffing. Their technology and service acquisition needs and challenges are similar to complex commercial enterprises, but typically with more restrictive acquisition, staffing, management, reporting and operational requirements. Objective insight, assessment and guidance are more valuable than ever to such organizations.

ISG Public Sector Provider Lens™ research studies examine, explain and provide guidance on business software platforms, solutions, tools, services and providers that help improve how public sector organizations operate while enabling the shift to digital realities. This study assesses AWS's partners that provide development, consulting, outsourcing and other IT services covering ERP workload provisioning and migration, advanced analytics and machine learning, IoT, software migration and modernization, managed services and consulting. Each of these is described in more detail below.

ISG clients use these studies for provider and vendor consideration, evaluation and selection. ISG's advisory and consulting teams can also help clients understand the scope of capabilities and offerings suitable to clients' requirements. The reports also provide competitive insights



for vendor and provider positioning, key relationships and go-to-market considerations.

### Scope of the Report

In this ISG Provider Lens™ quadrant study, ISG includes the following six quadrants: AWS Consulting Services; AWS Managed Services;

Data Analytics and Machine Learning on AWS; Internet of Things (IoT) on AWS, SAP Workloads on AWS; and Software Migration and Modernization on AWS Services.

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

- Transparency on the strengths and weaknesses of relevant services providers
- A differentiated positioning of providers by segments

- 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/software vendors 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, and 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:

ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leaders, Product Challenger, Market Challenger and Contenders), 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 a 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 SAP Workloads

### Who Should Read This

This report is relevant to organizations in the U.S. public sector for evaluating providers offering AWS SAP workload services.

In this quadrant report, ISG highlights the current market positioning of providers of ERP workload services on AWS in the U.S. public sector and how they address the key challenges faced by most organizations.

RISE with SAP is considered and assessed as one of the prominent options for S/4 HANA. SAP promotes it as the preferred hosting approach for SAP systems. Enterprises prefer partners that work with SAP and AWS on the adoption of RISE with SAP and develop an optimal target model to support both SAP and non-SAP applications.

Providers should partner with AWS to assist and determine the value of selecting RISE with SAP on AWS and integration with clients' non-SAP AWS ecosystem.



**IT leaders** should read this report to better understand the relative strengths and weaknesses of the providers of SAP on AWS services, which would help them lead the digital transformation drive in their organizations.

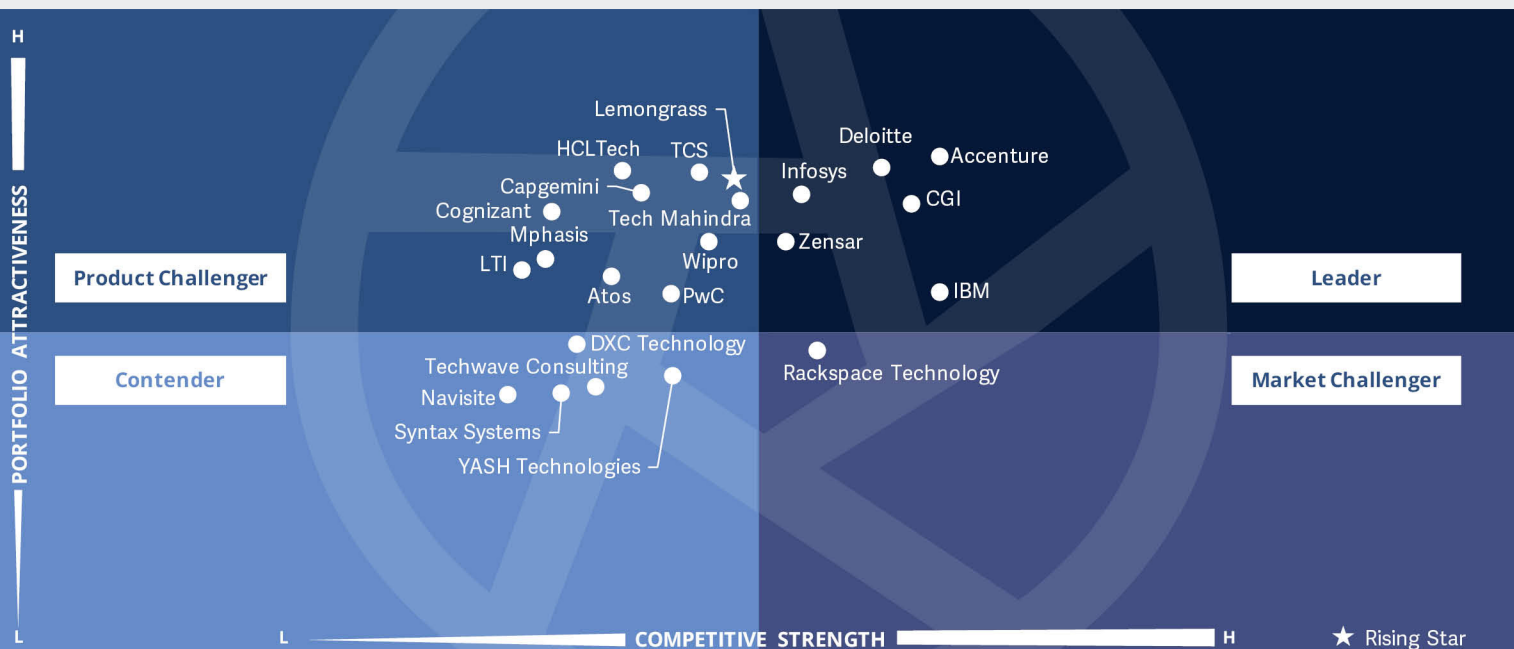


**ERP leaders** should read this report to understand the positioning of SAP providers, learn how those providers' offerings can impact an organization's ongoing transformation initiatives and discover the benefits they can achieve by moving to the cloud.



**Sourcing, procurement and vendor management professionals** should read this report to develop a better understanding of the current landscape of SAP service providers in the U.S. public sector.





ERP platforms and solutions have gained haphazard footholds within the U.S. public sector past decades. Providers in this quadrant enable significant (sometimes vast) improvements in the value of legacy SAP settings while **enabling fully cloud-native environments.**

*Bruce Guptill*



### Definition

This quadrant includes services providers that offer evaluation, provisioning, migration and ongoing support (including management and operation) for large-scale SAP ERP environments. Service providers in this category require AWS-provided certifications plus certifications and/or partnerships with SAP and additional, relevant providers of ERP solutions, services and technologies to stay current with products, technologies, licensing and platform changes and their effects on customer IT landscapes, applications and business processes.

### Eligibility criteria:

Evaluation and eligibility criteria for this quadrant include the following:

1. Breadth and depth of skills, services and tools with regards to the implementation, customization, provisioning and support of SAP and other leading **ERP application and services**
2. Dedicated scope and associated resources for **SAP offerings** on AWS (including scope of AWS Competency and Service Delivery offerings and certifications)
3. Depth and breadth of customer presence and involvement regarding **ERP applications** and services provisioning and support on AWS
4. Scope of **partner relationships** related to ERP on AWS, including technology, services, support and sales (e.g. example, channel partnerships)
5. Relevant AWS certification held by ERP providers and by **associated partners** and organizations
6. **Pricing model suitability**, maturity and adaptability



### Observations

Large-scale ERP implementations are much more common in larger commercial entities than in U.S. public sector organizations owing to the various challenges faced in standardizing operations within and across government agencies and departments within agencies. The often-substantial cost incurred in software implementation, customization and maintenance is another major roadblock.

ERP vendors' move to the cloud has altered the mindsets of many government organizations because it resulted in reduced overall costs, simplified (and speedy) implementation and adoption of the software for multiple agency-specific and department-specific needs.

While many ERP platforms are used in U.S. public sector organizations, SAP, by far, holds the largest presence. SAP

indicates having at least several hundred clients among U.S. state and municipal government entities and higher education institutions. According to SAP guidance, these must be moved to cloud platforms within the next few years, failing which they will not be supported by SAP.

With these compulsory migrations and net-new SAP users attracted by cloud-based, lower-cost implementations, ISG estimates that between 100 and 200 SAP ERP migrations and implementations will occur annually among U.S. public sector organizations through 2027.

The most important differentiators among providers in this quadrant are relative SAP implementation and migration experience with public sector organizations and levels of expertise in SAP integration and management services.

Of the 65 companies assessed for this study, 23 have qualified for this quadrant. Six have been recognized as Leaders and one a Rising Star.

#### **accenture**

**Accenture's** robust expertise in enterprise software (especially SAP) and cloud consulting, along with strong AWS qualifications, make it a Leader in this quadrant. Its public sector consulting approach maximizes the value of clients' existing IT and operational investments and expertise.

#### **CGI**

**CGI** is less well known outside the public sector than some other Leaders, but decades of ERP expertise and deep strategic insights from several public sector clients position it as a Leader for the U.S. public sector.

#### **Deloitte**

**Deloitte** is one of the largest and best-known business consulting firms globally, with an outstanding SAP and AWS services partnership. It has strengthened its public sector expertise by working with several U.S. state and municipal government agencies, federal agencies and AWS's government and public sector programs.



**IBM** is one of the most-established IT solution and service providers in the U.S. public sector. It is consistently among SAP's top partners in terms of migration and implementation certifications and activity. Unmatched sector expertise, along with great AWS proficiency and a broad array of sector contracting vehicles, make IBM a Leader in this quadrant.



## AWS SAP Workloads



**Infosys** is a relative newcomer to the U.S. public sector compared with some Leaders, but its longstanding SAP practice, enterprise software modernization practices, U.S.-based public sector business unit and exceptional AWS cloud expertise position it as a Leader.

### Zensar

**Zensar** is another relative newcomer to this sector but is equally qualified like some of the most-established Leaders. Its expertise in SAP environments, increasing investment in the U.S. public sector business, deep AWS services portfolio and broad contracting vehicle participation secure it in the Leaders quadrant.

### Lemongrass

**Lemongrass** (Rising Star) is an important SAP specialist firm and a Leader in several other ISG Provider Lens™ quadrants relating to SAP services on hyperscale platforms. Its relative lack of U.S. public sector presence keeps it out of the Leaders quadrant in this study, but we expect to see the company advance in this sector.





"SAP expertise with sector investment position Infosys as a Leader in SAP on AWS."

Bruce Guptill

# Infosys

## Overview

Infosys is headquartered in Bengaluru, India and operates in 50 countries. It has more than 279,617 employees in 234 global offices. Its FY21 revenues totaled \$13.6 billion (+10.7 percent YoY), with financial services as its largest segment. Its U.S.-based Infosys Public Services unit supports North American public sector organizations, including federal, state and municipal agencies and NGOs. It holds AWS Public Sector and Public Sector Solution Provider partnership status.

## Strengths

**SAP on AWS and associated core ERP strengths:** Infosys holds AWS's core SAP Consulting competency and several complementary AWS competencies and certifications. These include the Migration Consulting, Well-Architected Partner program memberships, and AWS Solutions Architect, Developer, Cloud Practitioner, SysOps Administrator and Big Data – Specialty certifications.

**Strong SAP tool and technology portfolio:** Infosys has developed and refined its SAP-certified tools and accelerators, with a series of proprietary methods for assessing,

implementing or migrating, managing and optimizing SAP and associated software applications and workloads. This includes Infosys' Innov8 program within its larger Cobalt cloud consulting and services portfolio.

**Recognized multi-category SAP HANA Ecosystem Leader:** Infosys was named a Leader in four categories assessed in ISG Provider Lens™ 2021 SAP HANA Ecosystem Services study. The categories were SAP S/4HANA System Transformation – Large Accounts, SAP S/4HANA System Transformation – Midmarket, Managed Cloud Services for SAP HANA and SAP Cloud Platform (BTP) and Intelligent Technologies.

## Caution

Though Infosys has been positioned as a Leader in this quadrant and has exceptional, dedicated U.S. public sector business and competencies, it currently lacks the AWS Government Consulting competency and AWS GovCloud services validation. The company should consider obtaining these certifications to significantly advance its leadership in public sector opportunities.





# Appendix

## Methodology & Team

The ISG Provider Lens™ 2023 – AWS Ecosystem Partners analyzes the relevant service providers in the U.S. Public Sector market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology

**Lead Authors:**

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Krishnanunni Payyappilly

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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 November 2022, 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 and vendors on capabilities and use cases
4. Leverage ISG's internal databases, advisor knowledge and experience
5. Use of Star of Excellence CX-Data
6. Detailed analysis, evaluation of services and service documentation based on the facts and figures received from providers and other sources.
7. 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 & Editor Biographies

*Lead Author*



**Bruce Guptill**  
**Distinguished Analyst**

Bruce Guptill brings more than 30 years of technology business and markets experience and expertise to ISG clients. Since the 1980s, Bruce has worked with IT market pioneers and innovators in business planning, product and service development, market analysis, and go-to-market strategy in desktop business computing, mobile telephony, electronic commerce, cloud IT, and now, digital business disruption and market transformation.

Within ISG, Bruce has helped develop and lead enterprise research development and delivery, global ISG Research

operations, and Research client support. His primary research and analysis for ISG clients has focused on IT services market development, disruption and change. He currently contributes to ISG's Provider Lens global research studies as a lead analyst.

Bruce holds a Masters' degree in Marketing and Finance from Framingham State University, and a B.A. in business and mass media communication psychology from the University of Connecticut. He also holds certifications in a wide range of software, hardware, and networking technologies, as well as in mechanical and electrical engineering disciplines.

*Enterprise Context and Global Overview Analyst*



**Srinivasan PN**  
**Research Specialist**

Srinivasan PN is a senior research analyst 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 the space of engineering services and digital transformation. Srinivasan comes with 8 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 each of his expertise areas. Along with this, he supports the advisors with his research skills and writes papers about latest market developments in the industry.



## Author & Editor Biographies



*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 partner 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.



### Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally. For more information about ISG Provider Lens™ research, please visit this [webpage](#).

### Research™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research delivers guidance that helps businesses accelerate growth and create more value.

ISG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: [Public Sector](#).

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**REPORT: AWS ECOSYSTEM PARTNERS**