

# AWS Ecosystem Partners

## AWS Data Analytics and Machine Learning

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

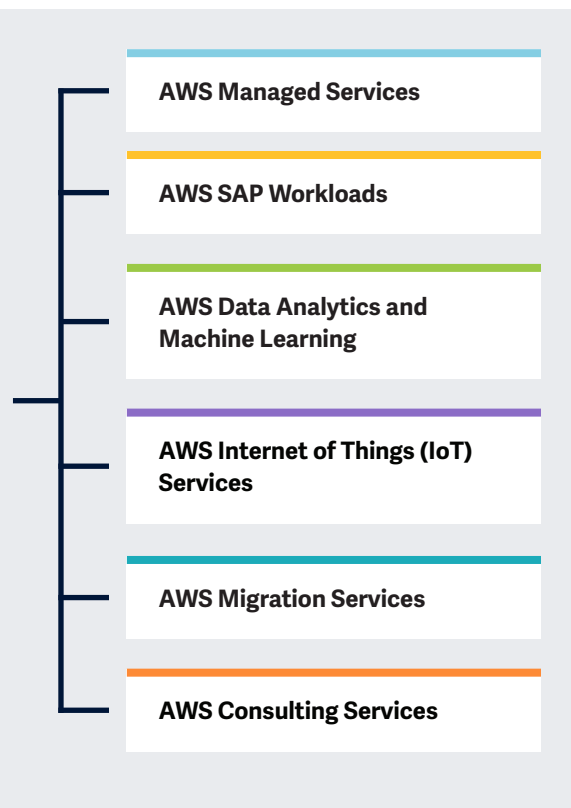
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|                   | AWS Managed Services | AWS SAP Workloads  | AWS Data Analytics and Machine Learning | AWS Internet of Things (IoT) Services | AWS Migration Services | AWS Consulting Services |
|-------------------|----------------------|--------------------|---|---------------------------------------|------------------------|-------------------------|
| 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.

**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 Data Analytics and Machine Learning

### Who Should Read This

This report is relevant to organizational leaders in the U.S. public sector for evaluating providers of data analytics and machine learning services. In this quadrant report, ISG highlights the current market positioning of providers in the U.S. public sector and how they can address the key challenges of sector organizations.

These organizations are bracing for a stronger push for modern data strategies that aim at tangible, effective and efficient data usage using various methods such as Data Mesh and Data Fabric. Most sector organizations are working toward hybridization and unification of IT strategies that emphasize on functionality and capability with technological toolsets or specific ecosystems.

ISG sees most sector organizations and leaders focused on partnering with providers with exemplary capabilities, talented professionals and a strong partner network.



**IT leaders** should read this report to better understand the relative strengths and weaknesses of data analytics and machine learning service providers, which would help them lead the digital transformation drive in their organizations.



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

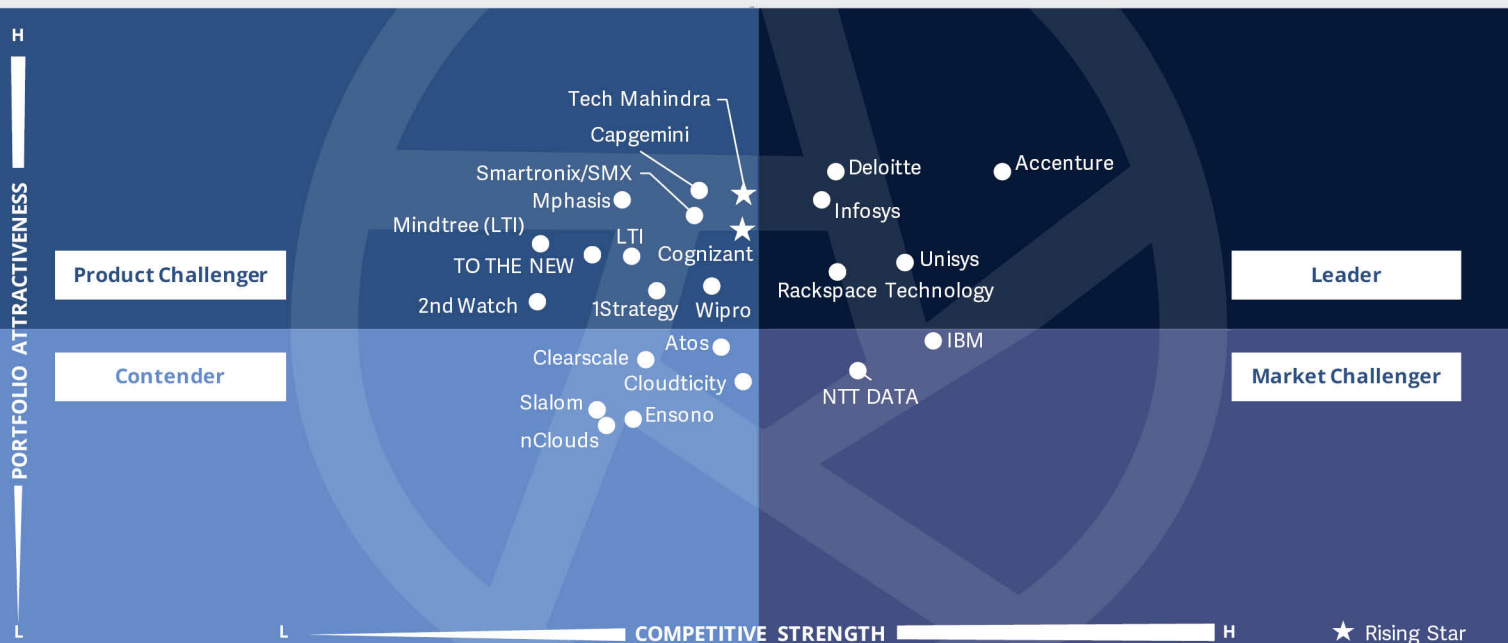


**Analytics leaders** should read this report to understand the positioning of data analytics and machine learning service providers, learn how the providers' offerings can impact an organization's ongoing transformation initiatives and identify the benefits of moving to the cloud.



**AWS Ecosystem Partners**  
**AWS Data Analytics and Machine Learning**

U.S. Public Sector 2022



As U.S. public sector organizations learn to break down functional and technology silos, the **use of machine learning** to collect and analyze an increasingly variable range and scale of data becomes critically valuable.

*Bruce Guptill*



### Definition

This quadrant covers providers that use machine learning to collect and analyze an often-unpredictable range and scale of data types within and across a growing range of systems and applications. Providers in this group must demonstrate capabilities and experience in data science (including big data and advanced analytics), database and solution architecture, machine learning and related AI development and implementation, software development, networking and data privacy/security. Most of them use an adaptive portfolio of tools and technologies to develop and deliver solutions.

### Eligibility Criteria

Evaluation and eligibility criteria for this quadrant include the following:

1. Availability, experience and certification regarding relevant analytics, data science and machine learning staff (including scope of AWS **Competency and Service Delivery** offerings and certifications)
2. Depth and breadth of customer presence and involvement regarding **data analytics and machine learning** on

AWS, including extent and availability of enabling programs for customer success

3. Scope and use of **relevant tools and technologies**
4. **Service/solution/data integration** capabilities and offerings
5. Suitability, maturity and adaptability of **pricing models**
6. Breadth and depth of **partner/channel relationships**
7. AWS-focused offering **roadmap and innovations** (current and planned)



## AWS Data Analytics and Machine Learning

### Observations

Using more, and better, data to improve decision-making is a key IT goal of most organizational leaders. The value of cloud-based data analytics and machine learning (DAML) services, which provide rapid, accurate and adaptable insights cost effectively, therefore becomes apparent very quickly for most organizations.

And as more public sector entities become cloud-centered in IT and operations, the value of DAML services increases practically exponentially due to the immediate availability of massive volumes of disparate data types from previously unconnected sources flowing to organizations that were previously unconnected to one another.

Not all advanced data analytics platforms and tools use machine learning, but most do, and they tend use it in similar manners. Therefore, the simple inclusion of machine

learning in analytics is not a differentiator for services and tools providers. Buyers and users must analyze how each provider integrates machine learning into its offerings, including how well and how easily the use of machine learning can be adapted to and controlled within various operations and systems.

From the 65 companies assessed for this study, 25 have qualified for this quadrant, with five being recognized as Leaders and two as Rising Stars.

### **accenture**

**Accenture's** Insights Platform includes a suite of pre-built analytics apps that support critical and peripheral business functions within and among government organizations. Custom applications can also be created to meet the specific needs of each client organization. Creation and adaptation of analytics apps is based on client-developed use cases and outcomes.

### **Deloitte**

**Deloitte's** AI and analytics services portfolio includes several core services: AI strategy; "Trustworthy AI" common data language; AI Insights and Engagement for human-like insights from structured and unstructured data; cloud-based machine learning for business processes; data and analytics modernization; AI-enabled innovation and ecosystem architecture; and managed analytics and AI services.

### **Infosys**

**Infosys** strategic focus on analytics for the public sector is on helping clients develop in-house data analytics and modeling to address significant cost issues in fraud, services provision, healthcare and overall fiscal management.

### **rackspace** technology

**Rackspace Technology's** DAML consulting services include data and AI strategy and roadmap development with AI ideation and data analytics workshops, data modernization and strategy assessments, database migration assessment and operating model and governance assessment.

### **UNISYS**

**Unisys** most-visible analytics and machine-learning offering is its IntelliServe Platform, an integrated suite of best-in-class technologies for offering omnichannel support, advanced analytics, automation, artificial intelligence, machine learning and identity authentication.



## AWS Data Analytics and Machine Learning

### Cognizant

**Cognizant's** (Rising Star) AWS-based Intelligent Data Works (IDW) and its Data Modernization Method stand out among providers in this quadrant. Expanded investment in public sector presence will help it advance toward Leader status in the future.

### Tech Mahindra

**Tech Mahindra** (Rising Star) is a global pioneer in AWS data analytics and machine learning services. Its increasing investment and presence among U.S. public sector organizations help position it as a Rising Star in this quadrant.



# Infosys



"Sector investment with portfolio depth position Infosys as a Leader in DAML on AWS."

*Bruce Guptill*

## Overview

Infosys is headquartered in Bengaluru, India and operates in 50 countries. It has over 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, municipal agencies and NGOs. It holds AWS Public Sector and Public Sector Solution Provider partnership status.

## Strengths

**Cost reduction using data science and analytics:** Infosys' strategic focus for analytics for the public sector is on addressing significant cost issues in fraud, services provision, healthcare and overall fiscal management.

**Key AWS data analytics and automation qualifications:** Infosys holds AWS Service Validations in Amazon Redshift (Cloud Data Warehousing), Relational Database Service (RDS) and Kinesis. It also holds AWS certification in big data analytics.

## Award-winning public services machine learning implementation:

Infosys' Health Insights Platform for the public sector was a finalist for the 2020 American Council for Technology - Industry Advisory Council Igniting Innovation Awards. It was among 40 IT solutions that were designed to help government agencies improve outcomes.

## Cobalt cloud services componentry:

Analytics and machine learning capabilities are key components in Infosys' Cobalt cloud services portfolio and platform. Launched in 2020, Cobalt has grown from 25,000 to 35,000 cloud assets and from 200 to more than 300 industry cloud solution blueprints.

## Caution

Though Infosys is 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. This should not disqualify it from consideration by public sector clients. But Infosys will be able to significantly advance its leadership in the public sector with such certifications.





# 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

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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



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**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.



### ISG Provider Lens™

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

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