ISG Provider Lens™


# AWS Ecosystem Partners

## AWS Managed Services

A research report comparing provider strengths, challenges and competitive differentiators

**QUADRANT REPORT | JANUARY 2023 | U.S. PUBLIC SECTOR**

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**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

**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

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 |
| ActioNet | 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.

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

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 Managed Services

## Who Should Read This

This report is relevant to organizations in the U.S. public sector for evaluating providers of AWS managed services. In this quadrant report, ISG highlights the current market positioning of these providers in the U.S. public sector and how they address the key challenges of offering managed services in the AWS ecosystem. ISG's assessment is based on the depth and breadth of providers' service offerings and market presence.

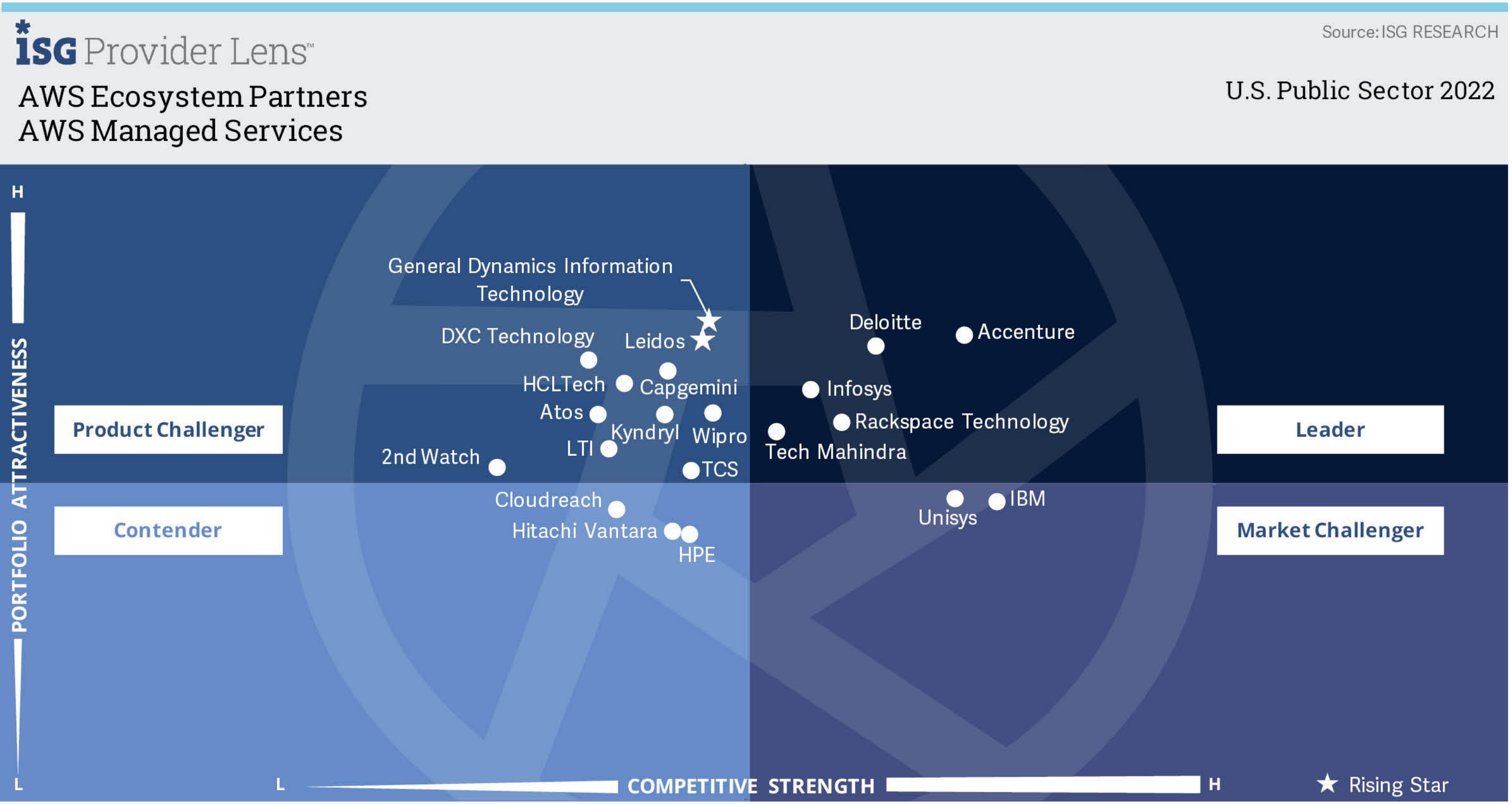
Digital environment enterprises must take a combined approach to their technical infrastructure. ISG notes that organizations in the U.S. public sector are taking the global lead in cloud adoption among government and other agencies; however, their counterparts in many other countries are not far behind.

Organizations should strategize their adoption of cloud native environments that include technologies such as container-based solutions. These include Elastic Kubernetes Service (EKS), Elastic Container Service (ECS) and microservices. Successful organizations are partnering with providers that can offer distributed cloud experience, which is experiencing a high demand along with edge, thus replacing the internal private cloud. Providers are expected to offer as-a-service solutions rather than just managed services. They must also offer industry-specific cloud solutions and environments that must meet security, compliance and regulatory requirements.

**IT leaders** should read this report to better understand the relative strengths and weaknesses of managed service providers that would help them lead the digital transformation drive in their enterprises.

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

**Software development and technology leaders** should read this report to understand the positioning of managed service providers and how the providers' offerings can impact an enterprise's ongoing transformation initiatives, while identifying the benefits of moving to the cloud.




This quadrant assesses providers with **professional and managed services** optimized for U.S. public sector client organizations. The most valuable services portfolios maximize work efficiency, **reduce costs and ensure compliance** and security in AWS cloud environments.

*Bruce Guptill*

## Definition

Managed services providers (MSPs) offer professional and managed services that include orchestration, provisioning, real-time and predictive analysis, monitoring and operational management of private, public and multi-cloud environments. The aim is to maximize work performance on the cloud, reduce costs and ensure compliance and security. Specially developed or licensed cloud management platforms and tools are often used to provide the highest levels of automation, capacity utilization and cost transparency through the managed cloud resource pool, including independent management.

### Eligibility Criteria

Evaluation and eligibility criteria for this quadrant include the following:

1. Experience in designing, building and managing private, public and **multi-cloud environments**
2. AWS Managed Service Program **certification**
3. Expertise in autonomous machine learning-driven system orchestration and **configuration management**
4. Proven support for big data and multiple database and **analytics solutions**
5. Experience in DevOps engineering, solutions **architecture** and server migration
6. Scope and availability of relevant resources and services
7. AWS-focused **consulting roadmap and innovations** (current and planned)
8. Suitability, maturity and adaptability of **pricing models**

## Observations

Once public sector organizations have committed to robust cloud-first or cloud-plus-legacy environments, managed services become essential and valuable. Even using a single hyperscale provider such as AWS can result in significant operational, technological and service complexity. These environments require effective implementation and use of managed cloud services to function efficiently and reliably and minimize the cost of operations.

About two thirds public sector entities use managed services from consulting services providers that introduced cloud-first or cloud-dominant environments within at least their first year of experience. As time passes, needs change and sector entities usually add services or shift to new or additional services providers as they build on their cloud environment knowledge and expertise.

By 2025, the demand for cloud managed services in the public sector will increase at about the same rate as core cloud consulting services. This will be followed by growth at an increasing rate, as the use of cloud services will expand and accelerate among sector entities.

From the 65 providers assessed for this study, 21 have qualified for this quadrant, with five being Leaders and two Rising Stars.

accenture

**Accenture** has expertise in business, IT and cloud consulting, with strong AWS qualifications including managed services related to AWS offerings. Its public sector consulting approach maximizes the value of clients' existing IT and operational investments and expertise, making it a Leader in this space.

Deloitte

**Deloitte** is one of the largest and best-known business consulting firms globally. Its public sector cloud managed services expertise builds from working with dozens of U.S. state and municipal government agencies, federal agencies with robust participation in AWS's own government and public sector programs.

Infosys

**Infosys**, a relative newcomer to the U.S. public sector, stands out for its U.S.-based public sector business unit and strong AWS cloud services expertise in this space.

rackspace technology

**Rackspace Technology** has been positioned as a Leader in this quadrant for the U.S. public sector study owing to its strong presence and expertise in the cloud services space.

Tech Mahindra

**Tech Mahindra** is a global leader in AWS managed services. Its increasing investment and growing presence among U.S. public sector organizations help position it as a Leader in this quadrant. We see significant opportunity for Tech Mahindra to advance further in the Leader quadrant as its investment and involvement with clients increase.

## General Dynamics Information Technology (GDIT)

**General Dynamics Information Technology (GDIT)**, a Rising Star and like Leidos, primarily competes at the central government level, especially within the U.S. federal government. But its deep and adaptable portfolio of services and exceptional U.S. public sector experience position it as a potential Leader in future studies.

## Leidos

Rising Star **Leidos** also competes primarily in the U.S. at the federal/central government level, but like GDIT is robustly positioned to also serve SLED client organizations. We see some inroads by Leidos into state-level governments, and expect it will shift to a Leader position should it invest enough in that sector.

# Infosys

Leader

"Sector investments with portfolio depth position Infosys as a Leader in managed services 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 the AWS Public Sector and Public Sector Solution Provider partnership status.

## Strengths

**AWS managed services competencies and certifications:** Infosys holds relevant AWS partnerships, including Managed Service Provider, Public Sector Partner, Solution Provider and Public Sector Solution Provider program partnerships. Relevant AWS Consulting Competencies include Digital Customer Experience, DevOps and Level 1 MSSP.

**Infosys Cobalt cloud services portfolio and platform:** Launched in 2020, Infosys Cobalt is a set of services, solutions and platforms for enterprises to accelerate their cloud journeys. Cobalt has grown from 25,000 to 35,000 cloud assets and from 200 to more than 300 industry cloud solution blueprints since its launch.

**Dedicated U.S. public sector business unit:** Infosys Public Services (IPS) is a subsidiary of Infosys, based in the U.S. It works exclusively with North American public sector organizations. IPS takes advantage of Infosys' more than 40 years of cross-industry IT and business services in the U.S. public sector.

## Caution

Infosys lacks the AWS Government Consulting competency and AWS GovCloud validation. Despite this, the firm has a strong base of experience with public sector initiatives. Infosys should consider obtaining these certifications to significantly advance its leadership in public sector opportunities.

# Appendix

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

*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.

*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.

# About Our Company & Research

ISG Provider Lens™

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

ISG Research™

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

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

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ISG

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JANUARY 2023

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