ISG Provider Lens™

AWS Ecosystem Partners

AWS Migration Services

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:
Infosys® Public Services

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 Migration Services

Who Should Read This

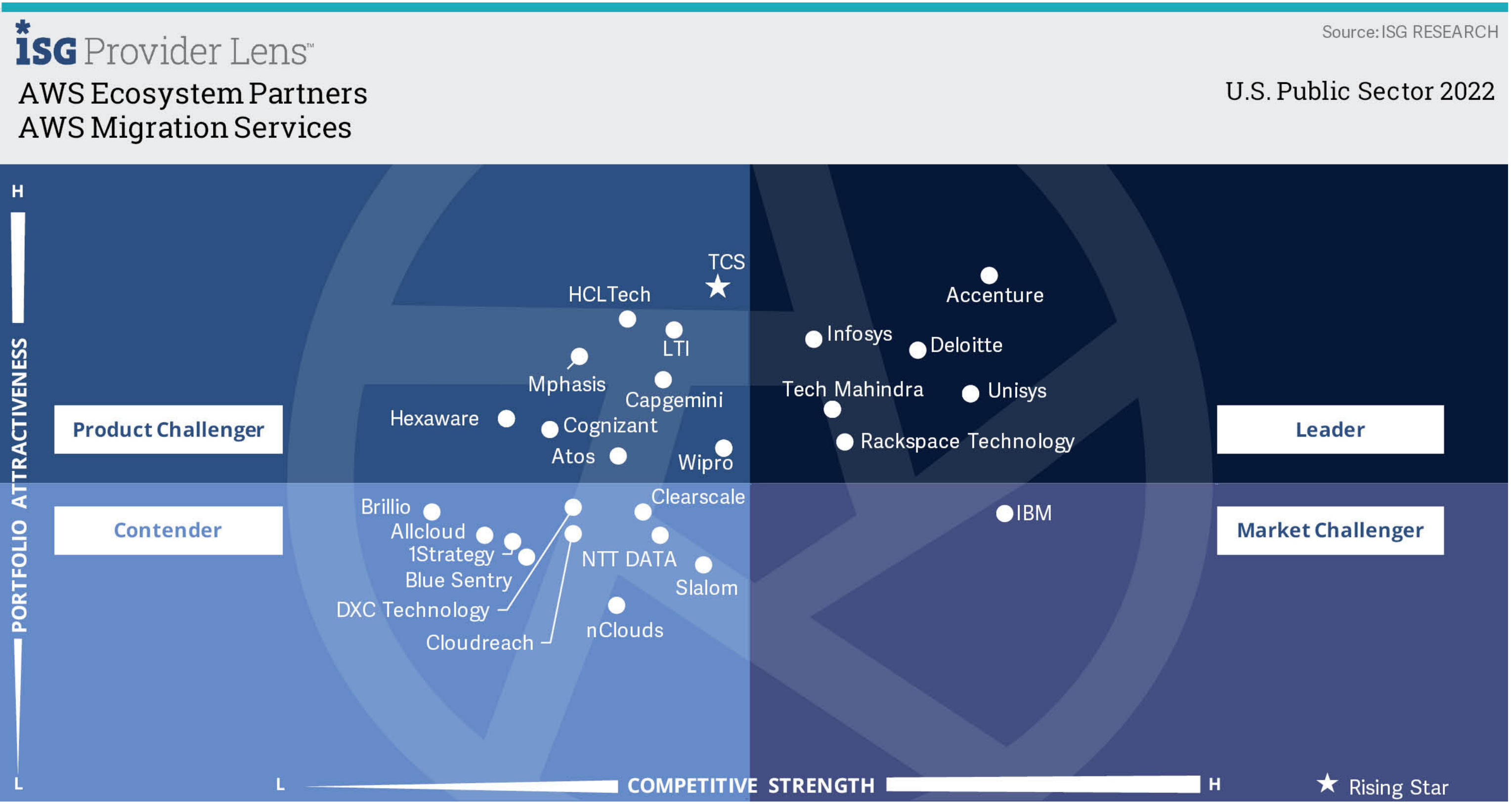
This report is relevant to organizations across the U.S. public sector for evaluating providers of AWS migration services.
In this quadrant report, ISG defines the current market positioning of providers of AWS migration services for the U.S. public sector agencies, and how they address the key challenges faced by such organizations.

Most U.S. public sector agencies are actively considering migration and modernization of their legacy mainframe applications to cloud native counterparts. Hyperscalers, including AWS, have made huge investments in acquiring and offering several solutions in this space. Enterprises are highly cautious of the investments in and steps taken by service providers to promote decarbonization and sustainable development. They seek providers that use serverless architectures and other solutions that reduce the cloud carbon footprint during migration. Enterprises partner with service providers that prioritize sustainability and have a broad portfolio on 6Rs (rethink, refuse, reduce, reuse, recycle, repair). They also prefer engaging providers with global talent and delivery ecosystems and custom pricing models.

Constituent-facing leaders should read this report to understand the relative positioning and capabilities of service partners that can help them build and manage complex business management software integrations and data flows for improved business data analysis and decision-making.

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

IT and technology leaders should read this report to understand the strengths and weaknesses of AWS migration service providers, including their offerings, capabilities and market presence. The report will highlight their relationships with AWS and how they employ the latest technologies and capabilities to deliver reliable offerings.



AWS provider partners in this quadrant support software application workload development, operation and migration. **Leaders** excel at architecture, development (including DevOps), **software modernization** and both established and emerging consulting and **technological capabilities.**

Bruce Guptill

Definition

The AWS provider partners in this quadrant offer technology, products or services that support workload operation and migration. Top providers in this space excel in automated testing, migration and deployment and typically work closely with clients to address needs such as readiness assessments and continuous change management. Typical leader skills and expertise include software architecture, software development (including DevOps), application and workload migration and modernization and related consulting and technological capabilities to build, enable and support robust, scalable applications and services. Some AWS partners can qualify as members of the AWS Migration Acceleration Program due to their special migration competencies.

Eligibility Criteria

Evaluation and eligibility criteria for this quadrant include the following:

1. Availability, experience and certification regarding AWS-relevant **cloud migration offerings**
2. Breadth and depth of partner/channel relationships including **Cloud Native Computing Foundation** (CNCF) participation and support
3. **Depth and breadth** of customer presence and involvement regarding software migration and modernization via AWS (including experience and expertise migrating business-critical applications using AWS, training and support)
4. Scope and use of **relevant tools and technologies** (e.g., Kubernetes, Docker, Istio, Envoy)
5. Scope of **AWS Competency** and Service Delivery offerings and certifications
6. Suitability, maturity and adaptability of **pricing models**
7. AWS-focused **offering roadmap and innovations** (current and planned)

Observations

Modernization – including transformation of business operations – is a critical change facing most U.S. public sector entities. As noted throughout this report, almost all must choose between transforming their business and IT capabilities or reducing staff and services.

Business software environments are a key piece to this puzzle. Software is the core of every business capability, from office productivity suites to transportation and logistics, to finance and procurement and supply chain management, to the delivery of citizen and constituent services. Many legacy software environments, especially back office platforms and applications, have grown remarkably complex and costly to maintain.

Software modernization and migration services enable organizations to move ahead from such legacy environments, by migrating them to and optimizing them for cloud environments, by reengineering them with more-capable alternatives – or often, both.

Software modernization and migration are among the most technology-dependent IT service types. Providers must have strong tools and technology portfolios and robust staff skillsets, in addition to sector-specific knowledge and expertise in managing compliance and security issues.

From the 65 companies assessed for this study, 26 have qualified for this quadrant. Six have been designated as Leaders and one as a Rising Star.

Accenture specializes in business, IT and cloud consulting, with strong AWS qualifications that make it a Leader in AWS software modernization and migration for the U.S. public sector. Its public sector consulting approach maximizes the value of clients' existing IT and operational investments and expertise.

Deloitte is one of the largest and best-known business consulting firms globally. Its public sector expertise is built from working with numerous U.S. state and municipal government agencies, federal agencies and AWS's government and public sector programs.

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

Rackspace Technology leverages its presence and expertise built from early days of cloud services provision and its longstanding AWS partnership into leadership for the U.S. public sector in this quadrant. Large-scale software migration engagements are a significant percentage of its AWS partner business.

Tech Mahindra is a global influencer in software migration and modernization services and a strong AWS partner in this space. Its increasing investment in and presence among U.S. public sector organizations have helped advance it into Leader status in this quadrant.

Unisys

Unisys is another of the longest-serving IT solution and services providers within the U.S. public sector. Its experiences in modernization and digitalization of public services and organizations via AWS position it as a strong Leader in this quadrant.

TCS Tata Consultancy Services

TCS (Rising Star) has an outstanding software migration and modernization services portfolio and a strong AWS partnership. Both should help the company expand its U.S. public sector presence and strengthen its competitive sector positioning in the coming months..

Infosys

Leader

"Software landscape expertise positions Infosys as a Leader in migration and modernization on AWS."

Bruce Guptill

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

AWS migration competencies and certifications: Infosys holds critical AWS Consulting competencies, including DevOps, Level 1 MSSP, Mainframe and Migration. Relevant AWS partnerships include Public Sector Partner, Solution Provider and Public Sector Solution Provider. Key AWS certifications include Solutions Architect, Cloud Practitioner and SysOps Administration.

Dedicated U.S. public sector business unit: Infosys Public Services (IPS) is a subsidiary of Infosys based in the U.S., leverages Infosys' more than 40 years of cross-industry IT and business services experience for the U.S. public sector.

Core public sector legacy modernization practice: Infosys' IPS business unit partners with its legacy modernization practice to help public organizations improve and advance legacy systems and operations. The practice includes more than 28,000 modernization experts supported by 20 proprietary tools that automate migration of business logic and user interface components. Infosys reports completing more than 900 modernization programs for clients, including those in the public sector.

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 AWS Government Consulting competency and AWS GovCloud services validation. This should not be considered a reason for not engaging Infosys on public sector initiatives, as the firm has a very strong base of experience otherwise. But Infosys will be able to significantly advance its leadership in the public sector with such certifications.

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.

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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Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,300 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data. For more information, visit www.isg-one.com.

ISG Provider Lens™

JANUARY 2023

REPORT: AWS ECOSYSTEM PARTNERS