

AWS - Ecosystem Partners

U.S. 2020

Quadrant
Report



A research report
comparing provider
strengths, challenges
and competitive
differentiators

Customized report courtesy of:



December 2020

About this Report

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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 2020 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.

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ISG Provider Lens™ delivers leading-edge and actionable research studies, reports and consulting services focused on technology and service providers' strengths and weaknesses and how they are positioned relative to their peers in the market. These reports provide influential insights accessed by our large pool of advisors who are actively advising outsourcing deals as well as large numbers of ISG enterprise clients who are potential outsourcers.

For more information about our studies, please email ISGLens@isg-one.com, call +49 (0) 561-50697537, or visit ISG Provider Lens™ under [ISG Provider Lens™](#).



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EXECUTIVE SUMMARY

Providers (and AWS) Build for the Post-COVID Digital Cloud Reality

With the outbreak of the COVID-19 pandemic in 2020, the range, and pace of enterprise spending on cloud-based IT have increased dramatically. Sudden and massive disruption in the allocations and locations of workforces and resources, in supplier and customer relationships and communication as well as business planning and operations, have accelerated digital transformation worldwide. To quote several providers interviewed for this study, the core goal for enterprises in 2020 is, “more digital, more quickly.”

Surprisingly to some, many enterprises are still working to respond effectively to the COVID-19 disruptions. Providers interviewed in this study report as many as 60 percent of their enterprise clients have yet to initiate any significant remote work or work-from-anywhere (WFA) capability. The result is that the global scale of cloud adoption and use witnessed before 2020 is minor compared to what most enterprises and providers are experiencing now, and what they will continue to experience for several years to come. This, in turn, helps boost the resource utilization of hyperscale cloud providers such as Amazon Web Services (AWS) to levels beyond what had been expected or even considered. Also, savvy IT services providers are adjusting, extending and promoting their services and capabilities to build on this growth.

The effects on services providers partnered with AWS are summarized as follows:

Consulting Services: Most providers are moving beyond digital enablement and initial operational improvements to provide clients with more refined digital business strategies. The primary focus for most engagements has shifted from cost reduction to improved business outcomes. This is leading to more consultative approaches by providers, which, in turn, is driving more client interest in change management and design thinking that closely ties cloud IT investment with business impacts. DevOps has become a core component of providers' portfolios, especially as clients investigate the benefits of cloud-native development and infrastructure-as-code.

Data Analytics and Machine Learning: Work-from-anywhere environments are spurring a huge wave of enterprise data discovery. Enterprise IT and business leaders are focusing more on what data exists across all aspects of the enterprise, rather than in specific functional areas. The scope and affordability of a huge range of IoT capabilities are adding to this. The result is accelerating interest and investment in analytics within business operations, especially including the use of machine learning (ML). More enterprises now see the benefits of using ML and artificial intelligence (AI) within business applications to process and learn from the massive scope of available data quickly and effectively.

IoT: Interest and investment in the Internet of Things (IoT) had been growing rapidly prior to the outbreak of COVID-19. We witnessed increasingly affordable and integrable capabilities to improve and manage productivity, processes, devices and environments. However, work-from-anywhere realities have helped broaden and accelerate enterprise IoT investigations and investments. Work from anywhere greatly expands the scope of devices

connected to enterprise systems beyond traditional industrial sensors and data. More devices, along with different types of data and more connections, have spurred enterprise and provider investments in edge computing, networking, security, application programming interfaces (APIs) and data analytics.

Managed Services Providers: As noted in previous ISG cloud ecosystem and services studies, the role and value of managed service providers (MSPs) have been rapidly expanding into areas traditionally thought of as systems integration. The impact of COVID-19 on cloud adoption and integration requirements has pushed MSPs farther into system integrator territory. As one of the MSPs in our Leader quadrant put it, the primary role of MSP today is “integration, security, integration, security, and integration,” although traditional MSP roles as transactional service providers continue. The Leaders in our study recognize the changing MSP reality, and are investing in more skills, expanding their roles with AWS, and are acquiring more technology and tools providers.

Migration and Container Services: A longstanding assumption in technology circles has been that not everything will move to cloud. The expectation for more than a decade has been that large-scale, complex and customized enterprise software environments would remain at least 50% on-premise, with cloud layered on top and between apps and databases. However, with the growth of digital business, we see many enterprises with major applications are not able to adapt quickly enough to changed business environments. This sparked a global move toward rationalizing and modernizing traditional business software environments. Currently, COVID-19 has catalyzed this transformation, and we see many enterprises each moving most of their applications (and databases) into AWS and other hyperscale platforms. The ubiquity of affordable and adaptable container technologies such

as Kubernetes and Docker has further accelerated interest and investment by enterprises and services providers.

SAP Migration and Implementation: SAP is the major enterprise app modernization and migration service provider. The company itself is pushing customers to move to cloud-based versions of its software by establishing cutoff dates to support on-premises versions within the next few years. This has helped catalyze some of the business app modernization and data discovery trend, which, in turn, leads to increased need of better analytics and MSP capabilities. Meanwhile, the larger trend toward enterprise-scale, cloud-based software as a service (SaaS) is inspiring more enterprises to outsource ongoing management of their SAP applications and environments.

At the bottom line, initial digital transformation is rapidly morphing into unified everything-as-a-service, and service providers building with AWS are witnessing massive opportunity and, therefore, business change. Providers themselves report some significant business challenges not only because they are adapting to widespread work from anywhere themselves, but also as more client work is done remotely. Most providers report either lean presence or no presence within client spaces. As environments become more complex, this could strain communications and relationships. Also, AWS itself is changing. The hyperscaler has been making huge investments in tools to enable new capabilities and services beyond its traditional platform position. AWS is also heavily spending on partnerships with service providers. We see few significant providers without strategic co-development, co-marketing agreements with AWS. In the emerging cloud-first, post-COVID digital business reality, each one is a critical appendage of the other.

Introduction

Definition

AWS continues to expand its presence and influence as a global provider of IT-as-a-service, while its AWS Partner Network (APN) grows even larger, as providers of technologies and services leverage AWS to develop and deliver an expanding array of enterprise IT and business services.

The 2020 ISG Provider Lens™ AWS Ecosystem Partners study analyzes the AWS partner landscape in the U.S. and Germany with regard to everyday service needs, emerging challenges, market changes and other important issues. ISG consultants and user clients can use this information to evaluate current supplier relationships and the potential for establishing new relationships.

This ISG Provider Lens™ report offers the following to the IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers.
- A differentiated positioning of providers by important segments according to market segments.
- A perspective on U.S. market.

This study serves as an important decision-making basis for provider positioning, key relationships and go-to-market considerations.

Provider Classifications

The ISG Provider Lens™ quadrants were created using an evaluation matrix containing four segments, where the providers are positioned accordingly.

Leader

The "Leaders" among the vendors/providers have a highly attractive product and service offering and a very strong market and competitive position; they fulfill all requirements for successful market cultivation. They can be regarded as opinion leaders, providing strategic impulses to the market. They also ensure innovative strength and stability.

Product Challenger

The "Product Challengers" offer a product and service portfolio that provides an above-average coverage of corporate requirements, but are not able to provide the same resources and strengths as the Leaders regarding the individual market cultivation categories. Often, this is due to the respective vendor's size or their weak footprint within the respective target segment.

Market Challenger

"Market Challengers" are also very competitive, but there is still significant portfolio potential and they clearly lag behind the Leaders. Often, the Market Challengers are established vendors that are somewhat slow to address new trends, due to their size and company structure, and therefore have some potential to optimize their portfolio and increase their attractiveness.

Contender

"Contenders" are still lacking mature products and services or sufficient depth and breadth of their offering, while also showing some strengths and improvement potentials in their market cultivation efforts. These vendors are often generalists or niche players.

Provider Classifications (cont.)

Each ISG Provider Lens™ quadrant may include a service provider(s) who ISG believes has a strong potential to move into the leader's quadrant.

Rising Star

"Rising Stars" are usually Product Challengers with high future potential. Companies that receive the Rising Star award have a promising portfolio, including the required roadmap and an adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market. This award is only given to vendors or service providers that have made extreme progress towards their goals within the last 12 months and are on a good way to reach the leader quadrant within the next 12 to 24 months, due to their above-average impact and innovative strength.

Not In

This service provider or vendor was not included in this quadrant as ISG could not obtain enough information to position them. This omission does not imply that the service provider or vendor does not provide this service. In dependence of the market ISG positions providers according to their business sweet spot, which can be the related midmarket or large accounts quadrant.



AWS - Ecosystem Partners Quadrants

ENTERPRISE CONTEXT

Consulting Services Providers

This report is for U.S.-based enterprises evaluating providers of consulting services related to the AWS platform.

In this quadrant report, ISG assesses the current market positioning of providers of AWS consulting services. Our assessment is based on the depth and breadth of providers' service offerings and market presence.

Even during current times of economic and business uncertainty, ISG sees a growing demand for consulting services that assess and address the changing enterprise business IT needs. Typically, these include IT architecture and infrastructure change, application modernization, workload migration and improvement, digital business and workplace transformation and training, tech and provider governance and data security risk and compliance – almost anything to do with managing the disruption and improvement of business and IT. The prevalence of AWS as a core IT platform means that demand for consulting service providers, partnered with AWS, is increasing in tandem. The range of competencies among providers (practices, skills and abilities) makes it a challenge (more than ever) to identify and engage with the most suitable partners.

Who should read this report:

Marketing and sales leaders should read this report to understand how consulting service providers can help them develop and improve business planning, go-to-market strategy and related activities using AWS platform-based capabilities.

Operational leaders and finance leaders should read this report to understand ways to differentiate, engage with and manage relationships with AWS consulting services providers that enable optimal return on investment, including business performance improvements.

IT and technology leaders should read this report to understand the strengths and weaknesses of providers offering AWS-related consulting services, including their offerings, capabilities, market presence and strengths, relationships with AWS and the way they employ the latest technologies and capabilities to deliver reliable offerings in keeping with enterprise business and market change.

TCS

 Overview

Tata Consultancy Services (TCS), a part of the multinational Tata Group, is based in India. It has more than 400,000 employees in 46 countries, delivering IT services, consulting and business solutions. TCS has two major office locations in the U.S., with several smaller locations as well. TCS generated revenue of US\$22 billion in FY2019. The company's Business 4.0 vision drives development and innovation in its MSP cloud migration, digital transformation, application development and managed service offerings. TCS is an AWS premier consulting partner.

 Strengths

Wide portfolio breadth and depth: TCS enterprise consulting practice areas built on or leveraging AWS services and capabilities include TCS' Cloud Counsel; iCMC — cloud applications consulting; Digital Value Broker — governance, service integration, vendor management; ITSM and cloud readiness consulting; Data and Analytics Target Operating Model (DATOM); Modernization Propeller; Hyperbreeze Container Service; Microservices-based Architecture Service; Enterprise Agility; and Machine First Delivery Model (MFDM™).

Competencies and certifications: TCS holds SAP, migration and industrial software AWS competencies. The company is also an AWS solution provider partner. Over 6,500 TCS employees are certified in one or more AWS proficiencies. TCS AWS certification includes seven of 11 service delivery areas used by ISG to assess providers in this quadrant; TCS is working toward extending and completing certification across the remaining service delivery programs. The company is also a launch partner for AWS Outposts.

 Caution

With the onset of COVID-19, TCS like other firms was affected by the need to institute remote work quickly and on a massive scale. Over the past few months, we have heard of communication and coordination issues from some clients and partners. We believe that this can be attributed in large part to implementing and coordinating remote-work productivity across TCS' substantial breadth and complexity. We know that TCS leadership is aware of the issue and is addressing it. We suggest that clients proactively institute and manage communication with TCS (and other providers).



2020 ISG Provider Lens™ Leader

TCS' depth and breadth of global resources, strong relationship with AWS and global market presence make it a Leader in this quadrant and a candidate for all AWS-related consulting needs of clients.

ENTERPRISE CONTEXT

Internet of Things (IoT)

This report is for U.S.-based enterprises evaluating providers of services supporting Internet of Things (IoT) environments on the AWS platform.

In this quadrant report, ISG assesses the current market positioning of providers of IoT-related services and solutions using the AWS platform. Our assessment is based on the depth and breadth of providers' service offerings and market presence.

The providers examined in this report offer capabilities to collect, collate, analyze and manage the growing scope of data generated from the rapidly-growing number and range of devices used in industry/business operations and everyday life. The scope of such devices and related data has grown beyond the abilities of many enterprises to manage, and we are seeing a growth in number of devices and data every day. Thus, an increasing number of enterprises are turning to providers of cloud-based solutions and services, and the AWS cloud platform has shown itself to be a natural environment for these.

Who should read the report:

Marketing and sales leaders should read this report to understand how providers can help them develop and leverage a broad range of business data from multiple IoT environments to enable improved business planning and go-to-market strategy.

Operational leaders and finance leaders should read this report to understand ways to differentiate, engage with and manage relationships with AWS partner providers that enable optimal return on investment, including business performance improvements.

IT and technology leaders should read this report to understand the strengths and weaknesses of providers offering IoT services and solutions on the AWS platform, including their offerings, capabilities, market presence and strengths, relationships with AWS and the way they employ the latest technologies/capabilities to deliver reliable and secure offerings in keeping with enterprise business and market change.

TCS

 Overview

Tata Consultancy Services (TCS), a part of the multinational Tata Group, is based in India. It has more than 400,000 employees in 46 countries, delivering IT services, consulting and business solutions. TCS has two major office locations in the U.S., with several smaller locations as well. TCS generated revenue of US\$19 billion in FY2019. The company's Business 4.0 vision drives development and innovation in its MSP cloud migration, digital transformation, application development and managed service offerings. Over 6,500 TCS employees are certified in one or more AWS proficiencies. TCS is an AWS premier consulting partner.

 Strengths

Multiple, complementary IoT frameworks: TCS' Bringing Life to Things IoT AI-enhanced business framework helps customers build predictive and self-aware systems that can sense and intelligently respond to changes in the physical environment. The TCS I4T Framework helps identify automation and digital opportunities specific to manufacturing and supply chain operations. It focuses on and analyzes productivity, cost, digitization and sustainability to provide visibility on opportunities to increase revenue, reduce costs, or improve margins.

Industry 4.0: TCS offers a comprehensive portfolio of Industry 4.0 IoT-related offerings including consulting, design, development, verification and validation, deployment and system integration, and managed services and support. Industries currently supported include manufacturing, consumer packaged goods, automotive, aerospace, energy, utilities, healthcare, life sciences, and high tech.

Cybersecurity and connected workers: Manufacturing IoT engagements often include TCS' framework providing visibility into current security conditions and a roadmap to more robust models. TCS' Gen 4-Work-AR is an IoT-based, connected worker mixed reality solution to provide real-time contextual information for better decision support, augmented collaboration with remote teams and enhanced operational efficiency.

 Caution

With the onset of COVID-19, TCS like other firms was affected by the need to institute remote work quickly and on a massive scale. Over the past few months, we have heard of communication and coordination issues from some clients and partners. We believe that this can be attributed in large part to implementing and coordinating remote-work productivity across TCS' substantial breadth and complexity. We know that TCS leadership is aware of the issue and is addressing it. We suggest that clients proactively institute and manage communication with TCS (and other providers).



2020 ISG Provider Lens™ Leader

TCS' strong IoT portfolio and focus on business improvement, especially within and across traditional commerce and Industry 4.0 environments, help to position it as a Leader in our AWS IoT partner ecosystem quadrant.

ENTERPRISE CONTEXT

Managed Services Provider

This report is relevant to U.S.-based enterprises evaluating managed service providers (MSPs) that utilize the AWS platform and associated services.

In this quadrant report, ISG assesses the current market positioning of providers that offer complete lifecycle solutions for AWS cloud infrastructure and application migration and management. They typically offer support in four key areas: plan and design, build and migrate, run and operate, and optimize.

As COVID-19 pushes more enterprises to accelerate and extend digital transformation, we see enterprises increasingly pursuing different types of cloud-native business IT solutions. Customers expect and demand solutions (and providers) that reduce costs, improve business agility, increase security and enable measurable business improvement. MSPs, in turn, are expanding capabilities, processes, services, and their own business models to help customers design, develop, migrate, run, manage and optimize digital infrastructure and applications. This level of change requires updated insights on providers and offerings, and better means to assess both.

Marketing and sales leaders should read this report to understand how providers can help develop and deliver secure business data from multiple services and providers on AWS that enable improved business planning and go-to-market strategy.

Operational leaders and finance leaders should read this report to understand ways to differentiate, engage with and manage relationships with AWS partner providers that enable optimal return on investment, including business performance improvements.

IT and technology leaders should read this report to understand the strengths and weaknesses of MSPs, including their offerings, capabilities, market presence and strengths, relationships with AWS, and how they employ the latest technologies/capabilities to deliver reliable offerings in keeping with enterprise business and market change.

TCS

 Overview

TCS, a part of the multinational Tata Group, is based in India. It has more than 400,000 consultants in 46 countries, delivering IT services, consulting and business solutions. TCS has two major office locations in the U.S. Over 4,000 TCS employees are certified in one or more AWS proficiencies. TCS generated a revenue of US\$19 billion in FY2019. The company's Business 4.0 vision drives development and innovation in its MSP cloud migration, digital transformation, application development and managed service offerings. TCS is an AWS premier consulting partner.

 Strengths

AWS MSP certified: TCS is certified as an AWS managed services partner. It also holds certifications in SAP, migration, and industrial software partner programs. The company is also an AWS solution provider partner. With TCS' strong business partnership with AWS, it has become a launch partner for AWS Outpost hybrid cloud offerings.

Large client base and numerous certifications: TCS reports more than 700 AWS MSP engagements to date, including engagements within each of the 12 vertical industry segments ISG uses in assessing providers in this quadrant. The company also provides all 21 solution types and all 33 managed service types used to assess providers in this quadrant. Globally, TCS has more than 6,500 FTEs certified within all 10 specializations used by ISG to assess providers in this quadrant.

Good pricing approach: We see significant pricing flexibility in TCS' MSP engagements with the U.S.-based clients. The company uses more pricing models than most Leaders in this quadrant, including per-user, flat pricing, graduated/bundled, usage-dependent (pay as you use), value-based pricing and results-based/risk-based pricing.

 Caution

With the onset of COVID-19, TCS, like other firms, was affected by the need to institute remote work quickly and on a massive scale. Over the past few months, we have heard of communication and coordination issues from some clients and partners. We believe that this can be attributed in large part to implementing and coordinating remote-work productivity across TCS' substantial breadth and complexity. We know that TCS leadership is aware of the issue and is addressing it. We suggest that clients proactively institute and manage communication with TCS (and other providers).



2020 ISG Provider Lens™ Leader

TCS' depth and breadth of global resources, strong relationship with AWS and global market presence make it a Leader in this quadrant and a potential candidate for all AWS-related MSP needs.

ENTERPRISE CONTEXT

SAP Workloads

This report is for U.S.-based enterprises evaluating providers of services for migrating, implementing and managing SAP applications and workloads on the AWS platform.

In this quadrant report, ISG assesses the current market positioning of providers of SAP consultation, migration and implementation services using the AWS platform. Our assessment is based on the depth and breadth of providers' service offerings and market presence.

SAP, for years, has been evolving its portfolio to take advantage of cloud flexibility and economics; it has even informed customers and potential buyers that all future iterations of its software will be cloud-based. This has helped spur enterprises to investigate, accelerate, migrate and update SAP business management software (and others) to cloud platforms like AWS. Also, it has helped enterprises identify not only their own core business software complexities, but also their own skill and technology gaps. Thus, we see a broad scope increase in enterprises seeking and engaging with providers of SAP migration and management services.

While SAP migration to cloud is worldwide, we see most activities among U.S.-based enterprises, akin to other areas of software development and migration. The most significant difference between U.S. enterprises and most others is the breadth and complexity of business software applications, tools, and customization. This pushes U.S.-based firms to seek providers with very broad and deep SAP portfolios, landscape expertise, skillsets and partnerships.

Who should read this report:

Marketing and sales leaders should read this report to understand how providers can help develop and deliver secure business data from SAP environments on AWS that enable improved business planning and go-to-market strategy.

Operational leaders and finance leaders should read this report to understand ways to differentiate, engage with and manage relationships with AWS partner providers that enable optimal return on investment, including business performance improvements.

IT and technology leaders should read this report to understand the strengths and weaknesses of providers offering SAP migration, implementation, and management services, including their offerings, capabilities, market presence and strengths, relationships with AWS, and the way they employ the latest technologies/capabilities to deliver reliable offerings in keeping with enterprise business and market change.

TCS

 Overview

TCS, a part of the multinational Tata Group, is based in India. It has more than 450,000 consultants in 46 countries, delivering IT services, consulting and business solutions. TCS has two major office locations in the U.S. Over 6,500 TCS employees are certified in one or more AWS proficiencies. TCS generated a revenue of US\$19 billion in FY2019. The company's Business 4.0 vision drives development and innovation in its MSP cloud migration, digital transformation, application development and managed service offerings. TCS is an AWS premier consulting partner.

 Strengths

Large-scale service engagements: TCS' SAP on AWS engagements are typically delivered as part of TCS Cloud Strategy and Design, Cloud Migrate, and Cloud Run service engagements. The company's SAP software engagements include SAP business objects, SAP database and mobile solutions, SAP business all-in-one, SAP HANA, and SAP business suite.

SAP and AWS certifications: In addition to more than 6,500 TCS employees are certified in one or more AWS proficiencies, TCS has more than 12,000 SAP certifications among its U.S. employees. These include certifications in SAP Basis, SAP CRM and ERP, SAP AMS, SAP HANA, and SAP AWS solutions. The company offers and supports all of the SAP-specific service types used in ISG's evaluation for this quadrant as well as all five client enabling programs used in our evaluation (for example, assessment and evaluation tools; training and workshop; events and conferences; webinars and webcasts; and customer-specific advanced training).

SAP engagements on AWS: Four proprietary tools are used in SAP engagements on AWS. These include TCS' ignio cognitive platform for application automation; TCS SAP Cloud Exponence for multi-tenant cloud delivery; TCS SAP rapid migration toolkit; and TCS SAP quick deployment template (QDT).

 Caution

Although the company does maintain a significant pool of skilled and certified employees in the U.S., clients should be aware that like many offshore-based services providers, the vast majority of TCS' SAP expertise is located outside of the U.S. This may affect client requirements for onshoring or nearshoring of IT services.

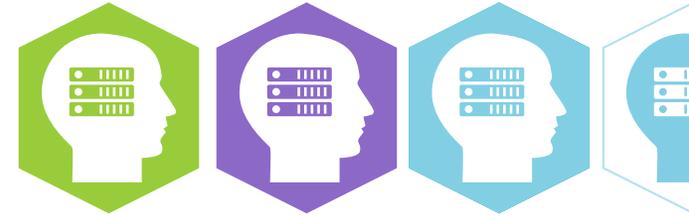


2020 ISG Provider Lens™ Leader

TCS' depth and breadth of global resources, strong relationship with AWS, and global market presence make it a Leader in this quadrant and a potential candidate for all client AWS-related service needs.



Methodology



METHODOLOGY

The research study “ISG Provider Lens™ AWS - Ecosystem Partners” analyzes the relevant software vendors/service providers in the Germany market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

The study was divided into the following steps:

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

Authors and Editors



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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.



Srinivasan PN, Enterprise Context and Global Summary Analyst

Senior Analyst

Srinivasan is a senior analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on AWS Ecosystem and Insurance BPO Industry. His area of expertise lies in the space of engineering services and digital transformation. Srinivasan has over 6 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 is responsible for developing content from an enterprise perspective and author the global summary report. Along with this, he supports the lead analysts in the research process and writes articles about recent market trends in the industry.

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Director, Principal Analyst and Global Head – ISG Provider Lens/ISG Research

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor. Now as a research director, principal analyst and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

ISG Provider Lens™ | Quadrant Report

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