ISG Provider Lens™

AWS Ecosystem Partners

A research report highlighting the significance of AWS partners to the success of AWS and its customers

BROCHURE | APRIL 2024 | APAC*, BRAZIL, GERMANY, MEXICO, U.K. AND U.S.

*APAC regions (excluding Japan, South Korea and China/Taiwan)

Table of Contents 🏠

In 2024, AWS introduced major innovations in services related to the cloud, data analytics and ML alongside a general mission that supports clients in their transformation toward sustainability, focusing on digital sovereignty and enhanced innovation power. Public cloud usage tends to outpace traditional infrastructures and known operational techniques. The success of AWS' mission depends on sophisticated CloudOps that cover cloud security and governance, resource and cost optimization, provisioning resources intelligently and service availability across delivery models (including the Edge). This strategy implies the need for maximum interoperability among services.

AWS has several engagement models to enable its strategic service provider partners to train and upskill their cloud workforces and leverage the latest platform innovations through the AWS Partner Network (APN). The partnerships have matured in terms of AWS cloud opportunities, including migration, consulting, data and AI, SAP services and managed services.

AWS continues solidifying its leadership and commitment to technological innovation, which is emphasized by various strategic alliances and pioneering developments. Partnerships are pivotal for cutting-edge innovation, future-proofing the technology service providers' roadmap and defining their strategies. The industry focus continues to strengthen the collaboration between global system integrators and AWS in developing solutions. These developments, coupled with AWS' ongoing commitment to product innovation and strategic foresight, signal a future where digital transformation is not just about technological advancement but also sustainable and responsible growth. AWS is paving the way for next-generation cloud services through its latest partnerships and product initiatives, reinforcing its role as a catalyst for industry-wide innovation and ethical technological practices.

OVERVIEW

CORNERSTONES

- INNOVATION (IP – Accelerators)
- PARTNERSHIPS & ENGAGEMENTS (Tiers – Types)
- COMPETENCY AND TALENT (Resources – Certifications)
- INDUSTRY FOCUS AND ALIGNMENT (Verticals – Function)
- EXPERIENCE AND ENGAGEMENT (Functionality – Capability)
- SECURITY & PRIVACY (Data – Access – Environment)
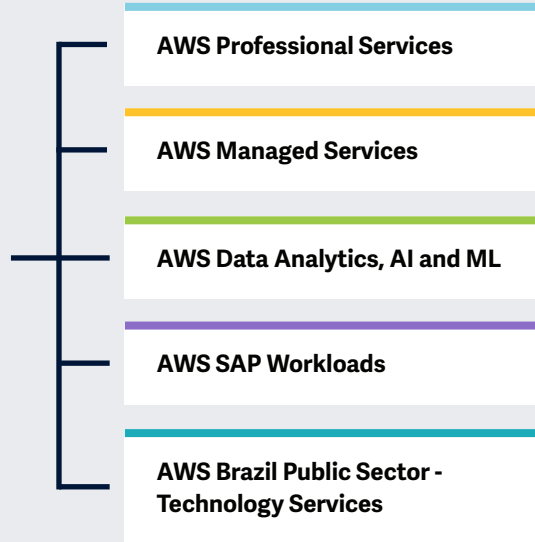
QUADRANTS / AREAS

AWS Professional Services

Consulting (Business & Technology)			Architecture (Design and Build)		Migration and Multi-Cloud Integration (Deployment Methodology)	
Strategy & Transformation (Maturity Assessment & Roadmap)	Industry & Domain	ESG - GRC	Compute – Storage – Network Integrated Architecture	Modernization (E.g.-Mainframes)	Applications	Data workloads

AWS Managed Services

Cloud Operations (Run)				Performance			Optimize	
Orchestration	Observability	FinOps	DataOps – LLMOps	Availability	IaaS	PaaS	SRE	PRE

AWS Data Analytics, AI and ML

Insights and Decision-making			GenAI With AWS			Customized ML Solutions		IoT Data
Predictive ML, Analytics	Dashboards & Real-time Insights	Hyper Personalization	Responsible GenAI	Sagemaker Bedrock Titan	GenAI Capabilities	Industry-specific Solutions	Enterprise LLM	

AWS SAP Workloads

SAP Operations			Industry Focus SAP Expertise		Integrated D&A on SAP
Consulting and Implementation	Integration	S/4HANA Migration	Industry Solutions	Tools and Accelerators	AWS solutions

AWS Brazil Public Sector - Technology Services

Migration and Managed Services			Data Analytics and Machine Learning			ERP Workloads	
Consulting	Migration Applications and Data workloads	Cloud Operations and Performance	Insights and Decision-making	Customized ML Solutions	Gen AI with AWS	IoT Data	ERP Operations	Integrated D&A on ERP

Key focus areas for the AWS Ecosystem Partners 2024

Simplified Illustration Source: ISG 2024

- **AWS Professional Services**
- **AWS Managed Services**
- **AWS Data Analytics, AI and ML**
- **AWS SAP Workloads**
- **AWS Brazil Public Sector - Technology Services**

The ISG Provider Lens™ AWS Ecosystem Partners 2024 study offers the following to business and IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments on their competitive strengths and portfolio attractiveness
- Focus on different markets, including the U.S., U.K., Germany, Brazil, Mexico and APAC (excluding Japan, South Korea and China/ Taiwan)

Our study serves as an important decision-making basis for positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their current vendor relationships and potential engagements.

AWS Professional Services

Definition

AWS Professional Services encapsulates a comprehensive consulting and migration services suite to guide and support businesses through enterprise clients' AWS cloud journeys. The providers in this quadrant excel in delivering a broad spectrum of services tailored to meet diverse business and IT requirements through business and technology consulting as the first step, followed by migration. The offerings encompass cloud strategy formulation, compelling business case development and insightful support for environmental, social and governance (ESG) and governance, risk and compliance (GRC) to ensure enterprises navigate the cloud landscape with confidence and strategic advantage.

The providers in this quadrant are committed to offering cutting-edge technologies and solutions addressing architecture, security and industry-specific needs and underscore the delivery of tangible business value through expert consulting services. Migration requires automated testing, comprehensive planning and execution, deployment strategies and rigorous change management to facilitate smooth transitions. AWS partners bring deep expertise in software architecture, software development (including DevOps principles), application migration, modernization, and the capability to architect, deploy and manage scalable, resilient applications and services in the cloud environment.

AWS Professional Services providers, through their consulting and migration services, offer businesses the necessary insights, skills and technological prowess to navigate the complexities of cloud adoption. By leveraging these services, organizations can achieve accelerated innovation, enhanced operational efficiencies and substantial business value in their cloud endeavors.

Eligibility Criteria

1. Have a wide scope of **AWS competencies** and service delivery offerings and related certifications with consulting and migration expertise

2. AWS-focused consulting **roadmap and innovations** (current and planned)

3. Demonstrate **value for clients** through perceptible business outcomes or other measurable improvements driving business-technology transformation

4. Offer **ESG** and **GRC** guidance, tools, technologies and services

5. Scope of **business-critical applications** migrated for customers using AWS

6. Competency, capability and experience in design — **building and modernizing integrated cloud architecture** — to lead migration and multicloud integration

7. Being part of the AWS **Migration Acceleration Program** (MAP) is advantageous

AWS Managed Services

Definition

This quadrant covers MSPs offering professional services that encompass orchestrating, provisioning, monitoring and managing operations of a customer's public cloud and multicloud environment. The services are in addition to IaaS and PaaS hyperscale platforms for public clouds from third-party service providers. The aim is to maximize performance in the cloud, reduce costs and ensure compliance and security. The providers typically use developed or licensed cloud management platforms (CMPs) and tools to deliver customers with the highest level of automation and the necessary transparency over the managed cloud resource pool in terms of capacity utilization, costs and independent management.

Eligibility Criteria

1. Have AWS Managed Service Program **certification**

2. Expertise in autonomous **ML-driven** orchestration, configuration and management of platforms and systems

3. Experience in designing, building and managing **public and multicloud** environments

4. Ability to **support** big data and multiple database solutions and analytics

5. Experience in **DevOps** engineering

6. Scope and availability of **security** resources and services

7. Experience in **solutions architecture and cost optimization (FinOps)**

8. Experience in **server migration** and handling resource availability

AWS Data Analytics, AI and ML

Definition

This quadrant covers providers of two increasingly intertwined sets of IT capabilities — the ability to collect and analyze an array of data types and amounts and the ability to demonstrate ML capabilities that enable faster and more efficient analysis of various kinds of data within and across a growing range of systems and applications. The providers in this space must demonstrate capabilities and experience in data science (including big data and advanced analytics), database and solution architecture, ML and related AI development (including generative AI), IoT data processing, solutions and implementation, software development, networking and data privacy and security. Most of these providers use an adaptive portfolio of tools and technologies to develop and deliver solutions.

Eligibility Criteria

1. Scope and use of **relevant tools and technologies**

2. Service/solution **integration capabilities** and offerings

3. Scope and availability of **enabling programs** for customer success (for example, planning workshops and training)

4. Availability, experience and certification of **experts** in analytics, data science and ML

5. Ability to provide an AWS-focused offering **roadmap** and innovations (current and planned)

6. Number and reputation of **references** for ML and analytics services and solutions on AWS

7. Suitability, maturity and adaptability of **pricing model** with a go-to-market (GTM) strategy

8. Breadth and depth of **partner and channel** relationships

9. Competency and capability in **deploying and managing IoT solutions** on AWS

AWS SAP Workloads

Definition

This quadrant assesses service providers that enable the provisioning and ongoing operation of SAP systems, such as SAP HANA or other platforms on AWS, together with their central management. The service providers in this quadrant help implement AWS as a hardware replacement or hardware extension (IaaS) for enterprises. They optimize, design and develop new processes and business flows as a part of platform management by combining their own services, SAP services and AWS. This select group of service providers is thus responsible for implementing and ensuring subsequent operations.

In addition to having relevant AWS certifications, the service providers in this quadrant require SAP certifications and partnerships to stay updated with SAP products, technologies, licensing and platform developments. They should also be able to demonstrate their impact on customer IT landscapes, applications and business processes.

Eligibility Criteria

1. Breadth and depth of **service portfolio** related to implementing, customizing, provisioning and supporting SAP applications and services

2. Number and locations of **resources** to support SAP offerings on AWS

3. **Awareness** and number of **customers** for SAP applications and services provisioning and support on AWS

4. Number and reputation of **references** for SAP applications, including services provisioning and support on AWS

5. **Experience** and relevant **certifications**, including AWS-certified SAP Competency

6. Offer **pricing models** that are suitable, mature and adaptable

7. **Dedicated resources** (including business units) around DevOps, automation and cloud-native application design

AWS Brazil Public Sector — Technology Services

Definition

This quadrant examines service providers that partner with AWS to develop, enable and deliver the capabilities required by public sector entities in Brazil. Organizations in this sector face immense pressure to improve operations, reduce costs and enhance their ability to serve internal audiences and users. The AWS Brazil Public Sector — Technology Services quadrant of the ISG Provider Lens™ study aims to address that, identifying the best-suited providers to help public sector companies address their challenges and modernize their environments. Public sector entities' technology and services procurement needs and challenges are similar to those of complex commercial enterprises but typically have restrictive procurement, staffing and operating system management requirements.

This quadrant evaluates AWS partners that provide development, consulting, outsourced services and other IT services spanning ERP workload provisioning and migration, advanced analytics, machine learning, software migration and modernization and managed services. ISG's clients use these studies to consider, evaluate and select the vendors best suited to their needs and to help achieve their business objectives.

Eligibility Criteria

1. Offer **AWS-focused consulting roadmap and innovations**

2. Scope and availability of **customer success enablement programs**

3. Availability of a broad scope of **relevant tools, technologies and services** (for example, Kubernetes, Docker, Istio, Envoy)

4. Experience in designing, building and managing **public and multicloud environments**

5. Showcase knowledge and expertise in **DevOps, solution architecture and server migration**

6. Offer suitable, mature and adaptable **pricing models**

7. Show depth and breadth of customer engagement regarding **software migration and modernization** via AWS

8. Experience, relevant certifications, and participation in AWS Partner Programs, including AWS Public Sector Partner

9. **Number and reputation of references** for services and solutions in the public sector using AWS

Quadrants by Region

As a part of this ISG Provider Lens™ quadrant study, we are introducing the following five quadrants on AWS Ecosystem Partners 2024:

Quadrant	U.S.	U.K.	Germany	Brazil	Mexico	APAC *
AWS Professional Services	✔	✔	✔	✔	✔	✔
AWS Managed Services	✔	✔	✔	✔	✔	✔
AWS Data Analytics, AI and ML	✔	✔	✔	✔	✔	✔
AWS SAP Workloads	✔	✔	✔	✔	✔	✔
AWS Brazil Public Sector - Technology Services				✔		

APAC regions (excluding Japan, South Korea and China/Taiwan)

The research phase falls in the period between April and May 2024, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in October 2024.

Milestones	Beginning	End
Survey Launch	April 15, 2024	
Survey Phase	April 15, 2024	May 15, 2024
Sneak Previews	August 2024	September 2024
Press Release & Publication	October 2024	

Collecting client testimonials via the Star of Excellence™ Program requires providers to make client referrals early in the process (no official reference needed) because CX scores have a direct influence on the provider's position in the IPL quadrant and the awards.

Please refer to the link to view/download the ISG Provider Lens™ 2024 research agenda.

Access to Online Portal

You can view/download the questionnaire from here using the credentials you have already created or refer to instructions provided in the invitation email to generate a new password. We look forward to your participation!

Research Production Disclaimer:

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing the work identified by clients. This data is collected as part of the ISG FutureSource™ process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of the information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.

Client Feedback Nominations

ISG Star of Excellence™ – Call for nominations

The Star of Excellence™ is an independent recognition of excellent service delivery based on the concept of "Voice of the Customer." The Star of Excellence™ is a program, designed by ISG, to collect client feedback about service providers' success in demonstrating the highest standards of client service excellence and customer centricity.

The global survey is all about services that are associated with IPL studies. In consequence, all ISG Analysts will be continuously provided with information on the customer experience of all relevant service providers. This information comes on top of existing first-hand advisor feedback that IPL leverages in context of its practitioner-led consulting approach.

Providers are invited to nominate their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

It is our vision that the Star of Excellence™ will be recognized as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments.

To ensure your selected clients complete the feedback for your nominated engagement please use the Client nomination section on the Star of Excellence™ website.

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply.

Here is the email address:
ISG.star@isg-one.com

ISG Star of Excellence

The ISG Provider Lens 2024 – AWS Ecosystem Partners research study analyzes the relevant software vendors/service providers in the global 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 April 2024, 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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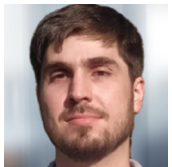Mark Purdy
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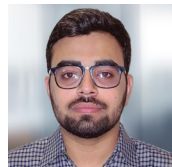
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ISG Provider Lens Advisors Involvement Program

ISG Provider Lens offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context.

In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three advisors participate as part of each study's quality and consistency review team (QCRT). The QCRT ensures each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the QCRT group and contribute at different levels depending on their availability and expertise.

The consultant advisors:

- Help define and validate quadrants and questionnaires,

- Advise on service provider inclusion, participate in briefing calls,

- Give their perspectives on service provider ratings and review report drafts.

ISG Advisors to this study

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Invited Companies

If your company is listed on this page or you feel your company should be listed, please contact ISG to ensure we have the correct contact person(s) to actively participate in this research.

1Strategy*	Allied Global	Ayesa (Iber)	Brillio
2nd Watch*	Altis	BABEL Group	BRLink*
A3Data	Ankercloud	Bambu Mobile	BRQ
abat Group	Apex Systems	BBVA Next Technologies	BSP Cloud
AC3	Apexon*	B-DRIVE-IT	C3entro Telecom
ACC	ARQ	Bechtle*	CACI
Accenture*	Arvato Systems*	BeOnUp	Capgemini*
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adesso	ATALAIT	BIP	CEICO ITT
Agilisium*	Atos*	Birlasoft	CI&T
AHEAD	Awale	BJSS	cignuz
Algar Tech	AX4B*	Blazeclan	Cirion Technologies Solutions, LLC
Alice&Bob.Company*	Axity	Blue People	CirrusHQ
AllCloud*	Axtel	Bluetab Solutions	Claranet*

Invited Companies

CleanSlate Technology Group	Codster de Mexico SA de CV	D3Clarity, Inc.	DISYS
Clearscale*	CoForge	DaCodes	DNX Brasil
ClickIT DevOps & Software Development	Cognizant*	Daemon	DNX.Solutions
Cloud Bridge Technologies	Colibri Digital	Darede*	DoIT International
Cloud Comrade	Compass UOL*	Datacom	Druid
Cloud Kinetics	COMPUCLOUD SAPI DE CV.	dataRain*	DXC Technology*
Cloud Up	Computacenter*	Dati	e-Core
Cloud4c	Connectria	DBACorp*	Effectual
Cloudeteer	Connetico / Cevo	Dedalus*	Embratel*
Cloudgenia	Contino	Deloitte*	Encora Inc.
CloudHesive	Corebi	Dexian*	Endava
CloudZone	Crayon*	Digital Geeks	Engineering
Clouxter	Criptonube	Digital Space Cloud Services Limited	Enkel IT*
CMD	Criptonube by Myappsoftware	Dimiour, a VDart Group Company	Ensitech de Mexico, SA de CV
Codebit	CyberCX	DirMOD	Ensono*

EPAM	Globant	Improving, LLC	IO Connect Services
EPI-USE	Grid Dynamics Holdings, Inc.	In Motion	IPsense*
Escala24x7	Grupo Scanda	Inawisdom	IT Solutions
Eviden (an Atos Business)*	Grupo SIAYEC	iNBest	ITC Infotech
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Extreme Group*	HCLTech*	Indra	Iteris
Financial Solutions	Hexaware*	Inetum	Itransition
Flentas	Hitachi Vantara	Infosys*	ITSTK
Flexa Cloud	ho1a Innovación	Ingram Micro	iX Agency
Folio3 Software Inc.	Honne Services	Inmetrics*	Kainos Software Limited
FPT Software	HPE	Innova Solutions	KIO Networks
Fujitsu*	IA interactive	Instituto Atlantico	Kloia
G&P*	IBM*	Intelimatica Soluciones Informaticas	kreuzwerker*
Genpact*	ilegra	Intelimétrica	Kyndryl*
GFT*	Impetus*	Intellilabs	Lemongrass*

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Lumston	Mission Cloud	Netlution*	O2B
Lytics	mLogica	Neurons Lab	OpenService
MadeinWeb*	Motherson	Nextios*	OPITZ CONSULTING*
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Mastek	MSG	Nordcloud*	Optimissa Capital Markets Consulting SA de CV
Materna*	msg services*	Noventiq	Orange Business Services*
Matillion	MXMART	Novis	OST Tecnologia
Matrix Business USA Corp	myCloudDoor	NTT DATA*	PA Consulting
Mechanical Rock	N Group (Nfq)	Nuage IT's everywhere	PALO IT

Invited Companies

PC CENTRAL	Pyramid Consulting	SIITECS	Solvimm (e- core)*
PEAK	Pyxis S.A.	Singtel Group/OpTus/NCS	Sonda
Pentalog	q.beyond*	SIPSER cloud	Sourcefuse
Perficient	Quantiphi*	SiTSA	Sparq
Persistent	Rackspace Technology*	Skaylink*	SPIRIT/21*
Persistent Systems*	Rapyder	Sky.One*	ST IT Cloud*
PlusServer*	Rebura	Slalom*	STAND 8
Presidio	Reply*	Sngular	Stefanini*
Proatech	Runibex Technology	SNP Schneider-Neureither & Partner SE	Sycomp, A Technology Company, Inc.
Processor	SC Empresarial	SOAINT	Syntax Systems*
Projetas	SDT Electrónica, S.A.	Softcat plc	SysInnov
Protiviti	Seidor	SoftServe	Tata Communications
PruTech Solutions Inc	Select Soluções *	Softtek	TCS*
Public Cloud Group*	Senior Mega	SoftwareONE*	TD SYNNEX
PwC*	Senior Sistemas*	SOIN	Tech Holding

Invited Companies

Tech Mahindra*	Transact Technology Solutions	Wipro*
Technogi	Trianz*	Wizeline
Techwave*	Triple S	WorkDB
tecRacer*	T-Systems*	Workmates
TEKsystems	Ubertas Consulting	World Wide Technology
Telefonica	UDS	Wundertec
Teleperformance	Unisys*	XalDigital
Telmex	V8.Tech*	Zensar*
Telstra Purple	Valcann*	Zivaro, Inc.
Tesselar Soluciones	Vention	Zoi
Thoughtworks	Versent	
TIVIT*	Virtusa*	
TO THE NEW*	Vision33*	
TotalCloud	Visionet	
Totalplay	Vívaro	

ISG Provider Lens™

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

For more information about ISG Provider Lens™ research, please visit this webpage.

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ISG

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Founded in 2006, and based in Stamford, Conn., ISG employs 1,600 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 isg-one.com.

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APRIL, 2024

REPORT: AWS ECOSYSTEM PARTNERS