

AWS Ecosystem Partners

A report summarizing the global and regional
trends of AWS Ecosystem Partners

GLOBAL SUMMARY | OCTOBER 2023

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DXC TECHNOLOGY

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FinOps is gaining momentum

The shift toward cloud financial management is gaining momentum among enterprises and has led to an increased focus on spend management through FinOps tools and frameworks. To facilitate AWS cloud adoption, providers need to build FinOps platforms and tools, encompassing various metrics such as financial accountability, cloud usage optimization, planning and forecasting.

Sustainability is considered a critical component of the ecosystem

The global commitment toward a green environment is encouraging enterprises and providers alike to focus on service delivery with the aim of reducing carbon footprint and emissions. Providers and enterprises are investing in enabling a Green Cloud in AWS, and build data intelligence platforms to calculate ESG footprint, offer data governance and report during an enterprise cloud transformation.

Industry cloud offerings poised to grow

Enterprises worldwide want to accelerate cloud transformation and innovation. This has led to the development and use of tailored industry-specific solutions. Several service providers are expanding their partnership with AWS and focusing on industry clouds to further benefit customers and create a scalable and transformative impact; this trend is increasingly gaining momentum. All leading providers offer an array of industry cloud solutions for AWS and are investing notably in this space. These providers often combine their existing industry assets and IPs with AWS to create tailored offerings specific to industries such as healthcare, manufacturing, retail and financial services.



Verticalization is gaining traction in Brazil

In the AWS partners ecosystem in Brazil, there is much focus on exploring innovative solutions integrated with advanced technologies such as AI, ML and analytics after the generative AI revolution.

The region is witnessing an increased emphasis on cloud workloads, migration services and managed services, which represents a high and sustained growth potential for providers in this space.

Providers anticipate that customers will demand increasingly complex services, with accompanying specializations and certifications, and robust vertical-specific knowledge. A few partners are working on developing vertical-based platforms, anticipating the movement of AWS to verticalize the cloud platform eventually.

ISG notes partnerships among competitors to meet customer demand for specific services. As the need for innovation and acceleration of digital transformation among organizations grow, there is a growing realization that service providers do not have all the expertise or the resources to fulfill specific customer projects. Therefore, providers are setting aside competition and focusing on cooperation, adding resources aimed at a single objective — to serve customers.

The maturity of cloud computing continues to accelerate, with the focus shifting from total cost of ownership (TCO) to business gains and objectives and key results (OKR).

Mauricio Ohtani – Lead Analyst, Brazil

Midsize providers are gaining more prominence in Germany

The demand AWS partners ecosystem in Germany is increasing with sharp requirement and need for mid sized providers who has niche and strong experience in the portfolio.

- The demand from midsize companies, an important target group in the country, is growing above average.
- Germany-based providers have an advantage in operating solutions because of stringent data protection considerations. These providers are increasingly preferred by midsize clients.
- As in other countries, automation and AI are increasingly gaining prominence.

In uncertain times, companies want as much adaptability and flexibility as possible; cloud solutions, especially AWS solutions, enable it.

Frank Heuer – Lead Analyst, Germany



Skill gap is driving the market in the U.S.

Skills shortage is driving the demand for external service providers in the U.S. During the pandemic, the market penetration of cloud-based offerings accelerated due to their advantages and enterprise requirements. The cost pressure triggered by this health crisis is driving many companies to transform their IT landscapes into on-demand and cost-flexible architectures.

Enterprises benefit from AWS' extensive portfolio of innovative offerings and industry-aligned solutions to optimize operations, foster innovation and achieve sustainable growth.

Ashwin Gaidhani – Lead Analyst, U.S.



In this year's AWS Cloud Ecosystem survey, 160 providers were evaluated in five (variable by area) quadrants and three regions.

Of the 160 providers evaluated, 42 are identified as Leaders and 13 as Rising Stars for multiple quadrants across regions.

Strengths of Leaders

- **Well-rounded partnerships with AWS:** Leaders have an established relationship with AWS and a dedicated AWS business group, focusing on continuous innovation and providing business value to customers. These providers have many AWS-certified professionals and aim to facilitate enterprises' cloud modernization journeys by offering advanced technology solutions and ensuring transformational outcomes.
- **Broad sustainability and ESG goals:** The importance of sustainable workplaces has grown in the last few years, accelerating investments in sustainable services among enterprises and service providers. Leading providers in this space are aligning their sustainability initiatives with AWS and focusing on areas such as carbon reduction, waste management and green infrastructure. These providers are empowering enterprises to refine and scale their sustainability initiatives and helping them to achieve their overall ESG goals.

- **Comprehensive AWS expertise:** Service providers with solid expertise in AWS cloud technologies are offering a broad spectrum of AWS cloud services — covering assessment and deployment to integration and operations — irrespective of customer size and industry.



Common Leaders Identified Across Geographies for AWS Ecosystem Partners 2023

Service Provider	AWS Consulting Services	AWS Migration Services	AWS Managed Services	AWS Data Analytics and Machine Learning	AWS SAP Workloads	AWS Brazil Public Sector - Technology Services
Accenture	● ●	● ●	● ● ●	● ●	● ● ●	
AllCloud				●		
BRLink	●	●	●	●		
Capgemini	● ●	● ●	● ●	● ●	● ●	
Claranet	● ●	● ●	● ●			
Cognizant	● ●	● ●	● ●	●	●	
Compass UOL	●	●	●	●		
Computacenter		●				
Darede	●	●	●			

● Brazil ● Germany ● U.S.



Common Leaders Identified Across Geographies for AWS Ecosystem Partners 2023

Service Provider	AWS Consulting Services	AWS Migration Services	AWS Managed Services	AWS Data Analytics and Machine Learning	AWS SAP Workloads	AWS Brazil Public Sector - Technology Services
dataRain	●	●		●		●
Dedalus	●	●	●	●		
Deloitte	●	●	●	●	● ●	
DXC Technology	●	● ●	● ●	●	●	
Embratel	●					●
Eviden (Atos)	●	●	●	●	●	
Extreme Group		●				●
G&P						●
Genpact				●		

● Brazil ● Germany ● U.S.



Common Leaders Identified Across Geographies for AWS Ecosystem Partners 2023

Service Provider	AWS Consulting Services	AWS Migration Services	AWS Managed Services	AWS Data Analytics and Machine Learning	AWS SAP Workloads	AWS Brazil Public Sector - Technology Services
HCLTech	●	● ●	●	● ●	●	
Hexaware	●					
IBM	●		● ●		●	
Infosys	●	●	●	●	●	
IPsense	●	●	●	●		
Lemongrass					●	
Logicalis	●	●	●	●		
LTIMindtree	●	●	●	●	●	
Materna				●		

● Brazil ● Germany ● U.S.



Common Leaders Identified Across Geographies for AWS Ecosystem Partners 2023

Service Provider	AWS Consulting Services	AWS Migration Services	AWS Managed Services	AWS Data Analytics and Machine Learning	AWS SAP Workloads	AWS Brazil Public Sector - Technology Services
MIGNOW					●	
Nextios	●	●	●			
NTT DATA					●	
PwC	●				●	
Rackspace Technology	● ●	● ●	● ●	●		
Sky.One					●	
SoftwareONE	●	●	●			
ST IT Cloud				●		
Syntax					●	

● Brazil ● Germany ● U.S.






Common Leaders Identified Across Geographies for AWS Ecosystem Partners 2023

Service Provider	AWS Consulting Services	AWS Migration Services	AWS Managed Services	AWS Data Analytics and Machine Learning	AWS SAP Workloads	AWS Brazil Public Sector - Technology Services
TCS	● ●	● ●	● ●	● ●	● ●	
Tech Mahindra	●	●	●	●		
tecRacer	●		●	●		
TIVIT	●	●	●		●	
T-Systems	●	●	●		● ●	
Wipro	● ●	● ●	● ●	● ●	● ● ●	

● Brazil ● Germany ● U.S.



Rising Stars Across Geographies for AWS Ecosystem Partners 2023

Quadrants	 Brazil	 Germany	 U.S.
AWS Consulting Services	Enkel, GFT	Public Cloud Group	Kyndryl, Persistent Systems
AWS Migration Services	GFT, e-Core	LTIMindtree	PwC, Persistent Systems
AWS Managed Services	e-Core	HCLTech	Kyndryl, Persistent Systems
AWS Data Analytics and Machine Learning	e-Core		Hexaware, Quantipi
AWS SAP Workloads	SoftwareONE	HCLTech	Tech Mahindra, Kyndryl



Who Should Read This

This report is relevant to executives and managers in enterprises who are adding or re-evaluating relationships with service providers working in the AWS ecosystem. Readers should also consider the ongoing changes in AWS product offerings and how service providers can best adapt to these changes. The report is of value to enterprises of all sizes and industries, especially the ones in the U.S., Brazil and Germany.

Technology Professionals

These include CTOs and CIOs who play critical roles in adopting and integrating AWS technologies across enterprises and should read this report to understand the relative positioning and capabilities of partners, which will help them effectively deploy AWS offerings.

Digital Professionals

Those who spearhead initiatives to build resilient and future-proof organizations should read this report to understand how AWS offerings can impact an enterprise's ongoing transformation initiatives while identifying the benefits of cloud migration.

Strategy Professionals

They should read this report to understand how service providers can help adapt AWS technologies and the overall ERP functions of enterprises. As AWS offerings are deeply integrated into business processes, technical and business teams must collaborate to fully comprehend the implications of IT infrastructure decisions made in collaboration with service providers.

Operational Professional

These include Finance, HR and HCM leaders and they should read this report to understand the positioning of partners that will facilitate the implementation of the software critical for their jobs.





Further Reading

Further Reading

Brazil

[AWS Consulting Services](#)

[AWS Migration Services](#)

[AWS Managed Services](#)

[AWS Data Analytics and Machine Learning](#)

[AWS SAP Workloads](#)

[AWS Brazil Public Sector – Technology Services](#)

Germany

[AWS Consulting Services](#)

[AWS Migration Services](#)

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U.S.

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Srinivasan PN is a Research Specialist 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 engineering services and digital transformation. Srinivasan has close to 9 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 his expertise. He also supports the advisors with his research skills and writes papers about the latest market developments in the industry.

Enterprise Context and Global Overview Analyst



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 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.

IPL Product Owner



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 (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 900 clients, including more than 75 of the world's top 100 enterprises, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis.

Founded in 2006, and based in Stamford, Conn., ISG employs more than 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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