ISG Provider Lens™

AWS Ecosystem Partners

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

unisys

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

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Service providers scramble to meet emerging public sector needs

U.S. public sector organizations, including state, local and educational (SLED) organizations, must cost effectively improve what they do and how they do it. Otherwise, they must deliver lower levels and fewer types of services. AWS offers a cloud foundation for rapidly emerging, next-generation digital public sector IT systems, services and business operations. And it has a large services partner ecosystem capable of enabling the changes needed by SLED organizations.

This ISG Provider Lens™ U.S. Public Sector research study examines service providers that partner with AWS to develop, enable and deliver capabilities needed by these public sector organizations in the U.S. Together, they work to improve operations, reduce costs, address digital change and improve their ability to serve constituencies and internal users alike.

This study assesses AWS partners that provide development, consulting, outsourcing and other IT services. These cover ERP workload provisioning and migration, advanced analytics and machine learning, IoT, software migration and modernization, managed services, and consulting among others.

ISG clients use these studies for provider and vendor consideration, evaluation and selection. ISG's advisory and consulting teams can also help clients understand the scope of capabilities and offerings suitable to clients' requirements. The reports also provide competitive insights for vendor and provider positioning, key relationships and go-to-market considerations.

Rapid **digital transformation** became a de facto mandate

Key U.S. public sector trend: Talent shortages led to outsourcing and cloud

U.S. public sector organizations, especially SLED entities, have been more disrupted by recent events than most other large organizations in the U.S. The pandemic-driven shift to remote work shift was particularly disruptive for government agencies as most lacked remote work policies and capabilities, and adequate IT security measures. Government agencies at all levels have long faced concerns about their inability to attract and retain skilled workers, especially in IT; the "great resignation of 2021" has only worsened this scenario. According to the U.S. Department of Labor, state and local government experienced the greatest percentage of staff loss among U.S. employers in the fourth quarter of 2021.

Meanwhile, tax and licensing revenues that fund government agencies were drastically reduced, further limiting their ability to attract and retain staff, or to invest in additional, better IT to mitigate some staffing issues.

In late 2021, U.S. SLED organizations began receiving significant funding from the federal government to not only mitigate revenue shortfalls, but also, and more importantly, to modernize operations and IT. Rapid digital transformation became a de facto mandate for organizations that had restructured only gradually over decades, or even centuries.

As a result, by mid-2022, ISG saw most U.S. SLED organizations actively pursuing an approach that relatively few had previously considered – shifting critical software to cloud and outsourcing IT – and outsourcing some business operations.

This approach requires significant education, training and consulting, as agencies need to learn what digital transformation is and how it can be achieved in their heavily regulated organizations and operations. Most SLED organizations have learned already that relatively few of their existing IT providers have extensive digital transformation expertise.

Why AWS?

AWS is one of the two largest hyperscale cloud services platforms – the other being Microsoft Azure. Google Cloud Platform, IBM and several smaller providers also compete, but AWS and Azure are the major cloud influencers with the largest partner ecosystems.

AWS's partner ecosystem includes many more IT tools and business services providers than does Azure. Azure is more inclined towards software vendors and developers. Hence, many organizations first turn to the AWS platform and ecosystem for IT and business transformation.

AWS itself is heavily involved in the development and refinement of services for government agencies and other public sector organizations. It has pioneered GovCloud services in the U.S. and was an important force in the development and adoption of the U.S. FedRAMP security classification for cloud services.

What makes leaders?

ISG positions providers' suitability in ISG Provider Lens™ studies based on the relative attractiveness of their portfolios and on the relative competitive strength that each exhibits in the market(s) under consideration.

"Portfolio attractiveness" does not only mean having the best or most capabilities, tools and technologies. Providers must also have portfolios suited to clients' current and emerging business requirements. The relative value of providers' offerings to client business and

IT needs is an important aspect.

In ISG's U.S. public sector studies, portfolio attractiveness frequently mirrors what is seen in our U.S. regional studies, with differences based on how well providers adapt their capabilities to the ways in which SLED and other public sector organizations use them.

"Competitive strength" considers such factors as market presence, expertise and client and partner relationships. The largest providers are not always the most competitive. The most competitive providers include those with the strongest influence and delivery of the most value within client organizations.

In ISG's U.S. public sector studies, competitive strength assessment also relies a great deal on the depth and breadth of providers' existing sector presence and relationships and proven expertise in how the sector works. They are also assessed on their ability to work well within public sector contracting environments, and having capable partner ecosystems to supplement and improve their delivery of value to clients.

Many providers have excellent portfolios but limited (or no) active presence and experience in the U.S. public sector; some providers have excellent sector presence but with portfolios that do not meet current and emergent needs. Leaders demonstrate both.

What's next? Widespread growth in a fragmented marketplace

The greatest challenge for service providers selling into and supporting SLED and similar public sector organizations is the relative fragmentation of the marketplace. The U.S. federal market can be simpler to access because it builds around a singular contracting template – the General Services Administration (GSA) Alliant governmentwide acquisition contract (GWAC).

Governments often use multiple contracting vehicles, sometimes even within a single department. Efforts by organizations such as the National Association of State Purchasing Officials (NASPO) have helped to develop and streamline contracting for many types of IT and business services. However, most states that rely on NASPO's ValuePoint solution still also use other vehicles – including copying those from other states.

Even with such fragmentation in contracting for services, ISG sees widespread growth in the demand for business and IT transformation services, BPO services, and new software platforms that enable rapid transformation toward cost-saving organizational and operational improvements. The ability to do more with less is too important for SLED organizations to ignore cloud use and business transformation. Change management will become a highly critical capability within transformation consulting services portfolios.

Widespread demand for these capabilities will accelerate through 2025 as more sector entities reap related rewards. This should draw more competitive providers into the sector and create a better climate for M&A among providers that lack key portfolio capabilities and/or competitive presence.

Rapid digital transformation has become a de facto mandate.

Provider Positioning

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	AWS Managed Services	AWS SAP Workloads	AWS Data Analytics and Machine Learning	AWS Internet of Things (IoT) Services	AWS Migration Services	AWS Consulting Services
1Strategy	Not in	Not in	Product Challenger	Not in	Contender	Not in
2nd Watch	Product Challenger	Not in	Product Challenger	Not in	Not in	Contender
Accenture	Leader	Leader	Leader	Leader	Leader	Leader
ActioNet	Not in	Not in	Not in	Not in	Not in	Contender
AllCloud	Not in	Not in	Not in	Contender	Contender	Not in
Atos	Product Challenger	Product Challenger	Contender	Not in	Product Challenger	Product Challenger
Blue Sentry	Not in	Not in	Not in	Not in	Contender	Not in
BoozAllen	Not in	Not in	Not in	Not in	Not in	Product Challenger
Brillio	Not in	Not in	Not in	Not in	Contender	Not in
Capgemini	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger

Provider Positioning

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	AWS Managed Services	AWS SAP Workloads	AWS Data Analytics and Machine Learning	AWS Internet of Things (IoT) Services	AWS Migration Services	AWS Consulting Services
CGI	Not in	Leader	Not in	Not in	Not in	Leader
Clearscale	Not in	Not in	Contender	Contender	Contender	Not in
Cloudreach	Contender	Not in	Not in	Not in	Contender	Not in
Cloudticity	Not in	Not in	Contender	Not in	Not in	Not in
Cognizant	Not in	Product Challenger	Rising Star ★	Product Challenger	Product Challenger	Contender
Deloitte	Leader	Leader	Leader	Leader	Leader	Leader
DXC Technology	Product Challenger	Contender	Not in	Product Challenger	Contender	Product Challenger
Ensono	Not in	Not in	Contender	Not in	Not in	Not in
General Dynamics Information Technology	Rising Star ★	Not in	Not in	Not in	Not in	Not in
HCLTech	Product Challenger	Product Challenger	Not in	Product Challenger	Product Challenger	Product Challenger

Provider Positioning

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	AWS Managed Services	AWS SAP Workloads	AWS Data Analytics and Machine Learning	AWS Internet of Things (IoT) Services	AWS Migration Services	AWS Consulting Services
Hexaware	Not in	Not in	Not in	Product Challenger	Product Challenger	Not in
Hitachi Vantara	Contender	Not in	Not in	Not in	Not in	Product Challenger
HPE	Contender	Not in	Not in	Not in	Not in	Contender
IBM	Market Challenger	Leader	Market Challenger	Leader	Market Challenger	Leader
Infosys	Leader	Leader	Leader	Leader	Leader	Leader
Kyndryl	Product Challenger	Not in	Not in	Not in	Not in	Not in
Leidos	Rising Star ★	Not in	Not in	Not in	Not in	Rising Star ★
Lemongrass	Not in	Rising Star ★	Not in	Not in	Not in	Not in
Mindtree (LTI)	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Not in
Mindtree	Not in	Not in	Product Challenger	Not in	Not in	Not in

Provider Positioning

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	AWS Managed Services	AWS SAP Workloads	AWS Data Analytics and Machine Learning	AWS Internet of Things (IoT) Services	AWS Migration Services	AWS Consulting Services
Mphasis	Not in	Product Challenger	Product Challenger	Not in	Product Challenger	Product Challenger
Navisite	Not in	Contender	Not in	Not in	Not in	Not in
nClouds	Not in	Not in	Contender	Not in	Contender	Not in
NTT DATA	Not in	Not in	Market Challenger	Contender	Contender	Contender
PwC	Not in	Product Challenger	Not in	Not in	Not in	Contender
Rackspace Technology	Leader	Market Challenger	Leader	Market Challenger	Leader	Leader
Reply	Not in	Not in	Not in	Contender	Not in	Not in
Slalom	Not in	Not in	Contender	Not in	Contender	Contender
Smartronix/SMX	Not in	Not in	Product Challenger	Not in	Not in	Not in
Syntax Systems	Not in	Contender	Not in	Not in	Not in	Not in

Provider Positioning

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	AWS Managed Services	AWS SAP Workloads	AWS Data Analytics and Machine Learning	AWS Internet of Things (IoT) Services	AWS Migration Services	AWS Consulting Services
TCS	Product Challenger	Product Challenger	Not in	Rising Star ★	Rising Star ★	Product Challenger
Tech Mahindra	Leader	Product Challenger	Rising Star ★	Not in	Leader	Market Challenger
Techwave	Not in	Contender	Not in	Not in	Not in	Not in
TensorIoT	Not in	Not in	Not in	Product Challenger	Not in	Not in
TO THE NEW	Not in	Not in	Product Challenger	Not in	Not in	Not in
Unisys	Product Challenger	Not in	Leader	Not in	Leader	Leader
Wipro	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger
YASH Technologies	Not in	Contender	Not in	Not in	Not in	Not in
Zensar	Not in	Leader	Not in	Not in	Not in	Leader

This study focuses on **AWS services** for U.S. public sector organizations.

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

Simplified Illustration Source: 2023

Definition

This study examines software and services providers that partner with Amazon Web Services (AWS) to develop, enable and deliver capabilities needed by public sector entities in the U.S. as they work to improve operations, reduce costs, address digital change and improve their ability to serve constituencies and internal users alike.

Public sector organizations face immense pressure to improve operations, reduce costs and modernize for digital reality – all in a climate of uncertain funding and diminished staffing. Their technology and service acquisition needs and challenges are similar to complex commercial enterprises, but typically with more restrictive acquisition, staffing, management, reporting and operational requirements. Objective insight, assessment and guidance are more valuable than ever to such organizations.

ISG Public Sector Provider Lens™ research studies examine, explain and provide guidance on business software platforms, solutions, tools, services and providers that help improve how public sector organizations operate while enabling the shift to digital realities. This study assesses AWS's partners that provide development, consulting, outsourcing and other IT services covering ERP workload provisioning and migration, advanced analytics and machine learning, IoT, software migration and modernization, managed services and consulting. Each of these is described in more detail below.

ISG clients use these studies for provider and vendor consideration, evaluation and selection. ISG's advisory and consulting teams can also help clients understand the scope of capabilities and offerings suitable to clients' requirements. The reports also provide competitive insights for vendor and provider positioning, key relationships and go-to-market considerations.

Scope of the Report

In this ISG Provider Lens™ quadrant study, ISG includes the following six quadrants: AWS Consulting Services; AWS Managed Services;

Data Analytics and Machine Learning on AWS: Internet of Things (IoT) on AWS, SAP Workloads on AWS: and Software Migration and Modernization on AWS Services.

This ISG Provider Lens™ study offers IT-decision makers:

- Transparency on the strengths and weaknesses of relevant services providers
- A differentiated positioning of providers by segments
- Focus on regional market

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

Provider Classifications

The provider position reflects the suitability of IT providers/software vendors for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, and the corporate structures of customers and positions IT providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leaders, Product Challenger, Market Challenger and Contenders), and the providers are positioned accordingly. Each ISG Provider Lens™ quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

Number of providers in each quadrant: ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible)..

Provider Classifications: Quadrant Key

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/services and a follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not in means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

AWS Managed Services

Who Should Read This

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

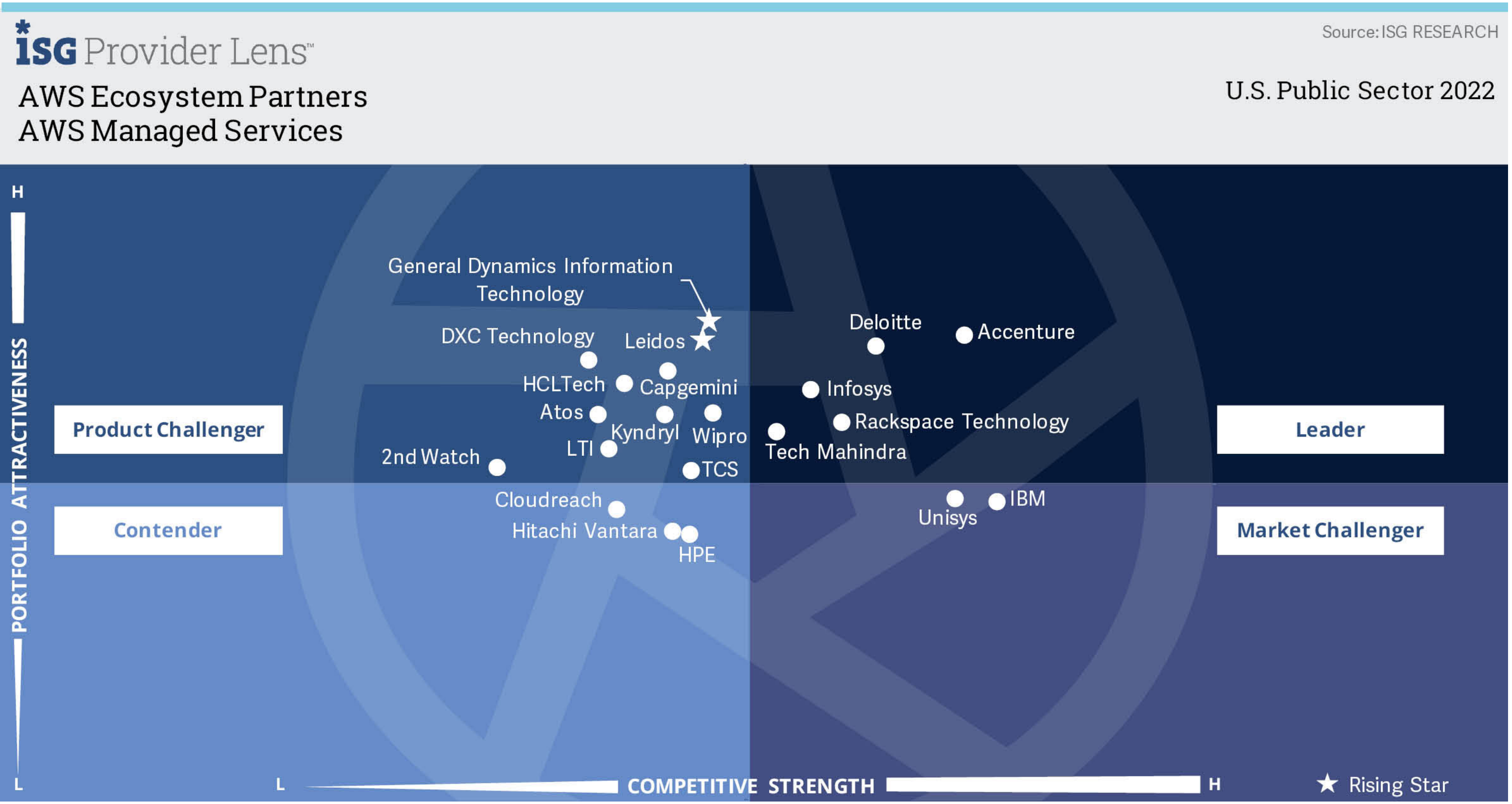
Digital environment enterprises must take a combined approach to their technical infrastructure. ISG notes that organizations in the U.S. public sector are taking the global lead in cloud adoption among government and other agencies; however, their counterparts in many other countries are not far behind.

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

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

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

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



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

Bruce Guptill

Definition

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

Eligibility Criteria

Evaluation and eligibility criteria for this quadrant include the following:

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

Observations

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

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

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

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

accenture

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

Deloitte

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

Infosys

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

rackspace technology

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

Tech Mahindra

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

General Dynamics Information Technology (GDIT)

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

Leidos

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

AWS SAP Workloads

Who Should Read This

This report is relevant to organizations in the U.S. public sector for evaluating providers offering AWS SAP workload services.

In this quadrant report, ISG highlights the current market positioning of providers of ERP workload services on AWS in the U.S. public sector and how they address the key challenges faced by most organizations.

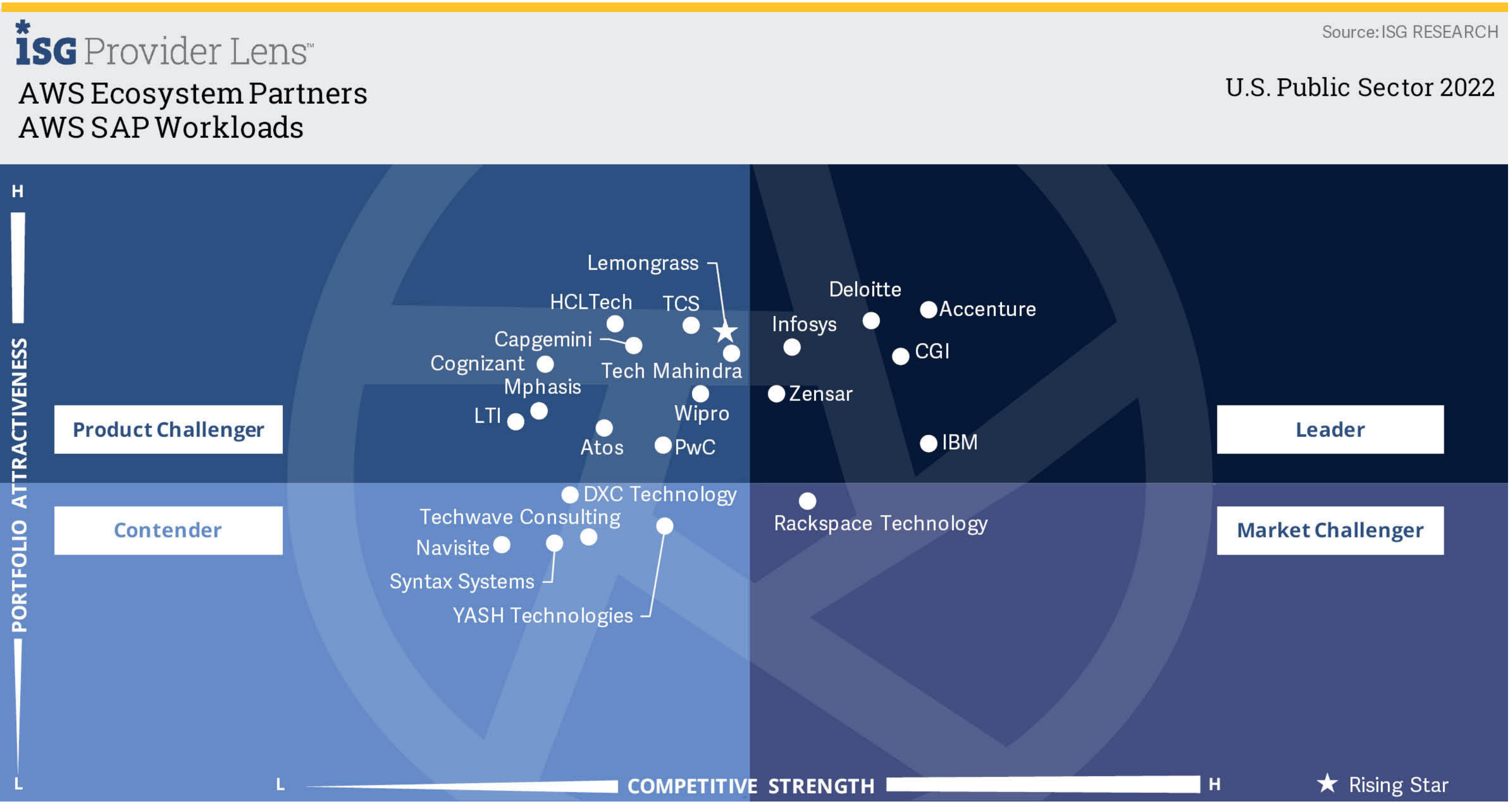
RISE with SAP is considered and assessed as one of the prominent options for S/4 HANA. SAP promotes it as the preferred hosting approach for SAP systems. Enterprises prefer partners that work with SAP and AWS on the adoption of RISE with SAP and develop an optimal target model to support both SAP and non-SAP applications.

Providers should partner with AWS to assist and determine the value of selecting RISE with SAP on AWS and integration with clients' non-SAP AWS ecosystem.

IT leaders should read this report to better understand the relative strengths and weaknesses of the providers of SAP on AWS services, which would help them lead the digital transformation drive in their organizations.

ERP leaders should read this report to understand the positioning of SAP providers, learn how those providers' offerings can impact an organization's ongoing transformation initiatives and discover the benefits they can achieve by moving to the cloud.

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



ERP platforms and solutions have gained haphazard footholds within the U.S. public sector past decades. Providers in this quadrant enable significant (sometimes vast) improvements in the value of legacy SAP settings while **enabling fully cloud-native environments.**

Bruce Guptill

Definition

This quadrant includes services providers that offer evaluation, provisioning, migration and ongoing support (including management and operation) for large-scale SAP ERP environments. Service providers in this category require AWS-provided certifications plus certifications and/or partnerships with SAP and additional, relevant providers of ERP solutions, services and technologies to stay current with products, technologies, licensing and platform changes and their effects on customer IT landscapes, applications and business processes.

Eligibility criteria:

Evaluation and eligibility criteria for this quadrant include the following:

1. Breadth and depth of skills, services and tools with regards to the implementation, customization, provisioning and support of SAP and other leading **ERP application and services**
2. Dedicated scope and associated resources for **SAP offerings** on AWS (including scope of AWS Competency and Service Delivery offerings and certifications)
3. Depth and breadth of customer presence and involvement regarding **ERP applications** and services provisioning and support on AWS
4. Scope of **partner relationships** related to ERP on AWS, including technology, services, support and sales (e.g.example, channel partnerships)
5. Relevant AWS certification held by ERP providers and by **associated partners** and organizations
6. **Pricing model suitability,** maturity and adaptability

Observations

Large-scale ERP implementations are much more common in larger commercial entities than in U.S. public sector organizations owing to the various challenges faced in standardizing operations within and across government agencies and departments within agencies. The often-substantial cost incurred in software implementation, customization and maintenance is another major roadblock.

ERP vendors' move to the cloud has altered the mindsets of many government organizations because it resulted in reduced overall costs, simplified (and speedy) implementation and adoption of the software for multiple agency-specific and department-specific needs.

While many ERP platforms are used in U.S. public sector organizations, SAP, by far, holds the largest presence. SAP indicates having at least several hundred clients among U.S. state and municipal government entities and higher education institutions. According to SAP guidance, these must be moved to cloud platforms within the next few years, failing which they will not be supported by SAP.

With these compulsory migrations and net-new SAP users attracted by cloud-based, lower-cost implementations, ISG estimates that between 100 and 200 SAP ERP migrations and implementations will occur annually among U.S. public sector organizations through 2027.

The most important differentiators among providers in this quadrant are relative SAP implementation and migration experience with public sector organizations and levels of expertise in SAP integration and management services.

Of the 65 companies assessed for this study, 23 have qualified for this quadrant. Six have been recognized as Leaders and one a Rising Star.

accenture

Accenture's robust expertise in enterprise software (especially SAP) and cloud consulting, along with strong AWS qualifications, make it a Leader in this quadrant. Its public sector consulting approach maximizes the value of clients' existing IT and operational investments and expertise.

CGI

CGI is less well known outside the public sector than some other Leaders, but decades of ERP expertise and deep strategic insights from several public sector clients position it as a Leader for the U.S. public sector.

Deloitte

Deloitte is one of the largest and best-known business consulting firms globally, with an outstanding SAP and AWS services partnership. It has strengthened its public sector expertise by working with several U.S. state and municipal government agencies, federal agencies and AWS's government and public sector programs.

IBM

IBM is one of the most-established IT solution and service providers in the U.S. public sector. It is consistently among SAP's top partners in terms of migration and implementation certifications and activity. Unmatched sector expertise, along with great AWS proficiency and a broad array of sector contracting vehicles, make IBM a Leader in this quadrant.

Infosys

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

Zensar

Zensar is another relative newcomer to this sector but is equally qualified like some of the most-established Leaders. Its expertise in SAP environments, increasing investment in the U.S. public sector business, deep AWS services portfolio and broad contracting vehicle participation secure it in the Leaders quadrant.

Lemongrass

Lemongrass (Rising Star) is an important SAP specialist firm and a Leader in several other ISG Provider Lens™ quadrants relating to SAP services on hyperscale platforms. Its relative lack of U.S. public sector presence keeps it out of the Leaders quadrant in this study, but we expect to see the company advance in this sector.

AWS Data Analytics and Machine Learning

Who Should Read This

This report is relevant to organizational leaders in the U.S. public sector for evaluating providers of data analytics and machine learning services. In this quadrant report, ISG highlights the current market positioning of providers in the U.S. public sector and how they can address the key challenges of sector organizations.

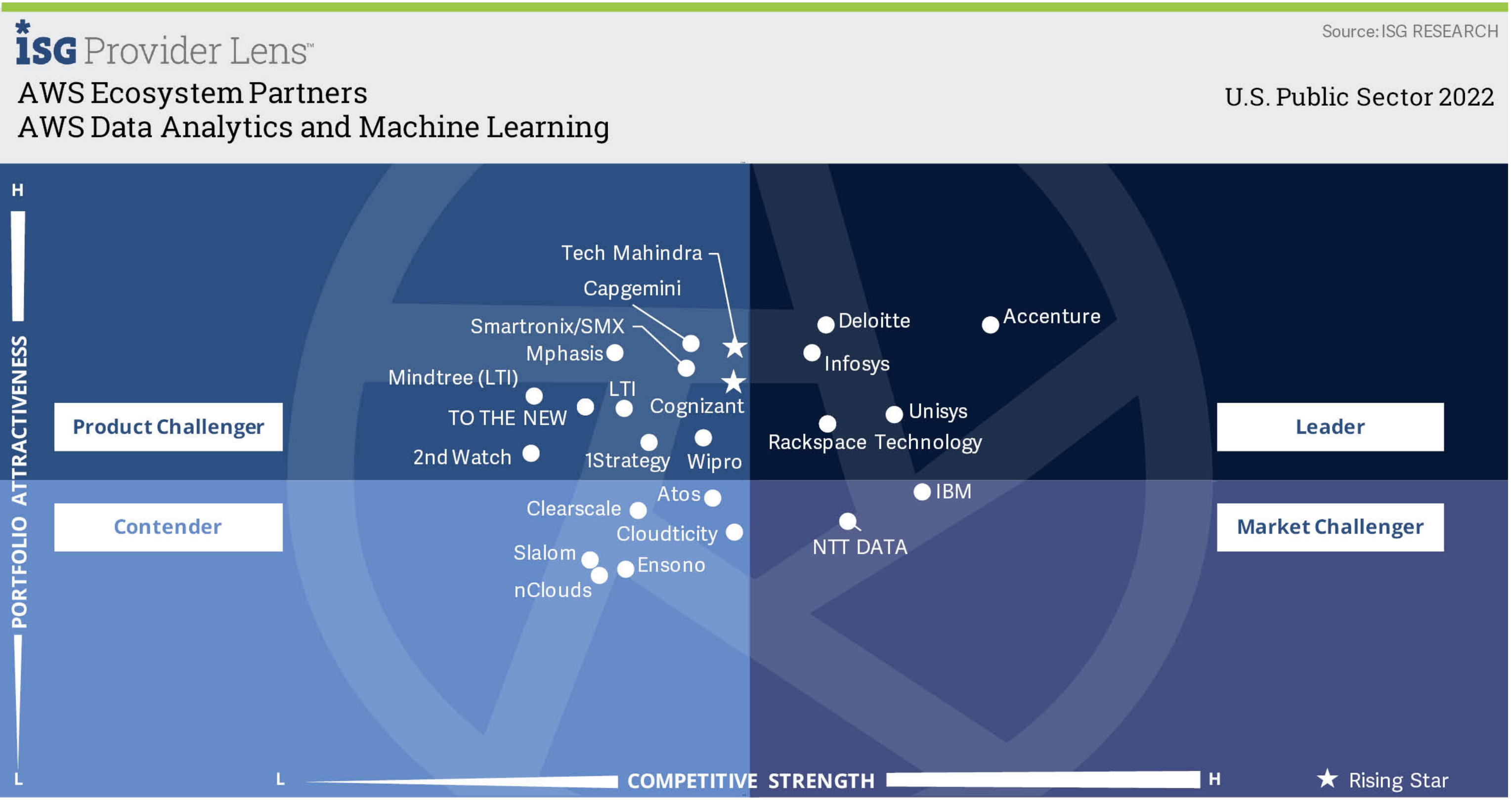
These organizations are bracing for a stronger push for modern data strategies that aim at tangible, effective and efficient data usage using various methods such as Data Mesh and Data Fabric. Most sector organizations are working toward hybridization and unification of IT strategies that emphasize on functionality and capability with technological toolsets or specific ecosystems.

ISG sees most sector organizations and leaders focused on partnering with providers with exemplary capabilities, talented professionals and a strong partner network.

IT leaders should read this report to better understand the relative strengths and weaknesses of data analytics and machine learning service providers, which would help them lead the digital transformation drive in their organizations.

Analytics leaders should read this report to understand the positioning of data analytics and machine learning service providers, learn how the providers' offerings can impact an organization's ongoing transformation initiatives and identify the benefits of moving to the cloud.

Sourcing, procurement and vendor management professionals should read this report to develop a better understanding of the current landscape of providers of data analytics and machine learning services in the U.S. public sector.



As U.S. public sector organizations learn to break down functional and technology silos, the **use of machine learning** to collect and analyze an increasingly variable range and scale of data becomes critically valuable.

Bruce Guptill

Definition

This quadrant covers providers that use machine learning to collect and analyze an often-unpredictable range and scale of data types within and across a growing range of systems and applications. Providers in this group must demonstrate capabilities and experience in data science (including big data and advanced analytics), database and solution architecture, machine learning and related AI development and implementation, software development, networking and data privacy/security. Most of them use an adaptive portfolio of tools and technologies to develop and deliver solutions.

Eligibility Criteria

Evaluation and eligibility criteria for this quadrant include the following:

1. Availability, experience and certification regarding relevant analytics, data science and machine learning staff (including scope of AWS **Competency and Service** Delivery offerings and certifications)
2. Depth and breadth of customer presence and involvement regarding **data analytics and machine learning** on AWS, including extent and availability of enabling programs for customer success
3. Scope and use of **relevant tools and technologies**
4. **Service/solution/data integration** capabilities and offerings
5. Suitability, maturity and adaptability of **pricing models**
6. Breadth and depth of **partner/channel relationships**
7. AWS-focused offering **roadmap and innovations** (current and planned)

Observations

Using more, and better, data to improve decision-making is a key IT goal of most organizational leaders. The value of cloud-based data analytics and machine learning (DAML) services, which provide rapid, accurate and adaptable insights cost effectively, therefore becomes apparent very quickly for most organizations.

And as more public sector entities become cloud-centered in IT and operations, the value of DAML services increases practically exponentially due to the immediate availability of massive volumes of disparate data types from previously unconnected sources flowing to organizations that were previously unconnected to one another.

Not all advanced data analytics platforms and tools use machine learning, but most do, and they tend use it in similar manners. Therefore, the simple inclusion of machine learning in analytics is not a differentiator for services and tools providers. Buyers and users must analyze how each provider integrates machine learning into its offerings, including how well and how easily the use of machine learning can be adapted to and controlled within various operations and systems.

From the 65 companies assessed for this study, 25 have qualified for this quadrant, with five being recognized as Leaders and two as Rising Stars.

accenture

Accenture's Insights Platform includes a suite of pre-built analytics apps that support critical and peripheral business functions within and among government organizations. Custom applications can also be created to meet the specific needs of each client organization. Creation and adaptation of analytics apps is based on client-developed use cases and outcomes.

Deloitte

Deloitte's AI and analytics services portfolio includes several core services: AI strategy; "Trustworthy AI" common data language; AI Insights and Engagement for human-like insights from structured and unstructured data; cloud-based machine learning for business processes; data and analytics modernization; AI-enabled innovation and ecosystem architecture; and managed analytics and AI services.

Infosys

Infosys strategic focus on analytics for the public sector is on helping clients develop in-house data analytics and modeling to address significant cost issues in fraud, services provision, healthcare and overall fiscal management.

rackspace technology

Rackspace Technology's DAML consulting services include data and AI strategy and roadmap development with AI ideation and data analytics workshops, data modernization and strategy assessments, database migration assessment and operating model and governance assessment.

unisys

Unisys most-visible analytics and machine-learning offering is its InteliServe Platform, an integrated suite of best-in-class technologies for offering omnichannel support, advanced analytics, automation, artificial intelligence, machine learning and identity authentication.

Cognizant

Cognizant's (Rising Star) AWS-based Intelligent Data Works (IDW) and its Data Modernization Method stand out among providers in this quadrant. Expanded investment in public sector presence will help it advance toward Leader status in the future.

Tech Mahindra

Tech Mahindra (Rising Star) is a global pioneer in AWS data analytics and machine learning services. Its increasing investment and presence among U.S. public sector organizations help position it as a Rising Star in this quadrant.

Unisys

Leader

"Outstanding presence and depth make Unisys a Leader in DAML on AWS for the U.S. public sector."

Bruce Guptill

Overview

Unisys is headquartered in Pennsylvania and operates in 24 countries. It has over 17,200 employees in more than 80 global offices. In FY21, the company generated $2.0 billion in revenue (-8.8 percent YoY), with services as its largest segment. In addition to being one of the most-established U.S. public sector IT providers, Unisys holds AWS's Government Consulting competency and AWS Public Sector Partner and Public Sector Solution Provider partner badges.

Strengths

Function- and client-targeted solutions: The machine learning and data analytics capabilities of Unisys tend to focus on developing client- and situation-specific solutions. This includes its digital workplace solutions practice area and solutions to optimize client-type-specific functions and operations (e.g. customs and border security agencies, IT help desk and support).

InteliServe platform integrates key componentry: Unisys' most visible analytics and machine learning offering is its InteliServe platform. It is an integrated suite of best-in-class technologies offering omnichannel support, advanced analytics, automation, AI, machine learning and identity authentication.

Pioneering AWS government cloud and services partnerships: Unisys qualified for AWS's original Government Consulting Partner Competency in 2016. It works with AWS to develop and optimize government and public-sector-related offerings and support. They also collaborate on cloud adoption best practices to control IT and operating costs, manage operations (including remotely) and scale operations up and down in advance of potential disruptions.

Caution

Clients report that Unisys' approach to promoting its offerings can be confusing and time-consuming, making Unisys more challenging to become aware of, understand and contract with in some engagement types. Unisys excels at engineering per-client, legacy-leveraging solutions, which may not be widely adaptable to other client situations.

AWS Internet of Things (IoT) Services

Who Should Read This Section

This report is relevant to organizations across the U.S. public sector for evaluating providers of AWS IoT services. In this quadrant report, ISG highlights the current market positioning of providers offering AWS IoT services in the U.S. public sector and how they address the key challenges faced by U.S. public sector business and IT leaders.

IoT security and mitigation, computing and analytics at the edge and advanced connectivity are in high demand and gaining popularity among enterprises. IoT is recording strong demand in different industry verticals, including medical technology, telecom and manufacturing. Manufacturing customers are strongly considering moving to the cloud by transforming their product lifecycle management (PLM), ERP and manufacturing execution systems.

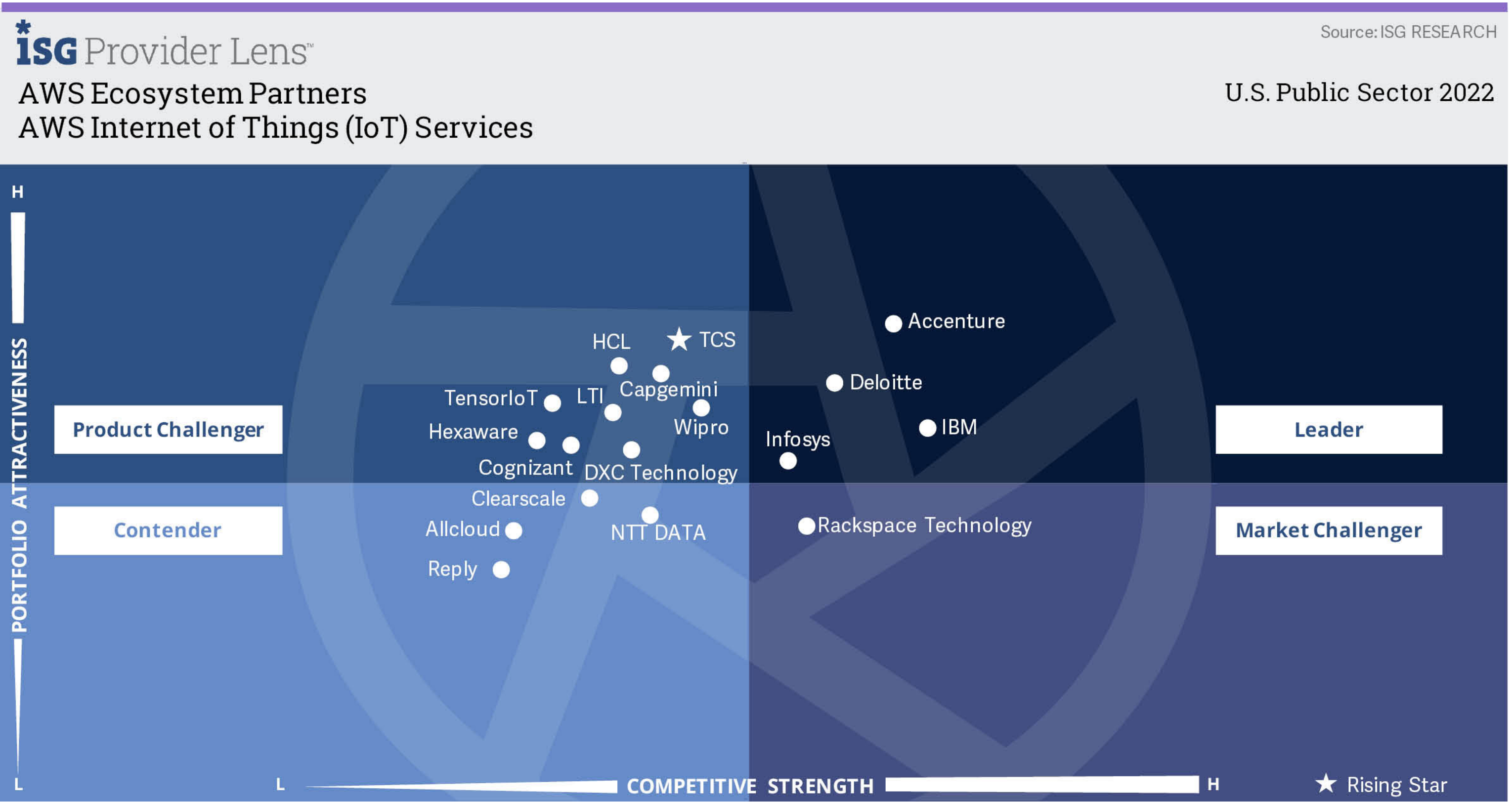
In addition, enterprises consider sustainability initiatives as an important parameter when partnering with providers. They aim at becoming green cloud enterprises with IoT integration.

Technology professionals should read this report to understand the relative positioning and capabilities of providers, which can help them effectively plan and select IoT products and services. The report highlights the technical and integration capabilities of providers and their partnerships.

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

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

CIOs and CTOs should read this report to understand the positioning of IoT providers, learn how their offerings can impact an organization’s ongoing transformation initiatives and identify the benefits of moving to the cloud.



AWS IoT partners improve the management of connected devices in more aspects of the public sector every day. The ability to enable and extend edge computing is crucial as public sector IoT environments become commonplace.

Bruce Guptill

Definition

IoT services and platforms serve as the main interface for device communication (measurement, control and regulation), data management tasks (device data storage, integration, analysis and visualization), device management (security and functional software updates on devices) and process management.

IoT AWS partners support and improve the use of applications for monitoring, managing and controlling connected devices based on AWS solutions (device software and/or control services). Essential functions include remote data collection, secure connectivity, sensor management and integration with third-party systems.

The ability to enable and extend edge computing for IoT environments is crucial as public sector IoT scenarios expand and become more business critical.

Eligibility Criteria

Evaluation and eligibility criteria for this quadrant include the following:

1. Availability, experience and certification regarding AWS-relevant IoT, security and **edge computing resources** (including scope of AWS Competency and Service Delivery offerings and certifications)
2. Relative experience and expertise in **AWS IoT environments**
3. AWS-focused offering **roadmap and innovations** (current and planned)
4. **Depth and breadth** of customer presence and involvement regarding IoT deployment and management via AWS (including training and support)
5. **Scope** and use of relevant tools and technologies
6. Suitability, maturity and adaptability of **pricing models**
7. Breadth and depth of **partner/ channel relationships**

Observations

IoT has rapidly become an important part of public sector business and IT value through a multitude of means, especially in resource management and allocation. Data from sensors is extremely valuable in understanding and planning for basically every aspect of government and public sector operations that use things and resources.

It is easy to see how the sensor devices themselves are important. But the ability to efficiently manage the devices, and the data that they generate, is more important. Many vehicles and machines commonly used daily have several hundred sensors (or more) gathering operational and performance data. This is in addition to tens of thousands of sensors typically integrated with infrastructure and other resources being used by the machines and vehicles. The volume of data escalates quickly and massively.

IoT systems and services must be able to plan for and then manage the use of that data efficiently. They also must be able to cost effectively, rapidly and accurately adapt to changes in the environment in which the sensors operate. This increasingly requires not only very efficient and scalable processing and data analytics, but also robust capabilities in edge computing services that bridge IoT devices and sensors with centralized and distributed processing and storage.

Users and buyers therefore need to weigh not only providers' device and sensor management abilities, but also providers' abilities to integrate, process, analyze and report data adaptively to suit organizational needs. Given that IoT is often relatively new to, or utilized at a small scale by, many public sector entities today, strategic and operational consulting is a critical service capability as well.

From the 65 companies assessed for this study, 18 have qualified for this quadrant. Four have been recognized as Leaders and one as a Rising Star.

Accenture has strong expertise in IoT business and cloud consulting, with AWS qualifications that make it a Leader in IoT services on AWS 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, and has a global IoT services portfolio. Its public sector expertise builds from working with numerous U.S. state and municipal government agencies, federal agencies and AWS's government and public sector programs.

IBM is one of the most-established IT solution and services providers in the U.S. public sector. It was an early entrant in the IoT and edge computing space and remains a leader. Unmatched sector expertise with great AWS proficiency and a wide array of contracting vehicles make IBM a Leader in this quadrant.

Infosys is a relative newcomer to the U.S. public sector compared with some Leaders, but its robust IoT consulting and data management services, along with its U.S.-based public sector business unit and exceptional AWS cloud expertise, position it as a Leader in this quadrant.

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

AWS Migration Services

Who Should Read This

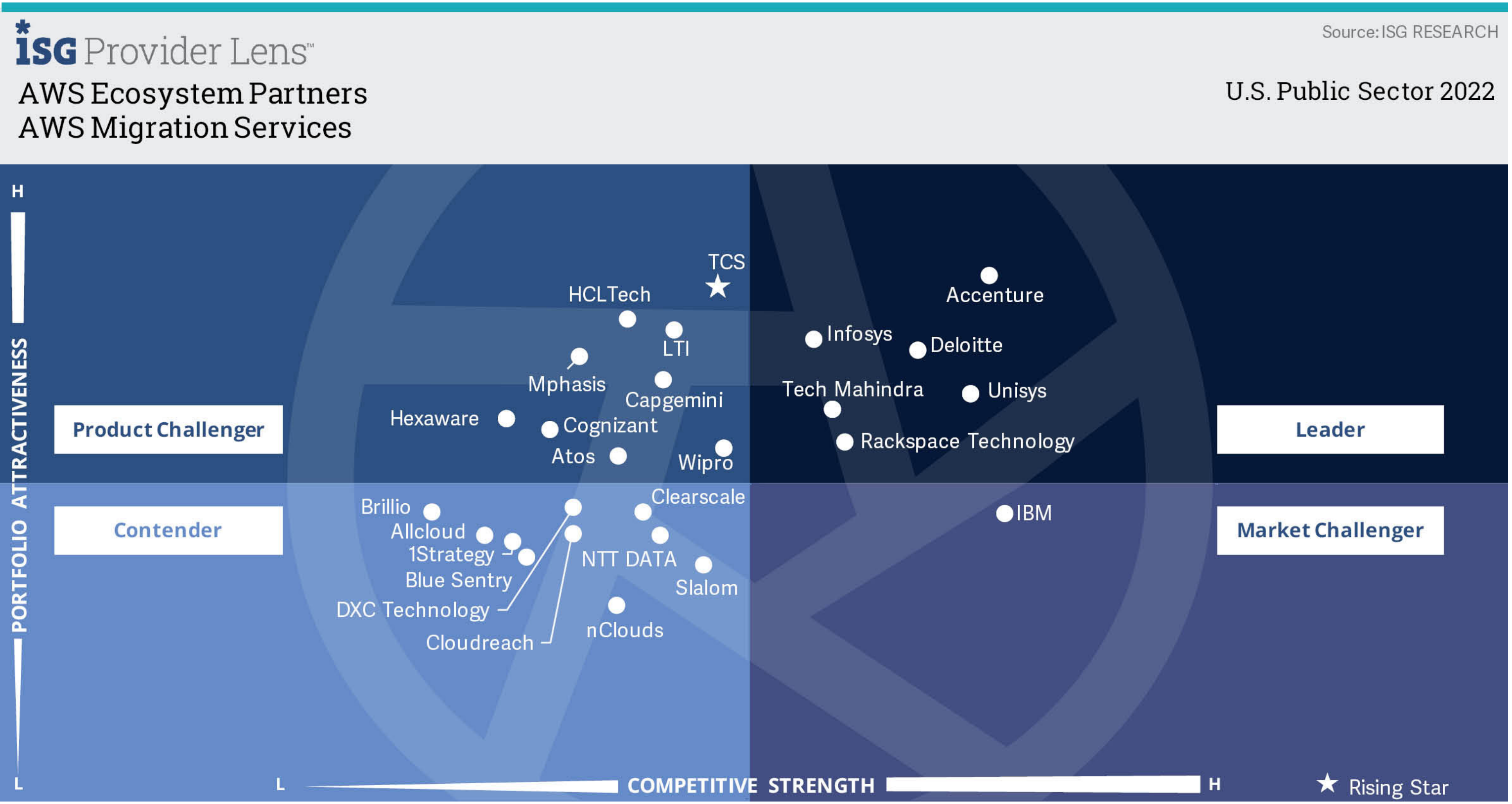
This report is relevant to organizations across the U.S. public sector for evaluating providers of AWS migration services.
In this quadrant report, ISG defines the current market positioning of providers of AWS migration services for the U.S. public sector agencies, and how they address the key challenges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

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

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

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

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

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 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 (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..

Unisys

Leader

"Deep sector presence and skills make Unisys a migration and modernization Leader on AWS."

Bruce Guptill

Overview

Unisys is headquartered in Pennsylvania and operates in 24 countries. It has over 17,200 employees in more than 80 global offices. In FY21, the company generated $2.0 billion in revenue (-8.8 percent YoY), with services as its largest segment. In addition to being one of the most-established U.S. public sector IT providers, Unisys holds AWS's Government Consulting competency and AWS Public Sector Partner and Public Sector Solution Provider partner badges.

Strengths

Hybrid cloud-plus-on-premises, legacy-retained environments: Unisys' modernization and migration strategy has been developed and optimized to leverage on-premises, legacy data center assets with more advanced cloud-based capabilities.

CloudForte software platform and tools: Unisys' CloudForte suite, which is deployed within Unisys cloud services, includes sets of applications, containers and infrastructure solutions for software modernization and migration for multi-cloud and hybrid, cloud-plus-on-premises environments. AIOps automation tools enable offloading and improve the performance of repetitive tasks.

ITSM-optimized tools and dashboards: CloudForte also includes a range of cloud and multi-cloud management tools and dashboards architected to conform with clients' Information Technology Service Management (ITSM) platforms.

CompuGain subsidiary enhances modernization and agile development: The December 2021 acquisition of CompuGain added critical capabilities in application modernization, cloud-native agile application development and cloud and hybrid cloud data management.

Caution

Clients report that Unisys' approach to promoting its offerings can be confusing and time-consuming, making it more challenging to become aware of, understand and engage with Unisys. The company excels at engineering client-specific, legacy-leveraging solutions that may not be widely adaptable to other client situations.

AWS Consulting Services

Who Should Read This

This report is relevant to organizations and IT leaders in the U.S. public sector that intend to evaluate providers offering consulting services for the transformation of cloud ecosystems to meet unique organizational and customer demands.

In this quadrant report, ISG highlights the current market positioning of AWS consulting providers in the U.S. public sector and how they address the key challenges in the region. Our assessment is based on the depth and breadth of providers' service offerings and market presence.

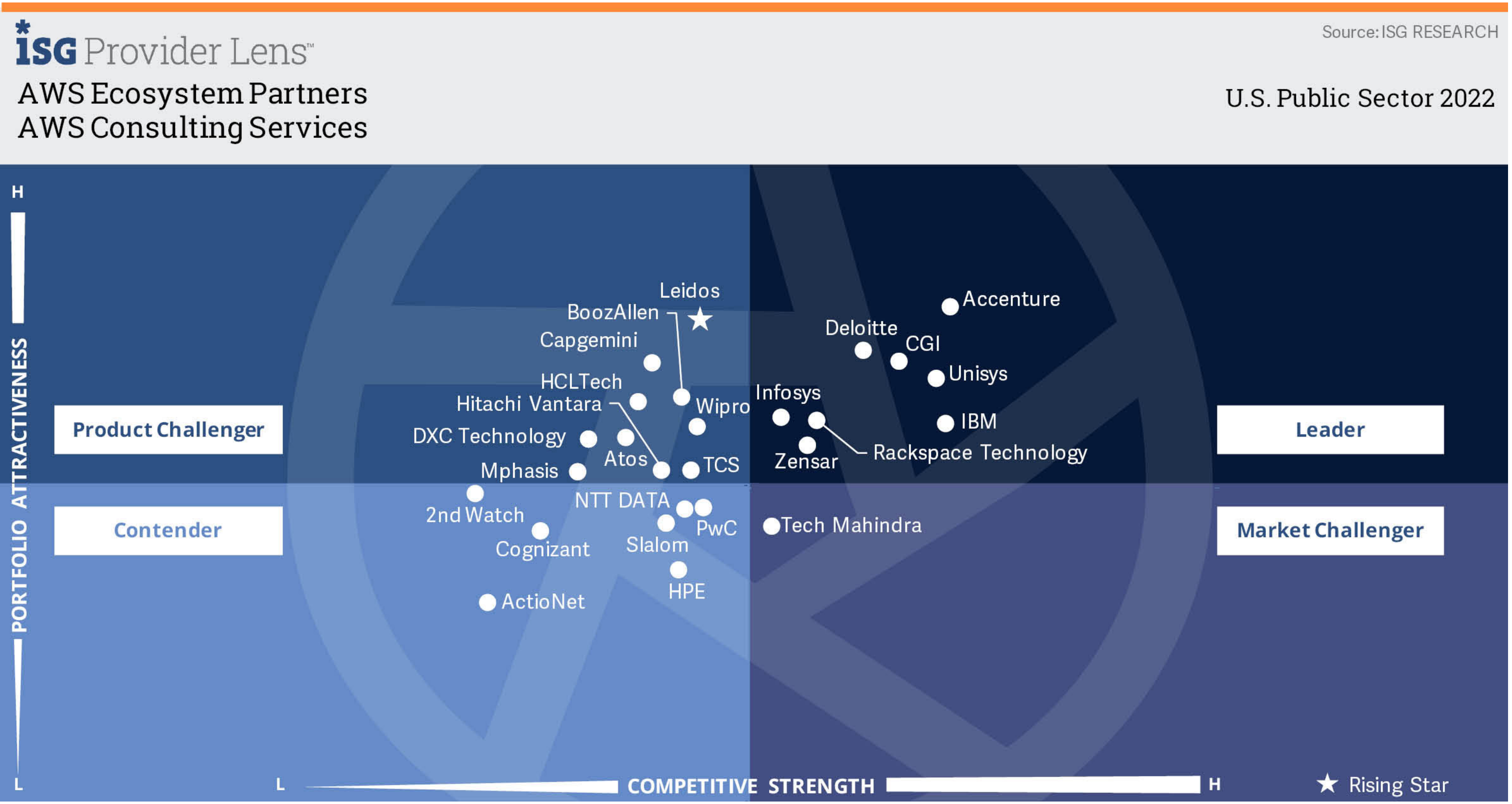
Public sector organizations in the U.S. are embracing the change by migrating to the cloud ecosystem. However, they are challenged with issues in terms of evaluating capabilities and change management, shortage of talented professionals and uncertainties about integration of legacy infrastructure. AWS consulting service providers can offer expert advice on workload assessment, transformational strategy, advisory, re-architecture of legacy applications and integration of automation capabilities.

With enterprises focusing on the adoption of multicloud platforms and service integration, leveraging and integrating AWS plus X is gaining interest. Service providers should also have FinOps expertise along with AWS optimization capabilities as these are gaining strong traction among enterprises. Enterprises are hesitant to being advised by providers on the selection of hyperscalers and are particular before engaging in any partnerships. They tend to partner with a provider only when a successful pilot is executed before any wider portfolio partnership.

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

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

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



This quadrant assesses AWS's consulting partners that offer training, analysis, insight, implementation and support across **key public sector business and IT needs** regarding cloud strategy, business operations, critical technologies, architecture, security and software solutions.

Bruce Guptill

Definition

Consulting partners form the largest group in the AWS Partner Network. Providers in this quadrant offer training, analysis, insight and guidance to address a wide range of business and IT needs, including cloud strategy, business case development and support and client needs for (and delivery of) governance, risk and compliance (GRC).

To be considered Leaders in this quadrant, providers must not only offer critical technologies, architecture, security and industry specific solutions, but also demonstrate business value delivered to clients through consulting services.

Eligibility criteria:

Evaluation and eligibility criteria for this quadrant include the following:

1. Demonstrated **client value** through business outcomes or other measurable improvement
2. Availability, experience and certification of staff supporting and **delivering relevant offerings**
3. Scope **of relevant AWS Competency and Service Delivery offerings and certifications**
4. AWS-focused consulting **roadmap and innovations** (current and planned)
5. Scope and availability of **enabling programs for customer success** (e.g., planning workshops and training)
6. Scope of relevant tools, technology and **services utilized**
7. Suitability, maturity and adaptability of **pricing models**

Observations

AWS and its consulting service partner ecosystem are compelling because cloud-based IT and business capabilities are highly relevant today for the public sector. Organizations must cost-effectively improve what they do and how they do it, or they run the risk of delivering lower levels and fewer types of services.

This requires many such organizations, especially government agencies, to invest quickly and effectively in substantial change, elevating the need for extensive business consulting assistance among public sector entities.

Technological change of course is integral to any such business change. Even in a single, somewhat unified cloud environment such as AWS, there is tremendous technological complexity. Given the scope of AWS's technology, product and services partnerships, this complexity grows constantly. Choices become more difficult and, as a result, their consequences become less clear.

This quadrant comprises consulting services providers that ISG sees as best suited to assist public sector entities, especially government agencies, in this challenging business and IT services cloud journey.

From the 65 companies assessed for this study, 26 have qualified for this quadrant, with eight being Leaders and one recognized as a Rising Star.

accenture

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

CGI

CGI is less well known outside the public sector than some Leaders. However, its decades of expertise and deep strategic insights from hundreds of public sector clients position it as a Leader in this quadrant.

Deloitte

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

IBM

IBM is one of the most-established IT solution and services providers in the U.S. public sector. Unmatched sector expertise, strong AWS proficiency, and the broadest array of public sector contracting vehicles make IBM a Leader in this quadrant.

Infosys

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

Rackspace Technology

Rackspace Technology leverages presence and expertise built from the early days of cloud services provisioning and its longstanding AWS partnership into leadership for the U.S. public sector in this quadrant.

Unisys

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

Zensar

Zensar is another relative newcomer to this sector but is no less qualified than some of the most-established Leaders. Its increasing investments in U.S. public sector business, deep AWS consulting services portfolio and broad contracting vehicle participation secure its quadrant leadership.

Leidos

Leidos (Rising Star) has one of the most comprehensive U.S. public sector consulting and services portfolios. Its lack of presence among state and municipal agencies keeps it from the Leader's quadrant. Leidos is expected to advance further into this marketplace from the federal market in months to come.

Unisys

Leader

"Outstanding presence and depth make Unisys a U.S. public sector Leader in AWS consulting services."

Bruce Guptill

Overview

Unisys is headquartered in Pennsylvania and operates in 24 countries. It has over 17,200 employees in more than 80 global offices. In FY21, the company generated $2.0 billion in revenue (-8.8 percent YoY), with services as its largest segment. In addition to being one of the most-established U.S. public sector IT providers, Unisys holds the AWS Government Consulting competency and AWS Public Sector Partner and Public Sector Solution Provider partner badges.

Strengths

Modernization and digitalization of public services and organizations: Unisys focuses its public sector consulting business on modernizing operations and enabling digital capabilities that reduce costs and improve constituent satisfaction. Unisys' consulting portfolio includes digital workplace solutions, cloud, applications and infrastructure, enterprise computing/data center, BPO and cybersecurity disciplines.

Pioneering AWS government cloud and services partnerships: Unisys qualified for AWS's original Government Consulting Partner Competency in 2016. It works with AWS to develop and optimize government and public-sector-related offerings and support. It also collaborates on cloud adoption best practices to control IT and operating costs, manage operations (including remotely) and scale operations up and down in advance of potential disruptions.

Practicing continuous integration and continuous delivery on AWS: Unisys' DevOps strategy and services groups have developed various methods to enable and optimize ongoing integration of new and legacy IT platforms using AWS services with minimal disruption and utmost efficiency.

Caution

Clients report that Unisys' approach to promoting its offerings can be confusing and time consuming, making it more challenging to become aware of, understand and contract with Unisys in some engagement types. The company excels at engineering client-specific, legacy-leveraging solutions that may not be widely adaptable to other client situations.

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.

JANUARY 2023

REPORT: AWS ECOSYSTEM PARTNERS