

A Canalys Special Report

Partner Ecosystem Multiplier: The AWS Opportunity

November 2022

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Executive summary

Study outline

Cloud adoption continues to expand rapidly, with the market for cloud infrastructure services expected to be worth US\$250 billion in 2022¹. Amazon Web Services (AWS) has long been the world's leading provider of public cloud infrastructure¹. But for customers to realize the full benefits of their cloud deployments, they lean on a wide variety of services and expertise from their technology providers. In the decade of the ecosystem, the importance of partner relationships has never been more apparent. AWS provides a technology foundation to help customers solve key problems, but increasingly relies on the offerings of its partner ecosystem to complete the overall value stack. At the same time, AWS itself creates significant opportunities for partners to generate revenue from incremental services and solutions. Canalys refers to these incremental opportunities as the **Partner Ecosystem Multiplier (PEM)**.

To help AWS identify its PEM impact, Canalys conducted an in-depth worldwide study. Canalys focused on the diverse number of ways in which ecosystem partners can add and gain value by working within the AWS economy. Partner engagement, business model and capabilities were all considered when assessing the AWS Partner Ecosystem Multiplier. Multiple factors affect the PEM, including breadth of offerings, maturity of partner, complexity of service offerings, scale of partner and local market dynamics (geographic factors). This study will uncover the value of the AWS Partner Ecosystem Multiplier and look in detail at the component breakdowns as well as the degree of variations identified.

It is important to also highlight that the **Multiplier reflects the revenue opportunities** that partners can capture with their services and solutions in relation to customer spend on AWS technology, as opposed to margins or profitability. Any insights related to profitability will be specifically highlighted.

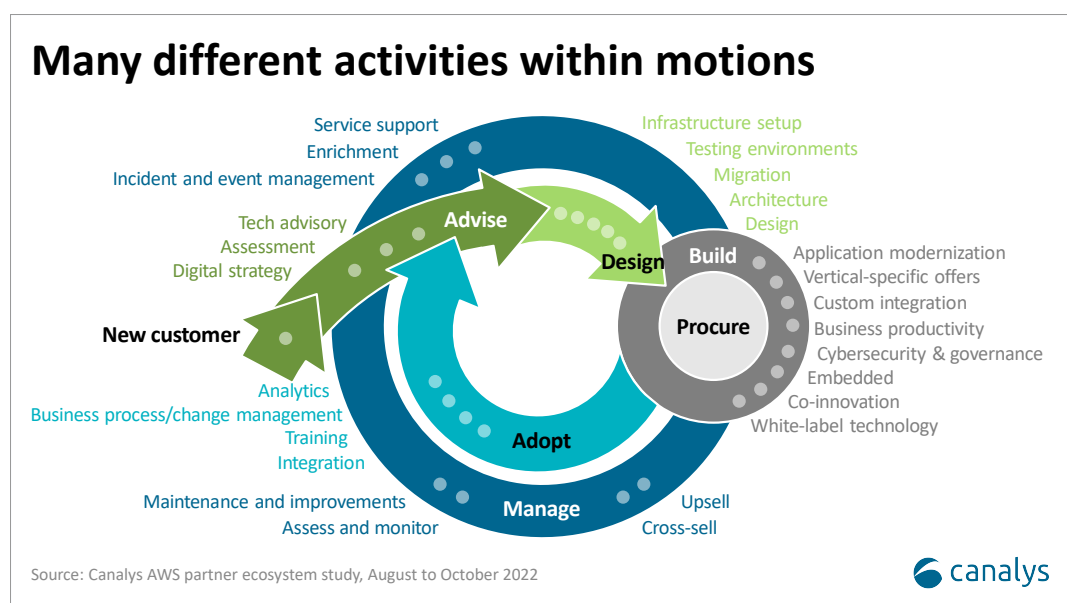
Research methodology

Canalys conducted 44 expert interviews with AWS partners around the world. Interviews were conducted with four main types of partners (systems integrators, resellers, managed services providers and ISVs). This study was carried out in eight major AWS markets: Australia, Brazil, France, Germany, India, Singapore, the UK and the US. Each interview lasted between 30 and 45 minutes, resulting in nearly 30 hours of conversations with senior subject-matter experts within each partner. Beyond an overarching discussion of the AWS ecosystem, these conversations focused on key client case studies to unearth the core services that were deployed, and what various factors contributed to a successful outcome with the customer. The data insights were fed into a Canalys model to help construct an aggregated view of the total multiplier captured, as well as understand how the multiplier was spread over time, and by partner activity.

¹Source: AWS held a 32.3% share of the cloud infrastructure market in Q3 2022 according to Canalys estimates.

Partner Ecosystem Flywheel

To help illustrate the range of service opportunities that partners are offering across the landscape, Canalys leveraged its **Partner Ecosystem Flywheel**. The Flywheel is a critical visual of the Partner Ecosystem Multiplier that serves two broad purposes. First, it shows the range of service activity types (shown below) that are typically delivered by partners when engaging in a customer technology deployment. The multiplier value is broken down into these activity types. Second, it serves as a visual aid to help understand where partners play across the customer technology lifecycle. Partners that engage across all activities of the Flywheel are better positioned to create the “spin” effect with customers, thus yielding further future opportunities.



- **Advise services** capture the consulting and professional services activities held either with new customers, or existing customers that are embarking on new cloud projects. This typically involves an understanding of the customer’s digital strategy (or outcomes that need to be achieved with a particular project), an assessment of the existing infrastructure and systems, as well as advisory on the specific technology solutions that will need to be built or procured.
- **Design services** capture the set-up activities required for customers to establish or expand their cloud capabilities. This involves designing and testing the environment that will be used and ultimately migrating customer data onto the public cloud infrastructure.
- **Procure services** are the activities that partners conduct to acquire the necessary infrastructure for setting up cloud environments. Revenue from these activities typically occurs in the form of resell or through procurement services offered by partners.
- **Build services** are the broadest and most diverse set of services within the Flywheel. Inclusive of industry and functionally focused software stacks, these services leverage the widest variety of partners within the ecosystem. Partners leverage

these services to, for example, transform a cloud environment from a storage solution into a business solution that adds value to customers, while also ensuring that the environment is safe and functional against growing external threats and challenges. This segment also includes the partners own IP creation and software development, for example, as part of a customized solution.

- **Adopt services** can be understood as the services that allow partners to help customers use and unlock value from their cloud investments. This could be in the form of ongoing customer success engagements or dedicated workshops to train customers in usage. Business process and change management services allow partners to fine-tune these environments depending on customer demand, while data analytics are leveraged to identify opportunities, both for efficiency and further cloud revenue in the future.
- **Manage services** for many partners are the end goal for cloud projects that they undertake and are by far the most operational of the services featured within the Flywheel. They can also be a key revenue driver as they offer an opportunity for consistent recurring revenue beyond the initial set-up of the cloud environment.

Key findings

- AWS partners can reach a US\$6.40 multiplier per US\$1 AWS sold. Partners achieving this level have a breadth of services and support for their customers across the entire cloud lifecycle.
- Differences across partner type and cloud maturity drive significant variations in the multiplier that partners can achieve.
- 61% of the multiplier is gained in the first year of the initial project. Partners that develop new opportunities within the same customer fuel greater growth within their AWS business.
- The largest portion of the multiplier is reliant on the wider ecosystem, namely the Build phase. Successful partners in this phase have wide-ranging relationships across the broader technology partner ecosystem.
- 79% of partners interviewed indicated that customers increased their cloud consumption after year one of an initial project.

“There’s more than a dozen relevant AWS services for this particular client... We can do all of those services, turn it up and create an outcome our client never had before.”

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AWS partner ecosystem multiplier



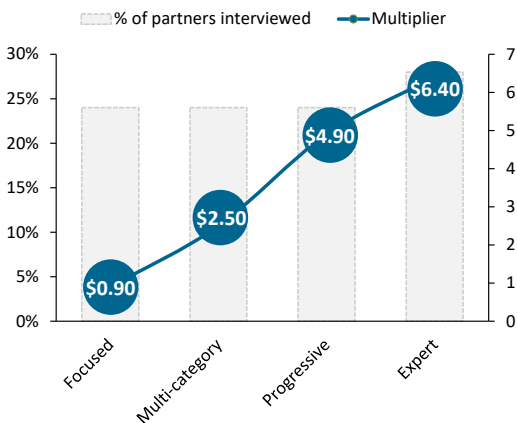
Overview

Consistent growth of AWS tells one part of the “global cloud adoption” story, but what has been less visible is the valuable contributions that the wider partner landscape makes. Canalys research has now shown that partners in the AWS ecosystem can earn a multiplier of **US\$6.40 for every US\$1 spent on AWS solutions**. As will be shown throughout, achieving this multiplier is dependent on a multitude of factors. These include the extent to which a partner can provide a breadth of services across the customer lifecycle, as well as the maturity of cloud adoption in a partner’s geographic region. Throughout the study, it also became clear that most of the multiplier value (61%, or US\$3.90) was achieved in the first year of an initial cloud engagement (when assessing a three-year period of AWS cloud consumption). The multiplier over time will be discussed in the next section of this report.

Canalys identified four categories of partners across the AWS ecosystem, as distinguished by the multiplier they were able to achieve. These partners have been defined as **Focused, Multi-category, Progressive** and **Expert**. The US\$6.40 multiplier was achieved by Expert partners. This section will explore the defining features of each of these partner categories, as well as the different multipliers that partners in these categories were able to generate.

Partner categories

Across the four categories of partners that Canalys has defined, the key differentiating factor between them is the **breadth of services** that they are able to offer to their end customers. While there was a relatively even representation of all partner categories interviewed in this study, in the wider market it is likely that most partners will fall into the Focused category. These partners were shown to earn the lowest multiplier, valued at US\$0.90. Despite generating the lowest multiplier, these partners can operate effectively with a depth of expertise in their chosen field, and there were varying levels of profitability achieved across this group of partners (defined by services delivered). But if partners wished to increase their revenue opportunities around AWS, the ability

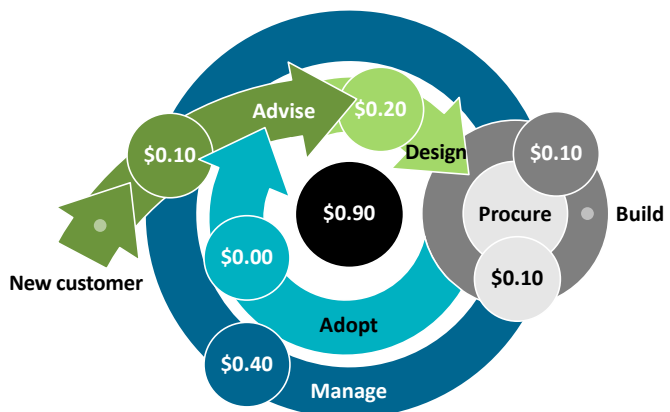


to provide a wide range of complex services, across the cloud lifecycle is vital. The following section highlights some key characteristics of each partner category, as well as the vital requirements for unlocking the next level of multiplier.

Focused – multiplier of US\$0.90

This category consists of a wide variety of partner types. What they have in common is that they are achieving a similar range of multiplier opportunities around their AWS practice through deeply specialized and specific activities. Partners in this category can participate in different

activities across the partner Ecosystem Flywheel, and include partners that predominantly resell cloud services, with limited additional services attach. Typically, however, partners in this group are most likely to specialize in activities that are focused on cloud migration or managing cloud services. Almost 75% of the total multiplier for Focused partners comes from these two activities. As a result, Focused partners are heavily reliant on growing cloud adoption by customers to increase revenue over time. In terms of revenue, managed services are the key driver of the multiplier. Nearly 50% of all focused multiplier revenue can be attributed to managed services. Managed services have an outsized impact on the multiplier of this group of partners compared with other partner types. But it is a category of service that delivers predictable recurring revenue.



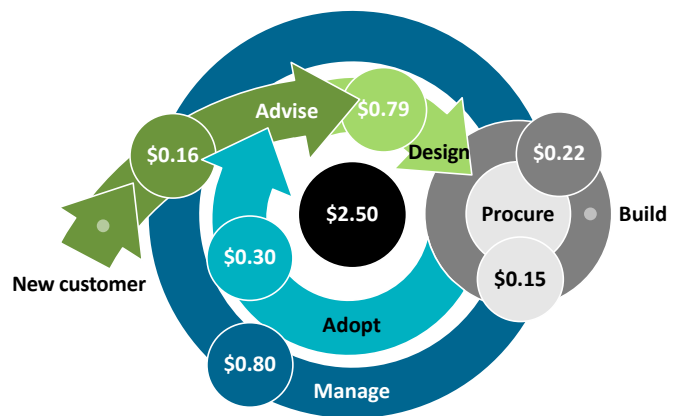
Focused partners do not typically stray beyond their core activities. Whether by choice or due to limitations of resources or skills, Focused partners do not typically tackle complex business transformation projects. Only 14% of Focused partners expressed any thought regarding broadening their service offerings to increase revenue. In contrast, 57% of Focused partners saw international expansion as a key means of growing their revenue. Essentially, most of these partners were prioritizing expanding their total addressable market through reach, rather than by evolving their portfolio of offerings.

Focused partners will always be inhibited in their pursuit of an increased multiplier because of the limited breadth of offerings they are able to provide. In addition, with most of these partners going to market with similar service offerings, differentiation with competition, particularly larger partners, can be difficult, with 57% of focused partners expressing this difficulty when interviewed.

“If we don’t see a managed service opportunity or agreement, we won’t necessarily do it [the migration].”

Multi-category – multiplier of US\$2.50

Multi-category partners are those that have begun to expand the breadth of their offerings, but still largely focus on a small number of select activities that are either aligned technically or by industry. Beyond this, partners in this category possess an ability to work with larger end customers that require a more complex approach. Compared to Focused partners, Multi-category partners achieve a 259% increase in multiplier revenue associated with migration activities. The increased size and complexity of projects undertaken by Multi-category partners are key to driving an increased breadth in service offering.



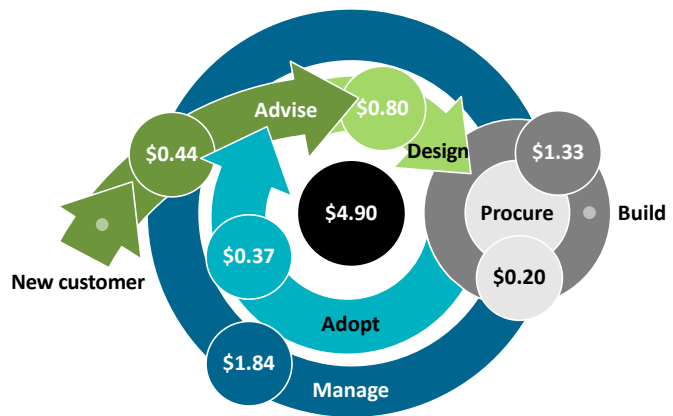
While there is an increased range of services offered by Multi-category partners, the overall scope of activities remains relatively narrow. 63% of the total Multi-category multiplier is attributed to the core activities of Design and Manage services. Other activities that Multi-category partners participate in still do not account for a significant proportion of total activity. For example, the Build segment of the multiplier accounts for less than 10% of the total Multi-category multiplier. This can be seen as evidence that partners in this category are often not driving development activity, nor are they fully capitalizing on engaging with the wider AWS ecosystem, particularly the numerous ISVs that formulate an important part of the overall multiplier stack.

“The management team has decided it wants to build a significant proportion of revenue from cloud services, and within that to build a significant portion of cloud revenue from repeatable solutions.”

Progressive – multiplier of US\$4.90

Progressive partners differentiate themselves from Multi-category and Focused partners significantly through their leveraging of the wider AWS ecosystem. The Build category of services is the key accelerator for Progressive partners' increased multiplier.

When compared with the Multi-category multiplier, there is a 536% increase in Build-attributed multiplier dollars for Progressive partners. While expanding the breadth of services offered, Progressive partners are likely to possess more AWS competencies than their Multi-category and Focused counterparts. Progressive



partners hold an average of six AWS competencies, compared with four for Multi-category and Focused partners. This is important for Progressive partners that wish to prove their ability to operate at the necessary depth as their service offerings broaden.

Progressive partners are less reliant on core activities, such as migration services. For these partners, only 17% of the multiplier comes from Design activities, compared with 32% in the same category for Multi-category partners. This decrease is indicative of partners that are finding broader opportunities to add value and generate revenue.

Progressive partners, by and large, remain highly technical partners. They are less likely to have the skills needed to deliver in areas of business transformation. Even when Progressive partners have these skills, they are yet to build the necessary reputation in this area for this segment to become a significant portion of their total multiplier opportunity. This is clear from the numbers, with less than 10% of the Progressive multiplier being attributed to advisory activities, often a key pillar of business transformation conversations.

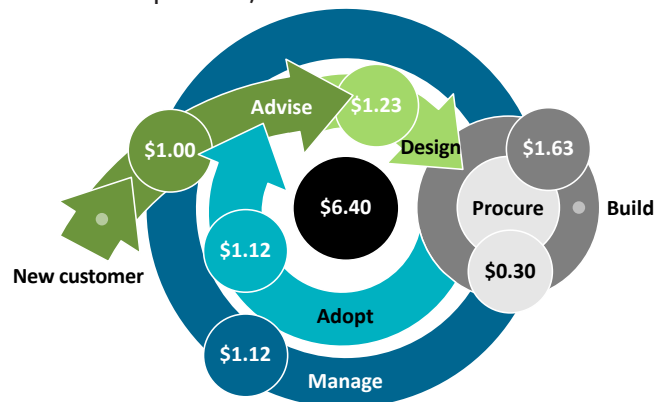
“We competed against larger SIs and won! Our differentiation was depth of expertise in large-scale AWS migrations, and we were able to leverage our [AWS] accreditations to prove this.”

Expert – multiplier of US\$6.40

Partners in the Expert category are those that provide the broadest set of service offerings and possess a large professional services organization. As a result, these partners

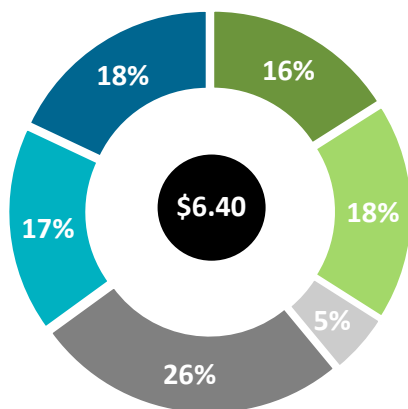
can pursue the largest and most complex projects within the ecosystem. 50% of Expert partners interviewed had some sort of vertical practice, which allows them to tackle industry-specific challenges.

Complexity also provides opportunity through Adopt activities. 75% of expert partners leverage data analytics as part of their overall delivery. Insights gained from analytics are key to drive potential revenue opportunities for partners within the same customer project.



Advisory services are important to setting the agenda for a cloud project, and Expert partners can gain the most Advise revenue of any partner type. Expert partners generate 121% more Advise-attributed revenue than Progressive partners. Beyond its contribution to the multiplier, leveraging this segment allows partners to define the

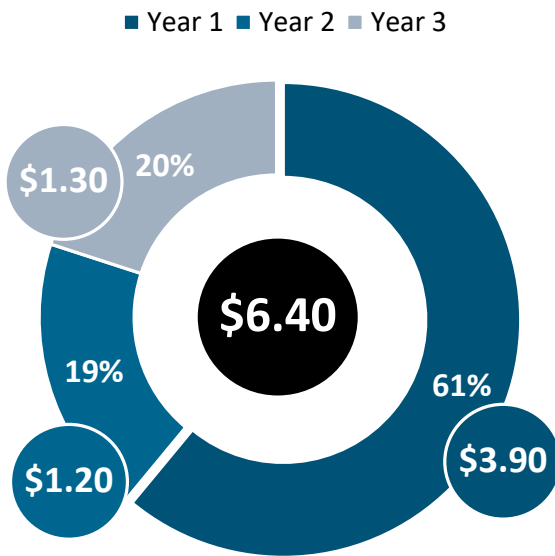
overall process more clearly and have greater influence on developing the overall multiplier revenue opportunities. Expert partner revenue is spread most broadly across all ecosystem activities, which differentiates Expert partners visibly from the other three categories. Expert partners leverage the wider AWS ecosystem most aggressively by leveraging software partnerships, building client-specific IP and delivering applications at scale through cloud infrastructure. This focus on the Build segment means that this revenue accounts for 26% of the total Expert multiplier.



“We are focused on transforming our customers’ business. Cloud is the key component of that change, and we see AWS is the backbone of the whole thing.”

Multiplier over time

AWS partners are typically brought in to support customers at various stages of their cloud migration projects. Overall, 61% of the multiplier achieved by partners, irrespective of partner type, occurs in the first year of a project cycle. But there are differences in terms of how this revenue is generated by partner type, reflecting differences in business models and value propositions. Focused and Multi-category partners are more likely to generate year-one revenue from migration and resell activities, while Expert and Progressive partners will achieve this through a mix of advisory consulting, application moderni-

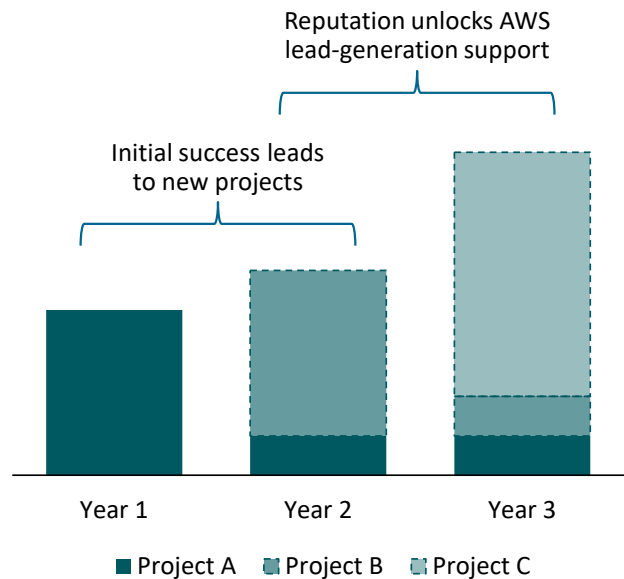


zation/rewriting and complex migration projects. Typical projects within the AWS ecosystem require a significant amount of resourcing in the front end across the Advise, Design and Build segments. In the first year of a project, typically over 70% of revenue is generated across these three segments alone. After deployment, subsequent revenue occurs from additional professional services as well as any recurring revenue streams that partners have enabled, whether these include managed service offerings or aaS offerings.

Given the importance of onboarding, partners cited critical AWS programs, such as the AWS Migration Competency and the Migration Acceleration Program (MAP). 65% of partners interviewed accessed resources via the MAP program, either in the form of customer credits or partner cash. Other programs include Large Partner Investment (LPI). Partners

that did not have the Migration Competency typically had at least one relationship with another partner that could offer those services. AWS' Co-Sell program is also seen as important for helping both drive increased customer demand and time to revenue.

While Canalys modelling for this study is based on a three-year model, it should be noted that recurring revenue from these customer projects often extends beyond year three. Beyond the initial deployment, 79% of partners indicated that their customers increased their consumption. So, while revenue opportunities from the initial project fell over time, these early projects fuel additional adoption by customers, which drives new deployments and new multiplier opportunities as a result.



“Co-sell is key to what we do. AWS helped to align the [client] business and expectations to help education. By removing the architecture questions, they truly helped accelerate the deal.”

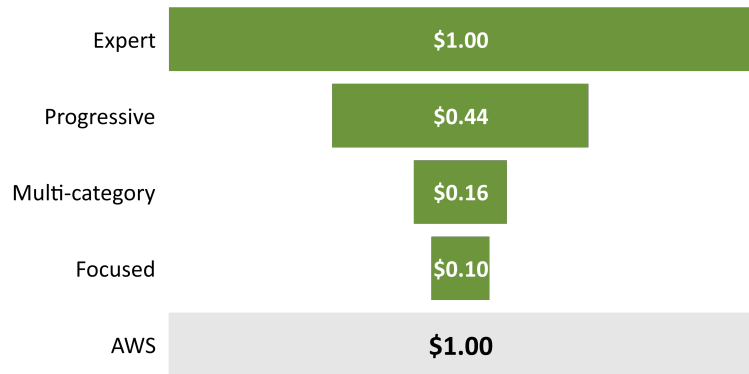
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Flywheel breakdown

As new customers enter the AWS ecosystem, the Advise segment of services allows partners to capture both net new cloud customers and expand the cloud adoption of existing customers. Within this segment, potential revenue activities include digital strategy, technology strategy and assessment services. At

the upper end of the multiplier, in the Expert segment, these services account for 16% of the total multiplier. Partners leverage these services to set the agenda for customers in cloud projects in the ecosystem. These services are vital to ensure overall success in a cloud project of any size or complexity. 21% of partners interviewed stated that they offered services within this segment free of charge. Most partners offering these services free of charge (77%) are Focused and Multi-category partners. But for Progressive and Expert partners, setting this agenda is also a revenue opportunity. This is both in the immediate delivery of those services (with partners earning US\$0.44 and US\$1.00 of their total multiplier in this respectively) as well as the wider ecosystem multiplier opportunities this unlocks for partners. In the case of Expert partners, the Advise segment is the beginning of a wider business transformation they conduct on behalf of their clients.

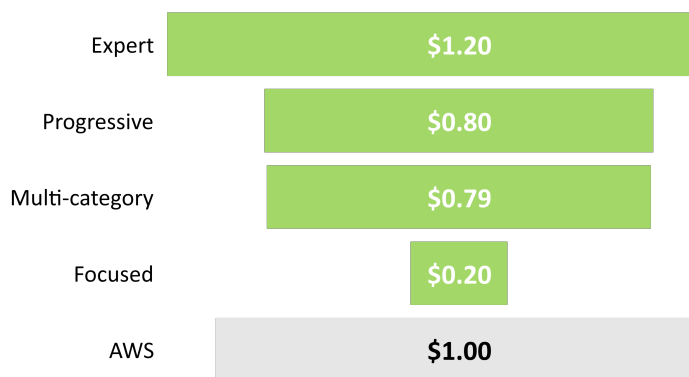
"Advise" multipliers attained by partner type



"Advise" multiplier spread: \$0.90

Partners of all categories deliver Design services to their end customers. These services are mostly attributed to migration services but also include infrastructure set-up, architecture and design, on the back of which partners can build out their multiplier revenue.

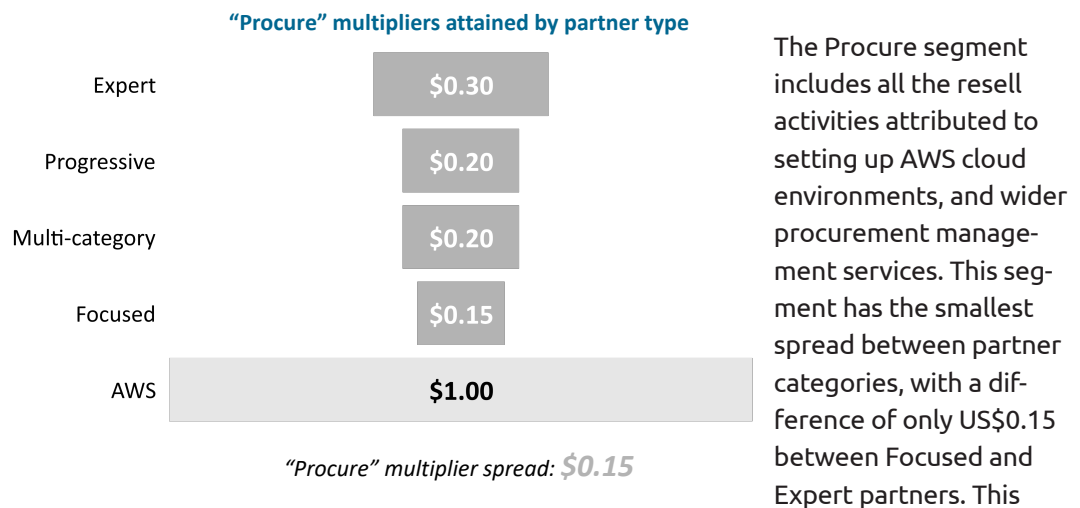
"Design" multipliers attained by partner type



"Design" multiplier spread: \$1.00

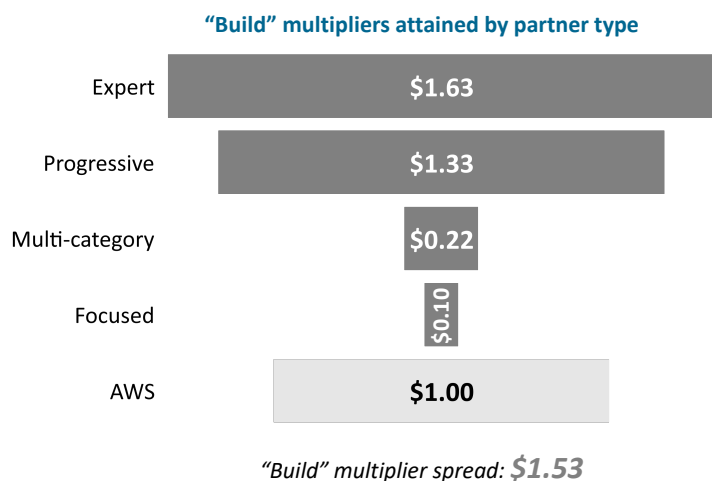
These activities are the most technically complex within the multiplier ecosystem. The key factors that cause variance in the comparable Design multipliers are size and complexity. As partners can tackle larger and more complex migration problems, they are able to generate greater multiplier revenue. While

Design activities are fundamental to an expansive cloud transformation project, they are not the drivers of increased multiplier revenue for Progressive and Expert partners. While Multi-category partners have 32% of their multiplier revenue derived from Design activities, Progressive and Expert partners see the Design portion of their multiplier as lower than 20% of their overall total. For these partners, breadth of offering is key and design, while an important segment, is not their only focus.



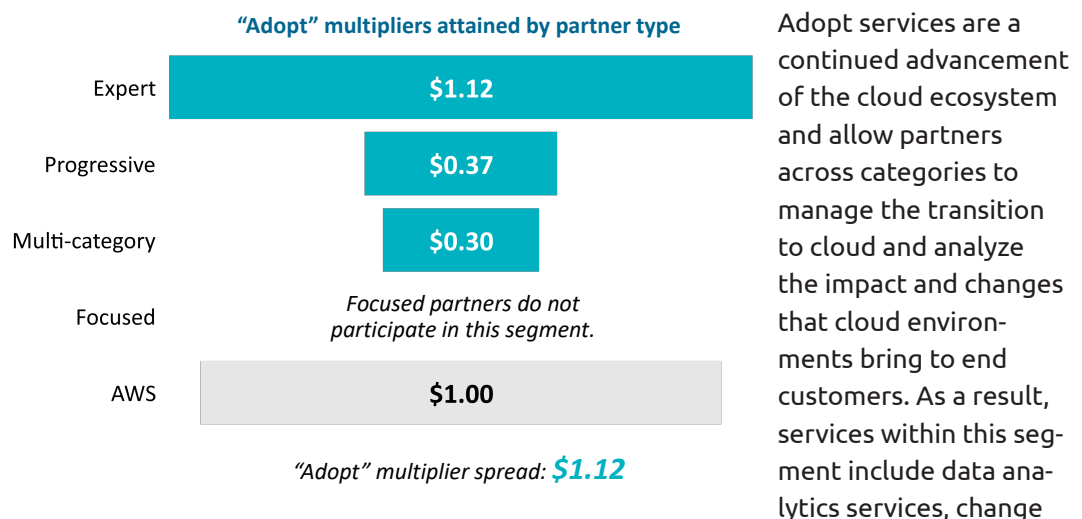
segment is where margin limitations drive partners to focus on volume, an advantage for larger Progressive and Expert partners. Despite this, the emergence of consolidated billing has been critical for partners across the spectrum to improve their relationships with customers and, more importantly, their margin in this segment. Procurement services, despite the lower margin typically available than with more advanced services and activities, are recognized as providing partners with an important ongoing touchpoint with customers, particularly those that rely more on project-based consulting than recurring business, such as managed services. As a result, even large GSIs are seeking to develop a greater focus on resell business, though often preferring to recognize only gross margin rather than top-line revenue, because of the dilutive effect of resell revenue on profit margin. In addition, when interviewed, AWS partners suggested that more advanced AWS products are also a key factor for improving their revenue from procurement activities.

Revenue in the Build segment is driven by taking recently created cloud infrastructure and tailoring it to the needs of end customers. Activities in this segment include application modernization, custom integrations, cybersecurity and governance software, co-innovation and white-label technologies. Software stacks are



the drivers of this revenue and present the first opportunity for recurring revenue in the Ecosystem Flywheel. 80% of Progressive and Expert partners provide some form of application modernization as part of their Build multiplier, as they help end customers move their functionality from on-premises to public cloud. Beyond this, the next largest contributions to this segment are cybersecurity and infrastructure support. The Build segment of the ecosystem multiplier is the most diverse, and as a result is the segment of the ecosystem that presents the clearest opportunity for partners to work together with the same end customers.

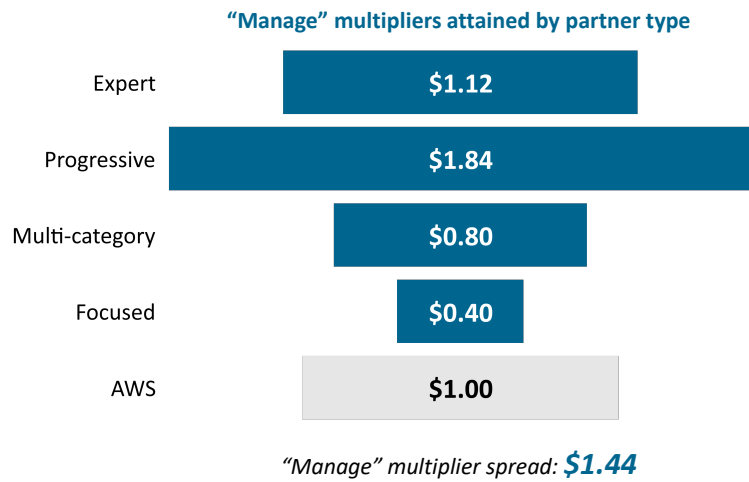
This collaboration is a significant driver of the multiplier, but also appears as a key differentiator between categories of partner. This differentiation is driven by additional capabilities that Progressive and Expert partners can develop and manage compared with the rest of the partner ecosystem. While some Focused and Multi-category partners may struggle with scaling issues that will prevent them from participating actively in this segment, many make the strategic decision to remain specialized in their areas of expertise.



management and training. Focused partners do not typically participate in this segment and focus instead on volume of migrations and managed service opportunities, rather than expanding revenue within customers. For Progressive and Multi-category partners, Adopt services are mainly focused on business process and change management activities. These account for 87% of Adopt revenue for these partners. Expert partners understand fully the opportunity that data analytics can provide, and leverage these offerings to expand revenue opportunities, both in terms of the initial project scope, and expanding the wider customer cloud consumption. 63% of all partners interviewed that belonged to the Expert category had multiplier revenue that was attributed to data analytics specifically. Not only are these services important to the initial project scope, but they also allow partners to identify their next AWS infrastructure dollar.

The Manage segment is the most operational element of the Flywheel, and for many partners it is the clearest opportunity for recurring revenue within the Flywheel. When assessing the timeline of these cloud projects, it is important to note that a significant amount of the revenue achieved in year two and beyond is from the managed services

that can be provided once cloud environments have been initially set up. 48% of partners described managed services as their ideal end goal in every cloud project that they delivered, especially with partners experiencing annual growth in managed services from 55% to 78% per year. Progressive partners can potentially earn the largest multiplier available in the entire ecosystem (US\$1.84) through managed services, due to their ability to scale across customer types. Expert partners will typically focus their resources further on the Adopt and Build segments as they identify these areas as the greatest cross-selling and upselling opportunities within the ecosystem.

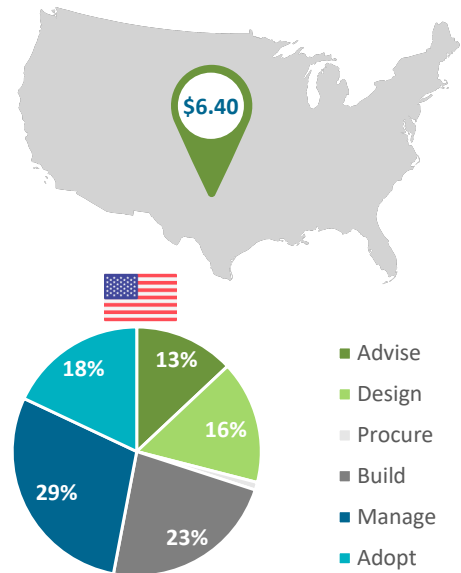


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Geographic variations

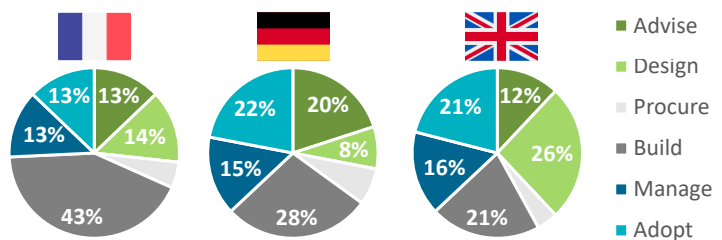
USA

The US cloud market is the largest in the world, with AWS environments accounting for US\$10.1 billion of total infrastructure spend in this region in Q2 2022². As a result, the US AWS partner ecosystem is the worldwide market leader and proves this with its total multiplier of US\$6.40. Furthermore, of the 17 US partners interviewed, 60% of them belonged to the Progressive or Expert category and this is evidence of the US's position as the most mature cloud services market in the world. As a result, the breakdown of the multiplier per activity category is also the most diverse across geographies. For partners in this market, there is a clear opportunity to capture high-spending accounts, from both Fortune 500 companies and large government opportunities. While a saturated market provides competition challenges, including a need to differentiate strongly against other partners, operating and employment costs are a significant challenge to partners, especially those that rely on local resources for their projects.



EMEA

In Western Europe, cloud adoption is less extensive than in the US, with AWS environments accounting for US\$4.7 billion of total infrastructure in Q2 2022. This means the AWS environment is roughly half the size of its US equivalent, though AWS still accounts for 35% of total market share in the region³. This, combined with higher regulatory thresholds in this region



²Estimates from Canalys Q2 2022 Worldwide Cloud Infrastructure Report.

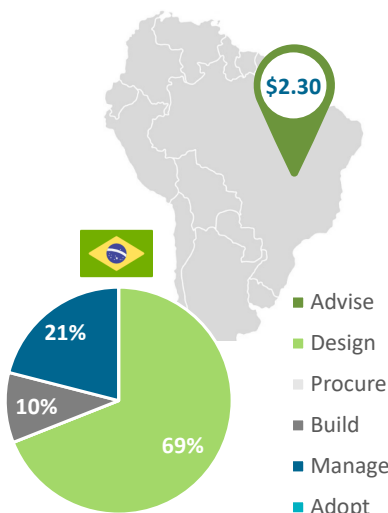
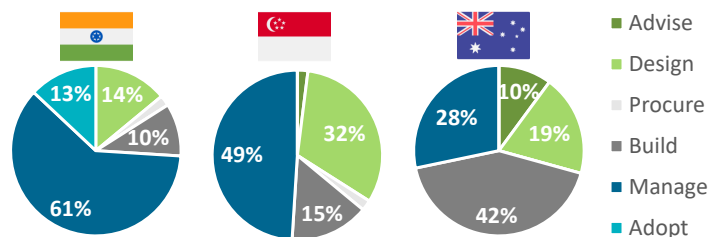
³Ibid

creates relative conservatism in cloud-related projects, contributing to a lower multiplier in the majority of EMEA. Despite these challenges, the European market still contains a mature services market, as can be seen in the breadth of services that make up the country multipliers uncovered by this Canalys study. The increase in local data centers has helped meet regulatory hurdles and driven local and governmental cloud adoption. This will drive future cloud growth in the region and will allow for an expansion of the available multiplier in the coming years.

APAC

Outside of the Chinese market, cloud adoption in this region still lags. In Q2 2022 the AWS infrastructure spend in APAC was US\$2.8 billion. In addition to lower cloud adoption, there is also a less mature services market across the region⁴. 75% of partners in the APAC region within this study are categorized as Multi-category partners, with 55% of revenue in the region originating from

Manage services. The relative lack of breadth in service offerings shows room to grow for ecosystem participants in this region, especially around the Advise and Build segments. Three markets highlight the variety of local conditions that exist in the Asia Pacific region. India's cloud adoption is benefiting from a government that is looking to digitalize its infrastructure. Singapore, meanwhile, is highly modernized but still shows signs of conservatism in cloud projects. At the same time, Australia is a highly experimental region and quick to explore cloud-led digital projects and moves against the wider regional hesitancy in the Build segment.



LATAM

The Latin American market combines a slower cloud adoption rate with a regional spend on AWS infrastructure of US\$647 million in Q2 2022, with a less mature services market focused primarily on the Design and Manage segments. These factors combined result in the lowest multiplier worldwide. 69% of all revenue activity is focused on the Design category. Of those interviewed, all offered Advise services as part of their pre-sales activity (not as a revenue category). Of the partners interviewed none indicated a focus or desire to leverage Adopt services.

⁴Ibid

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Summary

The study highlights the breadth and depth of the AWS partner ecosystem. AWS has a complex mix of channel partners globally, which can be found across all four categories. Channel partners range from highly focused organizations with deep expertise in a small number of areas to those that have the breadth of services and solutions alongside a substantial professional services organization.

AWS channel partners can reach a multiplier of US\$6.40 per US\$1 of AWS sold. Partners that achieve this multiplier have a breadth of services and support for their customers across the entire cloud lifecycle. Canalys identified differences across partner types and cloud maturity, which impacts the multiplier they can achieve.

Over 60% of the multiplier is realized in the first year of the project, but for the most successful partners, this creates the foundation for future revenue opportunities throughout the customer lifecycle. Partners that can develop new opportunities within the same customer drive significant growth with their AWS business. For example, effective advisory and consulting services establish credibility and trust with customers, which are vital to generate ongoing managed services business. The greatest opportunity is within the Build phase, with successful partners here having broad relationships across the wider technology partner ecosystem. More than three quarters of partners indicated that their customers increased their cloud consumption after the first year of an initial project.

As partners look to expand their offerings and develop greater expertise, there is an opportunity for them to move across the ecosystem. Focused partners may choose to develop adjacent solutions and services to explore diversification of new revenue streams. They may also develop new cross-partner relationships with other Focused partners to extend their offerings. Multi-category partners looking to move toward the Progressive category will need to build scale (especially within their managed services practices) to help drive that growth. These partners can look to the relevant AWS programs that help enable partners to maximize their breadth and depth. Progressive partners moving to the Expert category need to develop business transformation skills to help customers with their digital transformation journeys. Partners can leverage AWS co-selling to help differentiate their organizations.

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