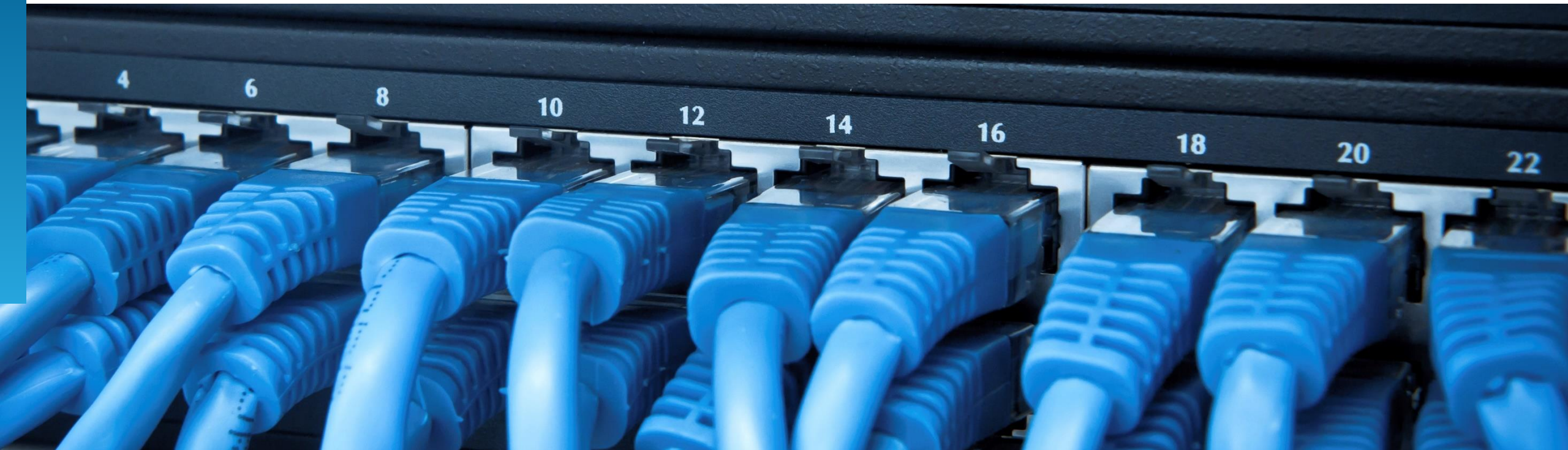


# Amazon Web Services (AWS) Services State of the Market 2023: Enabling Enterprise Transformation with AWS

August 2023: Complimentary Abstract / Table of Contents



# Our research offerings

This report is included in the following research program(s):

[Cloud and Infrastructure, Amazon Web Services \(AWS\)](#)

- ▶ Amazon Web Services (AWS)
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## Introduction

Enterprises are choosing AWS to drive innovation, enhance agility, and optimize their operations. AWS is differentiating itself through its comprehensive suite of services that cater to a wide range of industry-specific needs and portfolio segments. Enterprise traction for AWS' contact center transformation services, IaaS segment, data services, complex workload transformation services, and differentiated technology vendor partnerships is helping it hold its position as the leading hyperscaler. However, enterprises grapple with some key challenges such as commercial inflexibility and complex contracting and should leverage key enabling factors of solutioning, contracting, talent, and AWS Marketplace to truly reap the benefits of their investments on AWS.

In this report, we present an outlook on the current state of the market of global AWS services market trends and growth. The analysis is based on Everest Group's annual RFI process, interactions with leading cloud service providers, client reference checks, enterprise interactions, and ongoing analysis of the AWS services market. This report looks at:

- AWS services adoption trends and market dynamics
- AWS services deal characteristics
- Top differentiators driving enterprise traction for AWS
- Enablers for transformation on AWS

### Scope of this report



**Geography**  
Global



**Industry**  
All industries



**Services**  
AWS services

## Overview and abbreviated summary of key messages

This report provides an overview of the AWS services market, including trends, demand drivers, and key enterprise concerns. It also outlines the characteristics of AWS services engagement and deep-dives into top enterprise demands, along with key enablers to gain most out of enterprise AWS adoption.

Some of the findings in this report, among others, are:

### Global AWS services market

- Enterprise adoption of AWS is witnessing a shift in focus towards value realization, hybrid cloud adoption, and Generative AI leverage
- North America and Europe are the largest consumers of AWS services, driven by enterprises' cloud modernization and optimization focus
- Enterprise demand for infrastructure-focused and platform-focused services is expected to rise with continued AWS adoption

### AWS services engagement characteristics

- Cloud modernization and managed services account for over half of the AWS services spend, as enterprises are maturing in their cloud journey
- Enterprises highlight the subpar talent management capabilities, absence of a strategic partnership, and lack of value being delivered as critical challenges during AWS services engagements

### Gaining the most out of your AWS adoption

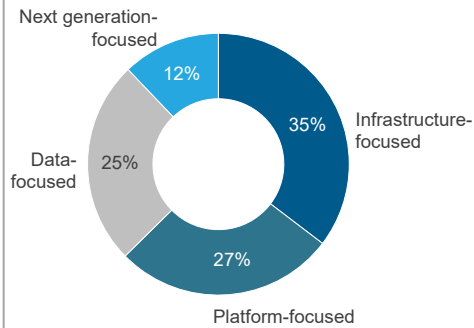
- Enterprises' top demands on AWS align primarily with its appetite for innovation and strength in IaaS
- Enterprises' differentiated demand themes require focused enablers for effective adoption of AWS



# This study offers three distinct chapters providing a deep dive into key aspects of cloud and infrastructure services market; below are four charts to illustrate the depth of the report

## Global AWS services market size, growth rate, and adoption drivers

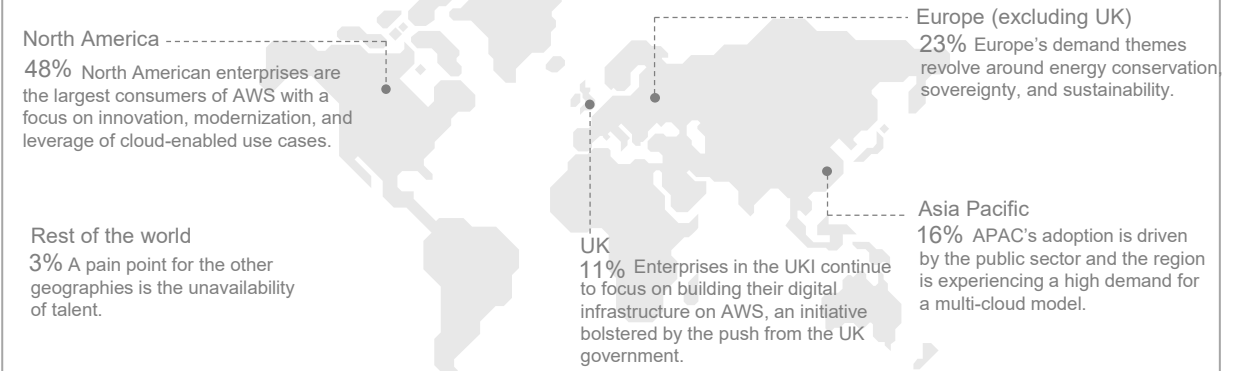
**AWS services portfolio segment-wise market split 2022; 100% = \$50 million**



- Infrastructure-focused**  
This segment continues to be a strength for AWS with data center-exit and infrastructure modernization use cases driving the demand. High Performance Computing (HPC) and FinOps demand themes are being addressed more
- Platform-focused**  
AWS' strength in Kubernetes and containerization along with its cloud-native development capabilities is helping AWS gain traction for its platform-focused capabilities. Application and workloads modernization capabilities continue to drive the demand for AWS
- Data-focused**  
Demand across this segment is being driven by data warehouse and data lake modernization. Capabilities around cloud-native data platforms along with its coverage of data analytics use cases are driving traction for AWS
- Next-generation-focused**  
With disruptive technologies, such as Generative AI taking over the market, enterprises are increasingly looking for next-generation-focused capabilities. Digital twins and confidential computing are also driving the demand for AWS

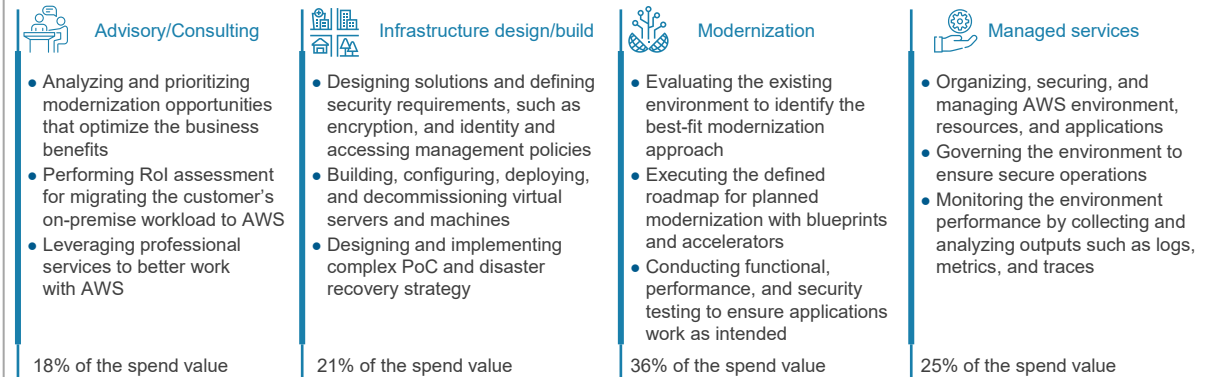
## AWS services market size – by geography

**Global AWS cloud services market size – by geography 2022; 100% = \$50 million**



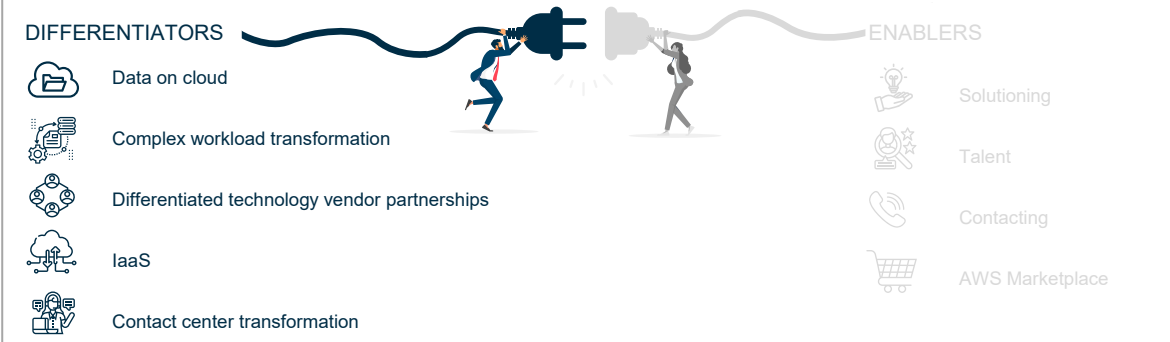
## AWS services market split across value chain

**AWS services market split across value chain<sup>1</sup> 2022; 100% = \$50 million**



## Top differentiators on AWS

**Enterprise transformation with AWS**  
A cloud transformation journey on AWS is an amalgamation of choosing the right set of services and products from AWS based on their differentiated market impact and leveraging key enablers to circumvent roadblocks.



# Research calendar

## Cloud and Infrastructure Services

■ Published
 ■ Planned
 ■ Current release

Reports title	Release date
Network Transformation Services Provider Compendium – Communication Service Providers (CSPs) 2023	January 2023
Cloud Revolution in Banking: Imperative Role of Hyperscalers	July 2023
Navigating the Cloudscape: Unveiling Enterprise Adoption of Google Cloud Services	July 2023
Cloud Services PEAK Matrix® Assessment 2023 – North America	July 2023
<b>Amazon Web Services (AWS) Services State of the Market 2023: Enabling Enterprise Transformation with AWS</b>	<b>August 2023</b>
Microsoft Azure Services State of the Market 2023	Q3 2023
Cloud Services PEAK Matrix® Assessment 2023 – Europe	Q3 2023
Cloud Services Provider Compendium 2023 – North America	Q3 2023
Cloud Services Provider Compendium 2023 – Europe	Q3 2023
Network Transformation and Managed Services (Focus on SIs) PEAK Matrix® Assessment 2023	Q3 2023
Network Transformation and Managed Services (Focus on SIs) Provider Compendium 2023	Q3 2023
FinOps: A Critical element of enabling Cloud for Value (CfV)	Q3 2023
Cloud Security Services PEAK Matrix® Assessment 2023	Q4 2023
Cloud Security Services Compendium 2023	Q4 2023
Public Cloud (AWS, Azure, GCP) Services PEAK Matrix® Assessment 2023 – Specialist providers	Q4 2023

Note: [Click](#) to see a list of all of our published Cloud and Infrastructure Services reports



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