# *iSG Provider Lens™

## 2021

## AWS Ecosystem Partners 2021

### imagine your future®

ISG (Information Services Group; NASDAQ: III) is a leading global market research and consulting company in the information technology segment. As a trusted business partner to more than 700 customers, including 75 of the world's 100 largest companies, ISG helps companies, public organizations, and service and technology providers to achieve operational excellence and faster growth. The company specializes in digital transformation services, including automation, cloud and data analysis, sourcing consulting, managed governance and risk services, network operations services, technology strategy and operations design, change management, market research and analysis of new technologies. Founded in 2006, ISG, based in Stamford, Connecticut, employs over 1,300 experts who are active in more than 20 countries. ISG's global team is renowned for its innovative thinking, valued voice in the market, in-depth industry and technology expertise, and world's leading market research and analysis resources based on the industry's most extensive market data.

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# Definition

Amazon Web Services (AWS) continues to grow its presence and influence as a global provider of IT-as-a-Service. As a result, its AWS Partner Network (APN) is expanding significantly, as providers of technologies and services leverage AWS to develop and deliver an expanding array of enterprise IT and business services. Primarily, AWS certified partners help customers find strategies for fast, secure and sustainable public cloud solution deployments. Ecosystem partners address all types of customer queries related to architecture, implementation, migration and the professional operation of XaaS solutions based on AWS infrastructures and platforms.

ISG reports strong demand for digital transformation engagements, which, in turn, is driving global contracts for cloud products and services, including those for Infrastructure-as-a-Service (IaaS) and Platform-as-a-Service (PaaS). According to the 1Q21 ISG Index™, the global market has grown 11 percent in combined market annual contract value (ACV) to reach its current value of US$17.1 billion year-over-year, while the as-a-service ACV has increased by 17.2 percent to reach US$9.9 billion in the same period. Concurrently, the IaaS market grew by 18 percent to reach US$7.2 billion, while the SaaS market grew by 7 percent to reach US$2.7 billion. The ISG Provider Lens AWS Ecosystem Partners 2021 study analyzes the AWS partner landscape in Australia, Brazil, Germany and the U.S. in terms of their portfolio attractiveness and competitive strength in each market. ISG consultants and user clients can use this information to evaluate current supplier relationships and the potential for establishing new relationships, with objective insights.

This ISG Provider Lens study offers IT decision-makers the following:

- Transparency on the strengths and weaknesses of relevant providers

- Differentiated positioning of providers by important segments according to market segments

- Perspective on the markets in the Australia, Brazil, Germany, and the U.S.

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

# Quadrant Research

Our AWS Ecosystem 2021 study examines and positions providers in the following six quadrants based on their AWS competencies, solution types and related services:

Simplified illustration

| AWS - Ecosystem Partners 2021 | |
|---|---|
| AWS Managed Services | AWS SAP workloads |
| AWS Data analytics and machine learning | AWS Internet of Things (IoT) Services |
| AWS Migration Services | AWS Consulting Services |

Source: ISG 2021

# AWS Managed Services

In addition to IaaS and PaaS hyperscale platforms for public clouds from third-party service providers, managed services providers (MSPs) offer professional and managed services that include orchestration, provisioning, real-time and predictive analysis, monitoring and operational management of a customer's public cloud and multicloud environment. The aim is to maximize the work performance in the cloud, reduce costs and ensure compliance and security. Typically, specially developed or licensed cloud management platforms and tools are used to provide customers with the highest level of automation and the necessary capacity utilization and cost transparency over the managed cloud resource pool, including independent management.

Evaluation and eligibility criteria for this quadrant include the following:

- AWS Managed Service Program certification
- Expertise in autonomous machine learning-driven orchestration and configuration management of platforms/systems
- Experience in designing, building, and managing public and multi-cloud environments
- Ability to support big data and multiple database and analytics     solutions
- Experience in DevOps engineering
- Scope and availability of security resources and services
- Experience in solutions architecture
- Experience in server migration experience and availability of resources

# AWS SAP Workloads

This quadrant assesses the service providers that offer provisioning and ongoing operation forSAP systems such as SAP HANA or platforms on AWS and their central management. These service providers not only help implement AWS as a sheer hardware replacement or hardware extension (IaaS) in the customer companies, but also optimize, design and develop new processes and business flows as part of platform management through a combination of their own services, SAP services and AWS. This group of professional IT service providers is, thus, responsible for implementing and ensuring subsequent operation.

Service providers in this category need AWS-provided certifications plus SAP certification and/or partnership to stay current with SAP products, technologies, licensing and platform changes, and their effects on customer IT landscapes, applications, aand business processes.

Evaluation and eligibility criteria for this quadrant include the following:

- Breadth and depth of service portfolio with regard to the implementation, customization, provisioning, and support of SAP application and services
- Number and locations of staff resources for SAP offerings on AWS
- Awareness and number of customers of the service provider for SAP applications and services provisioning and support on AWS
- Number and reputation of references for provisioning and supporting SAP applications and services on AWS
- Experience and number of relevant certifications, including AWS-certified SAP Competency
- Pricing model suitability, maturity and adaptability Dedicated resources (including business units) around DevOps, automation and cloud-native application design

# AWS Data analytics and machine learning

This quadrant includes providers of two increasingly intertwined sets of IT capabilities – the ability to collect and analyze a widening array of data types and amounts and machine learning capabilities that enable faster and more efficient analysis of various types of data 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 providers use an adaptive portfolio of tools and technologies to develop and deliver solutions.

Evaluation and eligibility criteria for this quadrant include the following:

- Scope and use of relevant tools and technologies (e.g., Hadoop, NoSQL, Spark, MXNet and TensorFlow)
- Service/solution integration capabilities and offerings
- Scope and availability of enabling programs for customer success (e.g., planning workshops and training)
- Availability, experience, and certification of analytics, data science and machine learning experts
- AWS-focused offering roadmap and innovations (current and planned)
- Number and reputation of references with regard to ML and analytics services and solutions on AWS
- Suitability, maturity and adaptablity of pricing model – go-to-market strategy
- Breadth and depth of partner/channel relationships

# AWS Internet of Things (IoT) Services

IoT specialist partners support the use of applications for monitoring, managing and controlling connected devices based on AWS solutions (device software and/or control services). The essential functions include remote data collection from connected devices, secure connection between devices, sensor management and integration with third-party systems. IoT platforms serve as the main interface for device communication (measurement, control and regulation), data management tasks (storage, integration, analysis and visualization of device data), device management (security and functional software updates on devices) and process management. Providers' ability to enable and extend edge computing for IoT environments is crucial as enterprise IoT scenarios expand and become more business critical.

Evaluation and eligibility criteria for this quadrant include the following:

- Availability, experience, and certification of staff provisioning and supporting AWS IoT offerings
- Use of relevant tools, technologies and partners in AWS IoT solutions/services provision
- Support for edge computing scenarios
- Scope and availability of enabling programs for customer IoT success (e.g., planning workshops and training)
- AWS-focused IoT offering roadmap and innovations (current and planned)
- Awareness and number of customers with regard to IoT offerings on AWS
- Number and reputation of references with regard to IoT services and solutions on AWS
- Suitability, maturity and adaptablity of pricing model
- Breadth and depth of partner/channel relationships
- Scope of security tools, technology and services utilized

## AWS Migration Services

The AWS provider partners in this quadrant offer technology, products or services that support workload operation and migration. Top providers in this quadrant excel in automated test, migration and deployment, and typically work closely with clients for needs and 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 competences.

Evaluation and eligibility criteria for this quadrant include the following:

- Availability, experience, and certification of staff supporting and delivering services
- Scope and use of relevant tools and technologies (e.g., Kubernetes, Docker, Istio and Envoy)
- Cloud Native Computing Foundation (CNCF) participation and support
- Scope of business-critical applications migrated for customers using AWS
- Platform/PaaS and channel partnerships
- Scope and availability of enabling programs for customer success (e.g., planning workshops and training)
- AWS-focused container offering roadmap and innovations (current and planned)
- Scope of security tools, technology and services utilized
- Number and reputation of references with regard to containerization and migration services and solutions on AWS
- Suitability, maturity and adaptability of pricing model

## AWS Consulting Services

Consulting partners comprise the single-largest group in the AWS Partner Network population. The 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. 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 for clients through their consulting services.

Evaluation and eligibility criteria for this quadrant include the following:

- Availability, experience, and certification of staff supporting and delivering relevant offerings
- Scope of AWS Competency and Service Delivery offerings and certifications
- AWS-focused consulting roadmap and innovations (current and planned)
- Demonstrate client value through business outcomes or other measurable improvement
- Scope and availability of enabling programs for customer success (e.g., planning workshops and training)
- Scope of security tools, technology and services utilized
- Number and reputation of references with regard to services and solutions on AWS
- Suitability, maturity and adaptability of pricing model

# Quadrants by Region

| Quadrant | Australia | Brazil | Germany | U.S. |
|---|---|---|---|---|
| AWS Managed Services | √ | √ | √ | √ |
| AWS SAP workloads | √ | √ | √ | √ |
| AWS Data analytics and machine learning | √ | √ | √ | √ |
| AWS Internet of Things (IoT) Services | √ | √ | √ | √ |
| AWS Migration Services | √ | √ | √ | √ |
| AWS Consulting Services | √ | √ | √ | √ |

# Schedule

The research phase with surveys, evaluation, analysis and validation extends from **July to November 2021.** Selected results shall be presented to the media in **December 2021.**

We have created a questionnaire for the manufacturer survey, which you can obtain on request. We look forward to your participation.

| Milestone | Start | End |
|---|---|---|
| Launch | 27th July 2021 | |
| Survey Phase | 27th July 2021 | 23rd August 2021 |
| Sneak Preview | November 2021 | |
| Press Release | December 2021 | |

Please refer to the link to view/download the ISG Provider Lens™ 2021 research agenda:

**Access to Online Portal**

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

**Research production disclaimer:**

ISG collects data for the purpose of research and the creation of service provider profiles. The profiles and supporting data are used by ISG consultants to make recommendations and inform their customers about the experience and qualifications of the respective outsourcing project service providers identified in advance by the customers.

This data is collected also as part of the ISG FutureSource process and Candidate Provider Qualification (CPQ) process. ISG leaves it open to use the collected data of certain countries or regions purely for the informational content of the consultants and therefore not for the preparation of ISG Provider Lens reports.

These decisions are made based on the quality and completeness of the data received directly from the service providers and the expertise of the analysts for the respective countries or regions.

The submitted information may also be used for individual research projects or for briefing notes written by senior analysts.

# Partial list of companies invited for the survey

**Are you on the list or do you see your company as a relevant provider that is missing in the list?** Then feel free to contact us to ensure your active participation in the research phase.

*um

1&1 Internet AG

1Strategy

2nd Watch

47lining

4ALL

7BusinessConsulting AG

8K Miles

abas Software AG

Accenture

acmeo cloud-distribution GmbH & Co. KG

ACP

Actindo GmbH

Adobe Systems GmbH

Afonza

Ahead

Alexander Thamm GmbH

AllCloud

Alluxio, Inc.

Alteryx

Altran

AppDynamics

Apps Associates

Arvato

Atos

Avnet Technology Solutions GmbH

BAE Systems

Baytech Consulting

Bechtle AG

Beck et al. Services GmbH

BMC Software GmbH

Booz Allen Hamilton

Brillio

BT (Germany) GmbH & Co. oHG

Cambridge Technology Inc.

CANCOM

Capgemini

Cascadeo

CenturyLink

CGI Group

Cisco

Citrix

Claranet

Clearscale

CloudHesive

Cloudreach

Codecentric

Cognizant Technology Solutions

Computacenter AG & Co. oHG

Connectria Hosting

Controlware GmbH

Corexpert

Cornerstone OnDemand Inc.

Cortado Mobile Solutions GmbH

Crayon

d.velop

DARZ GmbH

DATAGROUP SE

Datameer

Dell GmbH

Deloitte

DevOpsGroup

Dimension Data

DLT Solutions/TechData

DRACOON GMBH

DXC Technology

Dynatrace

Eagledream

ECS

ELAXY Business Solution & Services GmbH & Co. KG

EMC

Empolis

Ensono

Entaracloud

EPAM

Equinix

Essextec

Extreme Networks

Fluid Operations AG

Flux7, an NTT DATA Company

fme AG

F-Secure GmbH

Fujitsu

GBS Europa GmbH

General Dynamics Information Technology

Giant Swarm

HashedIn

HATech

HCL Technologies

Hewlett Packard Enterprise

Hexaware Technologies

Hitachi Vantara

Hornetsecurity

IBM

Infosys

Ingram Micro Distribution GmbH

Innovative Solutions

Interxion Deutschland GmbH

Iridium

ITAC Software AG

itelligence AG

Jelecos

Juniper Networks Inc.

Konica Minolta Business Solutions Deutschland GmbH

Kreuzwerker

Lemongrass Consulting

Logicalis

Logicworks

Lufthansa Systems GmbH & Co. KG

Materna GmbH

metafinanz Informationssysteme GmbH

Microstrategy

Mindtree

Mission Cloud

MobileIron

Mobiquity, a Hexaware company

Mphasis stelligent

Msg  services

mVISE AG

Navisite

nClouds

NetApp Deutschland GmbH

Netlution GmbH

Neudesic

Nordcloud

NTT Data

Onica

OPITZ CONSULTING

Pariveda Solutions

PlusServer

PowerupCloudTechnologies

Proservia GmbH

PTC

PwC

QLogic Germany GmbH

q.beyondRackspace

Rapyder

Redriver

Reply

retarus GmbH

RightBrain Networks

RiverMeadow

Sage

Salesforce

SAS

Saviynt Inc

ScanPlus GmbH

Scheer GmbH

Searce

Sirius Computer Solutions

Six Nines

Slalom

Smartronix

Softchoice

SoftServe Inc

Software AG

solutions direkt GmbH (direkt gruppe)

Sonda

Sopra Steria GmbH

Spirit/21

Splunk

Sprinklr

Stackarmor

Storm Reply

SugarCRM

Sumologic

Sungard Availability Services

Synchronet

Syntax Systems GmbH & Co. KG

TCS

Tech Data

Tech Mahindra

TechnoSIP

tecRacer

To The New

TOAS

TREND MICRO

Trianz

T-Systems International

Unisys

United Planet GmbH

Velocity Technology Solutions

VINCI Energies Germany

Virtusa

VMware

WatchGuard Technologies GmbH

Whitesource

Wintellect

Wipro

WNS

YASH Technologies Inc.

ZOI

Zuggand

# ISG Star of Excellence ™ – Call for nominations

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

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

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

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

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

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply. Here is the email address: ISG.star@isg-one.com

# Contacts for this study

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**Do you need further information?**

If you have any questions, please do not hesitate to contact us at isglens@isg-one.com.