ISG Provider Lens™

2022

AWS Ecosystem Partners

imagine your future®

ISG (Information Services Group) (NASDAQ: III) is a leading global technology research and advisory firm. A trusted business partner to more than 700 clients, including 75 of the top 100 enterprises in the world, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; technology strategy and operations design; change management; market intelligence and technology research and analysis. Founded in 2006, and based in Stamford, Connecticut, ISG employs more than 1,300 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.

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Definition

In 2022, AWS has been introducing major innovations in services related to cloud, data analytics and machine learning alongside the general mission that is all about supporting clients within their sustainability transformation, digital sovereignty and innovation power. Since public cloud usage tends to outstrip traditional infrastructures and therefore known techniques for operations, this mission depends on sophisticated CloudOps that cover cloud security and governance, resource and cost optimization, event-based or intelligent provisioning of resources, and service availability across delivery models (including the edge), which implies the need for maximum interoperability of services.

Hence AWS has launched several engagement models and options for its strategic service provider partners to train and upskill their cloud workforce in leveraging the latest platform innovations through its AWS Partner Network (APN). The partnerships have matured in terms of AWS cloud opportunities including migration, implementation and integration, data and AI, IoT services, SAP services and managed services.

Some of the main AWS innovations that have contributed to the growth and market for AWS, including APN and its end-user enterprise clients, include new high-performance EC2 C7g instances with AWS Gravitron3 processors, new locations for AWS DataSync, AppSync simplified interfaces for Pub/Sub APIs, etc.

For cloud managed services and operations governance, service augmentations such as FedRAMP-compliant Kinesis Data Analytics bring in industry-specific compliance requirements around public cloud adoption. On the cloud security and data privacy protection front, Amazon Comprehend can detect and redact several new personally identifiable information (PII) types across the U.S., U.K., India and Canada.

AWS has also made major contributions in the data, AI and machine learning spaces through additional offerings and enhancements beyond governance, data privacy and protection issues.

According to the 1Q22 ISG Index™, the global managed services grew by 13 percent to reach US$8.6 billion, while the as-a-service market grew by 43 percent to reach US$15.6 billion.

For customers and prospective customers of AWS services to keep up with this pace of innovation and make a meaningful entry into AWS services in the first place, AWS partners play a critical role. It is this important market of AWS partners, or the services they provide, that this study examines to provide transparency on six selected topics for five countries.

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

- Transparency on the strengths and weaknesses of relevant providers

- Differentiated positioning of providers based on important market segments

- Perspective on markets in Australia, Brazil, France, 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.

Quadrants Research

The "AWS Ecosystem 2022" 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 2022	
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 2022

AWS Consulting Services

Consulting partners form the single-largest group in the AWS Partner Network population. 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 support. They must not only offer critical technologies, architecture, security and industry-specific solutions, but also demonstrate business value to be delivered through consulting services.

Evaluation and eligibility criteria for this quadrant include the following:

- Availability, experience and certification of the 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 (for example, planning workshops and training)
- Scope of security tools, technology and services utilized
- Number and reputation of references for services and solutions on AWS
- Suitability, maturity and adaptability of pricing model

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, 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, developed or licensed cloud management platforms and tools are used to provide customers with the highest level of automation and the necessary transparency over the managed cloud resource pool in terms of capacity utilization and costs, 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 solutions and analytics

- 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 Migration Services

The AWS provider partners in this quadrant offer technology, products or services that support workload operation and migration. Providers participating in this quadrant should excel in automated testing, migration and deployment, and typically work closely with clients over requirements such as readiness assessments and continuous change management. Typical provider 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 for their special migration competence.

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 (for example, Kubernetes, Docker, Istio and Envoy)

- Participation and support in the Cloud Native Computing Foundation (CNCF)

- Scope of business-critical applications migrated for customers using AWS

- Platform/PaaS and channel partnerships

- Scope and availability of enabling programs for customer success (for example, 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 for containerization and migration services and solutions on AWS

- Suitability, maturity and adaptability of pricing model

AWS SAP Workloads

This quadrant assesses service providers that enable the provision and ongoing operation of SAP 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. They 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 select group of professional IT service providers is thus responsible for implementing and ensuring subsequent operation.

Service providers in this category not only need AWS-provided certifications, but also SAP certifications and/or partnerships to stay current with SAP products, technologies, licensing and platform changes. They should also demonstrate their effects on customer IT landscapes, applications and business processes.

Evaluation and eligibility criteria for this quadrant include the following:

- Breadth and depth of service portfolio related to the implementation, customization, provisioning and support of SAP application and services

- Number and locations of resources to support 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 SAP applications, including services provisioning and support 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 covers providers of two increasingly intertwined sets of IT capabilities – the ability to collect and analyze a widening array of data types and amounts, and ability to demonstrate 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 of them 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 (for example, Hadoop, NoSQL, Spark, MXNet and TensorFlow)

- Service/solution integration capabilities and offerings

- Scope and availability of enabling programs for customer success (for example, planning workshops and training)

- Availability, experience and certification of analytics, data science and machine learning experts

- Provide an AWS-focused offering roadmap and innovations (current and planned)

- Number and reputation of references for machine learning and analytics services and solutions on AWS

- Suitability, maturity and adaptability of pricing model with a go-to-market strategy

- Breadth and depth of partner and 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 (device data storage, integration, analysis and visualization), device management (security and functional software updates on devices) and process management. The ability to enable and extend edge computing for IoT environments is crucial as enterprise IoT scenarios are expanding and becoming more business critical.

Evaluation and eligibility criteria for this quadrant include the following:

- Availability, experience and certification of the staff provisioning and supporting AWS IoT offerings

- Use of relevant tools, technologies and partners for AWS IoT solutions/services provision

- Support for edge computing scenarios

- Scope and availability of enabling programs for customer IoT success (for example, planning workshops and training)

- Deliver an AWS-focused IoT offering roadmap and innovations (current and planned)

- Market awareness and number of customers with regards to IoT offerings on AWS

- Number and reputation of references for IoT services and solutions on AWS

- Pricing model suitability, maturity and adaptability

- Breadth and depth of partner/channel relationships

- Scope of security tools, technology and services utilized

Quadrants by Regions

This inaugural ISG Provider Lens™ study on AWS Ecosystem Partners includes the following regions:

Quadrant	Australia	Brazil	France	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 **June to August 2022**. The results will be presented to the media in **December 2022**.

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

Milestones	Start	End
Survey (questionnaire)	June 15, 2022	July 20, 2022
Sneak previews	October 13, 2022	
Content provision	December 2022	
Press release	December 2022	

Please refer to the link to view/download the ISG Provider Lens™ 2022 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 FutureSourceTM 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.

ISG Star of Excellence™ – Call for nominations

The Star of Excellence is an independent recognition of excellent service delivery based on the Voice of the Customer concept. 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

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	CGI Group	Empolis
1Strategy	Cisco	Ensono
2nd Watch	Claranet	EPAM
8K Miles	ClearScale	Equinix
Accenture	CloudHesive	Essextec
ACP	Cloudreach	Extreme Networks
Alexander Thamm	Cognizant Technology Solutions	fme
AllCloud	Computacenter	Fujitsu
Arvato	Controlware	General Dynamics Information Technology
Atos	Crayon	Giant Swarm
Bechtle	DATAGROUP	HATech
Brillio	Deloitte	HCL Technologies
BT	DLT Solutions/TechData	Hewlett Packard Enterprise
Cambridge Technology	DRACOON	Hexaware Technologies
CANCOM	DXC Technology	Hitachi Vantara
Capgemini	Dynatrace	IBM
Cascadeo	Eagledream	Infosys

Ingram Micro Distribution	NTT Data	Sopra Steria
Innovative Solutions	Onica	SPIRIT/21
Kreuzwerker	OPITZ CONSULTING	Splunk
Kyndryl	Pariveda Solutions	Synchronet
Lemongrass Consulting	plusserver	Syntax Systems
Logicalis	Proservia	TCS
Logicworks	PwC	Tech Data
LTI	Rackspace Technology	Tech Mahindra
Lumen	Reply	tecRacer
Materna	Scheer	TO THE NEW
Mindtree	Searce	TAOS
Mission Cloud	Six Nines	Trend Micro
Mphasis	Slalom	Trianz
Msg services	Smartronix	T-Systems International
mVISE	Softchoice	Unisys
Navisite	SoftServe	Virtusa
nClouds	Software AG	Wipro
Netlution	solutions direkt (direkt gruppe)	YASH Technologies
Nordcloud	Sonda	Zensar

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