

AWS - Ecosystem Partners

U.S. 2021

Quadrant Report



A research report
comparing provider
strengths, challenges
and competitive
differentiators

Customized report courtesy of:



December 2021

About this Report

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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 September 2021, 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.

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EXECUTIVE SUMMARY

In the past two quarters, industries have normalized and formalized their technology strategies around cloud adoption as a top priority after the COVID-19 pandemic. New cloud strategies, models and methodologies are already operational to accommodate swiftly changing market demands. Recent adoption trends around multi-cloud use, verticalization of solutions and infusing intelligence and analytics were spotted in our comprehensive discussion with technology companies, service providers and consulting firms. The past 18 months can be equally segmented into three phases: adopt, adapt and accelerate. Adopting a preferred technology service provider was a step toward evaluating and onboarding the technology competencies as part of the business strategy. Adaptation was included in the transition and migration approach from the traditional infrastructure and application setup to the new virtualized tenancy. The accelerated phase is where the relationship between the technology service provider (TSP) and the managed service provider (MSP) is nurtured to build solutions and components at pace.

The market and hyperscalers have responded with equal traction and pace to work collectively on virtualizing the infrastructure operations. Digital and business transformation themes are being built on a cloud foundation, a quintessential and enabling element for AI, automation, data engineering and analytics capabilities. Increasing technology adoption demand spikes the need for skilled resources to support and manage

large-scale cloud transformation programs. AWS is aggressively promoting and sponsoring its platform certifications to build a talent pool and competency levels. Simultaneously, enterprises have already started to build teams that are aligned with all major hyperscalers, with AWS being the most preferred choice by the enterprise community.

In the post-pandemic world, hyperscalers predominantly focused on accelerating the development of technology-agnostic solutions and products. AWS has launched programs and initiatives to invite talent and expertise from various industries to develop technology-wide offerings. The natural response to growing demand is to scale the product portfolio, envisioning the vast array of customers. On the other hand, the inorganic approach is to constantly look for mergers and acquisitions of firms already producing exceptional solutions. AWS has been vigilant in acting on both organic and inorganic pathways to gain a competitive advantage.

AWS Managed Services

The AWS managed services market is mature and fast-growing, with increasing competition. This has served as the basis for most new entrants. However, the competition is getting intense, with patented solutions and cloud operations frameworks, integrated operations value chains across CloudOps and FinOps to DevSecOps, MLOps

and DataOps, pre-trained industry-specific “cloud-in-a-box” microservices bundles and accelerators. The race for the cloud-relevant and agile talent pool that is ready to upskill and reuse knowledge at the same time is rapidly becoming intense. The key focus areas in the intellectual properties (IPs) and frameworks have been around autonomous AI- and machine learning-driven cloud operations and orchestration (CloudOps), centralized multi-tenancy platforms, performance analytics and financial management of cloud operations (FinOps). The leading players are infusing automation into every phase of cloud management, from monitoring to optimization. The MSPs are investing in building diverse product lines and skillsets that cover the business space. The roles and expectations for MSPs are proliferating. They are not just limited to basic support and maintenance but are expected to contribute as E2E cloud operations partners focusing on governance, risk and compliance (GRC) attributes.

AWS SAP Workloads

SAP is one of the most preferred ERP platforms and is closely integrated with AWS. Every major platform is driving customers to become cloud-native, and SAP is one of them. With business services being critical, almost all business applications are going through modernization. MSPs are compelled to build capabilities to participate in SAP AWS integration programs. AWS has a wide array of SAP-certified assets and solutions to integrate with almost every module and SAP function. Providers are building function-specific and industry-focused migration toolkits and offering provisioning and operation

for SAP systems such as SAP HANA or platforms on AWS and their management. Use cases combining AWS data lakes and big data tech stacks and cloud storages such as S3, combined with the predictive data analytics capabilities from S/4HANA, are becoming mainstream in all strategic enterprise data value realization and transformation programs. There is growing demand for implementing AWS and optimizing processes and business flows as part of platform management using a combination of their custom services, SAP and AWS.

AWS Data Analytics and Machine Learning

For enterprise-wide transitions, regardless of where they are conducted from, data is the most valuable asset. Machine learning enables faster and more efficient analysis of various forms of data within and across an expanding variety of systems and applications. AWS extends its data analytics and machine learning services to its ecosystem to openly connect and leverage the capabilities that can be integrated with proprietary systems. Leveraging AWS SageMaker plus Lex and Poly, along with their augmented natural language processing (NLP) capabilities and Hugging Face has helped increase data science adoption, including big data and advanced analytics. They are being used to build data platforms, linguistic AI and visualization systems. More businesses are realizing the importance of incorporating machine learning and AI into business applications to analyze and learn from the vast amount of data accessible. The target is to provide insight into untapped areas and help teams make educated process-related decisions in processes such as migration, directly impacting efficiency, economics and effectiveness.

AWS Internet of Things (IoT Services)

IoT has gained traction across industries, as it helps capture data that was impossible to get before. Most providers are working toward building IoT accelerators that combine with AWS IoT services. AWS IoT solutions cover many technological components, including sensors, devices, networks, security and management systems, allowing providers and clients to extract many types of data. This builds a data pool, wherein IoT analytics is applied to achieve reliability, performance and productivity data directly, leading to cost benefits. The coverage of AWS IoT spans from device software, core and connectivity to futuristic networks, 5G and control services. This helps provide applications and interfaces to connect AWS IoT devices without provisioning a server. For various types of devices from diverse consumer, commercial and industrial sectors, device management solutions help register, monitor and configure devices easily. Enterprise clients are seeking such one-stop solutions that enhance the experience, improve performance and deliver value.

AWS Migration Services

The digital-first approach is emerging in the market. However, many large organizations with complex systems cannot react quickly to such changing business contexts. This prompted the push to rationalize and modernize existing enterprise software and infrastructures, pointing toward cloud migration. Transitioning data, services and systems is a critical and complex task that needs careful calibration of activities. This space has enormous potential to improve using emerging technologies. The hybrid cloud strategy

introduces a need for dexterity in managing data and system migration, and this is an opportunity for the MSPs to claim. MSPs have built robust platforms to design, define, conduct and support lift-and-shift activities. Products leveraged by Amazon can help track the application migration process, gather specifications and performance data, and migrate from other hyperscalers to AWS. Providers have proprietary cross-platform solutions to integrate with AWS and run custom and open-scale migration.

AWS Consulting Services

Digital business transformation is leading enterprise agendas, and the scope of technology inclusion is expanding. In-depth technology and business process consulting services, such as technology, management and implementation consulting guidance, can create a difference in the organizational outputs and outcomes. By design, AWS consulting and advising services are strategically distinct, with an explicit focus on establishing state-of-the-art accelerators and developing industry-specific solutions and other service offers and packages. Consulting partners have built a comprehensive and modular approach to the AWS consulting space, catering to a wide range of requirements. Consulting discovers, evaluates and rationalizes various aspects, from customer journey to product recommendations. As this is a vast space and business case, roadmaps and delivery models guide the business strategy. Consulting firms have also developed their global business services faculty by providing all expertise in one offering. A combination of industry specialists, technologies and management experts is an effective approach to consider.

Introduction

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

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 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 \$17.1 billion year-over-

Definition (cont.)

year, while the as-a-service ACV has increased by 17.2 percent to reach \$9.9 billion during the same period. Concurrently, the IaaS market grew by 18 percent to reach \$7.2 billion, while the SaaS market grew by 7 percent to reach \$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.

Scope of Report

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

Provider Classifications

The provider position reflects the suitability of IT providers 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, as well as 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:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between \$20 million and \$999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with 5,000 or more employees or revenue above \$1 billion, with activities worldwide and globally distributed decision-making structures.

Provider Classifications

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly.

Leader

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.

Product Challenger

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.

Market Challenger

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.

Contender

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 both products and services and a sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Provider Classifications (cont.)

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).

Rising Star

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

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 – Ecosystem Partners - Quadrant Provider Listing 1 of 4

| | 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 | ● Product Challenger |
| Accenture | ● Leader | ● Leader | ● Leader | ● Leader | ● Leader | ● Leader |
| Allcloud | ● Contender | ● Not in | ● Not in | ● Contender | ● Contender | ● Contender |
| Arvato Systems | ● Not in | ● Not in | ● Not in | ● Not in | ● Not in | ● Market Challenger |
| Asavie | ● Not in | ● Not in | ● Not in | ● Product Challenger | ● Not in | ● Not in |
| Atos | ● Product Challenger | ● Not in | ● Market Challenger | ● Not in | ● Market Challenger | ● Not in |
| Ayla Networks | ● Not in | ● Not in | ● Not in | ● Contender | ● Not in | ● Not in |
| Blue Sentry | ● Contender | ● Not in | ● Not in | ● Not in | ● Contender | ● Contender |
| Brillio | ● Not in | ● Not in | ● Not in | ● Not in | ● Contender | ● Contender |
| Cambridge Technology | ● Contender | ● Not in | ● Not in | ● Not in | ● Not in | ● Product Challenger |
| Capgemini | ● Leader | ● Leader | ● Leader | ● Leader | ● Leader | ● Leader |
| Cascadeo | ● Contender | ● Not in | ● Not in | ● Not in | ● Not in | ● Not in |
| Clearscale | ● Not in | ● Not in | ● Contender | ● Contender | ● Contender | ● Contender |
| Cloudhesive | ● Product Challenger | ● Not in | ● Not in | ● Not in | ● Not in | ● Not in |

AWS – Ecosystem Partners - Quadrant Provider Listing 2 of 4

| | AWS Managed Services | AWS SAP Workloads | AWS Data Analytics and Machine Learning | AWS Internet of Things (IoT) Services | AWS Migration Services | AWS Consulting Services |
|-----------------|----------------------|---------------------|---|---------------------------------------|------------------------|-------------------------|
| Cloudreach | ● Product Challenger | ● Not in | ● Not in | ● Not in | ● Rising Star | ● Contender |
| Cloudtivity | ● Not in | ● Not in | ● Contender | ● Not in | ● Not in | ● Product Challenger |
| Cognizant | ● Leader | ● Leader | ● Leader | ● Leader | ● Leader | ● Leader |
| Deloitte | ● Leader | ● Leader | ● Leader | ● Leader | ● Leader | ● Leader |
| DLT Solutions | ● Contender | ● Not in | ● Not in | ● Not in | ● Not in | ● Not in |
| DXC Technology | ● Product Challenger | ● Market Challenger | ● Not in | ● Leader | ● Market Challenger | ● Leader |
| Ensono | ● Product Challenger | ● Not in | ● Contender | ● Not in | ● Not in | ● Not in |
| EPAM | ● Not in | ● Not in | ● Not in | ● Market Challenger | ● Not in | ● Not in |
| Genpact | ● Not in | ● Not in | ● Leader | ● Not in | ● Not in | ● Not in |
| HCL | ● Leader | ● Leader | ● Not in | ● Leader | ● Leader | ● Leader |
| Hexaware | ● Not in | ● Not in | ● Not in | ● Leader | ● Not in | ● Leader |
| Hitachi Vantara | ● Market Challenger | ● Not in | ● Not in | ● Not in | ● Not in | ● Market Challenger |
| IBM | ● Market Challenger | ● Not in | ● Market Challenger | ● Market Challenger | ● Not in | ● Market Challenger |
| Informatica | ● Not in | ● Not in | ● Leader | ● Not in | ● Not in | ● Not in |
| Infosys | ● Leader | ● Leader | ● Leader | ● Not in | ● Leader | ● Leader |

AWS – Ecosystem Partners - Quadrant Provider Listing 3 of 4

| | AWS Managed Services | AWS SAP Workloads | AWS Data Analytics and Machine Learning | AWS Internet of Things (IoT) Services | AWS Migration Services | AWS Consulting Services |
|----------------------|----------------------|----------------------|---|---------------------------------------|------------------------|-------------------------|
| Lemongrass | ● Not in | ● Product Challenger | ● Not in | ● Not in | ● Not in | ● Not in |
| LTI | ● Leader | ● Leader | ● Leader | ● Leader | ● Leader | ● Leader |
| Lumen | ● Product Challenger | ● Not in | ● Not in | ● Not in | ● Not in | ● Not in |
| Mindtree | ● Not in | ● Not in | ● Leader | ● Not in | ● Not in | ● Not in |
| Mphasis | ● Not in | ● Rising Star | ● Rising Star | ● Product Challenger | ● Product Challenger | ● Leader |
| Navisite | ● Not in | ● Contender | ● Not in | ● Not in | ● Not in | ● Not in |
| nClouds | ● Not in | ● Not in | ● Contender | ● Not in | ● Contender | ● Not in |
| N-iX | ● Not in | ● Not in | ● Contender | ● Not in | ● Not in | ● Not in |
| NTT DATA | ● Market Challenger | ● Not in | ● Market Challenger | ● Market Challenger | ● Market Challenger | ● Market Challenger |
| Pariveda | ● Not in | ● Not in | ● Not in | ● Contender | ● Not in | ● Not in |
| Persistent | ● Not in | ● Not in | ● Not in | ● Rising Star | ● Not in | ● Not in |
| Protera | ● Not in | ● Contender | ● Not in | ● Not in | ● Not in | ● Not in |
| PwC | ● Not in | ● Market Challenger | ● Not in | ● Not in | ● Not in | ● Not in |
| Rackspace Technology | ● Leader | ● Market Challenger | ● Leader | ● Market Challenger | ● Leader | ● Market Challenger |
| Reply | ● Not in | ● Not in | ● Not in | ● Contender | ● Not in | ● Not in |

AWS – Ecosystem Partners - Quadrant Provider Listing 4 of 4

| | AWS Managed Services | AWS SAP Workloads | AWS Data Analytics and Machine Learning | AWS Internet of Things (IoT) Services | AWS Migration Services | AWS Consulting Services |
|---------------|----------------------|-------------------|---|---------------------------------------|------------------------|-------------------------|
| Slalom | ● Not in | ● Not in | ● Contender | ● Not in | ● Contender | ● Contender |
| Smartronix | ● Contender | ● Not in | ● Not in | ● Not in | ● Product Challenger | ● Not in |
| TCS | ● Leader | ● Leader | ● Not in | ● Leader | ● Leader | ● Leader |
| Tech Mahindra | ● Leader | ● Rising Star | ● Rising Star | ● Leader | ● Leader | ● Leader |
| TechEdge | ● Not in | ● Contender | ● Not in | ● Not in | ● Not in | ● Not in |
| 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 |
| ThingLogix | ● Not in | ● Not in | ● Not in | ● Product Challenger | ● Not in | ● Not in |
| To The New | ● Product Challenger | ● Not in | ● Product Challenger | ● Not in | ● Not in | ● Rising Star |
| Trianz | ● Product Challenger | ● Not in | ● Not in | ● Not in | ● Not in | ● Product Challenger |
| Unisys | ● Market Challenger | ● Not in | ● Not in | ● Not in | ● Not in | ● Not in |
| Virtusa | ● Not in | ● Not in | ● Product Challenger | ● Rising Star | ● Rising Star | ● Product Challenger |
| Vision33 | ● Not in | ● Contender | ● Not in | ● Not in | ● Not in | ● Not in |
| Wipro | ● Leader | ● Leader | ● Leader | ● Leader | ● Leader | ● Leader |



AWS - Ecosystem Partners Quadrants

ENTERPRISE CONTEXT

AWS Managed Services

This report is relevant to enterprises across industries in the U.S. for evaluating providers of AWS managed services. In this quadrant report, ISG highlights the current market positioning of these providers in the U.S. 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.

In the current digital environment enterprises must take a combined approach to their technical infrastructure. ISG notes that enterprises in the U.S. are taking the lead in cloud adoption, though their counterparts in many other countries are not far behind.

Enterprises are evaluating managed service providers for their automation and AI capabilities, to monitor their infrastructure to forecast failures and are gauging the reliability of the services to reduce maintenance costs in case of failure. Enterprises expect service providers to offer platforms or frameworks that offer infrastructure as code (IaC) capability to accelerate their deployments with high quality cloud security.

Who should read the report:

IT leaders should read this report to better understand the relative strengths and weaknesses of the 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.

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.

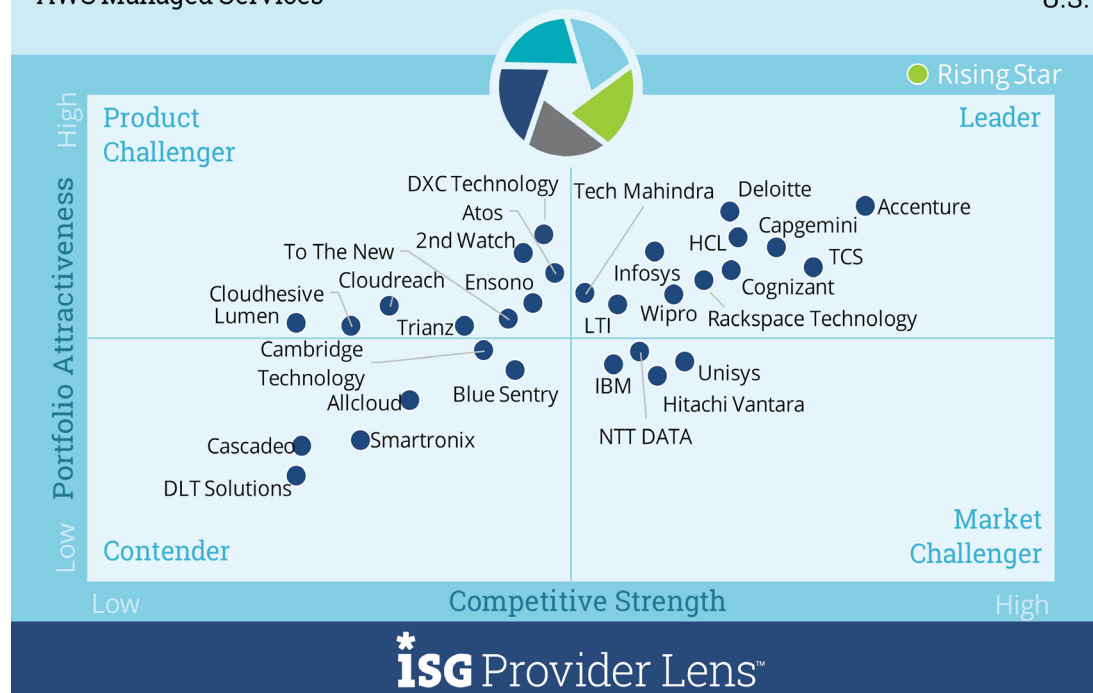
AWS MANAGED SERVICES

Definition

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 multi-cloud 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.

AWS - Ecosystem Partners AWS Managed Services

2021
U.S.



Source: ISG Research 2021

AWS MANAGED SERVICES

Eligibility Criteria

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

Observations

Key observations about the providers, M&A and brief pointers about the quadrant Leaders:

- **Accenture** provides industry-leading best and next practices in AWS managed services by combining its deep domain knowledge with security, risk and governance related expertise on cloud and leveraging its internal AI-automation capabilities, for example, in MyWizard®, along with assets from partner platforms.
- **Capgemini's** cloud operation manages both traditional and cloud-native workloads, providing a springboard for digital initiatives. The company is also an AWS Level 1 MSSP, which is uniquely designed to protect and monitor essential AWS resources.
- **Cognizant** Cloud Operate ecosystem is delivered by an intelligent Cloud Management Platform (iCMP). The platform is powered by Cognizant Automation Center, which is designed with four tenets of governance, which include financial, technology, service, and security and regulatory.
- **Deloitte's** integrated next-gen managed services (NGMS) offerings on top hyperscaler platforms such as AWS provide a holistic and seamless approach in large and complex multi-vendor cloud and IT infra-apps scenarios, including public sectors such as GovCloud in the U.S.

AWS MANAGED SERVICES

Observations (cont.)

- **HCL's** development of new AI-led capabilities, tools, intellectual properties (IPs), alliances and partnerships with several companies has helped meet function- and industry-specific requirements of enterprises.
- **Infosys** assists enterprises in designing, building and managing public and multi-cloud environments. It has expertise in offering autonomous machine learning-driven orchestration and configuration management of platforms and systems.
- **LTI's** C=BT^2-based cloud strategy offers business transformation framework focusing on five dimensions, covering industry, platform and function cloud led by its NorthStar Framework.
- **Rackspace Technology's** optimizer+ offers robust cost optimization services, including cloud health analytics, cost optimization experts and best practice guidance on architecture and monitoring.
- **TCS** leverages its Cloud Exponence platform for managed services, which is a centralized multi-tenant platform that enables centralized management service to view, investigate and resolve operational work items. Its focus on enabling industry-led solutions, automation solutions and training/development of resources has resulted in a seamless cloud experience for enterprises.
- **Tech Mahindra** leverages its iCOPS solution framework, which offers a well governed and highly available services. It integrates services such as TechOps, DevOps, FinOps and SecOps.
- **Wipro's** development of Cloud Studio helps enterprises modernize the workloads through its Boundaryless Enterprise approach, driving cloud adoption, transformation and usage. This also enables enterprises to accelerate multi-cloud adoption and integration.

ENTERPRISE CONTEXT

AWS SAP Workloads

This report is relevant to enterprises across all industries in the U.S. for evaluating providers offering AWS SAP implementation and integration services.

In this quadrant report, ISG highlights the current market positioning of providers of SAP implementation and integration services on AWS in the U.S. and how they address the key challenges faced by enterprises. In the past few years, the implementation of SAP S/4HANA has been one of the critical milestones either as a greenfield or brownfield implementation.

The pandemic impacted SAP S/4HANA adoption as enterprises decelerated their transformation initiatives and instead focused more on cost efficiency. The SAP's new RISE with SAP campaign bundles existing SAP assets by offering business transformation to enterprises, thus accelerating their cloud adoption.

Service providers continue their focus to integrate agile and DevOps processes into SAP Services, across development, implementation and managed services. Providers have developed their own internal and proprietary tools to deliver SAP S/4HANA services.

The complexity of SAP S/4HANA is directly proportional to the size of an enterprise as most of the large enterprise implementations take place at a global level involving multiple regions, hence, the projects become complex. Therefore, large enterprises prefer providers with a skilled workforce, high integration capabilities and a global presence.

Who should read the report:

IT leaders should read this report to better understand the relative strengths and weaknesses of the providers of SAP on AWS services 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 SAP service providers in the U.S.

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

AWS SAP WORKLOADS

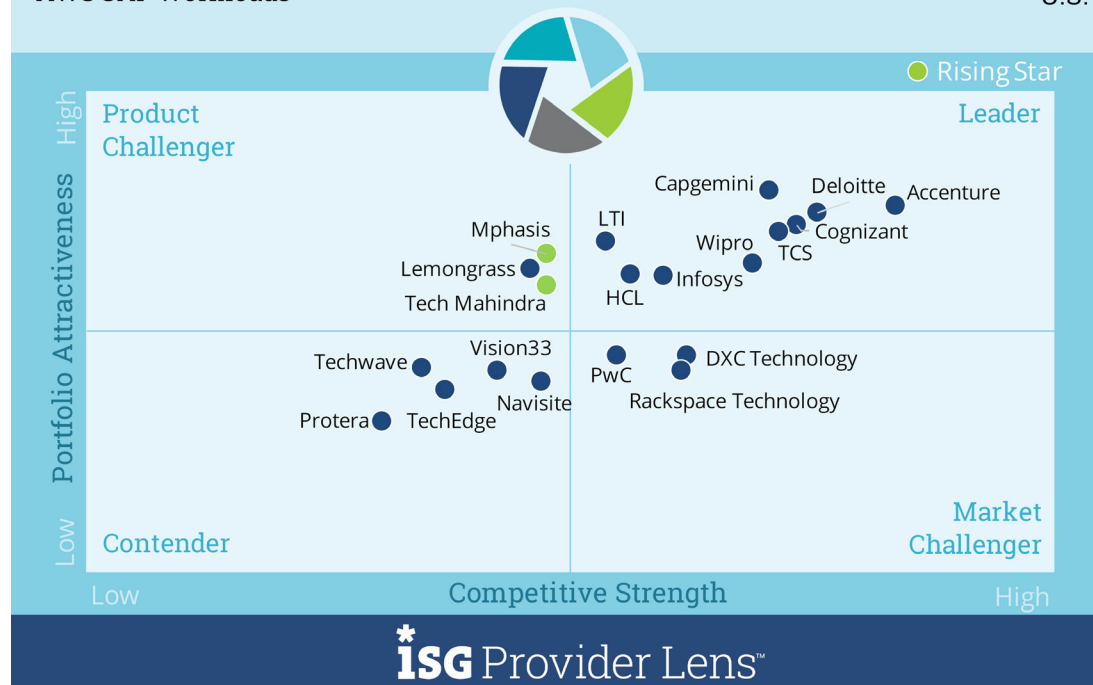
Definition

This quadrant assesses the service providers that offer provisioning and ongoing operation for 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, but also to 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, and business processes.

AWS - Ecosystem Partners AWS SAP Workloads

2021
U.S.



Source: ISG Research 2021

AWS SAP WORKLOADS

Eligibility Criteria

- 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

Observations

Key observations about the providers, M&A and brief pointers about the quadrant Leaders and Rising Stars:

- **Accenture's** innovative approaches such as data lake accelerators, combined with AWS SAP services, help clients with complex and heterogenous data environment-related challenges and leverage integrated data and analytical competencies across all source systems.
- **Capgemini** is one of the first global system integrators to be on the AWS MAP for SAP Program, which offers a prescriptive framework and investments.
- **Cognizant** offers consulting and infrastructure services. It also helps clients in architecting and executing SAP adoption on AWS and technical operations.
- **Deloitte** Cloud Platform (DCP) offers turnkey services designed to accelerate the digital transformation with the SAP HANA platform.
- **HCL's** market differentiating proposition, ASM 2.0 framework, offers a new dimension to application operations, encompassing lean thinking and custom support models with DevSecOps-based team structure, supported by system reliability engineering (SRE) practices.

AWS SAP WORKLOADS

Observations (cont.)

- **Infosys** Cobalt, with more than 40,000 assets, accelerates the cloud journey and offers a set of services, solutions and platforms that act as a force multiplier for cloud-powered enterprise transformation.
- **LTI's** Accelerated Migration Platform for SAP Workloads Framework (LTI LAMPS) enables enterprises across industry segments to migrate faster to AWS with its discovery module, build and deployment module and validation module.
- **TCS** Crystallus, a preconfigured solution, offers different industry and business solutions, line of business solutions and decision solutions aligned to the RISE with SAP migration program.
- **Wipro** Cloud Studio for SAP infrastructure as code accelerates instant provisioning on AWS during migration and post-migration run operations.
- **Mphasis** (Rising Star) combines technical and platform capabilities in cloud and SAP, powered by consultative approaches stemming from Mphasis Stelligent with proven DevOps competencies, to make the SAP to AWS cloud migration journeys of its clients seamless, consistent and reliable.
- **Tech Mahindra** (Rising Star) delivers SAP on AWS across diverse client landscapes, while leveraging a plethora of AWS tech services such as CloudHSM, CloudTrail, CloudWatch, Lambda, AWS Identity and Access Management, Elastic and Network Load Balancer, Transit Gateway and Amazon Machine Images (AMI) for different availability zones.

ENTERPRISE CONTEXT

AWS Data Analytics and Machine Learning

This report is relevant to enterprises across industries in the U.S. 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. and how they can address the key challenges of enterprises.

Digital transformation of enterprises has led to the creation of large volumes of data. Enterprises have been keen on processing the data to derive business insights to offer a seamless experience to their respective customers. This has led to the adoption of advanced data analytics in a serverless architecture that further allows scalability and maintainability of data powered transformation.

Enterprises are focused on partnering with providers with exemplary capabilities, talented professionals and a strong partner network.

Who should read the report:

IT leaders should read this report to better understand the relative strengths and weaknesses of the data analytics and machine learning 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 providers of data analytics and machine learning in the U.S.

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 enterprise's ongoing transformation initiatives and identify the benefits of moving to the cloud.

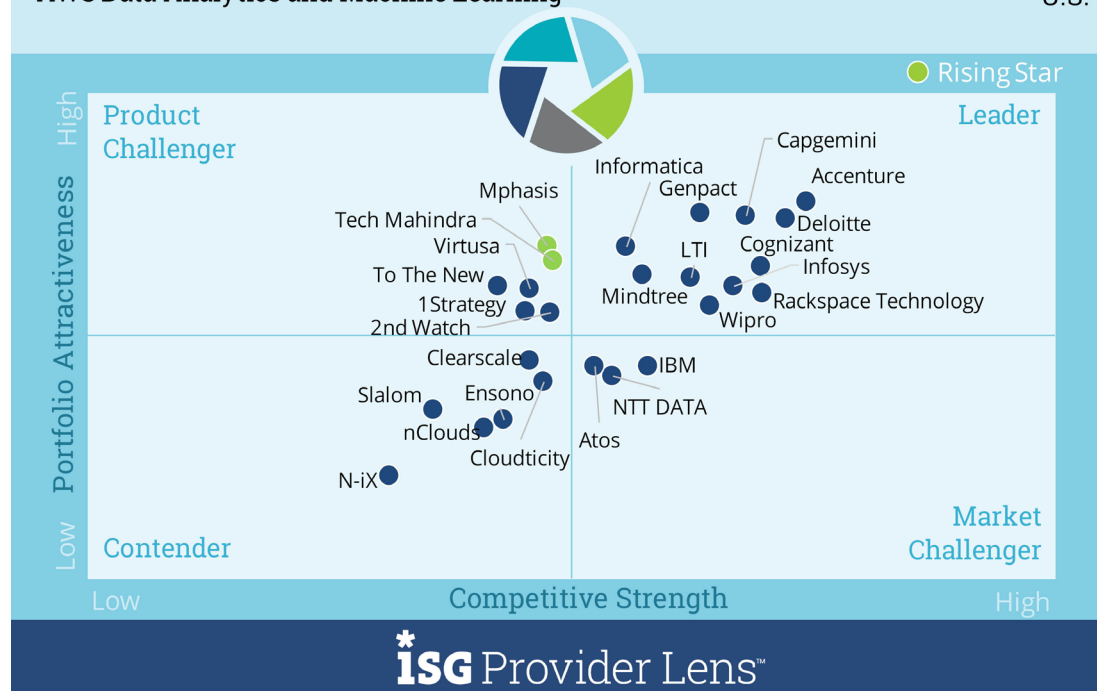
AWS DATA ANALYTICS AND MACHINE LEARNING

Definition

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 (ML) 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 and security. Most providers use an adaptive portfolio of tools and technologies to develop and deliver solutions.

AWS - Ecosystem Partners AWS Data Analytics and Machine Learning

2021
U.S.



Source: ISG Research 2021

AWS DATA ANALYTICS AND MACHINE LEARNING

Eligibility Criteria

- 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 machine learning and analytics services and solutions on AWS
- Suitability, maturity and adaptability of pricing model – go-to-market strategy
- Breadth and depth of partner/channel relationships, number and locations of staff

Observations

Key observations about the providers, M&A and brief pointers about the quadrant Leaders and Rising Stars:

- **Accenture's** AWS Data Analytics/Machine Learning services, in combination with its home-grown assets such as its MyWizard platform and AI solutions, enable clients with complex data landscapes to quickly leverage their non-performing or hidden data goldmines and build contextually relevant “data on cloud” solutions.
- **Capgemini's** Industrialized Data and AI Engineering Acceleration (IDEA) is a suite designed to accelerate data estate modernization projects, industrialize enterprise cloud data platforms and empower data- and AI-powered decisions and actions at scale.
- **Cognizant** offers more than 60 AI patents and more than 50 partner ecosystems to support enterprises in offering best-in-class capabilities. It has also spent on increasing its inorganic revenue focus by series of acquisitions in the data analytics space.
- **Deloitte** offers the best-fit architecture approach to data on cloud strategy that extends the on-premises data supply chain, thereby modernizing and creating a new data ecosystem.

AWS DATA ANALYTICS AND MACHINE LEARNING

Observations (cont.)

- **Genpact**, with its partner ecosystem, innovations such as the CORA digital platform, and a series of acquisition, has strengthened its focus on analytics.
- **Informatica's** integration with Amazon Redshift Console enables users and clients to seamlessly adopt and scale data analytics and machine learning solutions and use cases on AWS cloud platforms.
- **Infosys** offers assets that complement Data Analytics & Machine Learning offering. The assets include a data operations workbench, data governance workbench (which helps enterprise to be AI ready and compliant), Infosys Genome# (accelerates the delivery of analytics through industrialization by 30 percent).
- **LTI** offers Model Ops templates for AI Engineering to extend the process of CI/CD with continuous training and monitoring for machine learning models.
- **Mindtree's** Decision Moments platform simplifies and accelerates AWS data analytics for enterprises. It offer 20 industry-specific machine learning algorithms based on deep learning techniques.
- **Rackspace Technology** DataOps/Rackspace Elastic Engineering for Data is an innovative offering that combines the full lifecycle of work for customers, from architecture and engineering to support.
- **Wipro** Nimbus has been a flagship solution that addresses data migration and transformation services. It has three phases that cover planning-to-migration, post-migration monitoring, and cost estimation.
- **Mphasis'** (Rising Star) PACE-ML framework accelerates the lifecycle of machine learning development, deployment and productionizing of machine learning algorithms.
- **Tech Mahindra** (Rising Star) has a proven end-to-end view of data and analytics capabilities, from data technologies and machine learning to leveraging AWS Cloud Foundation, to ensure that the clients get the targeted agility and scalability.

ENTERPRISE CONTEXT

AWS Internet of Things (IoT) Services

This report is relevant to enterprises across industries in the U.S. for evaluating providers of AWS IoT services.

In this quadrant report, ISG highlights the current market positioning of providers offering AWS IoT services in U.S. and how they address the key challenges faced by enterprises in the country.

ISG sees an increasing demand among U.S. enterprises to outsource the complexities of IoT deployments. The service providers here offer a range of value-added services and offerings to help enterprises achieve their desired business outcomes. An increasing number of enterprises are showing interest in IoT, drawing the attention of IoT managed service providers worldwide. However, data management and security are the key challenges in the market. Due to the COVID-19 pandemic and the restrictions enforced by the government, manufacturing facilities are expected to increase their level of automation, including by deploying IoT-based devices across their facilities.

Who should read the report:

Technology professionals should read this report to understand the relative positioning and capabilities of the providers that can help them effectively plan and select IoT products and services. The report also highlights the technical and integration capabilities of a service provider, its partnerships and how the company can be compared with the others in the market

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 enterprises.

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.

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

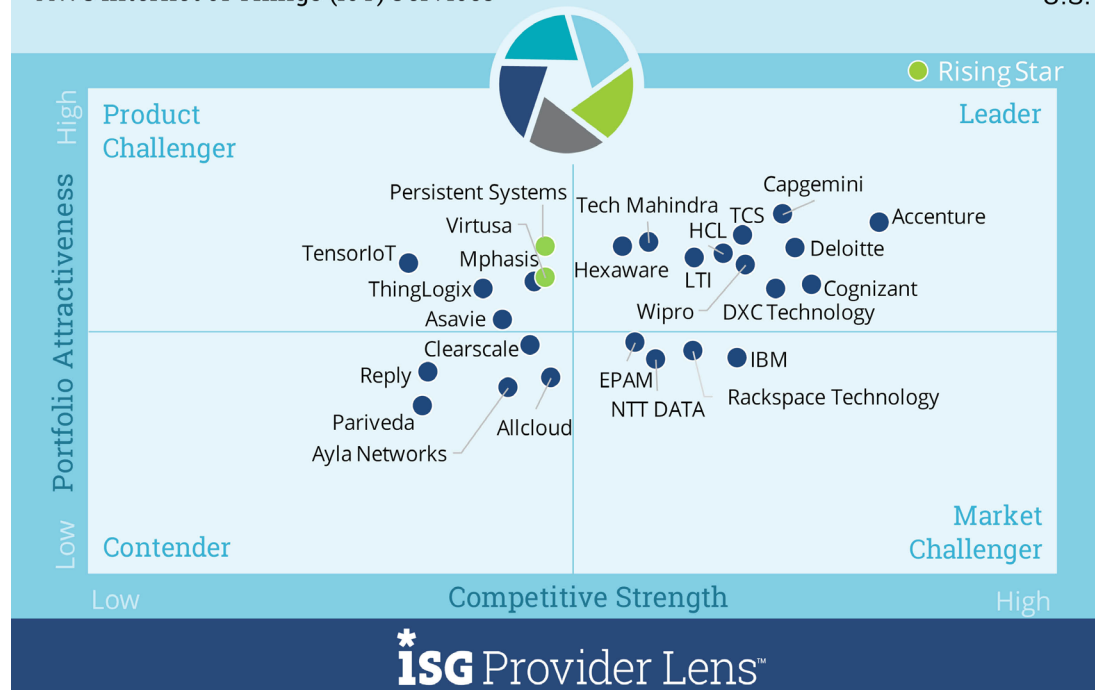
AWS INTERNET OF THINGS (IOT) SERVICES

Definition

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.

AWS - Ecosystem Partners AWS Internet of Things (IoT) Services

2021
U.S.



Source: ISG Research 2021

AWS INTERNET OF THINGS (IOT) SERVICES

Eligibility Criteria

- 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 adaptability of pricing model
- Breadth and depth of partner/channel relationships
- Scope of security tools, technology and services utilized

Observations

Key observations about the providers, M&A and brief pointers about the quadrant Leaders and Rising Stars:

- **Accenture** uniquely combines DevOps capabilities with data lake consolidation, data security and unified data governance, near real-time data analytics and artificial intelligence of things (AIoT) capabilities that integrate seamlessly with Accenture's applied AI industry practices.
- **Capgemini's** IoT capabilities on AWS have become more integrative with its Responsible Earth related initiatives. It aims to provide intelligent and green IoT solutions from connected vehicles to connected and intelligent logistics and supply chain ecosystems.
- **Cognizant's** AWS IoT capabilities are integrated and manifested in its focused applications of these tech stacks in industry-specific solutions, including its Industry 4.0 and Safe Buildings solutions.
- **Deloitte's** turnkey IoT accelerators, combined with AWS IoT services, help clients leverage diverse yet related/connected technology capabilities in a governance-assured, consistent and secure manner. This drives higher efficiencies and outcomes with controlled and reduced operational and technological risks.

AWS INTERNET OF THINGS (IOT) SERVICES

Observations (cont.)

- **DXC Technology's** integrated industrial IoT solutions combined with Luxoft capabilities and AWS IoT competencies excel in integrated and end-to-end value delivery across adjacent technology domains such as cloud migration, SAP and IoT, industrial IoT and edge, augmented reality (AR), virtual reality (VR), and remote field support.
- **HCL's** IoTWORKS capabilities, along with the AWS IoT Core services, create industry-relevant IoT solutions and services that enable clients to achieve high reliability and performance, with optimal cost efficiency, reduced operational risks and improved governance.
- **Hexaware's** AWS IoT solutions span technology components, including sensors, devices, networks, and security and management systems, enabling clients to leverage "smart" data from the huge petabytes of systems data .
- **LTI** enables strong collaboration and team efforts between customers, tech partners and service providers, which is essential for successful strategic and transformational initiatives such as cloud IoT, Industry 4.0 and Smart Factory.
- **TCS's** AWS IoT services excel at IoT advisory, designing and provisioning IoT platform foundation fabric, IoT application modernization and operations, through solutions hosted on AWS, such as TCS Connected Workforce Safety and TCS Industrial Energy Management.
- **Tech Mahindra's** human experience-centric approach toward AWS IoT and adjacent tech stacks completes the digital value delivery spectrum for the enterprise clients, enabling them to leverage the strategies of TechMNxt, with Industry 4.0 monitoring and predictive analytics use cases.
- **Wipro's** AWS IoT and related tech stacks and competencies such as AI, machine learning and data analytics, SAP, DevOps, and cloud migration, enable clients' digital journeys end to end.
- **Persistent Systems** (Rising Star) delivers rapid development of industrial IoT and analytics to manufacturing clients. The company makes apt use of its Flywheel software methodology that can be applied on the comprehensive set of AWS competencies in IoT, combining big data and AI and machine learning into industrial IoT.
- **Virtusa** (Rising Star) offers integrated data capabilities on top of AWS IoT services, which support all appropriate big data infrastructure and platforms, including Spark and Hadoop clusters.

HEXAWARE



Overview

Hexaware is a global IT consulting provider with strong focus on cloud-based solutions. The company has its headquarters in Mumbai, India, and has more than 20,000 professionals serving 260 customers from 36 global offices. The company generates more than \$900 million revenue. Hexaware is an AWS Premier Consulting Partner with more than 4,000 cloud experts and more than 80 customers.



Strengths

Integrative AWS IoT: Hexaware's long-standing and proven competencies in IoT, now augmented and integrated with hyper-cloud proficiencies, make it a next-generation leader in the IoT and adjacent technology and services space.

Tech stack coverage: Its IoT solutions span technology components, including sensors, devices, networks and security and management systems, enabling clients to leverage "smart" data from the huge petabytes of systems data. This is achieved through real-time data integration and analytics services on top of the data collected from IoT devices, using underlying cloud infrastructure.

End-to-end service: Hexaware delivers a complete cycle of competencies around IoT and data, from consultative activities such as opportunity identification and the evaluation and development IoT strategies and business cases with measurable targets and results, to providing operational support to all the connected devices and applications on the AWS IoT services and connected hyper-cloud ecosystems. The competencies are device-agnostic but can be easily embedded into client-specific business process chains, making them smarter with automation and data.



Caution

To support large-scale transformational projects end to end, Hexaware can look at opportunities to augment its talent and resource pool and accessibility, both through its in-house talent management systems and by more optimally leveraging partner ecosystems.



2021 ISG Provider Lens™ Leader

Hexaware provides both broad and deep IoT and related cloud services, in terms of integrated technology stacks as well as full cycle management competencies.

ENTERPRISE CONTEXT

AWS Migration Services

This report is relevant to enterprises across industries in the U.S. for evaluating providers of AWS migration services.

In this quadrant report, ISG defines the current market positioning of providers of AWS migration services in U.S. and how they address the key challenges faced by the enterprises in the country.

ISG notes that the U.S. is at the forefront in the adoption of AWS migration services. The complexity and need for such migrations is directly proportional to the size of the migrations. Therefore, large enterprise customers seek service providers with large skilled workforces, advanced capabilities and a global presence.

The top priorities for enterprises using these offerings are to improve workload uptime, reduce operational costs and increase user satisfaction.

The common obstacles to migrating enterprise workloads to AWS, especially during the current COVID-19 pandemic include high upfront costs, the shortage of necessary talent and skills among enterprises ,and concerns about data security.

Who should read the report:

Marketing and sales leaders should read this report to understand the relative positioning and capabilities of the 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.

Operational leaders and finance leaders should read this report to understand the relative positioning of providers offering AWS migration services that enable high ROI, including business performance improvements.

IT and technology leaders should read this report to understand the strengths and weaknesses of AWS migration service providers, including their offerings, capabilities, market presence and strengths, relationships with AWS and the way they employ the latest technologies and capabilities to deliver reliable offerings in keeping with changing enterprise needs and practices

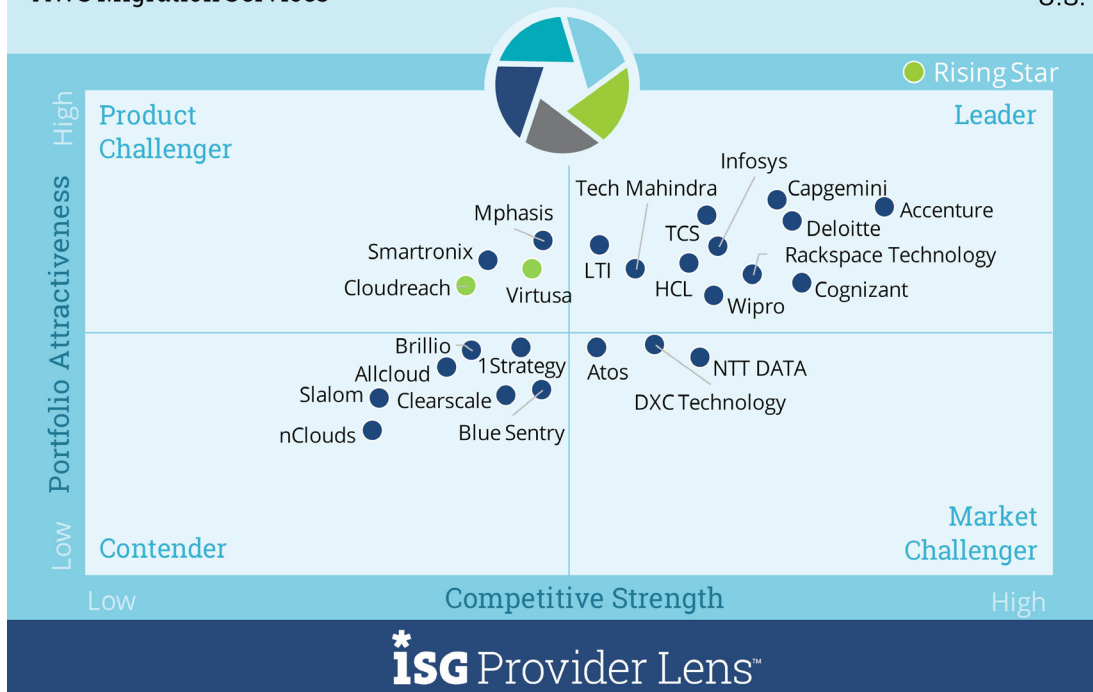
AWS MIGRATION SERVICES

Definition

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.

AWS - Ecosystem Partners AWS Migration Services

2021
U.S.



Source: ISG Research 2021

AWS MIGRATION SERVICES

Eligibility Criteria

- 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

Observations

Key observations about the providers, M&A and brief pointers about the quadrant Leaders and Rising Stars:

- **Accenture** offers near 100 percent accuracy and uptime and near-zero downtime with focus on sustainability targets, and offers best performance metrics across IaaS, architecture and engineering.
- **Capgemini's** Janus strategic program with AWS helps enterprise with business transformation to embrace cloud and new technology and deliver the business with innovative new mechanisms.
- **Cognizant's** AppLens, an AI-driven platform, offers an end-to-end “zero maintenance” migration strategy, which has been designed to increase application relevance and life span.
- **Deloitte** offers strategically relevant AWS migration services, making them transformational beyond operational and business-focused rather than delivering services as tech refresh programs only.
- **HCL's** migration of 100 apps in 100 days is a factor-based offering that commits to deliver enterprise scale end-to-end native forklift migration of 100 apps in 100 days.

AWS MIGRATION SERVICES

Observations (cont.)

- **Infosys'** cloud migration services leverage its factory model, including capabilities for assessment, migration, rehosting, remediation/replatforming and data migration, which helps drive a high level of automation.
- **LTI's** Migration Factory, also called Fast Factory, provides application-centric workload assessment, migration and streamlined operations through a pre-defined and iterative process.
- **Rackspace Technology**, an AWS Premier Partner, helps customers modernize their applications by leveraging serverless or container platforms to help them benefit from the scalability, reliability and cost-effectiveness of the cloud.
- **TCS** enhanced the reliability of its Migration Factory by leveraging machine learning, along with data discovery, to get more insights on applications, networks and security.
- **Tech Mahindra** has developed a serverless architecture that helps an enterprise build a data repository platform for customer insights and analytics.
- **Wipro's** Boundary Less Container Platform (BLCP) is a comprehensive framework that takes the complexity out of the lifecycle management of all Docker- and Kubernetes-based container platforms.
- **Cloudreach** (Rising Star) has been developing new and enhanced functionalities and modules in its SMART Migration and SMART Modernization services. These services enable client organizations to leverage intelligent automation and achieve cloud migration benefits in a faster and confident manner.
- **Virtusa's** (Rising Star) next-generation cloud migration and operations capabilities enable clients to migrate and run cloud environments in a cost and risk-optimized manner.

ENTERPRISE CONTEXT

AWS Consulting Services

This report is relevant to enterprises across industries in the U.S. for evaluating the ability of providers offering consulting services for the transformation of the cloud ecosystem to meet unique enterprise and customer demands.

In this quadrant report, ISG highlights the current market positioning of AWS consulting providers in the U.S. 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.

Some enterprises in the U.S. have been reluctant to migrate to the cloud ecosystem due to challenges in assessing the workloads, challenges in change management, the shortage of skilled professionals and uncertainties about integration of legacy infrastructure. With AWS consulting services, enterprises will have access to expertise for workload assessment, transformational strategy, advisory, re-architecture of legacy applications and integration of automation capabilities.

The focus on long-term application modernization has been spiking comparisons between providers in the lift-and-shift models for legacy systems they offer. Consulting partners with experience in re-architecture, code review and cloud native environments are growing in U.S.

Who should read the report:

IT leaders should read this report to better understand the relative strengths and weaknesses of the consulting and transformation 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 consulting and transformation service providers in the U.S.

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

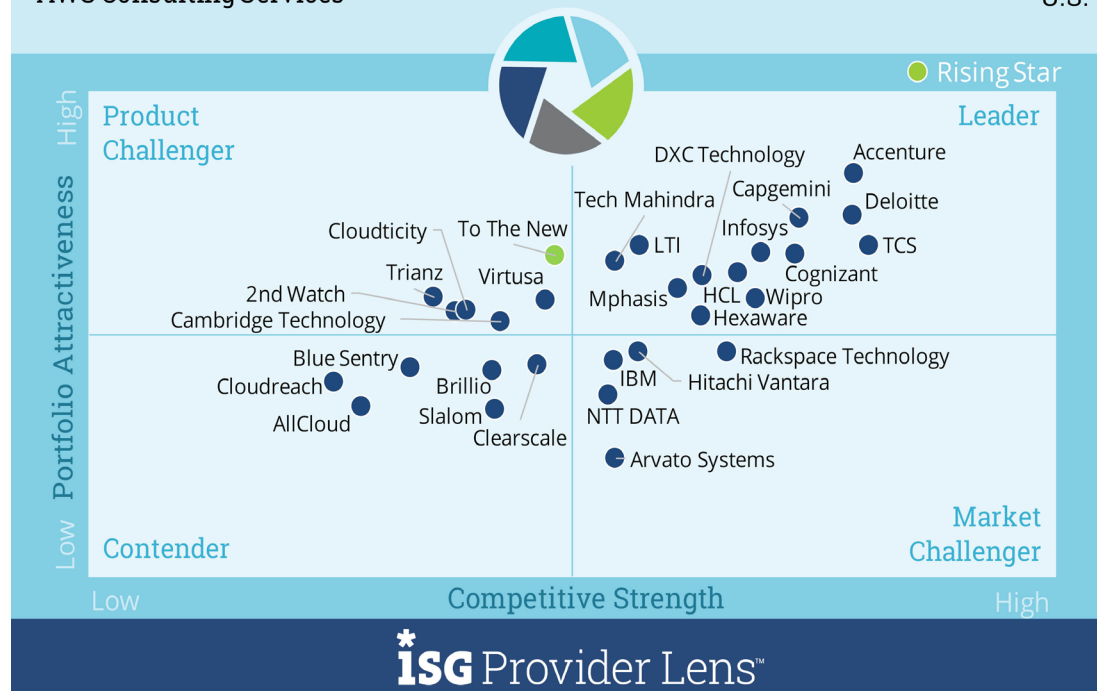
AWS CONSULTING SERVICES

Definition

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.

AWS - Ecosystem Partners AWS Consulting Services

2021
U.S.



Source: ISG Research 2021

AWS CONSULTING SERVICES

Eligibility Criteria

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

Observations

Key observations about the providers, M&A and brief pointers about the quadrant Leaders and Rising Stars:

- **Accenture** offers mature, industry-specific frameworks and more than 40 accelerators combining the domain and technology strengths from AWS and partner ecosystems, covering all major industry verticals.
- **Capgemini** and AWS collaborated to develop the Responsible Earth value proposition, which is a green initiative especially for resource-intensive hyperscaler cloud markets. Capgemini is scaling rapidly in North America as a first-mover cloud consulting capability provider.
- **Cognizant's** key strengths in AWS consulting services stem from its domain focus and outcomes-driven value delivery models.
- **Deloitte's** full capability stack view of AWS services, which include Amazon CloudWatch and AWS Systems Manager, along with Deloitte's Open Cloud Platform, helps clients achieve optimal strategic outcomes from integrated technology and services value chains with robust governance, risk assurance and sustainability.
- **DXC Technology's** AWS Center of Excellence and joint DXC and AWS integrated best practices offer data-driven and strong grounded strategies based on deep understanding of clients' technical debts, legacy infrastructure and application modernization challenges.

AWS CONSULTING SERVICES

Observations (cont.)

- **HCL's** AWS business unit, with its futuristic and realistic co-innovation pipelines and consulting knowledge frameworks, has created a strong position in mature markets by offering end-to-end cloud consulting and implementation services on AWS.
- **Hexaware's** intellectual property-driven Amaze offerings provide re-platforming and modernization roadmaps for a broad range of enterprise applications running in diverse environments.
- **Infosys'** AWS consulting services help clients discover, evaluate, reimagine, rearchitect and integrate enterprise software, services and processes, to make them cloud-ready and cloud-enabled for high-performance digital businesses.
- **LTI's** AWS consulting and advisory services are strategically differentiated by design. It has an explicit focus on building state-of-the-art accelerators and developing industry-specific solutions and services offerings and bundles.
- **Mphasis** enables the client ecosystems with long-term innovations-driven strategy to be future-ready on cloud. It leverages cutting-edge technology solutions from the AWS partner ecosystem and the AWS Marketplace.
- **TCS** applies its Machine-First Delivery Model™ (MFDM) and automation assets across large organizations in multiple domains, delivering its AWS consulting services as a unique blend for addressing industry-specific cloud journeys and competency requirements.
- **Tech Mahindra** includes deep-dive consulting services, ranging from assessing client landscapes and planning migration of applicable and appropriate workloads, to strategizing on cloud, modernization initiatives and requirements.
- **Wipro's** Fullstride AWS cloud services, spanning from consulting to implementation and operations, have enabled clients to achieve targeted outcomes through an accelerated route.
- **TO THE NEW** (Rising Star) has demonstrated deep strategic competencies in AWS cloud migration planning across operating models and tech stacks to cloud, estimating timelines and efforts, execution plans for setting up landing zones, and deep analysis of security, risks and audit and regulatory requirements.

HEXAWARE

Overview

Hexaware is a global IT consulting provider with strong focus on cloud-based solutions. The company has its headquarters in Mumbai, India, and has more than 20,000 professionals serving 260 customers from 36 global offices. The company generates more than \$900 million revenue. Hexaware is an AWS Premier Consulting Partner with more than 4,000 cloud experts and more than 80 customers.

Strengths

Holistic AWS cloud journey-mapping: Hexaware's AWS consulting services provide clients a holistic cloud journey map, considering the critical strategic dimensions of cloud transformation, innovation and cloud adoption. Its intellectual property-driven Amaze offerings provide re-platforming and modernization roadmaps for a broad range of enterprise applications running in diverse environments. As an advanced consulting partner in the AWS partner network, Hexaware has demonstrated capabilities to stitch and deliver strategic cloud value propositions in a diverse range of client segments.

Partner capabilities: Mobiquity, a Hexaware company, has brought a specialized set of tools and frameworks to the AWS consulting services ecosystem of offerings. Its assets enable clients to re-envision the journeys of their digital businesses powered by several technical AWS cloud competencies. Hexaware focuses on strengthening its partner capability ecosystems for AWS and hybrid cloud adoption capabilities from front-end to back-end, in complex client scenarios, for example, as manifested in its recent joining of forces with cloud-native leader Lightbend.

Caution

Hexaware has significant opportunities for expanding its AWS certified competencies and in communicating effectively about its already proven and differentiated competencies, especially in the U.S. and other crowded, mature markets.



2021 ISG Provider Lens™ Leader

Hexaware's AWS consulting services excel at providing holistic strategic cloud journey maps across its business transformation initiatives through cloud innovations and adoption.



Methodology

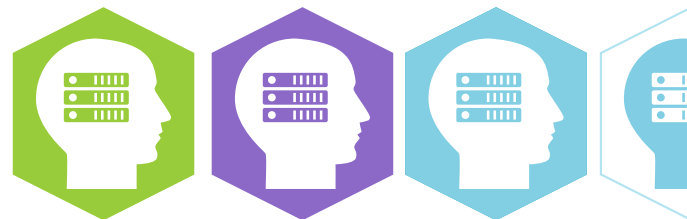


METHODOLOGY

The research study “ISG Provider Lens™ 2021 AWS - Ecosystem Partners” analyzes the relevant software vendors/service providers in the U.S. market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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/vendors on capabilities and use cases
4. Leverage ISG's internal databases and advisor knowledge and experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts and figures received from providers and other sources.
6. 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



Authors and Editors



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Lead Analyst

Dr. Tapati Bandopadhyay has been an inventor, builder, practitioner and researcher in AI, intelligent automation and related domains, for 25+ years. She has been a global practice leader and executive-level advisor & consultant, in AI-automation-cloud and services management, covering MLOps, AIOps, CloudOps, DataOps, ModelOps & DevOps metrics-driven practices and data and AI story-building and story-telling practices and tools. As an ISG Lead Analyst on AWS and in AI-ML, consulting & managed services, she is responsible for defining and leading the ISG Provider Lens branded research projects, for the US market.



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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 research director, Partner and Global Head — 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.

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