ISG Provider Lens™

AWS - Ecosystem Partners

AWS Migration Services

Australia 2021

Quadrant Report

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

wipro

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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ISG Provider Lens

ISG Provider Lens™

ISG Provider Lens™ delivers leading-edge and actionable research studies, reports and consulting services focused on technology and service providers' strengths and weaknesses and how they are positioned relative to their peers in the market. These reports provide influential insights accessed by our large pool of advisors who are actively advising outsourcing deals as well as large numbers of ISG enterprise clients who are potential outsourcers.

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EXECUTIVE SUMMARY

AWS Services Ecosystem in Australia Continues to Grow

Since the outbreak of the COVID-19 pandemic in 2020, there has been a dramatic increase in the range and pace of enterprise spending on cloud-based IT. Massive disruption in the allocations and locations of workforces and resources, in supplier and customer relationships and communication, as well as business planning and operations, have accelerated digital transformation worldwide.

The global scale of cloud adoption has accelerated significantly. This, in turn is helping to boost the resource utilisation of hyperscalers such as Amazon Web Services (AWS) to levels beyond previous expectations. Innovative IT service providers are adjusting, by extending and promoting their services and capabilities to build on this trend.

Initial digital transformation is rapidly morphing into unified Everything as a Service (XaaS), and service providers building with AWS are reaping the benefits. Providers report significant business challenges as they themselves adapt to widespread work-from-anywhere practices, and an increasing amount of client work is being done remotely. AWS has been making huge investments in tools to enable new capabilities and services beyond its traditional platform position. It is also spending heavily on partnerships with service providers.

The effects on services providers partnered with AWS are summarized below.

AWS Managed Services: The role and value of managed service providers (MSPs) have been rapidly expanding into areas traditionally referred to as systems integration. The impact of COVID-19 on cloud adoption and integration requirements has pushed MSPs farther into the traditional role of a system integrator. In response, MSPs are investing in more skills, expanding their roles with AWS, and acquiring more technology and tools providers.

AWS SAP Migration and Implementation Services: SAP is the major enterprise app modernization and migration service provider. It is pushing customers to move to cloud-based versions of its software by announcing cutoff dates for the support of the on-premises versions within the next few years. This has helped catalyse some of the business app modernisation and data discovery trend, which is leading to increased need for better analytics and MSP capabilities. Meanwhile, the larger trend towards enterprise-scale, cloud-based Software as a Service (SaaS) is driving more enterprises to outsource the ongoing management of their SAP applications and environments.

AWS Data Analytics and Machine Learning Services: Work-from-anywhere environments are now the catalyst for increased enterprise data discovery. Business leaders are focussing more on what data exists across all aspects of an enterprise, rather than in specific functional areas. The scope and affordability of a growing range of IoT capabilities are adding to this. The result is accelerating interest and investment in analytics within business operations, especially including the use of machine learning. An increasing number of enterprises now see the benefits of using machine learning and AI within business applications to process and gain insights from the massive volume of available data, quickly and effectively.

AWS IoT Services: Interest and investment in IoT had been growing rapidly in the past five years, even before the outbreak of COVID-19. There have been growing capabilities to improve and manage productivity, processes, devices and environments. However, work-from-anywhere realities are now broadening and accelerating enterprise IoT investments. Work-from-anywhere functionality significantly expands the scope of devices connected to enterprise systems beyond traditional industrial sensors and data. A growing range of devices and data types, and more connections, is stimulating increased investments in edge computing, networking, security, application programming interfaces (APIs) and data analytics.

AWS Migration Services: With the growth of digital business, many enterprises with major applications are not able to adapt quickly to changed business environments. This has triggered a global move towards rationalising and modernising traditional business software environments. COVID-19 catalysed this transformation, with many enterprises moving most of their applications into AWS and other hyperscaler platforms. The ubiquity of affordable and adaptable container technologies such as Kubernetes and Docker has further accelerated interest and investment by enterprises and services providers.

AWS Consulting Services: Most IT service providers have already started to move beyond digital enablement and initial operational improvements to provide clients with more refined digital business strategies. The primary focus for most engagements has shifted from cost reduction to improved business outcomes. This is leading to more consultative approaches by providers, which, in turn, is driving more client interest in change management and design thinking that closely ties cloud IT investment with business impacts. DevOps has become a core component of providers' portfolios, especially as clients investigate the benefits of cloud-native development and infrastructure-as-code (IaC).

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

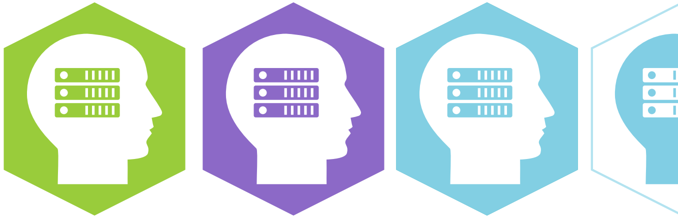
Definition

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.

Definition (cont.)

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-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.



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 US$20 million and US$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 US$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 products/ services and follow 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 3

	AWS Managed Services	AWS SAP Workloads	AWS Data Analytics and Machine Learning	AWS Internet of Things (IoT) Services	AWS Migration Services	AWS Consulting Services
AC3	Leader	Not in	Not in	Not in	Leader	Leader
Accenture	Leader	Leader	Leader	Leader	Leader	Leader
ARQ	Contender	Not in	Not in	Not in	Contender	Contender
ASG	Contender	Not in	Not in	Not in	Not in	Not in
Aspire Systems	Not in	Not in	Not in	Not in	Product Challenger	Not in
Atos	Product Challenger	Not in	Market Challenger	Not in	Market Challenger	Not in
Capgemini	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger
CMD	Not in	Not in	Not in	Not in	Not in	Rising Star
Cognizant	Leader	Not in	Not in	Not in	Leader	Leader
CyberCX	Contender	Not in	Product Challenger	Not in	Contender	Product Challenger
Datacom	Rising Star	Contender	Product Challenger	Not in	Leader	Product Challenger
Deloitte	Leader	Leader	Leader	Leader	Leader	Leader
DXC Technology	Product Challenger	Leader	Product Challenger	Leader	Leader	Leader

AWS - Ecosystem Partners - Quadrant Provider Listing 2 of 3

	AWS Managed Services	AWS SAP Workloads	AWS Data Analytics and Machine Learning	AWS Internet of Things (IoT) Services	AWS Migration Services	AWS Consulting Services
EPAM	Not in	Not in	Not in	Contender	Not in	Not in
FPT Software	Not in	Not in	Not in	Not in	Contender	Contender
HCL	Leader	Not in	Not in	Not in	Leader	Product Challenger
Hitachi Vantara	Contender	Not in	Not in	Not in	Not in	Contender
IBM	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Infosys	Leader	Not in	Leader	Not in	Leader	Leader
Intellify	Not in	Not in	Leader	Not in	Not in	Not in
ITOC	Not in	Contender	Not in	Not in	Not in	Not in
Lemongrass	Not in	Rising Star	Not in	Not in	Not in	Not in
Logicworks	Not in	Not in	Contender	Not in	Not in	Not in
LTI	Contender	Not in	Not in	Not in	Product Challenger	Not in
Mechanical Dock	Product Challenger	Not in	Not in	Not in	Not in	Product Challenger
Mindtree	Contender	Not in	Contender	Not in	Not in	Not in

AWS - Ecosystem Partners - Quadrant Provider Listing 3 of 3

	AWS Managed Services	AWS SAP Workloads	AWS Data Analytics and Machine Learning	AWS Internet of Things (IoT) Services	AWS Migration Services	AWS Consulting Services
NTT DATA	Market Challenger	Not in	Market Challenger	Market Challenger	Market Challenger	Market Challenger
Persistent Systems	Not in	Not in	Not in	Not in	Not in	Contender
Rackspace Technology	Contender	Not in	Contender	Not in	Contender	Contender
Slalom	Not in	Not in	Rising Star	Not in	Rising Star	Contender
TCS	Leader	Leader	Leader	Leader	Leader	Leader
Tech Mahindra	Contender	Contender	Contender	Contender	Contender	Not in
Telstra Purple	Leader	Not in	Contender	Contender	Product Challenger	Product Challenger
To The New	Not in	Not in	Contender	Not in	Not in	Not in
Unisys	Product Challenger	Not in	Not in	Not in	Not in	Not in
Versent	Leader	Not in	Leader	Not in	Leader	Leader
Virtusa	Not in	Not in	Not in	Not in	Contender	Not in
Wipro	Product Challenger	Contender	Leader	Contender	Leader	Product Challenger

AWS - Ecosystem Partners Quadrants

ENTERPRISE CONTEXT

AWS Migration Services

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

In this quadrant report, ISG highlights the current market positioning of providers of AWS migration services in Australia and how they address the key challenges faced by enterprises in the region.

ISG notes that Australia is at the forefront in the adoption of AWS migration services when compared with other regions. 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.

Providers are improving their cloud offerings related to data migration and transformation, covering phases from planning to migration, post migration monitoring and cost estimation for enterprises. In this transformation journey, providers support enterprises by assessing and planning the strategy, providing tools that helps to migrate and validate, offering pipeline and business intelligence visualizations to cloud, monitoring to operationalize cloud migration, determining consumption trends and making forecasts, among other services.

The common obstacles to migrating enterprise workloads to AWS, especially during the current COVID-19 pandemic include high upfront costs, 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.

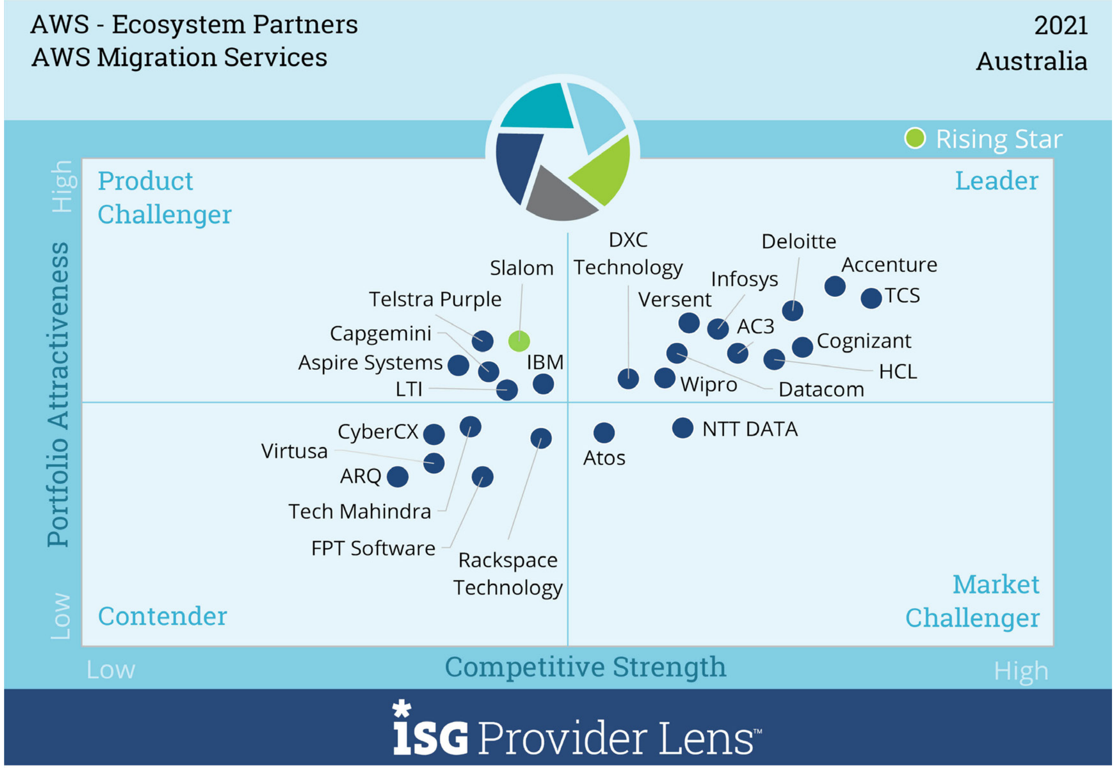
Operational leaders and finance leaders should read this report to understand the relative positioning of providers offering AWS migration services that enable high ROI, including business performance improvements.

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.



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

AWS MIGRATION SERVICES

Observations

With the growth of digital business, many enterprises with major applications are unable to adapt quickly to the changing business environment that includes a global move towards modernising traditional software environments. COVID-19 catalysed this transformation, with many enterprises moving most of their applications into AWS and other hyperscale platforms. The ubiquity of affordable and adaptable container technologies such as Kubernetes and Docker has further accelerated interest and investment by enterprises and services providers.

Of the 25 providers in Australia in this quadrant, 11 are Leaders and one is a Rising Star:

- **AC3** is a leading privately owned cloud services provider, with its base in Australia and New Zealand. It has a highly differentiated cloud migration offering and high levels of AWS accreditation.
- **Accenture** is a leading, global professional services company that provides end-to-end cloud solutions on the AWS platform. It has access to a broad range of migration tools that can be adapted to individual client engagements.
- **Cognizant** is a large global IT services provider, headquartered in the U.S. It offers a comprehensive range of best-in-class solutions for AWS environments and has a highly transformative migration service offering.
- **Datacom** is one of Australasia's largest professional IT services companies, with annual revenues of more than $1.3 billion in 2021. Datacom has proprietary managed services tools and processes and is substantially increasing its revenues both through its migration and managed services offerings.
- **Deloitte** is one of the largest professional services firms in the world and a leader in digital transformation strategy. It has a lucrative multiyear global deal with AWS for cloud migration services.
- **DXC Technology** is a global software and services provider that offers a broad range IT services and solutions. It has a broad range of optimised cloud solutions and provides innovative end-to-end cloud migration services.

AWS MIGRATION SERVICES

Observations (cont.)

- **HCL** is an India-based multinational IT services and consulting technology company with offices in Australia. It has an advanced cloud transformation strategy, offered through consulting services, and an innovative cloud migration approach.
- **Infosys** provides business consulting, information technology and outsourcing services, encompassing mobility, data and cloud computing. It has a comprehensive migration suite and a growing presence in Australia in the cloud space.
- **TCS** is a global IT services, consulting and business solutions company, headquartered in India. It has a highly comprehensive migration solutions portfolio and an advanced and comprehensive compliance and security offering.
- **Versent** is a technology solutions company based in Australia. It offers comprehensive end-to-end cloud migration services and highly secure and efficient cloud transformation services.
- **Wipro** is a leading global IT, consulting and business process services provider, headquartered in India. It has comprehensive cloud consulting services and a strong managed service offering.
- **Slalom** (Rising Star) is a U.S.-based consulting firm focussed on strategy, technology and business transformation. It has a fast-growing Australian practice and specialises in high-impact, customised engagements.

WIPRO

Overview

Wipro is a leading global IT, consulting and business process services provider, headquartered in India. It has had a presence in Australia for more than 20 years and employs over 2,700 employees. The key AWS services offered in Australia include AWS Managed Services, AWS Modernisation Services and AWS Migration services. Through the AWS Launch Pad, Wipro has been AWS's Premier Consulting Partner for the last seven years and its Managed Service Partner for the last five years.

Strengths

Comprehensive cloud consulting services: Wipro FullStride Cloud Services is a set of consulting services, engineering capabilities, technology solutions and business platforms for enterprises. Wipro is heavily investing in cloud technologies and partnerships through the launch of this portfolio of cloud services. It brings together Wipro's extensive range of industry-leading cloud-related capabilities. It delivers full-cycle cloud transformation from strategy to operations, at scale with experience and Wipro's extensive partner and hyperscaler ecosystem to simplify, orchestrate and accelerate the cloud journey for clients. The key use cases delivered globally on AWS platforms include data migration, application modernisation, next-generation contact centres and a connected car platform.

Strong managed service offering: Wipro's BoundaryLess Enterprise (BLE) offering drives the adoption, transformation and use of cloud services. Its Cloud Studio offering and Enterprise Digital Operations Center (EDOC) are focussed on modernising the workloads through this BLE offering. Its Modernisation program includes migrating from legacy applications into hybrid clouds through Infrastructure as a Service (IaaS), Platform as a Service (PaaS), containers, cloud-native services and microservices. The Wipro AWS Launch Pad includes a state-of-the-art facility to develop cutting-edge innovations in cloud services and has in-house technical expertise to ensure seamless cloud adoption.

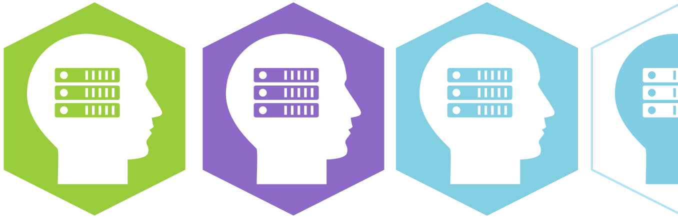
Caution

Wipro is taking an innovative and an efficient direction for scalable AWS migration services. However, its talent pool is sometimes inconsistently leveraged across various stage of the process, which may lead to greater requirement for provider management from the client side.

2021 ISG Provider Lens™ Leader

Wipro is heavily investing in cloud technologies and partnerships in Australia through the launch of a broad portfolio of cloud services.

Methodology



METHODOLOGY

The research study "ISG Provider Lens™ 2021 AWS - Ecosystem Partners, Australia" analyzes the relevant software vendors/service providers in the Australia 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 2021 AWS - Ecosystem Partners, Australia market
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & use cases
4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)
5. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
6. Use of the following key evaluation criteria:
   - Strategy & vision
   - Innovation
   - Brand awareness and presence in the market
   - Sales and partner landscape
   - Breadth and depth of portfolio of services offered
   - Technology advancements

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Distinguished Lead Analyst

Distinguished analyst and author Craig Baty has extensive research and thought leadership experience in the Asia Pacific and Japan ICT markets. Craig is Principal and Founder of DataDriven an Asia/Pacific based research and advisory firm. Craig has over 30 years of executive and board level experience in the ICT industry, including as a Group VP and Head of Gartner Research AP/J, CEO of Gartner Japan, Global VP Frost & Sullivan, and more recently as VP Global Strategy and VP Digital Services in Fujitsu Tokyo HQ. As a well know ICT commentator and analyst, Craig has written more than 200 research pieces, and presented at over 1500 events globally. He is also regularly quoted in regional media. Craig is actively involved in the ICT community as a board member of the Australian Information Industry Association (AIIA) and Immediate Vice Chair of the Australian Computer Society NSW (ACS).

Srinivasan PN, Author

Research Analyst

Srinivasan is a senior analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on Insurance BPO Industry, Mainframe Ecosystem, Cybersecurity Ecosystem and AWS Ecosystem. His area of expertise lies in the space of engineering services and digital transformation. Srinivasan has over 6 years of experience in the technology research industry and in his prior role, he carried out research delivery for both primary and secondary research capabilities. Srinivasan is responsible for developing content from an enterprise perspective and author the global summary report. Along with this, he supports the lead analysts in the research process and writes articles about recent market trends in the industry.

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Partner and Global Head – ISG Provider Lens/ISG Research

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, principal analyst and global head of 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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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 more than 75 of world's top 100 enterprises, 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; strategy and operations design; change management; market intelligence and technology research and analysis. Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,300 digital-ready 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. For more information, visit www.isg-one.com.