

***ISG** Provider Lens™

AWS - Ecosystem Partners

Australia 2021

Quadrant
Report



A research report
comparing provider
strengths, challenges
and competitive
differentiators

Customized report courtesy of:

AC3

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.

The lead author for this report is Craig Baty. The editors are Ipshita Sengupta and John Bunnell. The research analyst is Srinivasan PN and the data analyst is Sachitha Kamath.

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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

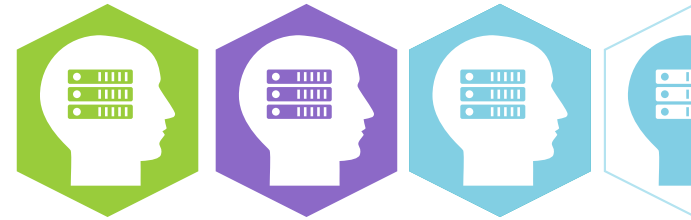
Definition

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 Managed Services

This report is relevant to enterprises across industries in Australia for evaluating providers of AWS managed services. In this quadrant report, ISG highlights the current market positioning of these providers 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 Australia are taking the lead in cloud adoption, though their overseas counterparts are not far behind.

Providers in Australia are improving their capabilities by establishing dedicated centers of excellence to serve enterprises. The AWS managed services market in Australia is driven by the growing need for managed services across various industry verticals such as finance, energy and utilities, telecom and the government sector. Providers are also investing more toward building automation and AI capabilities to improve customer satisfaction and ensure quick turnaround time.

Enterprises in Australia prefer providers that have a local presence, talented professional resources and AWS certifications that indicate their expertise in specific verticals.

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 Australia.

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.

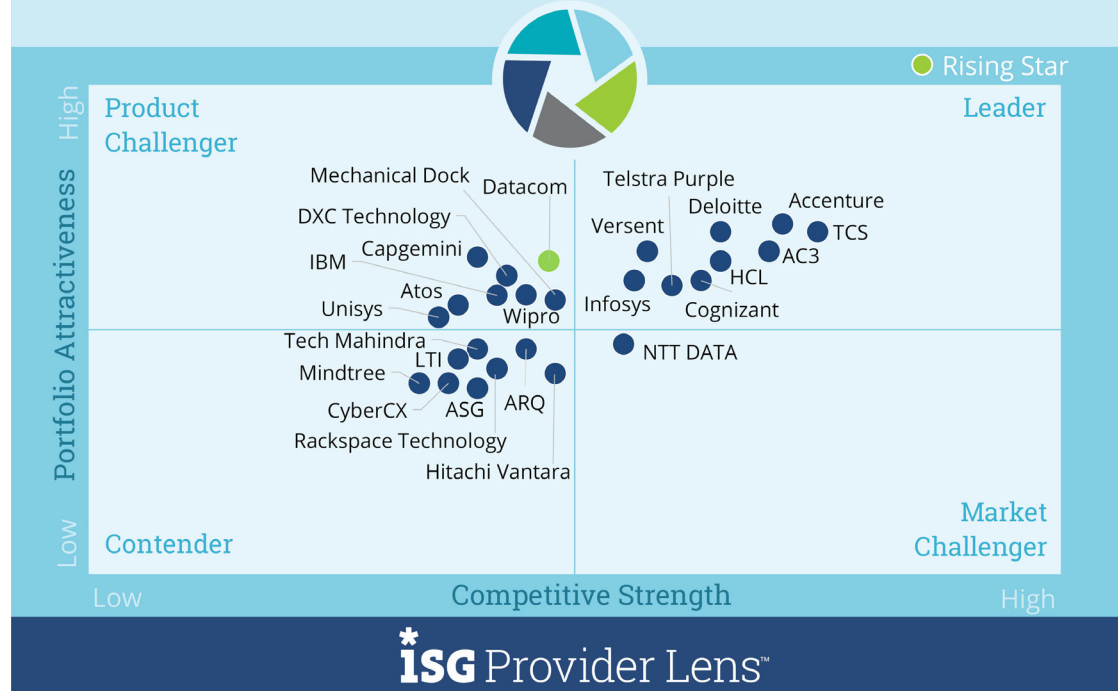
AWS MANAGED SERVICES

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
Australia



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

COVID-19 has seen more enterprises accelerate and extend digital transformation, and, as a result, enterprises are increasingly pursuing different types of cloud-native business IT solutions. Clients expect and demand solutions that reduce costs, improve business agility, enhance security and enable measurable business improvement. MSPs, in turn, are expanding capabilities, processes, services and their own business models to help clients design, develop, migrate, run, manage and optimise digital infrastructure and applications. This level of change requires updated insights on providers and offerings, and better means to assess both.

Of the 26 providers in Australia in this quadrant, nine are Leaders and one is a Rising Star:

- **AC3** is a leading, privately owned cloud services provider based in Australia and New Zealand. It has comprehensive end-to-end managed cloud services and a highly flexible and adaptable managed cloud offering.
- **Accenture** is a leading, global professional services company that provides end-to-end cloud solutions on the AWS platform. It has strong capabilities in digital, cloud and security, with a Cloud First strategy that provides strong market differentiation.

AWS MANAGED SERVICES

Observations (cont.)

- **Cognizant** is a large global IT services provider, headquartered in the U.S. It offers a highly comprehensive portfolio of managed services via the AWS platform
- **Deloitte** is one of the largest professional services firms in the world and a leader in digital transformation strategy. It has a strong Risk Advisory practice for AWS services and an Application Modernization Studio to assist clients in modernising their core systems.
- **HCL** is an India-based multinational IT services and consulting technology company, with offices in Australia. It has a comprehensive cloud managed service offering and strong cloud compliance and security features.
- **Infosys** provides business consulting, information technology and outsourcing (ITO) services, encompassing mobility, sustainability, big data and cloud computing. It has a highly comprehensive managed services portfolio.
- **TCS** is a global IT services, consulting and business solutions company, headquartered in India. It has an advanced cloud platform for managed services and is an industry leader in AWS product innovation.
- **Telstra Purple** is the professional services business of Australia's largest telecommunications provider. Telstra is establishing an AWS Centre of Excellence that will include Telstra Purple's consulting and managed services professionals.
- **Versent** is an Australia-based provider of technology transformation services for enterprises. It has a highly comprehensive managed services cloud strategy and a fast-growing AWS partnership for cloud services.
- **Datacom** (Rising Star) is one of Australasia's largest professional IT services companies, with more than 6,200 employees. It is substantially growing revenues in both its migration and managed services offerings.

AC3

 Overview

AC3 is a leading, privately owned cloud services provider based in Australia and New Zealand and has more than 1,000 clients. It is headquartered in Sydney with offices in Melbourne, Auckland and Wellington and over 300 full time employees and more than 80 contractors. AC3 offers end-to-end AWS managed services, including 24/7 monitoring, incident response and cost optimisation. Its AWS strategy focusses on industry-specific services in the government, financial services and ISV segments.

 Strengths

Comprehensive end-to-end managed cloud services: AC3 offers a range of cloud services, including cloud optimisation, data integration and agile and DevOps enablement for cloud-empowered digital transformation. It has cloud adoption packages to design and implement next-generation cloud architectures. It provides cost optimisation through the delivery of a robust and scalable AWS environment, supported by tools, processes and people.

Highly flexible and adaptable managed cloud offering: AC3's managed services offerings provide flexibility, enabling clients to choose the engagement model that best suits them and their unique workloads. AC3 delivers three types of cloud management: Standard Management; Advanced Management, which includes a package of services covering modern application technologies; and DevOps Management, which provides complete coverage of modern application technologies, working in an Agile method.

Strong cybersecurity managed offering: AC3 has a dedicated Cyber Security practice, which works across multiple hyperscalers and in on-premises environments. The team works closely with AWS and its hyperscale practice to provide cybersecurity to clients of all sizes. Its Cyber Security practice can deliver consulting through to ongoing standalone managed security services or as an add on to its AWS managed services products. It focusses on governance and compliance through to automated remediation with SOAR (security orchestration, automation and response) capabilities.

 Caution

AC3 has developed an extensive range of AWS managed services and quite a mature cybersecurity offering associated with this, however, lack of awareness about this capability in the market could lead to buyers overlooking the offering. A stronger focus on communicating its story may be required to counter this.



2021 ISG Provider Lens™ Leader

AC3 was the first AWS Premier Consulting Partner to launch managed AWS services in Australia and New Zealand. It is one of the few Australia-based certified AWS Managed Services Providers.

ENTERPRISE CONTEXT

AWS SAP Workloads

This report is relevant to enterprises across industries in Australia 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 Australia 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. SAP's new RISE with SAP campaign bundles existing SAP assets by offering business transformation to enterprises, thus accelerating their cloud adoption.

Enterprises engage with providers that offer frameworks to support the transformation process, including various methods and tools relevant for S/4HANA transformation. Providers should also have high capability in SAP System Landscape Optimization, which is a data-oriented approach to implement transformation at the database level.

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 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 Australia.

SAP leaders should read this report to understand the positioning of SAP providers, learn how the 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

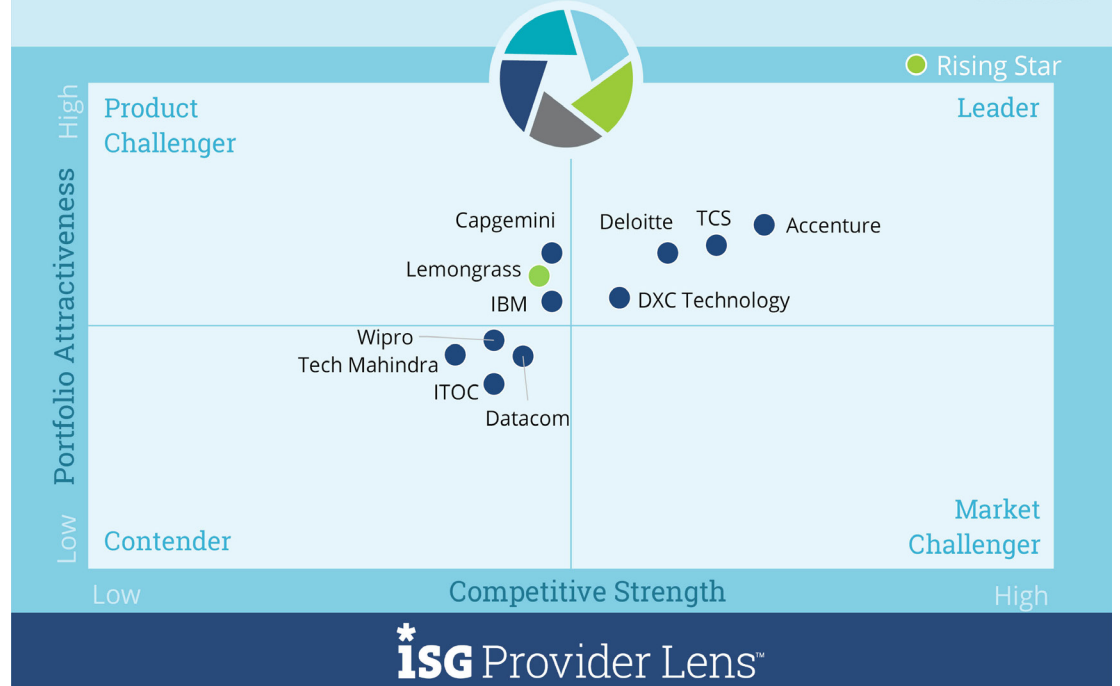
Definition

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
Australia



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

There has been a broad scope increase in enterprises seeking and engaging with providers of SAP migration and management services. In particular, the move towards overall digital transformation helped to accelerate the migration of existing SAP instances to AWS and to implement new instances as well. The outbreak of COVID-19 and its impact on labour and the economy have pushed that early interest into mounting pressure to either shift existing applications and data or implement entirely new applications on AWS. The Leaders in this quadrant are all capable of addressing even the most complex SAP landscape, but all have their own areas of specialization.

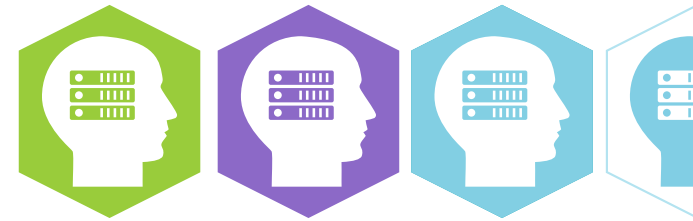
Of the 11 providers in Australia in this quadrant, four are Leaders and one is a Rising Star:

- **Accenture** is a leading, global professional services company that provides end-to-end cloud solutions on the AWS platform. It offers a highly advanced SAP offering in partnership with AWS.
- **Deloitte** is one of the largest professional services firms in the world and a leader in digital transformation strategy. Deloitte's joint SAP practice with AWS includes a large global team of more than 2,500 practitioners.

AWS SAP WORKLOADS

Observations (cont.)

- **DXC Technology** is a global software and services provider that offers a broad range digital IT services and solutions. Its collaboration with AWS includes mission-critical support for SAP.
- **TCS** is a global IT services, consulting and business solutions company, headquartered in India. It has a highly comprehensive catalogue of SAP cloud offerings and advisory services.
- **Lemongrass** (Rising Star) is a software-enabled services provider that specialises in the implementation of SAP S/4 HANA and Business Suite environments on the AWS cloud. It offers a highly flexible “DevOps-as-a-Service” model.



ENTERPRISE CONTEXT

AWS Data Analytics and Machine Learning

This report is relevant to enterprises across industries in Australia for evaluating providers of data analytics and machine learning services. In this quadrant report, ISG highlights the current market positioning of providers in Australia 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 Australia.

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.

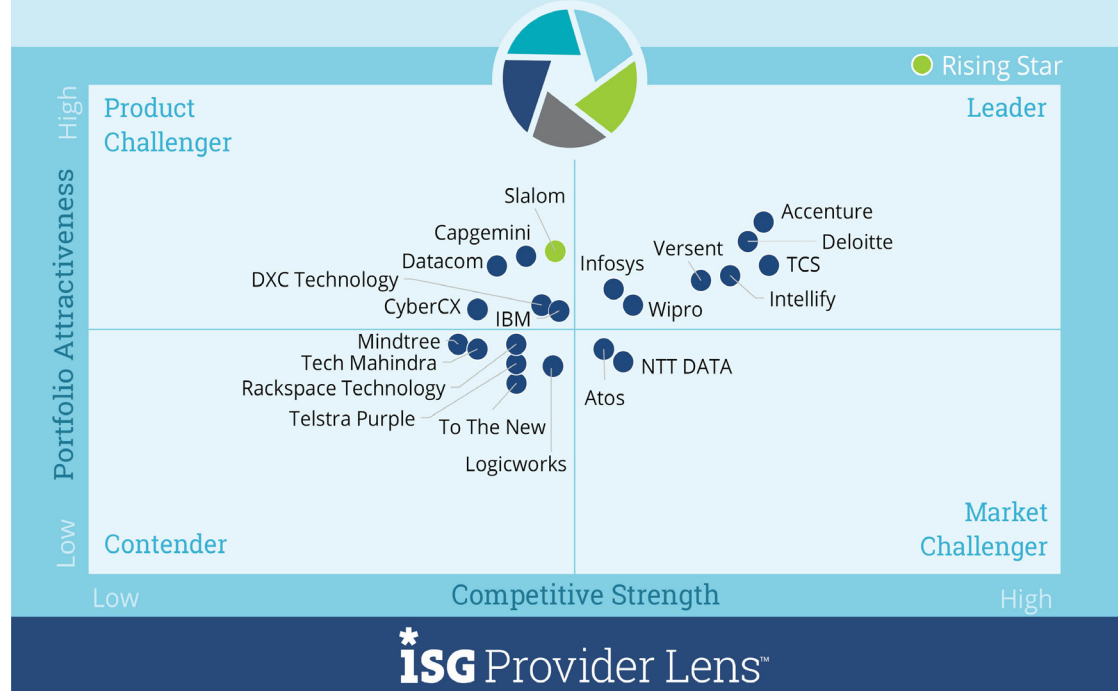
AWS DATA ANALYTICS AND MACHINE LEARNING

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
Australia



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

The expanding and accelerating digital transformation of enterprises – including changes stemming from the COVID-19 pandemic, have made enterprises more aware of the vast scope of business data they can access. Recent business disruptions have further underscored the need for finding and effectively using such data. As a result, there is an increasing number of enterprises seeking and implementing advanced data analytics capabilities, including the use of machine learning to improve data accumulation. Due to the widescale shortage of skilled personnel, enterprises are increasingly turning to service providers that can develop, adapt, scale and manage these capabilities for a variety of business requirements. The AWS platform is an ideal platform for this, and the AWS partner network includes a growing list of providers with strong capabilities.

Of the 21 providers in Australia in this quadrant, seven are Leaders and one is a Rising Star:

- **Accenture** is a leading, global professional services company that provides end-to-end cloud solutions on the AWS platform. It has a highly capable and growing data-centric and analytics practice on AWS.
- **Deloitte** is one of the largest professional services firms in the world and a leader in digital transformation strategy. Leveraging AWS's scalable cloud platform, Deloitte offers strong data analytics capabilities to maximise value for clients.

AWS DATA ANALYTICS AND MACHINE LEARNING

Observations (cont.)

- **Infosys** provides business consulting, information technology and outsourcing services, encompassing big data and cloud computing. It offers innovative data analytics and cloud functionalities and a next-generation cloud centre of excellence.
- **Intellify** is an Australian IT provider that delivers machine learning and data analytics solutions.
- **TCS** is a global IT services, consulting and business solutions company, headquartered in India. It has a comprehensive range of business and technology data analytics offerings.
- **Versent** is an Australia-based provider of transformation services for enterprises. It has a highly adaptable and innovative data analytics platform and facilitates fast implementations of data and insights platforms, utilising its AWS frameworks.
- **Wipro** is a leading global IT, consulting and business process services provider, headquartered in India. It has a comprehensive data analytics and machine learning offering and an innovative Insights-as-a-Service offering.
- **Slalom** (Rising Star) is a U.S.-based consulting firm focussed on strategy, technology and business transformation. It has a strong culture of innovation with a modern approach to IT services and an expanding practice in Australia.

ENTERPRISE CONTEXT

AWS Internet of Things (IoT) Services

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

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

Australian enterprises have been increasingly investing on AWS IoT over the past couple of years by hiring new talent, building use cases, developing frameworks and solutions and platforms, and offering better end user experience. Enterprises have partnerships with providers that can offer them talented local professionals, co-innovation capabilities and cost optimization.

The hurdles enterprises face include (but are not limited to) building the right talent and partner ecosystem, data and network security and compliance with regional regulations. Providers help enterprises to hire the right talent to engage with different operating models and an industry-specific security infrastructure to adhere to regulations, among other benefits.

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 it can be compared with the others in the market

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

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.

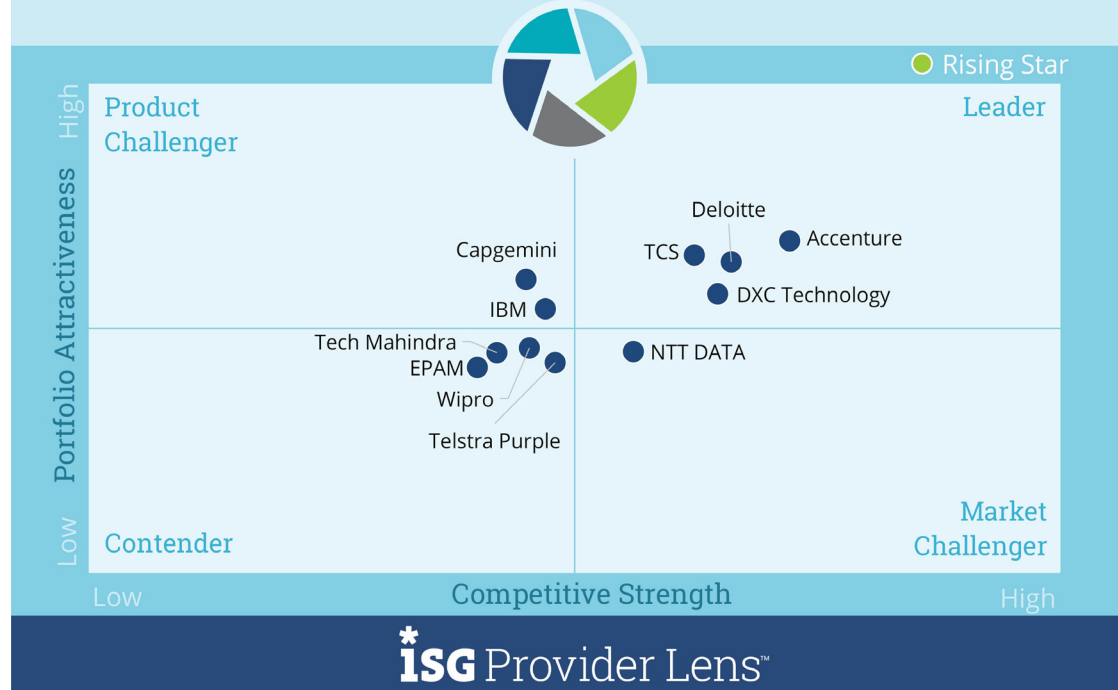
AWS INTERNET OF THINGS (IOT) SERVICES

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
Australia



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

AWS INTERNET OF THINGS (IOT) SERVICES

Observations

The COVID-19 pandemic has rapidly accelerated digital transformation, and related to that is an increase in interest in the use and management of IoT. The year 2020 saw a sharp expansion of the remote workforce with inadequate connectivity, driving the need for IoT and increased interest in related areas such as mobile devices, sensors, network security and data management. In addition, traditional IoT needs and challenges escalated, as industrial plants closed down or underwent reconfiguration, supply chains broke down and transportation usage changed. Services providers responded quickly by aligning their respective portfolios with complementary services such as data analytics, and implemented many of their initial solutions within their own organisations.

Of the 11 providers in Australia in this quadrant, four are Leaders.

- **Accenture** is a leading, global professional services company that provides end-to-end cloud solutions on the AWS platform. It has strong IoT capabilities and credentials, and recent local acquisitions have significantly strengthened its capabilities.
- **Deloitte** is one of the largest professional services firms in the world and a leader in digital transformation strategy. It has a dedicated global IoT practice and innovative smart factory solutions, powered by AWS IoT.
- **DXC Technology** is a global software and services provider that offers a broad range digital IT services and solutions. It is certified in AWS's IoT competency and typically develops and delivers IoT engagements through its full-stack enterprise IT approach.
- **TCS** is a global IT services, consulting and business solutions company, headquartered in India, with a broad range of IoT offerings.

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.

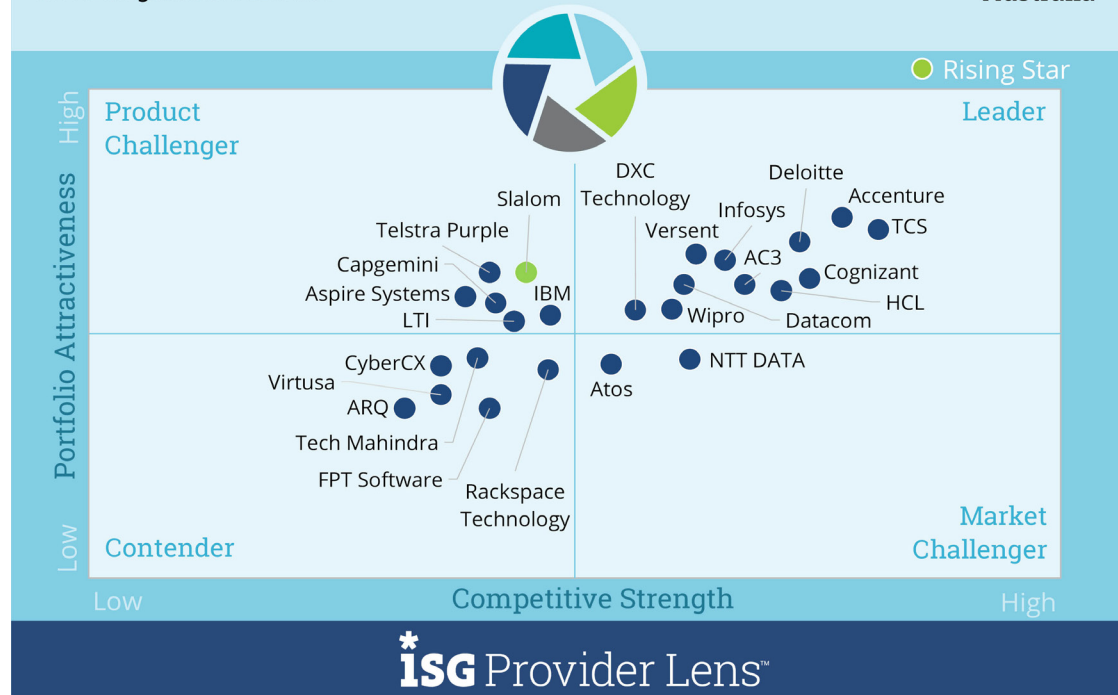
AWS MIGRATION SERVICES

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.

AWS - Ecosystem Partners
AWS Migration Services

2021
Australia



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.

AC3

 Overview

AC3 is a leading privately owned cloud services provider with coverage across Australia and New Zealand. It is headquartered in Sydney with other offices in Melbourne, Auckland and Wellington and its client base includes more than 1,000 organisations. AC3 offers end-to-end AWS managed services, including 24/7 monitoring, incident response and cost optimisation. Its target market is mid- to enterprise-level organisations on the eastern seaboard of Australia and New Zealand, the government and industries with low risk tolerance. It also targets ISVs.

 Strengths

Highly differentiated cloud migration offering: AC3's framework, based on previous customer experiences, takes an efficient and effective approach to migrations through three phases: migration readiness, migration planning and migrate. In line with the AWS Cloud Value framework, ACS creates a business case for migration. Other market differentiators in this space include government-grade governance and security. The company's heritage and expertise in the government sector comes from it formerly being a part of the NSW state government. This ideally positions it to support the most stringent requirements from financial services and insurance industries.

High levels of AWS accreditation: AC3 is an AWS Premier Consulting Partner in Australia and New Zealand and is also an AWS Managed Service Partner and an audited member of the Managed Services Program. It has six partner programs and more than 100 AWS certifications. AC3 is also an AWS Cloud Economics Partner, with six of its personnel certified to conduct the engagements, which positions it well to balance speed, risk mitigation and practical outcomes. Going forward, its strategy is to continue to develop its cloud assessment and business case delivery capabilities. AC3 has three AWS APN Ambassadors in its team and has recently been awarded with 100 APN Certification Distinctions.

 Caution

AC3's strong government heritage and reputation, may be adversely impacting the perception of its ability to deliver outside of that core skillset. Focussing on showcasing its successes in the enterprise market should therefore be a high priority for future development.



2021 ISG Provider Lens™ Leader

Australia based AC3's change management processes are often a winning differentiator for its migration services.

ENTERPRISE CONTEXT

AWS Consulting Services

This report is relevant to enterprises across industries in Australia 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 Australia 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.

Enterprises opt for providers that are AWS certified on the following five benchmarks: operational excellence, security, reliability, performance efficiency and cost optimization. Of these, cost optimization is one of the important parameters that Australian enterprises consider when they choose providers. They look for those that offer a robust and scalable AWS environment by aggregating the best tools, processes and people to offer actionable cost-saving recommendations.

Enterprises have been hesitant to transform their cloud ecosystem due to difficulties in measuring the workloads, shortage of skilled professionals and uncertainties about integration of the legacy infrastructure. Enterprises also expect providers to offer solutions and tools that are vertical specific and platforms that are offered in close partnerships with relevant players.

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 Australia

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 Australia.

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.

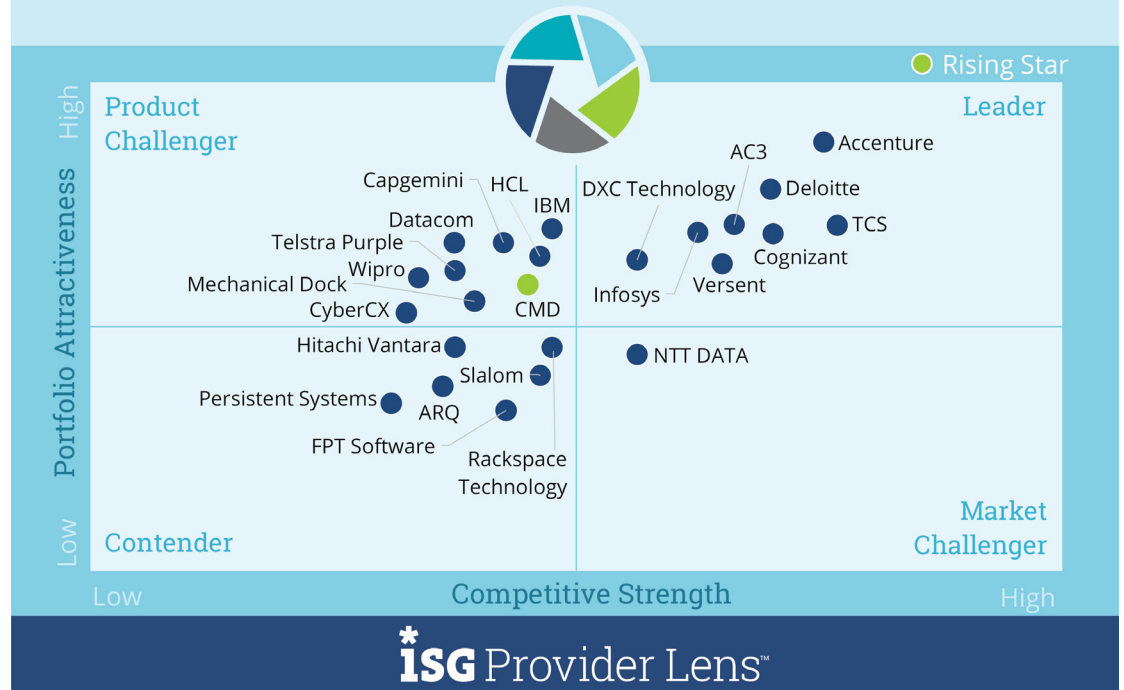
AWS CONSULTING SERVICES

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
Australia



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

Even during the current times of economic and business uncertainty, ISG continues to see a growing demand for consulting services that assess and address the changing enterprise business and IT needs. Typically, these centre around all aspects of managing the disruption and improvement of business and IT, including IT architecture and infrastructure change, application modernisation, workload migration and improvement, digital business and workplace transformation and training, technology and provider governance, and data security risk and compliance. The market pervasion of AWS, as a core IT platform, means that demand for the services of consulting providers partnered with AWS is increasing in tandem. The range of competencies among providers, in terms of skills and abilities, makes it a challenge, more than ever, to identify and engage with the most suitable partners.

Of the 24 providers in Australia this quadrant, eight are Leaders and one is a Rising Star:

- **AC3** is a leading privately owned cloud services provider based in Australia and New Zealand. It has a highly developed consulting-based offering with competitive cost optimisation features.
- **Accenture** is a leading, global professional services company that provides end-to-end cloud solutions on the AWS platform. Its Cloud First offering is delivered through its Intelligent Platform Services to deliver migration and application cloud services.

AWS CONSULTING SERVICES

Observations (cont.)

- **Cognizant** is a large global IT services provider, headquartered in the U.S. It offers a broad range of end-to-end consulting services and a comprehensive range of cloud modernisation offerings.
- **Deloitte** is one of the largest professional services firms in the world and a leader in digital transformation strategy. It has a large global cloud team with cutting-edge expertise and a holistic approach to cloud business transformation.
- **DXC Technology** is a U.S.-headquartered, global software and services provider that offers a broad range of digital IT services and solutions. It has an extensive AWS partnership to deliver migration and transformation services.
- **Infosys** provides business consulting, information technology and outsourcing services, encompassing mobility, sustainability, big data and cloud computing. Infosys has a highly comprehensive range of cloud strategy and consulting services.
- **TCS** is a global IT services, consulting and business solutions company, headquartered in India. It has a holistic and innovative cloud strategy and consulting offering, and a comprehensive security and compliance offering.
- **Versent** is an Australia-based provider of technology transformation services for enterprises. The company culture strongly embraces innovation and Versent has a highly collaborative relationship with AWS.
- **CMD Solutions** (Rising Star) is an Australian IT service provider that assists organisations to transform their IT operations using specialised AWS automation expertise. It offers a broad range of consulting services on the AWS platform.

AC3

 Overview

AC3 is a leading, privately owned cloud services provider offering services in Australia and New Zealand. It is headquartered in Sydney with other offices in Melbourne, Auckland and Wellington and its client base includes more than 1,000 organisations. AC3 offers consulting services with core focus on security and governance. Its key consulting offerings include AWS Migration and Well-Architected Review and Cost Optimisation. Its target market is mid- to enterprise-level organisations on the eastern seaboard of Australia and New Zealand.

 Strengths

Highly developed consulting-based offering: AC3's consulting expertise includes end-to-end AWS delivery and support, digital, e-commerce, data analytics and DevOps and Agile enablement. The company is constantly transforming its business model and repositioning itself to move further up the IT stack. It offers end-to-end AWS managed services, including 24/7 monitoring, incident response and cost optimisation.

Strong Well-Architected Review credentials: AC3's experts review a client's architecture against five pillars: Well-Architected Framework (Operational Excellence); security; reliability; performance efficiency; and cost optimisation. AC3 is a part of the exclusive group of AWS partners with staff trained and endorsed to conduct Well-Architected Reviews. ACS's migration services can benchmark a client's architecture against AWS global best practices and identify areas of improvement.

Highly competitive cost optimisation features: ACS has AWS environment tools, processes and people to provide actionable cost saving recommendations. Its Smart Cloud Saver Assessment can help an organisation optimise its configuration and costs, while maintaining availability and performance. AC3 offers consulting services with security and governance as its core focus areas. The DevOps management functionality provides proactive support using an Agile delivery approach.

 Caution

AC3's obvious strengths in migration and management services overshadows its smaller but growing consulting capability. It should increasingly focus on leading bid responses by showcasing strong examples of its capabilities in this area.



2021 ISG Provider Lens™ Leader

Australian firm AC3 is constantly evolving its business model and repositioning itself to move further up the IT stack, especially in relation to AWS.



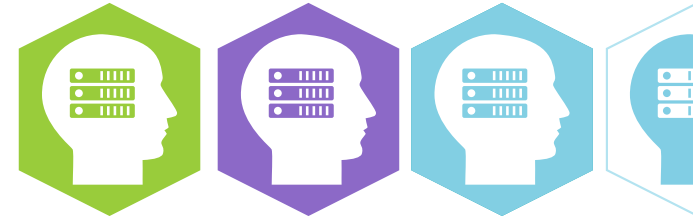
Methodology

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



Authors and Editors



Craig Baty, Author
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.

Authors and Editors



Jan Erik Aase, Editor

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.

ISG Provider Lens™ | Quadrant Report

December 2021

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