

AWS Ecosystem Partners

AWS partners are critical to the success of
AWS and its customers



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In 2022, AWS introduced major innovations in services related to the cloud, data analytics and machine learning (ML), alongside a general mission that is all about supporting clients in their transformation toward sustainability, focusing on digital sovereignty and the objective of enhanced innovation power. Public cloud usage tends to outstrip traditional infrastructures and, therefore, known techniques for operations. The success of AWS' mission depends on sophisticated CloudOps that cover cloud security and governance, resource and cost optimization, intelligent provisioning of resources and service availability across delivery models (including the edge) – all this implies the need for maximum interoperability of services.

Consequently, AWS has several engagement models to enable its strategic service provider partners to train and upskill their cloud workforce in leveraging the latest platform innovations through its AWS Partner Network (APN). The partnerships have matured in terms of AWS cloud opportunities, including migration, consulting, data and artificial intelligence (AI), SAP services and managed services.

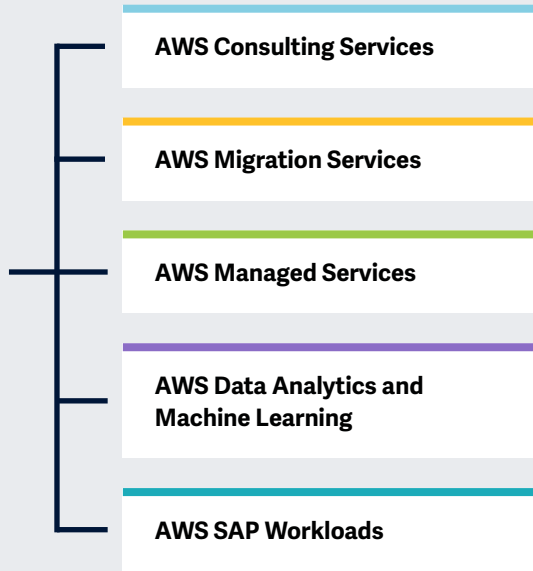
Some of the main innovations that have contributed to AWS' growth and market expansion, including APN and enterprise clients, are new high-performance EC2 C7g instances with AWS Graviton3 processors, new locations for AWS DataSync and AppSync simplified interfaces for Pub/Sub APIs. AWS has also made major contributions in the data, AI and ML spaces through additional offerings and enhancements.

AWS partners play a critical role in ensuring that customers and prospective customers of AWS can keep up with its pace of innovation and make a meaningful entry into the AWS services space, respectively.



Key focus areas for AWS Ecosystem Partners 2023.

Simplified Illustration Source: ISG 2023



Definition

The ISG Provider Lens™ AWS Ecosystem Partners 2023 study offers the following to business and IT decision makers:

- Transparency on the strengths and weaknesses of relevant providers.
- A differentiated positioning of providers by segments on their competitive strengths and portfolio attractiveness.
- Focus on different markets, including Brazil, Germany and the U.S.

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



Definition

This quadrant includes consulting partners that form the single-largest group in the AWS Partner Network (APN) coterie. 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 (GRC) support. They must not only offer critical technologies, architecture, security and industry-specific solutions but also demonstrate their ability to deliver business value through consulting services.

Eligibility Criteria

1. Availability of **staff** with experience and certification to support and deliver relevant offerings
2. Wide scope of **AWS competencies** and service delivery offerings and related certifications
3. AWS-focused consulting **roadmap and innovations** (current and planned)
4. Demonstrate **value for clients** through perceptible business outcomes or other measurable improvements
5. Scope and availability of **enabling programs** for customer success (for example, planning workshops and training)
6. Offer a **range** of security tools, technologies and services.
7. Demonstrate credibility in the area of AWS services and solutions through notable **references**
8. Ensure the suitability, maturity and adaptability of the **pricing model**



Definition

This quadrant covers AWS provider partners that offer technologies, products or services to support workload operation and migration. Providers participating in this quadrant should excel in automated testing, migration and deployment, and typically work closely with clients over requirements such as readiness assessments and change management. The relevant provider skills and expertise include software architecture, software development (including DevOps), application and workload migration and modernization, and related consulting and technological capabilities to build, enable and support robust, scalable applications and services. Some AWS partners can qualify as members of the AWS Migration Acceleration Program for their special migration competence.

Eligibility Criteria

1. Availability, experience and **certification** of staff supporting and delivering services
2. Scope and use of **relevant tools and technologies** (for example, Kubernetes, Docker)
3. Participation and support in the **Cloud Native Computing Foundation (CNCF)** is advantageous
4. Scope of **business-critical applications** migrated for customers using AWS
5. Platform/PaaS and channel **partnerships**
6. Scope and availability of enabling programs for **customer success** (for example, planning workshops and training)
7. AWS-focused **container** offering roadmap and innovations (current and planned)
8. Scope of **security** tools, technology and services utilized
9. Number and reputation of **references** for containerization and migration services and solutions on AWS
10. Offer suitable, mature and adaptable **pricing models**
11. Being part of the **AWS Migration Acceleration Program (MAP)** is advantageous



Definition

This quadrant covers managed service providers (MSPs) that, in addition to IaaS and PaaS hyperscale platforms for public clouds from third-party service providers, offer professional services that encompass orchestrating, provisioning, monitoring and managing operations of a customer's public cloud and multicloud environment. The aim is to maximize performance in the cloud, reduce costs and ensure compliance and security. They use typically developed or licensed cloud management platforms and tools to provide customers with the highest level of automation and the necessary transparency over the managed cloud resource pool in terms of capacity utilization, costs and independent management.

Eligibility Criteria

1. AWS Managed Service Program **certification**
2. Expertise in autonomous **ML-driven** orchestration and configuration management of platforms/systems
3. Experience in designing, building, and managing public and **multicloud** environments
4. Ability to **support** big data and multiple database solutions and analytics
5. Experience in **DevOps** engineering
6. Scope and availability of **security** resources and services
7. Experience in **solutions architecture**
8. Experience in **server migration** experience and availability of resources



Definition

This quadrant covers providers of two increasingly intertwined sets of IT capabilities – the ability to collect and analyze a widening array of data types and amounts, and ability to demonstrate machine learning capabilities that enable faster and more efficient analysis of various types of data within and across a growing range of systems and applications. Providers in this space must demonstrate capabilities and experience in data science (including big data and advanced analytics), database and solution architecture, ML and related AI development and implementation, software development, networking and data privacy/security. Most of these providers use an adaptive portfolio of tools and technologies to develop and deliver solutions.

Eligibility Criteria

1. Scope and use of **relevant tools** and technologies
2. Service/solution **integration capabilities** and offerings
3. Scope and availability of **enabling programs** for customer success (for example, planning workshops and training)
4. Availability, experience and certification of analytics, data science and ML **experts**
5. Ability to provide an AWS-focused offering **roadmap** and innovations (current and planned)
6. Number and reputation of **references** for ML and analytics services and solutions on AWS
7. Suitability, maturity and adaptability of **pricing model** with a go-to-market strategy
8. Breadth and depth of **partner and channel** relationships



Definition

This quadrant assesses service providers that enable the provisioning and ongoing operation of SAP systems such as SAP HANA or platforms on AWS, together with their central management. These service providers not only help implement AWS as a hardware replacement or hardware extension (IaaS) for enterprises but also optimize, design and develop new processes and business flows, as a part of platform management, by combining their own services, SAP services and AWS. This select group of service providers is thus responsible for implementing and ensuring subsequent operations.

Service providers in this quadrant not only need relevant AWS certifications but also SAP certifications and/or partnerships to stay updated with SAP products, technologies, licensing and platform developments. They should also be able to demonstrate their impact on customer IT landscapes, applications and business processes.

Eligibility Criteria

1. Breadth and depth of **service portfolio** related to the implementation, customization, provisioning and support of SAP application and services
2. Number and locations of **resources** to support SAP offerings on AWS
3. **Awareness** and number of **customers** of the service provider for SAP applications and services provisioning and support on AWS
4. Number and reputation of **references** for SAP applications, including services provisioning and support on AWS
5. **Experience** and a number of relevant **certifications**, including AWS-certified SAP Competency
6. Offer **pricing models** that are suitable, mature and adaptable
7. **Dedicated resources** (including business units) around DevOps, automation and cloud-native application design



Quadrants by Region

As a part of this ISG Provider Lens™ quadrant study, we are introducing the following five quadrants on AWS Ecosystem Partners 2023.

Quadrant	Brazil	Germany	U.S.
AWS Consulting Services	✓	✓	✓
AWS Migration Services	✓	✓	✓
AWS Managed Services	✓	✓	✓
AWS Data Analytics and Machine Learning	✓	✓	✓
AWS SAP Workloads	✓	✓	✓



The research phase falls in the period between April and May 2023, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in October 2023.

Milestones	Beginning	End
Survey Launch	May 2, 2023	
Survey Phase	May 2, 2023	May 30, 2023
Sneak Previews	August 21, 2023	September 20, 2023
Press Release & Publication	October 2023	

Please refer to the [link](#) to view/download the ISG Provider Lens™ 2023 research agenda

Access to Online Portal

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

Research Production Disclaimer:

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing the work identified by clients. This data is collected as part of the ISG FutureSource™ process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of the information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.



ISG Star of Excellence™ – Call for nominations

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

The Star of Excellence™ is a program, designed by ISG, to collect client feedback about service providers’ success in demonstrating the highest standards of client service excellence and customer centricity.

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

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

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

To ensure your selected clients complete the feedback for your nominated engagement please use the Client nomination section on the Star of Excellence™ [website](#).

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply.

Here is the email address:
ISG.star@isg-one.com



Contacts For This Study



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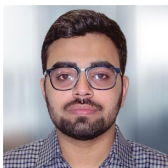
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**Akshay
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Data Analyst



Shilpashree N

Data Analyst



ISG Provider Lens™ Advisors Involvement Program

ISG Provider Lens™ offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context.

In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three advisors participate as part of each study's quality and consistency review team (QCRT). The QCRT ensures each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the QCRT group and contribute at different levels depending on their availability and expertise.

The QCRT advisors:

- Help define and validate quadrants and questionnaires,
- Advise on service provider inclusion, participate in briefing calls,
- Give their perspectives on service provider ratings and review report drafts.

ISG Advisors to this study



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Huber

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and Solutions Holistic
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Dave
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**Director
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Billable**



Bernie Hoecker

**Partner, Enterprise
Cloud Transformation
Lead Infrastructure &
Cloud Trans**



Invited Companies

If your company is listed on this page or you feel your company should be listed, please contact ISG to ensure we have the correct contact person(s) to actively participate in this research.

1Strategy	Claranet	DevOpsGroup	Genpact
2nd Watch	Cloudeteer	DISYS	GFT
8K Miles (renamed as SecureKloud)	CloudHesive	DLT Solutions	Giant Swarm
Accenture	Cloudreach	DoIT International	globaldatanet
AHEAD	Cognizant	DXC Technology	GM5
Algar Tech	Computacenter	ECS	HASHICORP
Alice&Bob.Company	Comunet Pty Ltd	Effectual	HCLTech
AllCloud	Conductor Tecnologia	Embratel	Hepta
Amdocs	Constellation	Ensono	Hexaware
Artefact	Crayon	Essextec	Hitachi Vantara
Arvato Systems	D2iQ: Mesosphere	Eviden	iBlue Consulting
Atos	Darede	Extreme Group	IBM
Bechtle	DATAGROUP SE	Flexa Cloud	Indra
Capgemini	dataRain	Fronde	Informatica
Cascadeo	DBACorp	Fujitsu	Infosys
CentralServer	Deloitte	G&P	Inmetrics



Invited Companies

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Innova solutions	Materna	Persistent Systems	SoftwareONE
Innovations ON	Metal Toad	Pismo	SPIRIT/21
Intellify	MIGNOW	PlusServer	Syntax Systems
Intetics	Mission Cloud	Projetas	TCS
Intive	Mission Cloud Services	Protera	Tech Mahindra
IOS Informatica Organização e Sistemas	Mphasis	Provectus	tecRacer
IPsense	msg services	PwC	Triumph Technology Solutions
IT Convergence	Navitas	q.beyond	TSA Group
Itoc	Netlution	Quantiphi	T-Systems
kreuzwerker	Nextios	Rackspace Technology	Unisys
Kyndryl	Nfq	Ramo Sistemas Digitais	V8.Tech
Lemongrass	Nordcloud	Reply	Virtusa
Logicalis	NTT DATA	Resultant	Vision33
LTIMindtree	Numen	Select Soluções	Wipro
Lumen Technologies	OPITZ CONSULTING	Semantix	Zensar
Mantalus	Orange Business Services	Skaylink	ZOI



iSG Provider Lens™

The iSG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of iSG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while iSG advisors use the reports to validate their own market knowledge and make recommendations to iSG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about iSG Provider Lens™ research, please visit this [webpage](#).

iSG Research™

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iSG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: [Public Sector](#).

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iSG

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Founded in 2006, and based in Stamford, Conn., iSG employs more than 1,600 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 isg-one.com.





MAY, 2023

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