



**\*ISG** Provider Lens™

2020

AWS – Ecosystem  
Partners 2020

imagine your future®

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# Definition

As Amazon Web Services (AWS) continues to expand its presence and influence as a global provider of IT-as-a-service, its AWS Partner Network (APN) grows even larger, as providers of technologies and services leverage AWS to develop and deliver an expanding array of enterprise IT and business services.

The 2020 ISG Provider Lens “AWS Ecosystem Partners” study analyzes the AWS partner landscape in the U.S. and Germany with regard to everyday services needs, emerging challenges, market changes, and other important issues. ISG consultants and user clients can use this information to evaluate current supplier relationships and the potential for establishing new relationships, with objective insights into the following.

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

- Transparency on the strengths and weaknesses of relevant providers.
- Differentiated positioning of providers by important segments according to market segments
- Perspective on the markets in the U.S. and Germany

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

# Quadrants Research

Our “AWS Ecosystem 2020” study examines and positions providers in the following six quadrants of AWS competencies, solution types, and related services:

Simplified illustration

AWS – Ecosystem Partners 2020	
SAP Workloads	Data Analytics and Machine Learning
Internet of Things (IoT)	Migration and Container Solutions
Managed Service Providers	Consulting Services Providers

Source: ISG 2020

## Managed Services Providers

Managed Services Providers (MSPs) offer professional and managed services in addition to IaaS and PaaS hyperscale platforms for public clouds from third-party service providers. On a broader scale, these services include provisioning, real-time and predictive analysis, monitoring and operational management of the 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 transparency over the managed cloud resource pool in terms of capacity utilization and costs, including independent management.

### Evaluation and eligibility criteria for this quadrant include the following:

- AWS Managed Service Program certification
- Expertise in configuration management of platforms/systems
- Experience in designing, building, and managing public and multi-cloud environments
- Support for Big Data and multiple database solutions and analytics
- DevOps engineering experience
- Scope and availability of security resources and services
- Solutions architecture experience
- Server migration experience and resources

## SAP workloads

Service providers that offer the provision and ongoing operation of SAP systems such as SAP HANA or platforms on AWS and its central management are evaluated. These service providers not only help to implement AWS as a sheer hardware replacement or hardware extension (IaaS) in the customer companies, but also optimize, design and develop new processes and business flows as part of platform management through a combination of their own services, SAP services and AWS.

This selected group of professional IT service providers is thus responsible for implementation and ensuring subsequent operation.

Service providers in this category not only need AWS-provided certifications, but also SAP certification and/or partnership in order to stay current with SAP product, technology, licensing, and platform changes, as well as their effects on customer IT landscapes and applications right up to business processes.

### **Evaluation and eligibility criteria for this quadrant include the following:**

- Breadth and depth of service portfolio with regard to SAP application and services implementation, customization, provisioning, and support
- Number and locations of resources with regard to SAP offerings on AWS
- Awareness and number of customers of the service provider with regard to SAP applications and services provisioning and support on AWS
- Number and reputation of references with regard to SAP applications and services provisioning and support on AWS
- Experience as well as 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.

## Data analytics and machine learning

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 capabilities that enable faster and more efficient analysis of more types of data within and across a growing range of systems and applications. Providers in this group must demonstrate capabilities and experience in data science (including Big Data and advanced analytics), database and solution architecture, machine learning and related AI development and implementation, software development, networking, and data privacy/security. Most utilize an adaptive portfolio of tools and technologies to develop and deliver solutions.

### **Evaluation and eligibility criteria for this quadrant include the following:**

- Scope and use of relevant tools and technologies (e.g., Hadoop, NoSQL, Spark; MXNet, TensorFlow)
- Service/solution integration capabilities and offerings
- Scope and availability of enabling programs for customer success (e.g., planning workshops, 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 ML and analytics services and solutions on AWS
- Pricing model suitability, maturity, and adaptability – go-to-market strategy
- Breadth and depth of partner/channel relationships

## Internet of Things (IoT)

IoT-specialist partners support the use of applications for monitoring, managing and controlling connected devices on the basis of 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 increasingly important as enterprise IoT scenarios expand and become more business-critical.

### **Evaluation and eligibility criteria for this quadrant include the following :**

- Availability, experience, and certification of staff provisioning and supporting AWS IoT offerings
- Tools, technologies, and partners utilized 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, 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
- Pricing model suitability, maturity, and adaptability
- Breadth and depth of partner/channel relationships
- Scope of security tools, technology and services utilized



## Migration and Container Solutions

Containers are a software “packaging” mechanism that allow applications to be more quickly and easily deployed and migrated between machines, data centers, clouds, and – increasingly – hybrid combinations of all these. The AWS provider partners in this quadrant offer technology, products or services that support workload operation and migration using containers. Top providers in this quadrant typically work closely with clients in needs and readiness assessments, and continuous change management, and excel in automated test, migration, and deployment. 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. Container solutions on AWS often include a combination of AWS services and APN partner technologies.

### **Evaluation and eligibility criteria for this quadrant include the following:**

- Availability, experience, and certification of staff supporting and delivering services
- Scope and use of relevant tools and technologies (e.g., Kubernetes, Docker, Istio, 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, 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 containerization and migration services and solutions on AWS
- Pricing model suitability, maturity, and adaptability

## Consulting services providers

Consulting partners comprise the single-largest group in the AWS Partner Network population. The providers in this quadrant provide training, analysis, insight, and guidance across a 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; they must also demonstrate business value delivered for clients through their consulting services.

### **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)
- Demonstrated client value through business outcomes or other measurable improvement
- Scope and availability of enabling programs for customer success (e.g., planning workshops, training)
- Scope of security tools, technology and services utilized
- Number and reputation of references with regard to services and solutions on AWS
- Pricing model suitability, maturity, and adaptability

# Quadrants by Region

Quadrants	Global	U.S.	Germany
SAP Workloads	Overview	√	√
Data Analytics and Machine Learning	Overview	√	√
Internet of Things (IoT)	Overview	√	√
Migration and Container Solutions	Overview	√	√
Managed Service Providers	Overview	√	√
Consulting Services Providers	Overview	√	√

# Schedule

The research phase with surveys, evaluation, analysis and validation extends from **July to November 2020**. Selected results shall be presented to the media in **December 2020**.

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

<b>Milestones</b>	<b>Start</b>	<b>End</b>
Launch	2 <sup>nd</sup> July 2020	
Survey Phase	2 <sup>nd</sup> July 2020	23 <sup>rd</sup> July 2020
Sneak Preview	October 2020	
Press Release	December 2020	

## 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!

Please refer to [this link](#) to view/download the ISG Provider Lens™ 2020 research agenda.

## 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 work identified by the 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 to produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of 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 lead analysts.

# Partial list of companies invited for the survey

**Are you in the list or do you see your company as relevant provider that is missing from the list?** Then feel free to contact us to ensure your active participation in the research phase.

*um	Atos
1&1 Internet AG	Avnet Technology Solutions GmbH
1Strategy	BAE Systems
2nd Watch	Baytech Consulting
47lining	Bechtle AG
4ALL	Beck et al. Services GmbH
7BusinessConsulting AG	BMC Software GmbH
8K Miles	Booz Allen Hamilton
abas Software AG	Brillio
Accenture	BT (Germany) GmbH & Co. oHG
acmeo cloud-distribution GmbH & Co. KG	Cambridge Technology Inc.
ACP	CANCOM
Actindo GmbH	Capgemini
Adobe Systems GmbH	Cascadeo
Afonza	CenturyLink
Ahead	CGI Group
Alexander Thamm GmbH	Cisco
AllCloud	Citrix
Alluxio, Inc.	Claranet
Alteryx	Clearscale
Altran	CloudHesive
AppDynamics	Cloudreach
Apps Associates	Codecentric
Arvato	Cognizant Technology Solutions

Computacenter AG & Co. oHG

Connectria Hosting

Controlware GmbH

Corexpert

Cornerstone OnDemand Inc.

Cortado Mobile Solutions GmbH

Crayon

D.Velop

DARZ GmbH

DATAGROUP SE

Datameer

Dell GmbH

Deloitte

DevOpsGroup

Dimension Data

DLT Solutions/TechData

DRACoon GmbH

DXC Technology

Dynatrace

Eagledream

ECS

ELAXY Business Solution & Services GmbH & Co. KG

EMC

Empolis

Ensono

Enteracloud

EPAM

Equinix

Essextec

Extreme Networks

Fluid Operations AG

Flux7, an NTT DATA Company

fme AG

F-Secure GmbH

Fujitsu

GBS Europa GmbH

General Dynamics Information Technology

Giant Swarm

HashedIn

HATech

HCL Technologies

Hewlett Packard Enterprise

Hexaware Technologies

Hitachi Vantara

Hornetsecurity

IBM

Infosys

Ingram Micro Distribution GmbH

Innovative Solutions  
Interxion Deutschland GmbH  
Iridium  
ITAC Software AG  
itelligence AG  
Jelecos  
Jive Software  
Juniper Networks Inc.  
Konica Minolta Business Solutions Deutschland GmbH  
Kreuzwerker  
Lemongrass Consulting  
Logicalis  
Logicworks  
Lufthansa Systems GmbH & Co. KG  
Materna GmbH  
metafinanz Informationssysteme GmbH  
Microstrategy  
Mindtree  
Mission Cloud  
MobileIron  
Mobiquity, a Hexaware company  
Mphasis stelligent  
Msg services  
mVISE AG

Navisite  
nClouds  
NetApp Deutschland GmbH  
Netlution GmbH  
Neudesic  
Nordcloud  
NTT Data  
NTT DATA Deutschland GmbH  
Onica  
OPITZ CONSULTING  
Pariveda Solutions  
Plusserver  
PowerupCloudTechnologies  
Proservia GmbH  
PTC  
PwC  
QLogic Germany GmbH  
QSC  
Rackspace  
Rapyder  
Redriver  
Reply  
retarus GmbH  
RightBrain Networks

RiverMeadow

Sage

SalesForce

SAS

Saviynt Inc

ScanPlus GmbH

Scheer GmbH

Searce

Sirius Computer Solutions

Six Nines

Slalom

Smartronix

Softchoice

SoftServe Inc

Software AG

solutions direkt GmbH (direkt gruppe)

Sonda

Sopra Steria GmbH

Spirit/21

Splunk

Sprinklr

Stackarmor

Storm Reply

SugarCRM

Sumologic

Sungard Availability Services

Symantec (Deutschland) GmbH

Synchronet

Syntax Systems GmbH & Co. KG

TCS

Tech Data

Tech Mahindra

TechnoSIP

tecRacer

To The New

TOAS

TREND MICRO

Trianz

T-Systems International

Unisys

United Planet GmbH

Velocity Technology Solutions

VINCI Energies Germany

Virtusa

VMware Global, Inc.

WatchGuard Technologies GmbH

Whitesource

Wintellect

Wipro

YASH Technologies Inc..

ZOI

Zuggand



# ISG Star of Excellence Awards™ 2020 – Call for nominations

We are excited to bring to you the 2020 ISG Star of Excellence Awards™.

The ISG Star of Excellence Awards™ serves as an industry beacon for service excellence – a true north star for enterprise clients that want to know, and engage with, the best of the best.

As a leading technology research and advisory firm known for its unbiased, independent research and advice, ISG is uniquely positioned to lead the initiative.

This year, we have made few changes and enhanced our approach to this award. We have also added to the Star of Excellence Award™ – the Star of Excellence Emerging Technology Award™ designed to recognize providers that incubate, enable and accelerate modern technologies (blockchain, big data, machine learning/ AI and IoT) for their clients.

The refreshed approach to the ISG Star of Excellence Awards™ includes a very strong focus on internal ISG, provider, industry association and enterprise educational marketing.

To ensure your selected clients compete the feedback for your nominated engagement please use the Client nomination section on the Star of Excellence website [www.isgstar.isg-one.com](http://www.isgstar.isg-one.com)

Please get your nominations in early, to allow your clients the maximum time to submit their feedback. As we highlighted during the webinar, all submissions must be received before midnight U.S. Eastern time on July 15, 2020.

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](mailto:ISG.star@isg-one.com)

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## Do you need any further information?

If you have any questions, please contact us at [isglens@isg-one.com](mailto:isglens@isg-one.com).