

***ISG** Provider Lens™

AWS - Ecosystem Partners

AWS Consulting Services

Australia 2021

Quadrant
Report



A research report
comparing provider
strengths, challenges
and competitive
differentiators

Customized report courtesy of:



December 2021

About this Report

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The research and analysis presented in this report includes research from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of September 2021, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

All revenue references are in U.S. dollars (\$US) unless noted.

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ISG Provider Lens™



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

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EXECUTIVE SUMMARY

AWS Services Ecosystem in Australia Continues to Grow

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

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

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

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

AWS Managed Services: The role and value of managed service providers (MSPs) have been rapidly expanding into areas traditionally referred to as systems integration. The impact of COVID-19 on cloud adoption and integration requirements has pushed MSPs farther into

the traditional role of a system integrator. In response, MSPs are investing in more skills, expanding their roles with AWS, and acquiring more technology and tools providers.

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

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

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

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

AWS Consulting Services: Most IT service providers have already started to move beyond digital enablement and initial operational improvements to provide clients with more refined digital business strategies. The primary focus for most engagements has shifted from cost reduction to improved business outcomes. This is leading to more consultative approaches by providers, which, in turn, is driving more client interest in

change management and design thinking that closely ties cloud IT investment with business impacts. DevOps has become a core component of providers' portfolios, especially as clients investigate the benefits of cloud-native development and infrastructure-as-code (IaC).

Introduction

Simplified Illustration

| AWS - Ecosystem Partners 2021 | |
|---|---------------------------------------|
| AWS Managed Services | AWS SAP Workloads |
| AWS Data Analytics and Machine Learning | AWS Internet of Things (IoT) Services |
| AWS Migration Services | AWS Consulting Services |

Source: ISG 2021

Definition

Amazon Web Services (AWS) continues to grow its presence and influence as a global provider of IT-as-a-service. As a result, its AWS Partner Network (APN) is expanding significantly, as providers of technologies and services leverage AWS to develop and deliver an expanding array of enterprise IT and business services. Primarily, AWS certified partners help customers find strategies for fast, secure and sustainable public cloud solution deployments. Ecosystem partners address all types of customer queries related to architecture, implementation, migration, and professional operation of XaaS solutions based on AWS infrastructures and platforms.

Definition (cont.)

ISG reports strong demand for digital transformation engagements, which, in turn, is driving global contracts for cloud products and services, including those for infrastructure-as-a-service (IaaS) and platform-as-a-service (PaaS). According to the 1Q21 ISG Index™, the global market has grown 11 percent in combined market annual contract value (ACV) to reach its current value of \$17.1 billion year-over-year, while the as-a-service ACV has increased by 17.2 percent to reach \$9.9 billion during the same period. Concurrently, the IaaS market grew by 18 percent to reach \$7.2 billion, while the SaaS market grew by 7 percent to reach \$2.7 billion.

The ISG Provider Lens AWS Ecosystem Partners 2021 study analyzes the AWS partner landscape in Australia, Brazil, Germany and the U.S. in terms of their portfolio attractiveness and competitive strength in each market. ISG consultants and user clients can use this information to evaluate current supplier relationships and the potential for establishing new relationships, with objective insights.

Provider Classifications

The provider position reflects the suitability of IT providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions IT providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

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

Provider Classifications

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

Leader

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Product Challenger

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Market Challenger

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

Contender

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/ services and follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Provider Classifications (cont.)

Each ISG Provider Lens™ quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star. Number of providers in each quadrant: ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

Rising Star

Rising Stars have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not In

The service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

AWS - Ecosystem Partners - Quadrant Provider Listing 1 of 3

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

AWS - Ecosystem Partners - Quadrant Provider Listing 2 of 3

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

AWS - Ecosystem Partners - Quadrant Provider Listing 3 of 3

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



AWS - Ecosystem Partners Quadrants

ENTERPRISE CONTEXT

AWS 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.

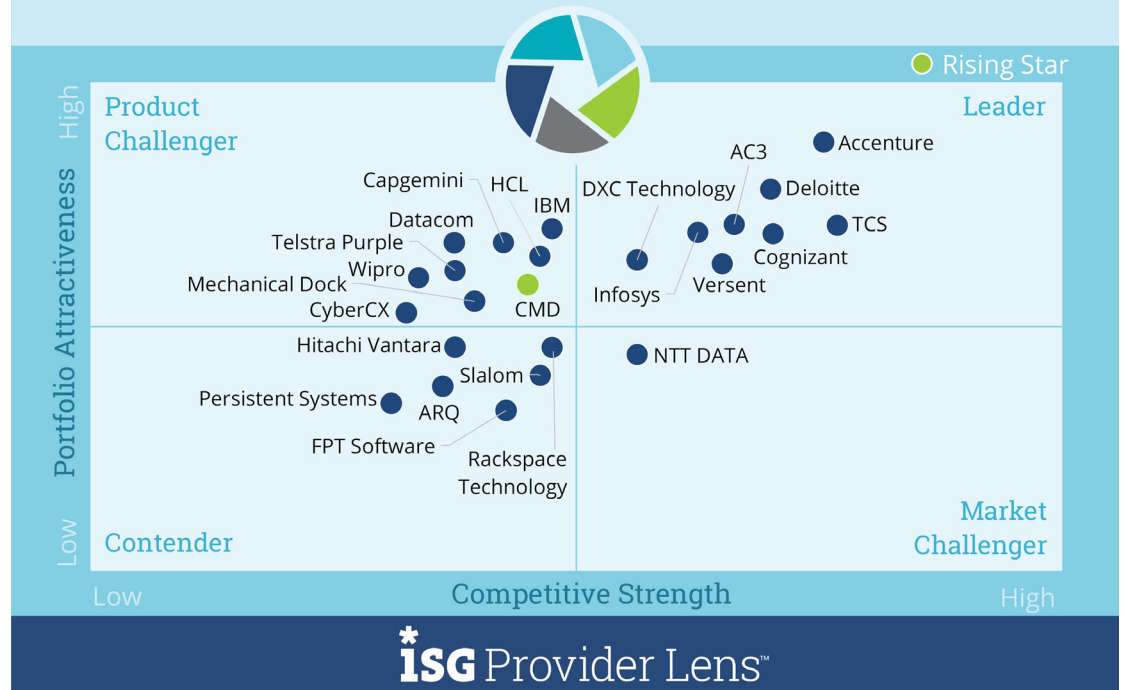
AWS CONSULTING SERVICES

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.

VERSENT

Overview

Versent is an Australia-based provider of technology transformation services for enterprises. The company specialises in a broad range of managed services and consulting, including cloud adoption, app modernisation, data analytics, security and identity. It is headquartered in Melbourne, with other offices in Sydney, Brisbane and Perth and in Singapore and the U.S., and employs more than 350 people. Versent has been an AWS Premier Consulting Partner since its inception in 2014 and has four AWS competencies and six AWS partner programs.

Strengths

Company culture that strongly embraces innovation: Versent's mission is to help businesses lay the foundation required to interact and succeed in a digital world. This includes addressing technical, cultural and procedural change to assist enterprises to think and act like startups. It helps many of the top 50 corporations in Australia manage their AWS enterprise foundations by delivering on the AWS Well-Architected Framework pillars of operational excellence, security, reliability, performance efficiency and cost optimisation.

Highly collaborative relationship with AWS: Versent's core business integrates the AWS Well-Architected Framework into all its activities and represents the strong collaborative relationship between the two companies. They often discuss issues such as the beta test of a new AWS service or new insights that Versent's engineers discover. There are also strong levels of engagement and integration between the solution architects, the specialists and several key stakeholders from the technical, business and marketing points of view.

Extensive AWS credentials: Versent has been an AWS Premier Consulting Partner since its inception in 2014 and has four AWS competencies: Level 1 MSSP Consulting, Migration Consulting, DevOps and Security Consulting. It has six AWS partner programs, which include Well-Architected, Managed Service Provider, AWS Public Sector Partner, AWS Solution Provider Program and AWS Marketplace, and AWS Skilled Consulting Partner. Versent has more than 200 AWS certifications and has completed more than 50 customer launches.

Caution

Versent's AWS consulting portfolio is strong and growing, but is still a relatively small part of the overall business. Clients require a complete end-to-end AWS service, and Versent must continue to ensure that its focus in this area is proportional to the other parts of the AWS business.



2021 ISG Provider Lens™ Leader

Australian-born Versent has been an AWS Premier Consulting Partner since its inception in 2014 and is highly capable in delivering consulting services to Australian organisations.



Methodology

METHODOLOGY

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

The study was divided into the following steps:

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



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Distinguished 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).



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Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor. Now as a research director, principal analyst and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

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