

**\*ISG** Provider Lens™

# AWS - Ecosystem Partners

Australia 2021

Quadrant  
Report



A research report  
comparing provider  
strengths, challenges  
and competitive  
differentiators

Customized report courtesy of:



December 2021

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

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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

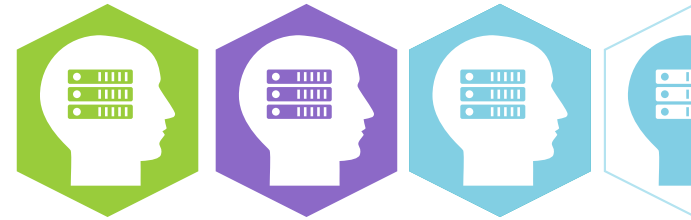
## Definition

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.



## 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.

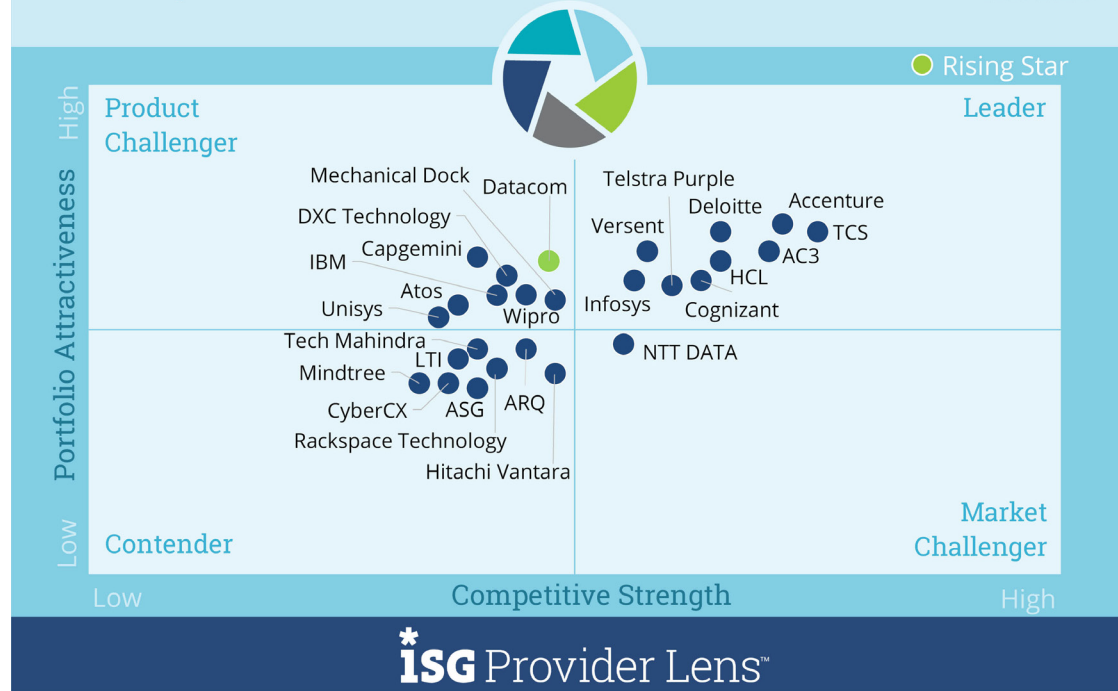
## AWS MANAGED SERVICES

### 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

## TCS

 Overview

Tata Consultancy Services (TCS) is a global IT services, consulting and business solutions company, headquartered in India. It has had a presence in the Australian IT market for more than 30 years and employs approximately 17,000 consultants and associates. TCS is an AWS Premier partner via the AWS Managed Service Provider and Well-Architected Partner programs. TCS offers full lifecycle infrastructure and application solutions on the AWS Cloud. It supports clients to assess, migrate, deploy, optimise and manage their infrastructure and apps.

 Strengths

**Advanced cloud platform for managed services:** TCS's Cloud Exponence is a multitenant platform that enables centralised management of services to view, investigate and resolve operational work items. It deploys an integrated set of tools to aggregate and standardise service operations with cloud consumption, and get a view across geographies through shared or dedicated service models.

**Industry leader in AWS product innovation:** TCS's AWS Business unit is focussed on delivering full-stack enterprise transformation on cloud. It provides a comprehensive suite of offerings, spanning cloud advisory services, migration, modernisation services and industry solutions. This is supported by next-gen technologies including edge, AI and machine learning and low code/no code. TCS partners with AWS for product innovation in the areas of application modernisation, mainframe modernisation, data and analytics, SAP and business solutions. TCS has 21 solutions and 33 managed services on AWS, along with more than 200 AWS architecture blueprints. It has also built a Cloud Value Measurement Model, based on TCS and AWS best practice frameworks to measure a customer's cloud transformation journey.

**Broad range of industry solutions:** TCS has partnered with AWS to develop a portfolio of leading-edge, industry-centric products and platforms for the financial services, life sciences, communication and media, travel, tourism and hospitality industries. TCS's AWS BU leverages TCS's design studios to redesign front-end interactions and associated processes. These include the BaNCS™ suite for financial services, TCS Aviana™, TCS Optumera™ and TCS Omnistore™ for Retail, TCS HOBStm for telecom and TCS ADD™ for life sciences.

 Caution

In a very crowded and competitive AWS managed services market in Australia, TCS has managed to stake a significant claim. Future growth will be tough and will require improved market positioning to ensure a forward momentum.



## 2021 ISG Provider Lens™ Leader

TCS provides a comprehensive suite of offerings for Australian, clients spanning cloud advisory services, migration, modernisation services and industry solutions. This is supported by next-gen technologies, including edge, AI and machine learning and low code/no code.

## 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

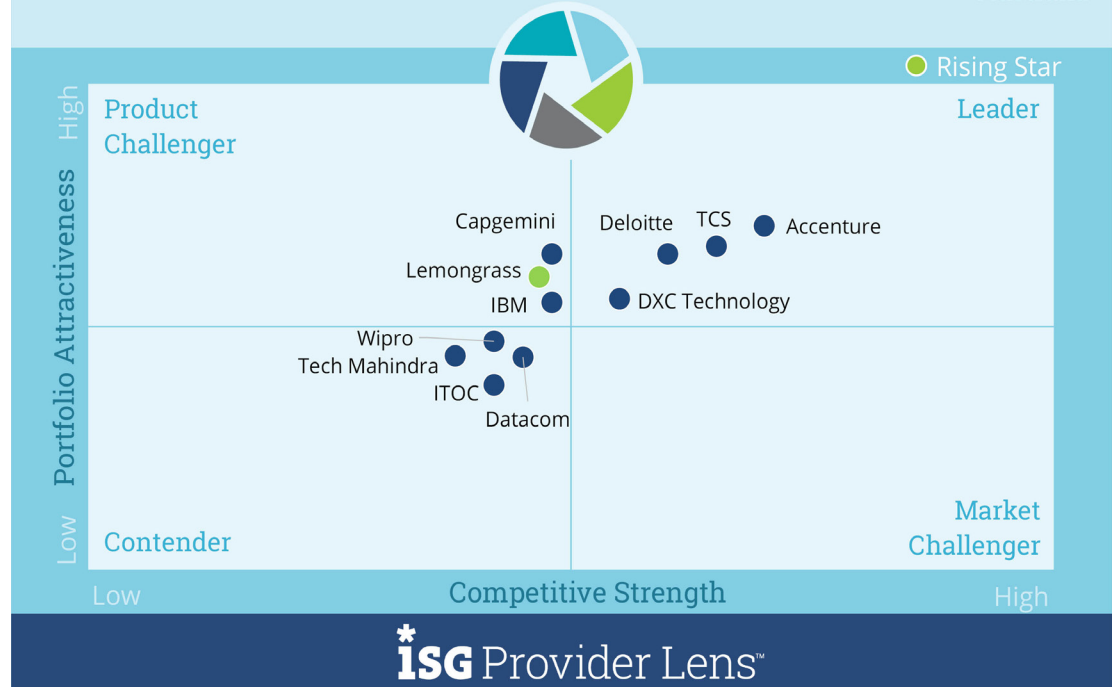
### Definition

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



## TCS

 Overview

Tata Consultancy Services (TCS), headquartered in India, is a global IT services, consulting and business solutions company. It has had a presence in the Australian IT market for more than 30 years and employs approximately 17,000 consultants and associates. TCS offers a full suite of SAP Cloud offerings in partnership with AWS, is a Global Strategic Services Partner (GSSP) for SAP, and a Premier Consulting Partner for AWS. The company's SAP Cloud advisory includes business case definition, SAP Cloud and landscape strategy definition and SAP Cloud performance review.

 Strengths

**Highly advanced SAP on AWS offerings:** TCS offers a full suite of SAP Cloud services, including strategy definition, design, migration, implementation, operations and custom development on AWS. These include SAP Innovations on Cloud (SAP business solutions, customer developments and cloud integrations), SAP Operations on Cloud, SAP Cloud Advisory (SAP cloud and landscape strategy and performance review), SAP cloud design and migration and SAP cloud implementations.

**Comprehensive catalogue of SAP cloud offerings and advisory services:** SAP Cloud advisory provides business case definition, SAP Cloud and landscape strategy definition and SAP Cloud performance review. SAP Cloud design and migration includes SAP Cloud architecture design, SAP High Availability (HA) and Disaster Recovery (DR) design and tool-based migrations. SAP Migration services are based on its TCS ConvertCore™ offering. Other SAP offerings include SAP Cloud Implementations; SAP Operations on Cloud that include managed operations, catalogued services and DR management; and SAP Innovations on Cloud, which includes SAP business solutions, customer developments and cloud integrations.

 Caution

TCS is highly capable in the AWS SAP workloads market in Australia but is only recognised for this capability in limited verticals. A stronger focus on industry-specific offerings will enable the company to maintain its strong leadership position.



## 2021 ISG Provider Lens™ Leader

TCS in Australia offers a full suite of SAP cloud services, including strategy definition, design, migration, implementation, operations and custom development on AWS.

## 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.

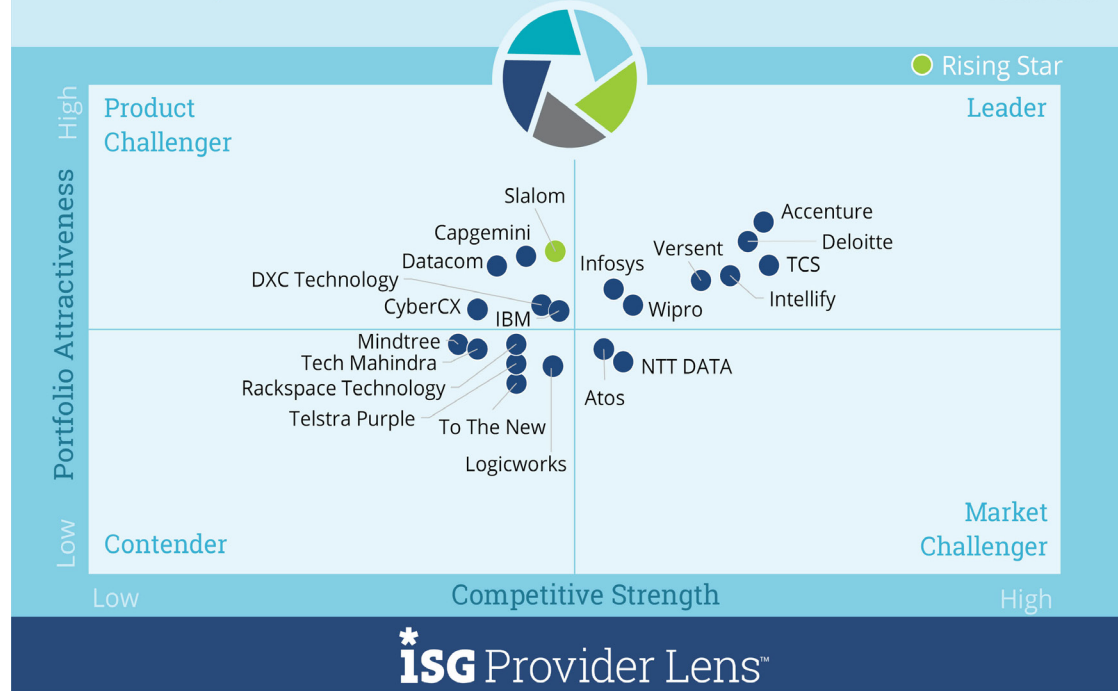
## AWS DATA ANALYTICS AND MACHINE LEARNING

### 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

## TCS

 Overview

Tata Consultancy Services (TCS) is a global IT services, consulting and business solutions company, headquartered in India. It has had a presence in the Australian IT market for more than 30 years and employs approximately 17,000 consultants and associates. TCS has been a trusted partner for AWS for more than a decade, focussing on modernising the entire tech value chain. It is an AWS Premier Consulting and Global Reseller Partner, with 25,000 associates skilled in AWS Services. TCS has plans to grow its AWS business, two to three times, by 2024.

 Strengths

**Strong data analytics consulting and advisory capabilities:** TCS's AWS Data, Integration and Analytics Services (TCS DIAS) practice has a comprehensive range of offerings including consulting and advisory services and services for data transformation, data warehouses and data lakes. It also includes data analysis and visualisation, data governance and data migration. TCS's AWS Data, Analytics and Insights practice has built several frameworks and tools that can accelerate work at every stage of data lifecycle management, including deriving insights.

**Comprehensive range of business and technology data analytics offerings:** Business offerings include customer analytics, business operations and performance analytics, risk and regulatory and compliance analytics. The associated technology offerings include business intelligence and data estate maintenance services, and data and application integration. TCS provides vulnerability assessment and penetration testing as a part of its Enterprise Vulnerability Management (EVM) service offering. It also partners with all major product vendors, including IBM, HP, Veracode, Qualys and Checkmarx to deliver end-to-end vulnerability management services. One of the key industries it focuses on in Australia is insurance.

 Caution

Data analytics and machine learning offerings are often the solution looking for a problem. The market is still not mature in understanding the true value of the data analytics and machine learning capabilities that are integral to TCS's solutions. The company can improve its market penetration by showing clear outcomes and how it has addressed some unique challenges in the Australian AWS market.



## 2021 ISG Provider Lens™ Leader

TCS is an AWS Premier Consulting and Global Reseller Partner and as 25,000 associates skilled in AWS Services. It leverages its global capabilities to deliver a high level of service locally.

## 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.

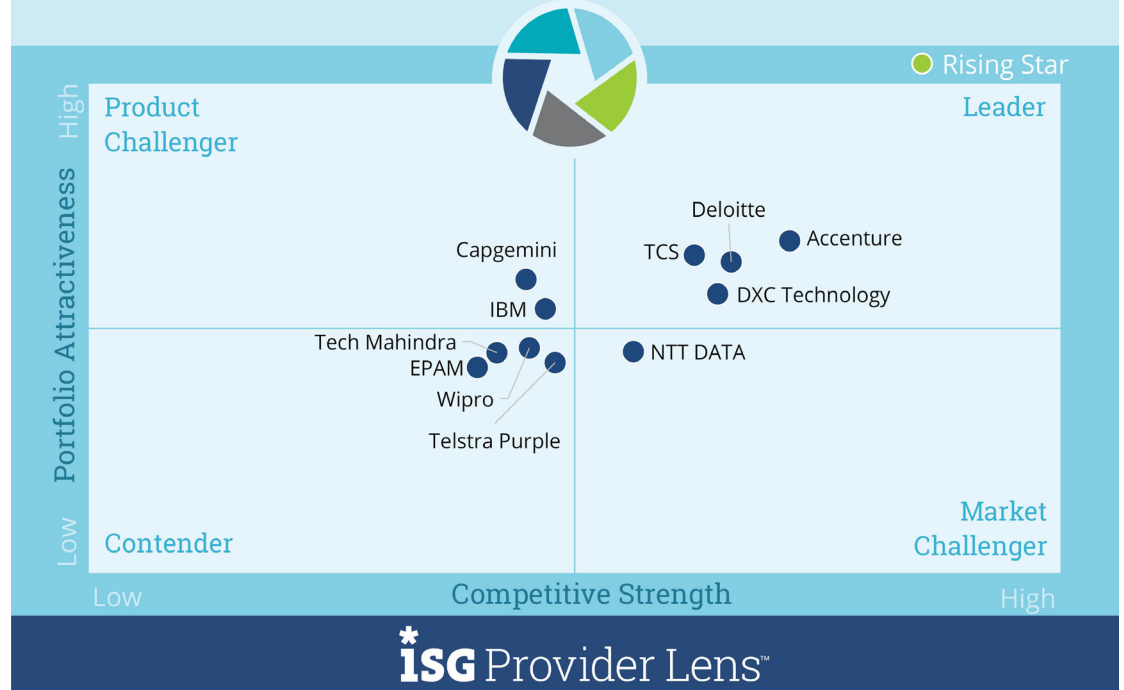
## AWS INTERNET OF THINGS (IOT) SERVICES

### 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

## TCS

 Overview

TCS, in partnership with AWS, offers a full spectrum of IoT services and collaborates with enterprises in this IoT space through scalable, reliable and future-ready solutions and technology services. TCS's global IoT practice has more than 9,000 associates, over 50 clients, more than 20 innovation labs and more than 40 IoT vendor partners. AWS has recognized TCS as its Premier Consulting Partner and its Inaugural Industrial Software Consulting Partner. TCS is also a launch partner for AWS IoT Things Graph, IoT Events, IoT SiteWise, IMC and Timestream.

 Strengths

**Global leader in IoT and data analytics:** TCS is a global leader in IoT, offering end-to-end scalable solutions to drive business and operational transformation, from sensors to the application level. It has a dedicated AWS IoT Centre of Excellence, IoT Experience Labs across geographies and Innovation Labs. It has access to an extensive ecosystem of partners for IoT and edge cloud implementations.

**Spectrum of IoT offerings:** TCS and AWS offer a full spectrum of IoT services including IoT Advisory services (strategic definition and roadmap); IoT platform Foundation Fabric to accelerate use case development; Realize IoT Solutions for end-to-end IoT solution development. Other services include IoT App Modernisation and Operations Deployment and Support. TCS's key differentiator in the IoT sector is the Bringing Life to Things™ framework that allows clients to realise innovative and disruptive business models, embrace risk and leverage ecosystems effectively.

**Comprehensive portfolio of IoT solutions on AWS:** These solutions focus on driving transformation of business and operations across the manufacturing, consumer packaged goods (CPG), utilities, transportation and logistics industries. The offerings include TCS Industrial Energy Management, which provides a process and asset level real-time view of energy sources enabled through IoT, and analytics for industries such as metal, chemical, CPG and automotive, and TCS DigiFleet™, which provides real-time impactful business insights to clients about their fleet and freight and helps enhance visibility, operational efficiency of their logistics.

 Caution

The IoT market in Australia is not mature. Although TCS has significant capabilities in this area, which it can bring to bear in the AWS space, defining the actual client requirement is still challenging and requires a more robust specification of outcomes than would be normal in most deals.



## 2021 ISG Provider Lens™ Leader

TCS's ability to leverage its global portfolio of IoT offerings and solutions makes it a highly suitable provider of AWS services to Australian organisations.

## 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.



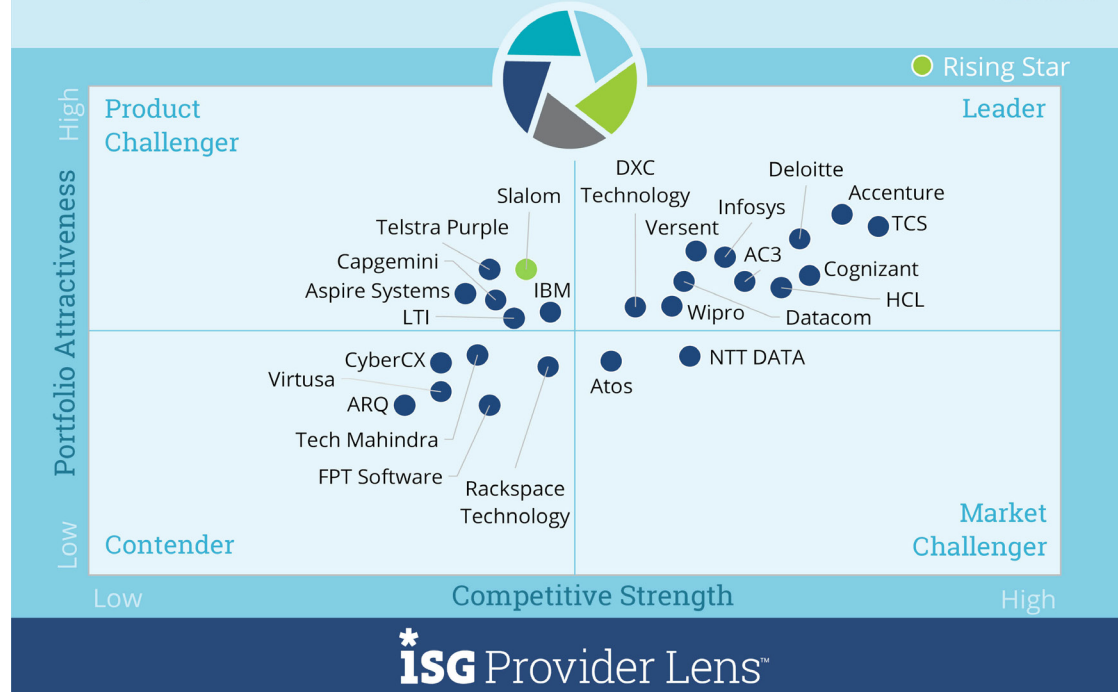
## AWS MIGRATION SERVICES

### 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

## TCS

 Overview

Tata Consultancy Services (TCS) is a global IT services, consulting and business solutions company, headquartered in India. It has had a presence in the Australian IT market for more than 30 years and employs approximately 17,000 consultants and associates helping enterprises migrate to the cloud with scalable, secure and cost-effective solutions. Its strategy with AWS rests on four pillars: engaging with clients in proactive and consulting-led deals, product innovation, industry specific solutions and talent transformation. Core cloud services include ERP on AWS Cloud, advisory and assessments, data management and smart analytics.

 Strengths

**Highly comprehensive migration solutions portfolio:** TCS provides ready-to-use, quick-start deployment templates and automation to accelerate cloud migration. Proprietary tools and solution accelerators, including iCMC (Intelligent Cloud Migration Continuum), Cloud Counsel, Cloud Mason and Migration Factory/ Modernization propeller seamless integration with partner products for cost-effective cloud migrations. TCS has an AWS Migration Consulting Competency and a Cloud Migration Factory to offer expertise in migrating to AWS for a range of global clients. It also has expertise in various migration frameworks and tools for analysis, orchestration and migration.

**Advanced and comprehensive compliance and security offering:** TCS provides tactical and strategic advice to assist clients in increasing their security compliance and maturity level related to security. This is provided after evaluating their endpoint security, enterprise security tooling, security architecture, network security, incident response, data security and provisions for identity and access management.

**High-level market differentiation in the AWS migration segment:** TCS helps its clients to deal with complex cloud migration and modernisation issues through its automated machine learning models that have been developed through years of experience in cloud migration. Its Migration Factory offering enables efficiency in large-scale cloud migrations by using the factory model. Its Modernization suite includes offerings around serverless, containers and an API-first approach, and leverages deep contextual knowledge of industry verticals.

 Caution

In the Australian market, TCS's strong heritage as a provider of applications development and other services still permeates the memory of many Australian organisations. This perception may hamper TCS's inclusion in some deals, especially in the SMB market.



## 2021 ISG Provider Lens™ Leader

TCS helps tackle complex AWS cloud migration and modernisation for Australian clients through its automated machine learning models that have been developed through years of experience in cloud migration.

## 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.

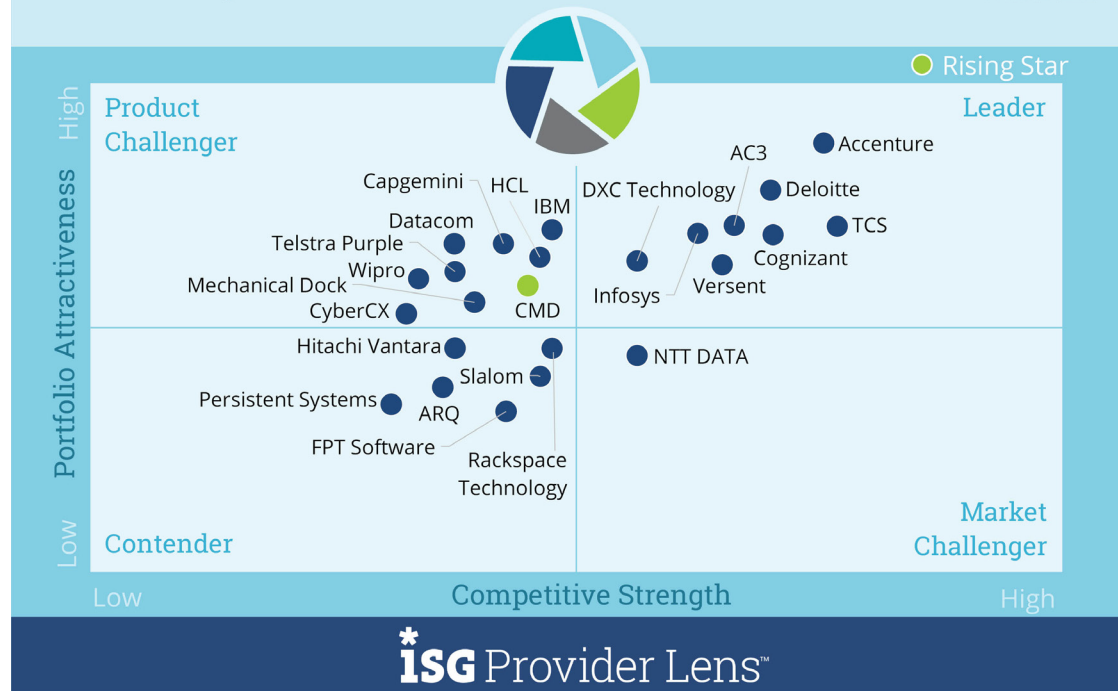
## AWS CONSULTING SERVICES

### 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

## TCS

 Overview

Tata Consultancy Services (TCS) is a global IT services, consulting and business solutions company, headquartered in India. It has had a presence in the Australian IT market for more than 30 years and employs approximately 17,000 consultants and associates. TCS is an AWS Premier Consulting Partner with eight AWS competencies, six AWS partner programs and four AWS service validations. Through its partnership with AWS, TCS enables enterprises to converge innovations in IT processes and analytics tools in their operational technology data on the AWS cloud.

 Strengths

**Holistic and innovative cloud strategy and consulting offering:** Cloud Strategy and Transformation (TCS CST) is TCS' core offering for assisting clients to migrate, modernise, and move to the cloud. Supported by the AWS Cloud business unit, it integrates industry and solution capabilities to consult and advise clients on their AWS cloud vision and strategy. The consulting services include planning for migration and modernisation, that leverages a cloud center of excellence and assessment. Its Cloud Accelerate cloud velocity consulting offering includes cloud operating model assessment and design, and service reliability engineering assessment and setup.

**Enhanced security offering:** TCS has enhanced its cybersecurity practice to include a risk and cyber consulting strategic offering to enable clients to manage the impacts of risk, compliance, cyber security issues, and the geostrategic environment on their global business. As a part of the compliance and security practice, it assesses the AWS Environment in the areas of identity access management, data, network, application, infrastructure and incident response and regulatory compliance. It includes an AWS Ransomware Readiness solution that assesses and remediates the white gaps identified in a customer's AWS environment. It also includes a DevSecOps Factory that incorporates a collection of AWS deployable DevOps pipelines integrated with security tools. Other services include Threat Modelling as a Service and vulnerability assessment.

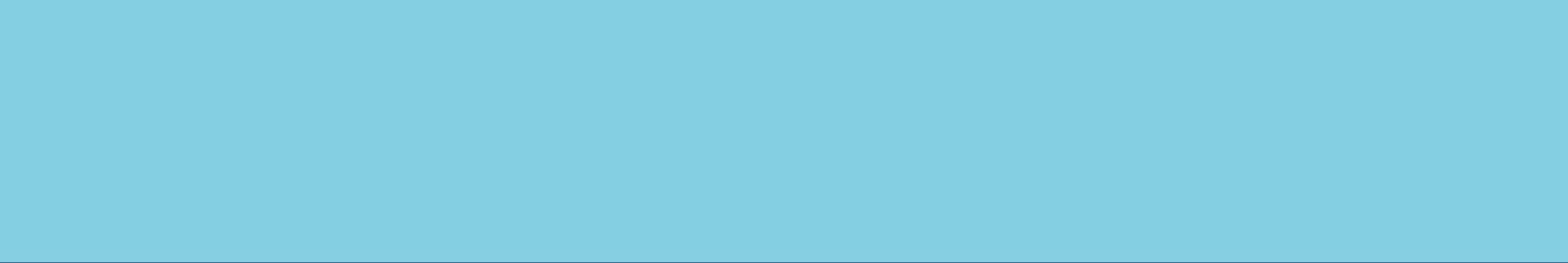
 Caution

TCS has a large AWS consulting practice, with excellent capabilities at the large end of the market, but its capabilities in this area need further refinement to handle the specific needs of the higher end of the small and medium-sized business (SMB) segment in Australia if it is to penetrate further in the market.



## 2021 ISG Provider Lens™ Leader

TCS's AWS Business Unit delivers full-stack enterprise transformation on the cloud, contextualized to specific industry sub-verticals across Australia.



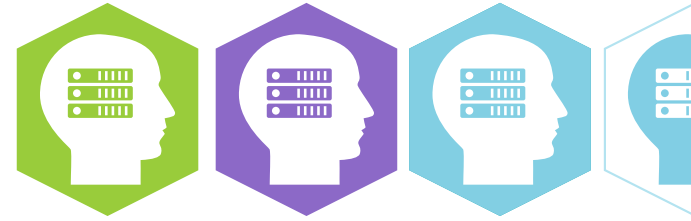
# Methodology

## 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



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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).



**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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