

***ISG** Provider Lens™

AWS - Ecosystem Partners

U.S. 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™ 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 Player8s as well as large numbers of ISG enterprise clients who are potential outsourcers.

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EXECUTIVE SUMMARY

In the past two quarters, industries have normalized and formalized their technology strategies around cloud adoption as a top priority after the COVID-19 pandemic. New cloud strategies, models and methodologies are already operational to accommodate swiftly changing market demands. Recent adoption trends around multi-cloud use, verticalization of solutions and infusing intelligence and analytics were spotted in our comprehensive discussion with technology companies, service providers and consulting firms. The past 18 months can be equally segmented into three phases: adopt, adapt and accelerate. Adopting a preferred technology service provider was a step toward evaluating and onboarding the technology competencies as part of the business strategy. Adaptation was included in the transition and migration approach from the traditional infrastructure and application setup to the new virtualized tenancy. The accelerated phase is where the relationship between the technology service provider (TSP) and the managed service provider (MSP) is nurtured to build solutions and components at pace.

The market and hyperscalers have responded with equal traction and pace to work collectively on virtualizing the infrastructure operations. Digital and business transformation themes are being built on a cloud foundation, a quintessential and enabling element for AI, automation, data engineering and analytics capabilities. Increasing technology adoption demand spikes the need for skilled resources to support and manage

large-scale cloud transformation programs. AWS is aggressively promoting and sponsoring its platform certifications to build a talent pool and competency levels. Simultaneously, enterprises have already started to build teams that are aligned with all major hyperscalers, with AWS being the most preferred choice by the enterprise community.

In the post-pandemic world, hyperscalers predominantly focused on accelerating the development of technology-agnostic solutions and products. AWS has launched programs and initiatives to invite talent and expertise from various industries to develop technology-wide offerings. The natural response to growing demand is to scale the product portfolio, envisioning the vast array of customers. On the other hand, the inorganic approach is to constantly look for mergers and acquisitions of firms already producing exceptional solutions. AWS has been vigilant in acting on both organic and inorganic pathways to gain a competitive advantage.

AWS Managed Services

The AWS managed services market is mature and fast-growing, with increasing competition. This has served as the basis for most new entrants. However, the competition is getting intense, with patented solutions and cloud operations frameworks, integrated operations value chains across CloudOps and FinOps to DevSecOps, MLOps

and DataOps, pre-trained industry-specific “cloud-in-a-box” microservices bundles and accelerators. The race for the cloud-relevant and agile talent pool that is ready to upskill and reuse knowledge at the same time is rapidly becoming intense. The key focus areas in the intellectual properties (IPs) and frameworks have been around autonomous AI- and machine learning-driven cloud operations and orchestration (CloudOps), centralized multi-tenancy platforms, performance analytics and financial management of cloud operations (FinOps). The leading players are infusing automation into every phase of cloud management, from monitoring to optimization. The MSPs are investing in building diverse product lines and skillsets that cover the business space. The roles and expectations for MSPs are proliferating. They are not just limited to basic support and maintenance but are expected to contribute as E2E cloud operations partners focusing on governance, risk and compliance (GRC) attributes.

AWS SAP Workloads

SAP is one of the most preferred ERP platforms and is closely integrated with AWS. Every major platform is driving customers to become cloud-native, and SAP is one of them. With business services being critical, almost all business applications are going through modernization. MSPs are compelled to build capabilities to participate in SAP AWS integration programs. AWS has a wide array of SAP-certified assets and solutions to integrate with almost every module and SAP function. Providers are building function-specific and industry-focused migration toolkits and offering provisioning and operation

for SAP systems such as SAP HANA or platforms on AWS and their management. Use cases combining AWS data lakes and big data tech stacks and cloud storages such as S3, combined with the predictive data analytics capabilities from S/4HANA, are becoming mainstream in all strategic enterprise data value realization and transformation programs. There is growing demand for implementing AWS and optimizing processes and business flows as part of platform management using a combination of their custom services, SAP and AWS.

AWS Data Analytics and Machine Learning

For enterprise-wide transitions, regardless of where they are conducted from, data is the most valuable asset. Machine learning enables faster and more efficient analysis of various forms of data within and across an expanding variety of systems and applications. AWS extends its data analytics and machine learning services to its ecosystem to openly connect and leverage the capabilities that can be integrated with proprietary systems. Leveraging AWS SageMaker plus Lex and Poly, along with their augmented natural language processing (NLP) capabilities and Hugging Face has helped increase data science adoption, including big data and advanced analytics. They are being used to build data platforms, linguistic AI and visualization systems. More businesses are realizing the importance of incorporating machine learning and AI into business applications to analyze and learn from the vast amount of data accessible. The target is to provide insight into untapped areas and help teams make educated process-related decisions in processes such as migration, directly impacting efficiency, economics and effectiveness.

AWS Internet of Things (IoT Services)

IoT has gained traction across industries, as it helps capture data that was impossible to get before. Most providers are working toward building IoT accelerators that combine with AWS IoT services. AWS IoT solutions cover many technological components, including sensors, devices, networks, security and management systems, allowing providers and clients to extract many types of data. This builds a data pool, wherein IoT analytics is applied to achieve reliability, performance and productivity data directly, leading to cost benefits. The coverage of AWS IoT spans from device software, core and connectivity to futuristic networks, 5G and control services. This helps provide applications and interfaces to connect AWS IoT devices without provisioning a server. For various types of devices from diverse consumer, commercial and industrial sectors, device management solutions help register, monitor and configure devices easily. Enterprise clients are seeking such one-stop solutions that enhance the experience, improve performance and deliver value.

AWS Migration Services

The digital-first approach is emerging in the market. However, many large organizations with complex systems cannot react quickly to such changing business contexts. This prompted the push to rationalize and modernize existing enterprise software and infrastructures, pointing toward cloud migration. Transitioning data, services and systems is a critical and complex task that needs careful calibration of activities. This space has enormous potential to improve using emerging technologies. The hybrid cloud strategy

introduces a need for dexterity in managing data and system migration, and this is an opportunity for the MSPs to claim. MSPs have built robust platforms to design, define, conduct and support lift-and-shift activities. Products leveraged by Amazon can help track the application migration process, gather specifications and performance data, and migrate from other hyperscalers to AWS. Providers have proprietary cross-platform solutions to integrate with AWS and run custom and open-scale migration.

AWS Consulting Services

Digital business transformation is leading enterprise agendas, and the scope of technology inclusion is expanding. In-depth technology and business process consulting services, such as technology, management and implementation consulting guidance, can create a difference in the organizational outputs and outcomes. By design, AWS consulting and advising services are strategically distinct, with an explicit focus on establishing state-of-the-art accelerators and developing industry-specific solutions and other service offers and packages. Consulting partners have built a comprehensive and modular approach to the AWS consulting space, catering to a wide range of requirements. Consulting discovers, evaluates and rationalizes various aspects, from customer journey to product recommendations. As this is a vast space and business case, roadmaps and delivery models guide the business strategy. Consulting firms have also developed their global business services faculty by providing all expertise in one offering. A combination of industry specialists, technologies and management experts is an effective approach to consider.



AWS - Ecosystem Partners Quadrants

ENTERPRISE CONTEXT

AWS Managed Services

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

Enterprises are evaluating managed service providers for their automation and AI capabilities, to monitor their infrastructure to forecast failures and are gauging the reliability of the services to reduce maintenance costs in case of failure. Enterprises expect service providers to offer platforms or frameworks that offer infrastructure as code (IaC) capability to accelerate their deployments with high quality cloud security.

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 the U.S.

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.

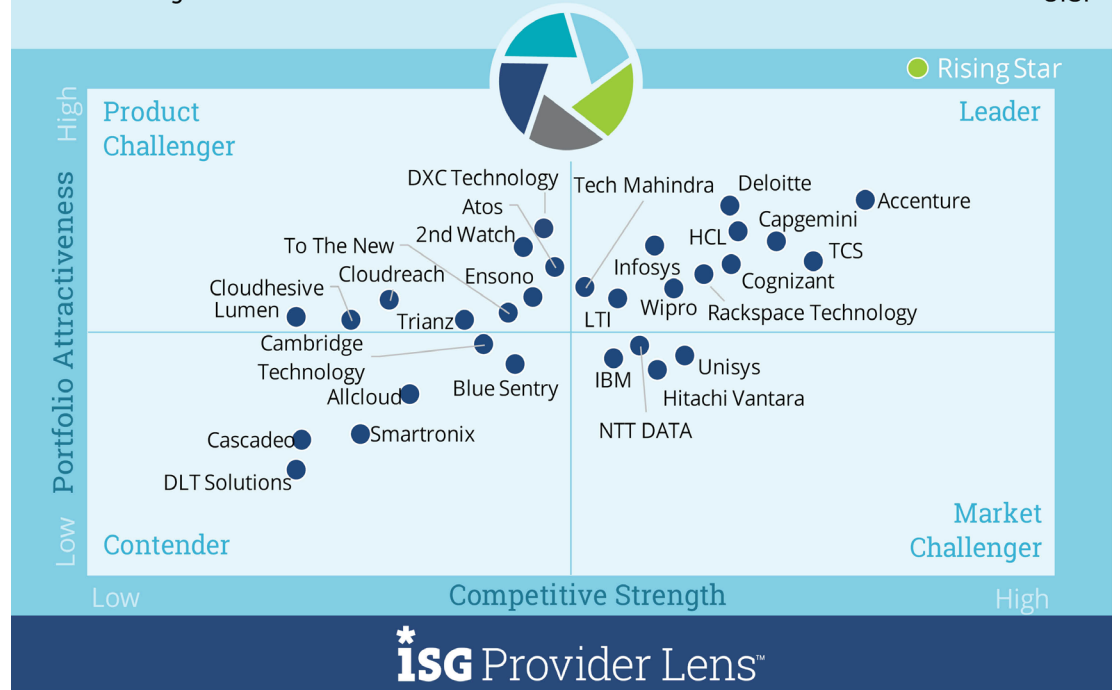
AWS MANAGED SERVICES

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
U.S.



Source: ISG Research 2021

TCS

 Overview

Tata Consultancy Services (TCS) is a part of the multinational Tata Group. It has more than 520,000 employees across 46 countries, representing 157 nationalities. The company delivers through its Global Network Delivery Model (GNDM), combining global expertise with local intelligence to deliver custom yet compliant solutions. TCS's AWS business unit serves more than 200 clients with more than 7,000 certifications through its 21 solutions and 33 managed services on AWS.

 Strengths

Hyper scalability: TCS stands out as a top leader in terms of AWS managed services market offerings. This is due to its proven scalability, speed of growth in partnership, joint value propositions development and support, and strategically unique ability to expand at speed, while maintaining best-in-class service quality and performance.

Broad portfolio: It has one of the largest AWS managed services client portfolios, supported by more than 7,000 AWS certified resources. With its strong partnership commitments and investments in developing deep and broad capabilities in a rapidly scaling resource pool, TCS has been chosen as an AWS launch partner for several strategic AWS initiatives and programs.

Strategic value enablement: TCS has expanded and uplifted the AWS managed services value propositions in recent years to more strategic value planes rather than just communicating the cost efficiency stories that are typical of managed services supply-side market. This approach has indeed synced well with the clients' demands. Requirements that are changing rapidly like hyperscaler cloud platforms such as AWS are becoming strategic capabilities and competitive enablers for the clients.

 Caution

TCS is among the most scalable, proven and value-focused AWS managed service providers. However, it should focus on its knowledge and experience of resources, especially in handling large and complex client environments in mature markets.



2021 ISG Provider Lens™ Leader

TCS is a proven and scalable AWS managed services provider. It has demonstrated significant impact both on strategic and operational outcomes of clients.

ENTERPRISE CONTEXT

AWS SAP Workloads

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

Service providers continue their focus to integrate agile and DevOps processes into SAP Services, across development, implementation and managed services. Providers have developed their own internal and proprietary tools to deliver SAP S/4HANA services.

The complexity of SAP S/4HANA is directly proportional to the size of an enterprise as most of the large enterprise implementations take place at a global level involving multiple regions, hence, the projects become complex. Therefore, large enterprises prefer providers with a skilled workforce, high integration capabilities and a global presence.

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 services 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 the U.S.

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

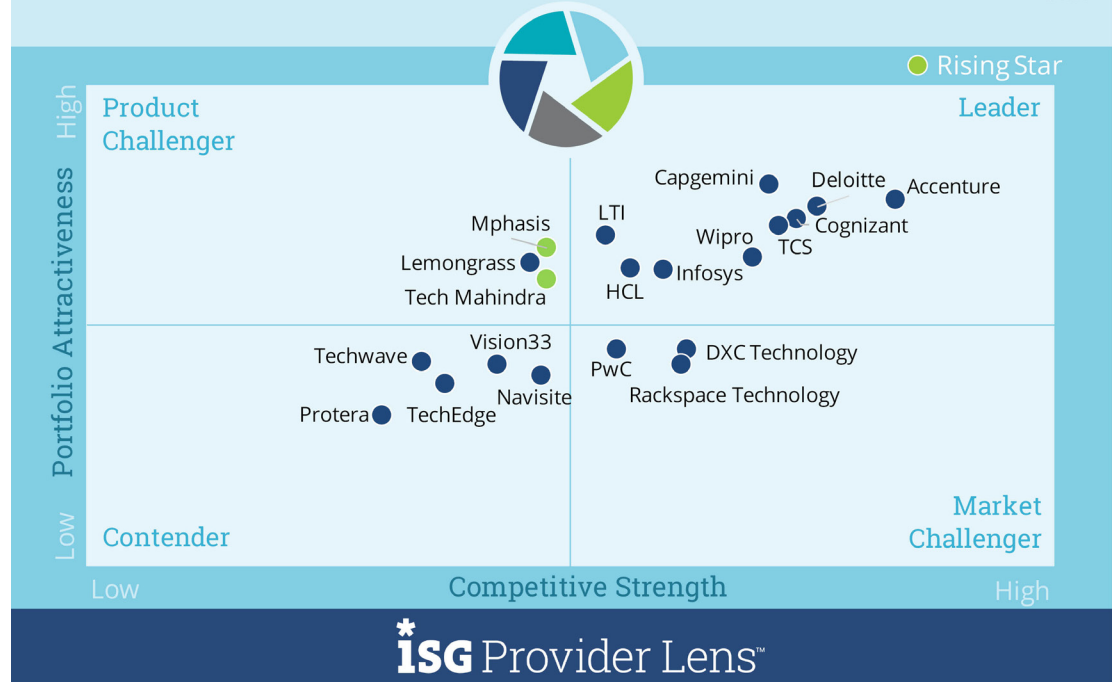
Definition

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
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Source: ISG Research 2021

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 Strengths

Innovation-driven approach: With proven and globally recognized competencies on AWS SAP migration solutions and services, TCS offers a highly consistent and unique innovation-driven approach in the SAP to AWS migration services market. These services span varied industry verticals, including the highly regulated banking and financial services and insurance sectors, to fast-expanding communication, media and information services entities.

Reimagined business with SAP on AWS: TCS is making trendsetting moves in the market by taking co-innovation-led routes to enterprise cloud migration and transformation programs for large global clients, with dedicated labs for building cognitive solutions on AWS. Through the TCS PacePort™ initiative, the TCS-AWS partnership is taking a hyper-scalable route towards reimagined and reengineered legacy business systems, helping large enterprise clients smooth their complex enterprise journeys, like SAP to the cloud. These initiatives are taking the previously available proprietary tool stacks, like TCS's SAP rapid migration toolkit and quick deployment templates, to elevated performance planes.

 Caution

While TCS is taking an innovation-driven yet efficient route for SAP workload migration to AWS, its large talent pool is often varied in its quality and ability to deliver consistent client experience, especially in client contexts that are complex and confusing.



2021 ISG Provider Lens™ Leader

TCS takes a unique, innovation-focused yet highly efficient and rapidly scalable approach toward SAP workload migration programs to AWS.

ENTERPRISE CONTEXT

AWS Internet of Things (IoT) Services

This report is relevant to enterprises across industries in the U.S. for evaluating providers of AWS IoT services.

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

ISG sees an increasing demand among U.S. enterprises to outsource the complexities of IoT deployments. The service providers here offer a range of value-added services and offerings to help enterprises achieve their desired business outcomes. An increasing number of enterprises are showing interest in IoT, drawing the attention of IoT managed service providers worldwide. However, data management and security are the key challenges in the market. Due to the COVID-19 pandemic and the restrictions enforced by the government, manufacturing facilities are expected to increase their level of automation, including by deploying IoT-based devices across their facilities.

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 the company can be compared with the others in the market

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

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.

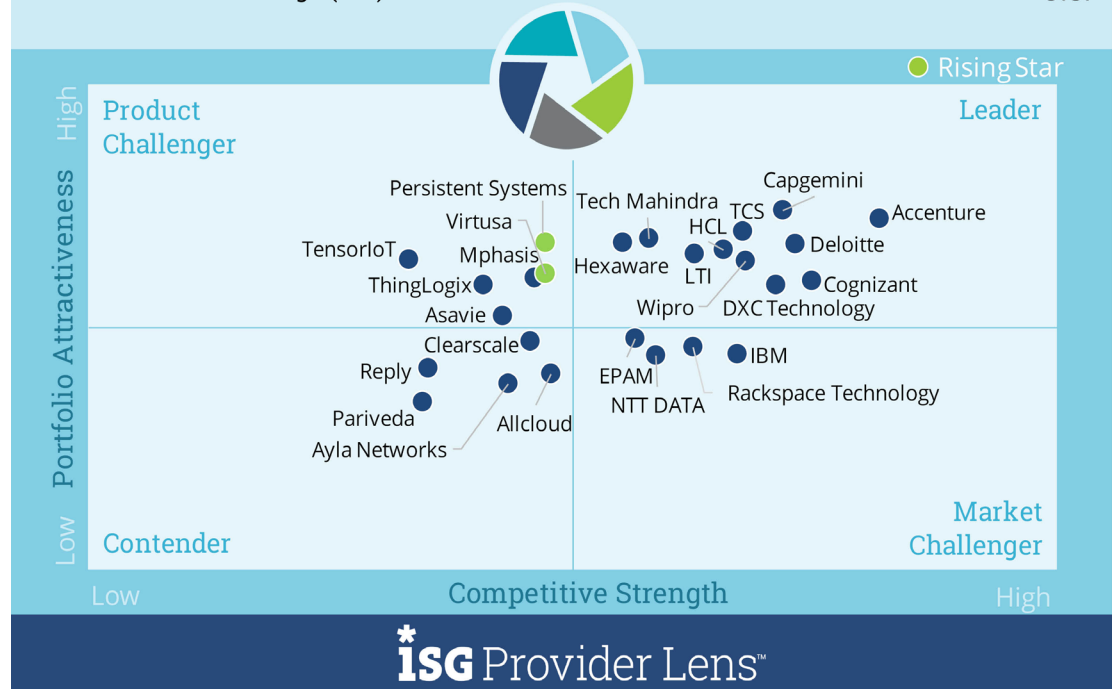
AWS INTERNET OF THINGS (IOT) SERVICES

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
U.S.



Source: ISG Research 2021

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 Strengths

Business 4.0 integrated value: TCS has successfully amalgamated its strategic Business 4.0 capabilities with the broad technology offerings of AWS IoT to deliver scalable, future-ready IoT services. Its IoT Business framework aims at bringing life to things to enable enterprise transformation services, new business models and superior customer experience, with higher agility and sustainability.

Innovation integration: The range of IoT services leveraging AWS and adjacent technology stacks covers the entire spectrum from technology component strategies to on-ground value realizations for clients. The services include IoT advisory, IoT platform foundation fabric design and provisioning, IoT app modernization and operations. It delivers through solutions such as TCS Connected Workforce Safety, TCS Industrial Energy Management solutions and others, hosted on AWS. TCS has been a successful launch partner for AWS IoT Thingsgraph, IoT Events, SiteWise, IMC and Timestream.

Scalability: TCS's AWS IoT strategies evolve around scalable innovations that deliver direct outcomes in client business scenarios. These include TCS IP2 that combined IoT with AI and digital twins to support critical assets in a reliable and flexible manner; TCS Digital manufacturing platforms, including an organizational change management framework; Intelligent Grid; and DigiFleet.

 Caution

Along with the breadth and depth of AWS IoT solutions and services comes the challenges of complexity in scope and scale. While TCS can handle these complexities quite adeptly with its extensive services experiences and technology expertise, consistent and reinforced storytelling specifically focused on these complex challenges and their solutions will benefit other clients with similar problem scenarios.



2021 ISG Provider Lens™ Leader

TCS offers an exhaustive and extensive portfolio of innovative services and solutions on AWS IoT competencies that are tuned to deliver clients' targeted business outcomes at scale.

ENTERPRISE CONTEXT

AWS Migration Services

This report is relevant to enterprises across industries in the U.S. for evaluating providers of AWS migration services.

In this quadrant report, ISG defines the current market positioning of providers of AWS migration services in U.S. and how they address the key challenges faced by the enterprises in the country.

ISG notes that the U.S. is at the forefront in the adoption of AWS migration services. 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.

The common obstacles to migrating enterprise workloads to AWS, especially during the current COVID-19 pandemic include high upfront costs, the 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

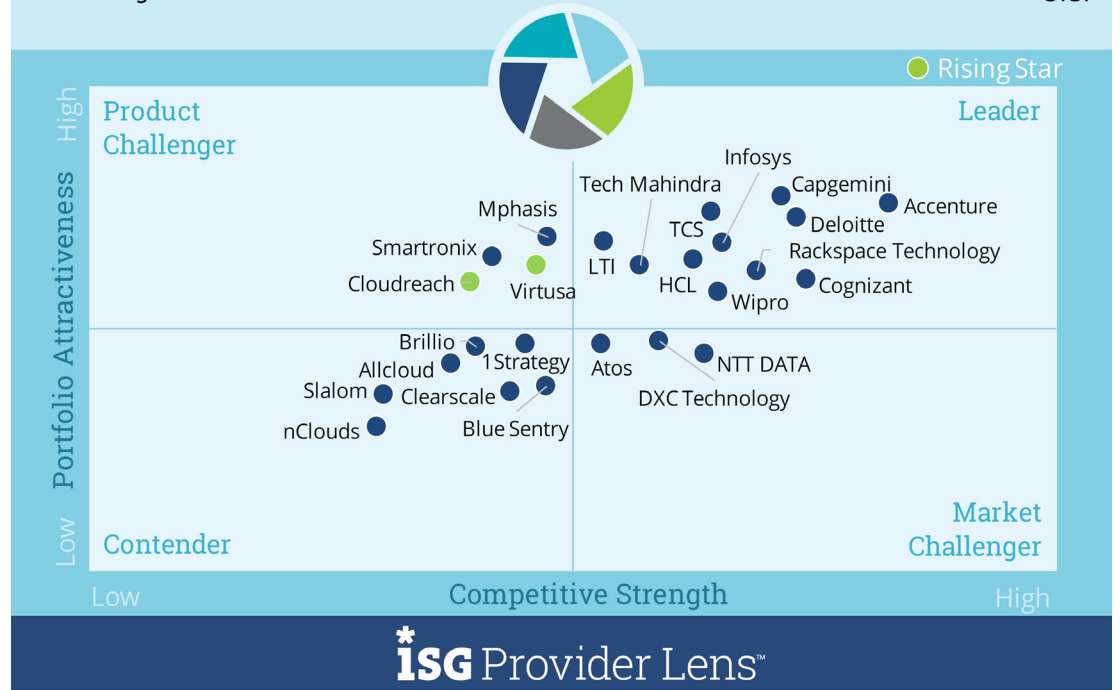
AWS MIGRATION SERVICES

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
U.S.



Source: ISG Research 2021

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 Strengths

Large-scale, complex AWS migrations execution: TCS's approach to AWS migration services for large-scale complex client environments focuses on delivering a seamless program experience while staying focused on continuity, reliability, managed risks and well-orchestrated governance.

Secure and scalable solutions: TCS has proven experience in leveraging solutions that are secure and scalable, performance-assured and cost-efficient. It helps customers achieve faster assessments of existing tech stacks and to define a cloud-optimized architecture for complex client tech scenarios. Recommendation frameworks based on TCS iCMC, Cloud Counsel and other assets help clients assess cloud leverage opportunities with an objective, business-relevant outlook.

End-to-end services: The company's end-to-end cloud services portfolio spans across all types of cloud-mixes, such as public, private and hybrid cloud environments. It leverages innovative solutions at different stages, including Enterprise Cloud Foundation for discovery, low-touch and high-touch cloud migration, modernization services and cloud managed services platforms. Ready to use, quick-start deployment templates and solution accelerator and automation assets improve the speed and reliability of AWS migration projects for clients.

 Caution

TCS, with its end-to-end cloud migration value propositions and proven skillsets, can communicate to the mature markets more broadly and differently, focusing on the client outcome realizations from cloud migrations, beyond technical competencies and solution discussion.



2021 ISG Provider Lens™ Leader

TCS offers mature end-to-end large-scale AWS cloud migration services, leveraging industry-leading practices, tools and frameworks and enabling smooth and seamless migration.

ENTERPRISE CONTEXT

AWS Consulting Services

This report is relevant to enterprises across industries in the U.S. 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 the U.S. 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.

Some enterprises in the U.S. have been reluctant to migrate to the cloud ecosystem due to challenges in assessing the workloads, challenges in change management, the shortage of skilled professionals and uncertainties about integration of legacy infrastructure. With AWS consulting services, enterprises will have access to expertise for workload assessment, transformational strategy, advisory, re-architecture of legacy applications and integration of automation capabilities.

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 U.S.

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 the U.S.

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.

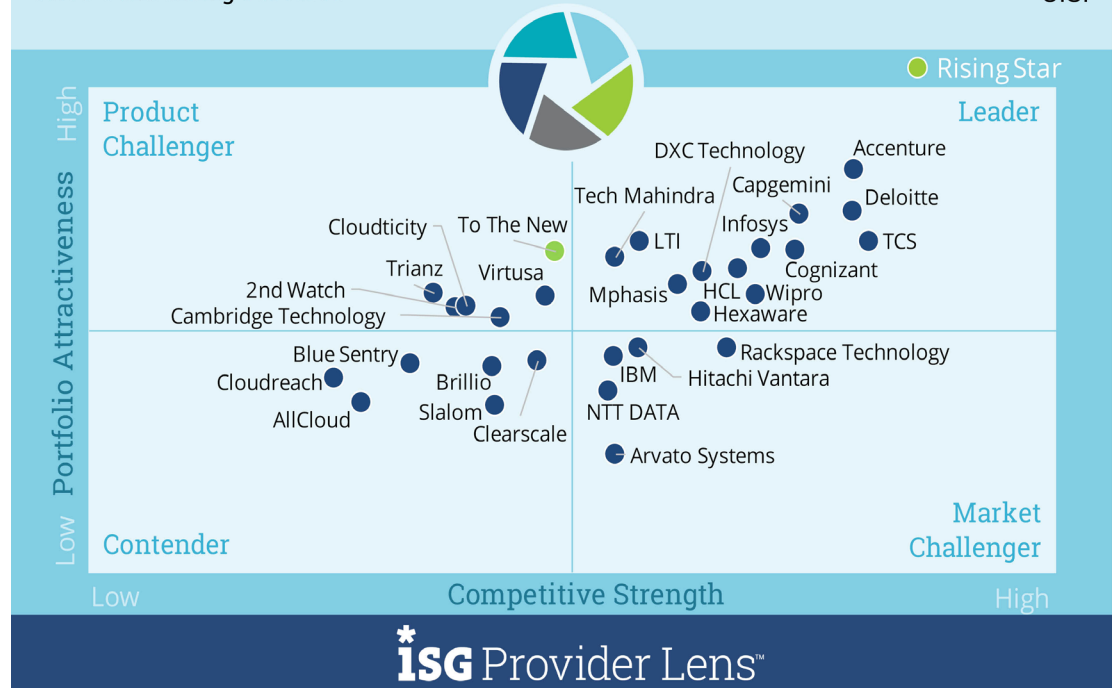
AWS CONSULTING SERVICES

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

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Source: ISG Research 2021

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 Strengths

Broad spectrum of AWS consulting: TCS, as a Premier Consulting Partner for AWS, offers a broad spectrum of AWS consulting services, spanning cloud advisory, cloud readiness assessment and opportunity evaluation, cloud strategy ideation and formulation, cloud adoption roadmap and migration plan creation, synergizing infrastructure, and application modernization and IT ops and service management, all with supporting the overall organizational cloud strategy.

Combined deep tech and services experience: By leveraging deep technology management and service delivery experiences and its proprietary Machine-First Delivery Model™ (MFDM) and automation assets, across large organizations in multiple domains, TCS brings to the AWS consulting services table a unique blend of industry-specific cloud journeys and competency requirements. The scale and scope of offerings from the services giant TCS and the cloud tech giant AWS give the best of both worlds to clients.

360° cloud consulting: TCS offers AWS consulting services covering all the critical 360° aspects of risk, reliability, governance, transparency, controls and cost efficiencies in clients' transformational cloud journeys. This value offering from consulting is possible only through combining elements and strategizing on the most appropriate and business-relevant cloud mix from private, public and hybrid cloud environments.

 Caution

While TCS excels at delivering value at scale, managing large programs such as cloud strategy and transformation roadmaps remotely and consistently is a major challenge for the industry overall and not unique to TCS. The company can leverage its experience at scale in framing industry-leading best practices.



2021 ISG Provider Lens™ Leader

TCS's AWS consulting services cover the broadest spectrum of cloud technologies and deep services knowledge and competencies, enabling clients take a giant leap to cloud.



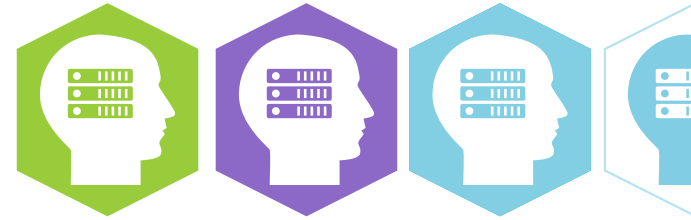
Methodology

METHODOLOGY

The research study “ISG Provider Lens™ 2021 AWS - Ecosystem Partners” analyzes the relevant software vendors/service providers in the U.S. 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 AWS - Ecosystem Partners market
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities and use cases
4. Leverage ISG's internal databases and advisor knowledge and experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts and figures received from providers and other sources.
6. Use of the following key evaluation criteria:
 - Strategy and 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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Dr. Tapati Bandopadhyay has been an inventor, builder, practitioner and researcher in AI, intelligent automation and related domains, for 25+ years. She has been a global practice leader and executive-level advisor & consultant, in AI-automation-cloud and services management, covering MLOps, AIOps, CloudOps, DataOps, ModelOps & DevOps metrics-driven practices and data and AI story-building and story-telling practices and tools. As an ISG Lead Analyst on AWS and in AI-ML, consulting & managed services, she is responsible for defining and leading the ISG Provider Lens branded research projects, for the US market.



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Ashwin Gaidhani has a comprehensive view of IT shared-managed services portfolio, and digital business transformation initiatives. As an ISG Research Partner and SME in the field of IT Services, and transformative technologies, he is presently working with the AWS Provider Lens team. Ashwin comes with an immense business technology experience especially revolving around emerging capabilities (AI-IA), work design methodologies and implementation frameworks.

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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, Partner and Global Head — 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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