ISG Provider Lens™

Microsoft Cloud Ecosystem

A research report comparing provider strengths, challenges and competitive differentiators to assist decision makers in sourcing services and solutions.

BROCHURE | NOVEMBER 2022 | AUSTRALIA, BRAZIL, GERMANY, SINGAPORE & MALAYSIA, SWITZERLAND, U.K. AND U.S.

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Microsoft is one of the most established technology providers in the world. It has a network of thousands of partners, which augments its capabilities to aid enterprises in adopting its technologies. This network has been through a series of shifts in the past five years, as Microsoft changed itself as part of a massive cloud transformation. In the same period, digital transformation has become a priority in the enterprise technology landscape, requiring a new generation of software and services from Microsoft and its partners.

To address these needs, Microsoft has honed its focus on three core areas: the Azure cloud platform; the Microsoft 365 suite of productivity experiences, which includes Windows 10 & 11 and Office 365; and the Dynamics 365 suite of business applications. Partners are now evaluated on their ability to drive the use of Microsoft cloud services that comprise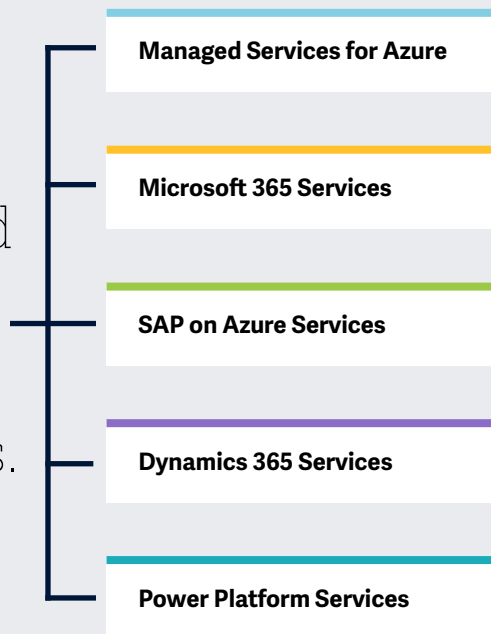 these core product lines. To succeed, service providers must offer enterprises a robust set of services that are complemented with forward- thinking capabilities and backed by a strong relationship with Microsoft. Providers should demonstrate a keen awareness of future developments in the Microsoft clouds and show an ability to drive innovation and client business opportunities using the Microsoft suite of products and services.

ISG's analysis will focus on how providers in Australia, Brazil, Germany, Singapore and Malaysia, Switzerland, the U.K. and the U.S. are positioned, based on the strength of their respective portfolios and their competitiveness in the market. While there are thousands of providers delivering services for Microsoft products in each of these regions, this report will only focus on the top competitors, both global firms and local providers, for each of the quadrants studied by region.

Providers' are positioned based on product portfolio and competitiveness.

Simplified Illustration Source: ISG 2022

- Managed Services for Azure
- Microsoft 365 Services
- SAP on Azure Services
- Dynamics 365 Services
- Power Platform Services

The ISG Provider Lens™ Microsoft Cloud Ecosystem study offers the following to business and IT decision makers:

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

For providers, the study serves as an important decision-making basis for positioning, key relationships and go-to-market considerations. In addition to consulting services from ISG advisors, enterprise clients may also use the information from this study to evaluate their current vendor relationships and potential engagements.

ISG Provider Lens™ MICROSOFT CLOUD ECOSYSTEM | NOVEMBER 2022 **4**

Managed Services for Azure

Definition

This quadrant assesses managed public cloud service providers that offer professional and managed services that augment Azure's built-in capabilities, including IaaS and PaaS. These services include provisioning, real-time and predictive analysis, and the monitoring and operational management of a client's public cloud and multicloud environments. The aim is to maximize the performance of enterprise cloud workloads, reduce costs and ensure compliance and security.

Providers in this quadrant are considered based on their capabilities in the respective regions by both services and delivery, as well as sales, which might be supported by nearshore and offshore delivery.

Going well beyond the lift and shift of single workloads, service providers offer comprehensive tools, services and solutions to support clients' business-critical demands using the Azure cloud.

The services provided typically include:

- Professional services for managing and monitoring CPU, memory, databases and operating systems, either independently or as microservices (virtual machine or container services)

- Update and patching services for operating systems, middleware and applications

- Service portal for cost management (chargeback and showback), identity management and IT service management

- Governance and compliance management

- Supporting services such as incident management, configuration, security services and automation setup

- Services and solutions developed atop the Azure cloud to help clients meet their net-zero goals and other environmental, social and governance (ESG) targets

Eligibility Criteria

1. Experience in **designing, building and managing public and multi-cloud environments,** with a focus on Microsoft Azure

2. Support in the development of **software code and cloud-native** and **legacy system integration**

3. Experience in implementing both **Agile and DevOps**, as well as integrating with enterprise clients' existing processes

4. Experience in **application programming interface (API) automation** and **cloud analytics**

5. Well-developed **security practices and capabilities**

6. Strength of the provider's **partnership** with Microsoft, measured by the number and category of relevant **certifications**, duration of relationship with Microsoft and evidence of **strategic cooperation** between the provider and Microsoft (around Azure)

Definition

This quadrant evaluates service providers that aid enterprises with the adoption, integration and ongoing operation of Microsoft 365, Microsoft's SaaS-based productivity suite.

These services go beyond provisioning and migrating to Microsoft 365; they focus on offering a quick, device-independent, high-quality productivity suite that enables seamless teamwork, irrespective of location, and adaptable to the role of the user. From clients' perspectives, Microsoft 365 is about collaboration and integrating globally dispersed teams. To enable this, integration and implementation services are necessary. This quadrant also evaluates providers on the support they offer for Windows as a part of their overall Microsoft 365 service portfolio.

Implementing SaaS-based workplace environments is a challenge for every enterprise client. ISG notes a plethora of challenges around collaboration, unified communication, file storage, performance, license costs, provisioning procedures and maintenance plans. There are also challenges in data integration, process integration and application integration, among other processes. Providers in this space must be able to go beyond implementing Microsoft 365 at a basic level to address the challenges head-on.

Providers considered in this quadrant are required to perform assessment, consulting and services and solutions to support clients with their digital journeys. This requires clear and open communication in the respective region and unique selling propositions that go beyond providing workplace environments based on Microsoft's desktop and collaboration solutions.

Eligibility Criteria

1. Service portfolio includes **technical consulting, license purchases and integration for Microsoft 365 modules, plus their implementation** and operation

2. Forward-thinking offerings that integrate with Microsoft 365 to create a **modern workplace** for enterprise clients, for example, **HoloLens development** and Teams bot creation

3. Management of **Microsoft Office APIs** to ensure appropriate use and increased enterprise productivity

4. Ability to migrate customer workplaces to modern cloud environments and **workspace-as-a-service** models

5. Provisioning of Microsoft 365-based **unified endpoint suites** through integration with state-of-the-art identity and access management (IAM) technology and mobile device management (Intune or others)

6. Strength of the **provider's partnership** with Microsoft, measured by the number and category of relevant **certifications** (including Office 365, Intune, Windows and Azure), duration of relationship with Microsoft and evidence of strategic modern workplace cooperation between the provider and Microsoft

SAP on Azure Services

Definition

This quadrant evaluates service providers that offer capabilities related to adopting, managing and using Microsoft's dedicated SAP on Azure suite of cloud solutions.

The services typically provided by these companies include architecture consulting and an analysis of requirements for the application landscape and technical design with support for configuration, deployment, escalation management, change and fault management, support, optimization and reporting. It is a must for providers evaluated in this category to help their clients migrate SAP workloads to Azure and to optimize, design and develop new processes and business flows. This must be provided as a part of platform management through a combination of the provider's own services, SAP services and Microsoft Azure services.

Running SAP on Azure requires a provider that must be able to support its clients along the whole journey and has the resources to deliver. Since SAP has committed solution support to 2040 and beyond, providers considered in this quadrant should provide a clear roadmap encompassing the next two decades.

Service providers in this category require both Microsoft and SAP certifications and need to have active and productive partnerships with both companies. They must also be well versed in how the relevant underlying technology offerings are evolving. Consequently, they should be able to articulate how product and platform changes would impact enterprises using this solution—from technical architecture considerations to business impacts.

Eligibility Criteria

1. Scope and depth of the service portfolio with regard to **migrating SAP workloads to SAP on Azure**, and SAP application and services implementation customization, provisioning and support

2. Ability and willingness to support **hybrid cloud and hybrid provider** environments

3. Strength of the **provider's partnerships with SAP and Microsoft**, measured by the number and category of relevant **certifications**, duration of relationship with both SAP and Microsoft, and evidence of **strategic cooperation between the provider and Microsoft around SAP on Azure**

4. **Support for multiple pricing models**, including "pay as you go"

5. Robustness of the provider's process for implementation, including the use of **Agile and DevOps methodologies**, and relevant **automation** for service delivery and quality

Dynamics 365 Services

Definition

This quadrant evaluates service providers that assist enterprises with the selection, integration, customization and operation of Microsoft's cloud-based Dynamics 365, an enterprise resource planning (ERP) and customer relationship management (CRM) software.

These services focus on digitizing business processes through the use of ERP and CRM software. In this context, service providers and system integrators should support user companies in analyzing processes that have not been digitally mapped and the IT implementation of these processes via solutions from Dynamics 365.

Beyond providing infrastructure and cloud services, providers to be considered in this quadrant should show long-term industry and domain expertise, from shop floor to warehousing, from manufacturing

to delivery, and from procurement to the provisioning of consumer goods, tools, semi-finished products, machinery, raw materials, food, energy and utilities. Industry-specific approaches will become more relevant due to the specialization of markets and emerging trends.

Furthermore, this study considers topics such as data integration with and transfer from legacy systems. Furthermore, it examines the way providers handle software lifecycle and user support. It also covers areas such as escalation handling, change management, optimization and reporting. Providers included in this quadrant also demonstrate a strong understanding of the way their services and the Dynamics 365 solution impact enterprise clients' business outcomes and financial performance.

Eligibility Criteria

1. Scope and depth of the provider's service portfolio in terms of **Microsoft Dynamics 365 implementation, customization, provisioning and support**, with special consideration for industry-specific services and capabilities

2. Ability to understand clients' workloads, for the **transformation of ERP or CRM**

3. Strength of the **provider's partnership with Microsoft**, measured by the number and category of relevant **certifications**, duration of relationship with Microsoft

and evidence of **strategic cooperation** between the provider and Microsoft

4. Support of **digital transformation processes** in user companies as a part of Dynamics 365 adoption

5. Variety and maturity of **pricing and payment models** that match the needs of enterprises adopting and using Dynamics 365

6. Robustness of the provider's process for implementation, including the use of **Agile and DevOps methodologies**, and relevant automation for service delivery and quality

Power Platform Services

Definition

This quadrant assesses providers that offer services for the enterprise-wide implementation of Microsoft Power Platform, support services and related advanced training. Enterprise clients utilize the services offered by providers to create new and sophisticated software applications for digital transformation, obtain new insights on business operations and optimize business processes in a sophisticated manner. The services offered by these providers not only leverage the capabilities of Power Platform but also educate enterprises on the best practices for developing low-code applications and solutions. Providers in this space ace the integration with a variety of Microsoft apps and other business apps, for example, Office 365, Dynamics 365 and Azure, and advanced concepts such as DevOps, DataOps or MLOps.

The trending concept of citizen development is resulting in huge demand for service and support to govern and embed apps created by users using low-code and no-code development tools within and/or on Power Platform. The ability to integrate or migrate third-party tools is also important. Furthermore, Power Platform's analytics, process management, IT management and process automation capabilities should be supported by the providers evaluated in this quadrant.

The providers in this quadrant understand a client's objectives and use their data literacy and skills to provide the necessary guidance. With an eye for detail, these providers also take a holistic approach to drive client business performance.

Eligibility Criteria

1. Services that support enterprises' **adoption** of all Power Platform solutions—**Power BI, Power Apps, Power Automate and Power Virtual Assistant**

2. Structured **offerings and IP** that enable easy adoption of Power Platform solutions and streamline the ongoing operation of the software

3. Technical **support capabilities** that assist enterprises with the adoption and management of platform solutions

4. Clear **business benefits** tied to the use of platform solutions

Quadrants By Region

As part of this ISG Provider Lens™ quadrant study, we are introducing the following five quadrants on Microsoft Cloud Ecosystem:

Quadrant	U.S.	Germany	Australia	Brazil	U.K.	Switzerland	Singapore-Malaysia
Managed Services for Azure	✔	✔	✔	✔	✔	✔	✔
Microsoft 365 Services	✔	✔	✔	✔	✔	✔	✔
SAP on Azure Services	✔	✔	✔	✔	✔	✔	✔
Dynamics 365 Services	✔	✔	✔	✔	✔	✔	✔
Power Platform Services	✔	✔	✔	✔	✔	✔	✔

Schedule

The research phase falls in the period between November 2022 and February 2023, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in April 2023.

Milestones	Beginning	End
Survey Launch	November 2022	
Survey Phase	November 14, 2022	December 16, 2022
Sneak Preview	February 15, 2023	March 15, 2023
Press Release & Publication	March 31, 2023	

Please refer to this link to view/download the ISG Provider Lens™ 2023 research agenda.

Access to Online Portal

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

Research Production Disclaimer:

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

ISG Star of Excellence™ – Call for nominations

ISG Star of ExcellenceTM is an independent recognition of excellent service delivery based on the voice of the customer concept. The Star of Excellence is a program, designed by ISG, to collect client feedback about service providers' success in demonstrating the highest standards of client service excellence and customer centricity.

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

Providers are invited to nominate their clients to participate. Once the nomination has been submitted, ISG mails confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

It is our vision that the Star of Excellence will be recognized as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments. To ensure your selected clients complete the feedback for your nominated engagement please use the Client nomination section on the Star of Excellence website.

We have set up an email where you can direct any questions or provide comments. This email will be checked daily. Please allow up to 24 hours for a reply. Here is the email address: ISG.star@isg-one.com

ISG Star of Excellence

Contents For This Study

Abhishek Rammurthy

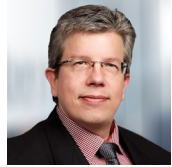Senior Project Manager

Mark Purdy

Lead Analyst: U.K.

Peter Crocker

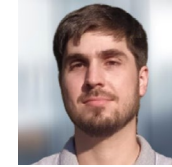Lead Analyst: U.S.

Mauricio Ohtani

Lead Analyst: Brazil

Craig Baty

Lead Analyst: Australia and Sin/Mal

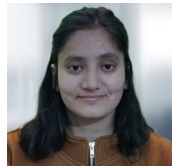**Holm Landrock**

Lead Analyst: Germany and Switzerland

Sonam Chawla

Senior Research Analyst

Gabriel Sobanski

Research Analyst

Angie Kho

Research Analyst

Khyati Tomar

Research Analyst

Practice Leaders Involvement

ISG Provider Lens™ research includes advisors and consultants from industry and technology practices worldwide. ISG advisors work with private and public sector clients to determine a future vision and lead rapid change, to realize the value of digital investments, at scale.

The advisory practice helps clients achieve operational excellence and rapid growth. Advisor involvement in IPL supplements the primary and secondary research conducted on service and technology providers, with field experience. More than 100 advisors participate, so on an average, there are three advisors for each study. For each of these studies, the advisors collaborate with analysts to update market trends, define the scope of the study, select the appropriate survey questions, validate the companies to be invited be a part of the study and participate in briefings and review analyses.

ISG Advisors to this study

Kevin
Turner

Principal Consultant

Bill
Huber

**Partner,
Digital Platforms
and Solutions**

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

4MSTech	Arvato Systems	Bytes Software	DataONE
AC3	Atos	CANCOM	Dedalus
Accenture/Avanade	Aveniq	Capgemini	Dell
Acuvate	Avepoint	Capita	Deloitte
Adaquest	Axians	Claranet	Deutsche Telekom (TDG)
ADTSys	Baggenstos	Cloud Target	Devoteam M Cloud
Agilisys	Barhead	Cognizant	Dicker Data
AlfaPeople	Bechtle	Communardo	DIGITALL
Alithya	Best.Projects	Computacenter	DXC Technology
All for One Group	Birlasoft	Content+Cloud	Econis
Allgeier	Bizapp	COSMO Consult	ELCA
Ambit Gruppe	BlueShift	Crayon	Embratel
ANS	Brillio	Customer Capital Consulting	Empired
AppSphere	BT	Data#3	Encore
Arbela Technologies	BTC	Datacom	Enfrasys

Invited Companies

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

Engage Squared

Espire Infolabs

Espria

EveryWare

EY

FCamara

Fênix Sistemas

FiveP Australia

Fujitsu

Fusion5

Generation-E

Genpact

glueckkanja-gab

GRVPPE

Hanu

HCLTech

Henson Group

Hexaware

Hitachi Solutions

Hitachi Vantara

HPE

HSO

IBM

Impeto

Infogain

Infosys

Ingram Micro

Inove

InovTI

Insight

intellecom

IPI

iSolutions

ITCore

KUMAVISION

Kyndryl

L3

LAB3

Lattine

Layer 2

Logicalis

Logicworks

LTI

Lumen

Macquarie Cloud Services

Mindtree

Mphasis

MSRCosmos

NCS

Net at Work

novaCapta

NTT DATA

Objektkultur

OOBE

ORBIT

Oxya

Pentare

Persistent Systems

Phoenix Software

PlusServer

Invited Companies

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Prime IT	SGA	Swisscom	V8 Consulting
Processor	Skaylink	Sycor	Velrada
ProCloud	SLK Software	Synoptek	Venha Pra Nuvem
Protiviti	Smart Consulting	Syntax Systems	Veritec
Publicis Sapient	SMX	TCS	VIVO
PwC	Softcat	Tech Mahindra	Wipro
q.beyond	Softline	Telstra	Wolkenwerft
Qualiserve	Softtek	Teltec	
Quantiphi	SoftwareONE	TIVIT	
Rackspace Technology	Solo Network	Transparity	
Reply	Somnitec	Trianz	
Rhipe	Sonata Software	T-systems	
Risual	Sopra Steria	UMB	
Scheer	SOU.cloud	Unisys	
Seidor	Sunrise Technologies	UST	

About Our Company & Research

ISG Provider Lens™

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

For more information about ISG Provider Lens research, please visit this webpage.

ISG Research™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research delivers guidance that helps businesses accelerate growth and create more value.

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

For more information about ISG Research subscriptions, please email contact@isg-one.com, call +1.203.454.3900, or visit research.isg-one.com.

ISG

ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 800 clients, including more than 75 of the world's top 100 enterprises, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis.

Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,300 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data. For more information, visit www.isg-one.com.

ISG Provider Lens™

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