



***ISG** Provider Lens™

2021

Microsoft Ecosystem 2022

imagine your future®

ISG (Information Services Group) (NASDAQ: III) is a leading global technology research and advisory firm. A trusted business partner to more than 700 clients, including 75 of the top 100 enterprises in the world, 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.



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Definition

Microsoft is one of the most established technology providers in the world, with a network of thousands of partners that augment its capabilities and aid enterprises in adopting its technologies. This network has been through a series of tectonic shifts in the past five years, as Microsoft transformed 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: Azure cloud platform; the Microsoft 365 suite of productivity experiences, which includes Windows 10 and Office 365; and the Dynamics 365 suite of business applications. Partners are now evaluated on their ability to drive the use of the Microsoft cloud services that comprise these core product areas. To succeed, service providers must provide enterprises with a robust set of services, complete with forward-thinking capabilities, and backed by a strong relationship with Microsoft that keeps them abreast of its future developments and, in turn, drive business opportunities.

ISG's analysis will focus on how providers in Australia, Brazil, Germany, Malaysia, Singapore, 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 in each of these regions, delivering services for Microsoft products, this report will only focus on the top competitors, both global firms and local providers, for each of the quadrants studied by region.

The ISG Provider Lens™ quadrant study offers the following to IT decision-makers:

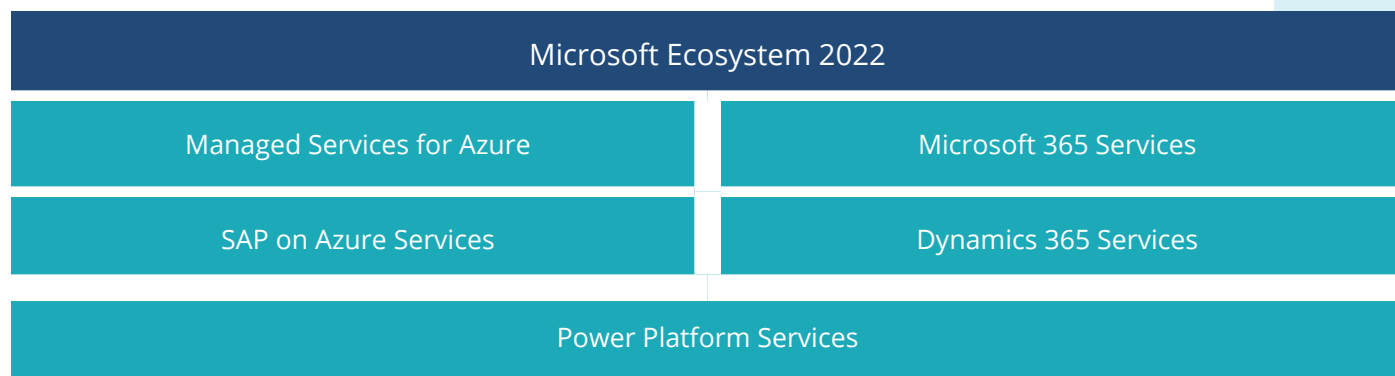
- Transparency in the strengths and weaknesses of providers/service providers.
- Differentiated positioning of service providers in relevant areas.

Our studies thus provide potential customers with an essential decision-making basis for positioning and go-to-market considerations. ISG advisors and enterprise customers also use information from these reports to evaluate their current and potential service provider relationships.

Quadrant Research

The ISG Provider Lens™ study on the topic, Microsoft Ecosystem Partners, will contain the following five quadrants:

Simplified illustration



Source: ISG 2021

At ISG's discretion, quadrants may be split into the midmarket and large accounts based on the size of the market in each region.

Managed Services for Azure

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 monitoring and operational management of a client's public cloud and multicloud environment. The aim is to maximize performance of enterprise cloud workloads, reduce costs and ensure compliance and security. Typically, specially developed or licensed cloud management platforms and tools are used to provide customers with the highest level of automation and the necessary transparency over the managed cloud resource pool, in terms of capacity utilization and costs, including independent management.

The provided services typically include:

- Professional services for the management and monitoring of CPU, memory, databases, operating systems as independent or microservices or virtual machine or container services
- Update and patching services for operating systems, middleware and applications
- Service portal for cost management (charge back and show back) and identity management or IT service management
- Governance and compliance management
- Supporting services such as incident management, configuration, security services and automation setup

Eligibility criteria:

- Experience in designing, building and managing public and multicloud environments with a focus on Microsoft Azure
- Support in the development of software code, cloud native and legacy system integration
- Experience in implementing both Agile and DevOps as well as integrating with enterprise clients' existing processes
- Experience in application programming interface (API) automation and cloud analytics
- Well-developed security practices and capabilities
- Number and location of provider resources that assist enterprises with Microsoft Azure
- 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).

Microsoft 365 Services

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 is adapted to the role of the user. From the client's perspective, Microsoft 365 is about collaboration and the integration of 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 pitfalls around collaboration, unified communication, file storage and performance, as well as license cost, provisioning procedures, maintenance plans, and efforts toward 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 aforementioned challenges head-on.

Eligibility criteria:

- Service portfolio includes technical consulting, license purchases, integration of Microsoft 365 modules, implementation and operation
- Forward-thinking offerings that integrate with Microsoft 365 to create a modern workplace for enterprise clients (for example, HoloLens development and Teams bot creation)
- Management of Microsoft Office APIs to ensure appropriate use and increased enterprise productivity
- Ability to migrate customer workplaces to modern cloud environments and Workspace as a Service models.
- Provisioning of Microsoft 365 based Unified Endpoint Suites through integration with state-of-the-art Identity and Access Management technology and Mobile Device Management (Intune or other).
- 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 cooperation between the provider and Microsoft around the modern workplace.

SAP on Azure Services

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, 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 both to help their clients to 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.

Service providers in this category require both Microsoft and SAP certifications. Providers need to have active and productive partnerships with technology vendors and be well versed with 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:

- Scope and depth of service portfolio with regard to migration of SAP workloads to SAP on Azure; SAP application and services implementation customization, provisioning, and support
- Number and location of employees who provide SAP on Azure services
- Ability and willingness to support hybrid cloud and hybrid provider environments
- 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
- Support for multiple pricing models, including pay-as-you-go
- Robustness of provider's process for implementation, including the use of Agile and DevOps methodologies, as well as relevant automation for service delivery and quality.

Dynamics 365 Services

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

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

In addition, this study considers topics, including 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.

Eligibility criteria:

- Scope and depth of the provider's service portfolio with regard to the implementation, customization, provisioning and support of Microsoft Dynamics 365, with special consideration for industry specific services and capabilities
- Number and location of employees who provide Dynamics 365 services
- Ability to understand the client's workloads regarding the transformation of ERP or CRM
- 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
- Support of digital transformation processes in user companies as a part of Dynamics 365 adoption.
- Variety and maturity of pricing and payment models that match the needs of enterprises adopting and using Dynamics 365.
- Robustness of provider's process for implementation, including use of Agile and DevOps methodologies, as well as relevant automation for service delivery and quality.

Power Platform Services

This quadrant assesses providers that offer services towards an enterprise wide implementation of the Microsoft Power Platform, support services and related advanced training. Enterprise clients utilize the services offered by the 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 the providers here not only leverage the capabilities of the Power Platform, but also educate enterprises on the best practices for development. Providers in this space ace the integration with a variety of Microsoft and other business apps, for example, Office 365, Dynamics 365 and Azure, as well as advanced concepts such as DevOps, DataOps or MLOps.

The providers in this quadrant have the ability to understand a client's objectives, demonstrate their data literacy and skills to provide the necessary guidance to a client, and take a holistic approach, with an eye on details, for the realization of their objectives.

Eligibility criteria:

- Services that support enterprise adoption of all Power Platform Solutions — Power BI, Power Apps, Power Automate and Power Virtual Assistant
- Structured offerings and IP that enable easy adoption of Power Platform Solutions and streamline ongoing operation of the software
- Technical support capabilities that assist enterprises with the adoption and management of platform solutions
- Clear business benefits tied to use of platform solutions
- Number and location of employees with relevant certifications for Power Platform use

Quadrants by Region

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

In order to be evaluated in a given region, providers must either have their headquarters in that country, or conduct significant operations there. Country-specific management, sales and marketing activities, delivery, as well as support in the local language are all necessary for inclusion. For inclusion in the Switzerland quadrant, a provider must either have its headquarters in Switzerland, or a significant, semi-autonomous workforce based in the country.

Schedule

The research and main survey phase take place between **November 2021 and December 2021**, followed by the evaluation, analysis and validation phase between January and February.

Selected results will be presented to the media in **April 2022**.

*You can download the questionnaire on an online platform. We will provide you with your individual link in our invitation via email.

Milestones

Launch

Survey (questionnaire and briefing)

Begin sneak previews

Content provisioning

Press release

Beginning

03 November, 2021

03 November, 2021 – November 30, 2021

February 2022

March 2022

April 2022

Research production disclaimer:

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

Partial list of companies being invited for the survey

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

4MSTech	Cloud Target	Encore
4Results	Cloudreach	EY
AC3	Codify	FCamara
Accenture (Avanade)	Cognizant	Fênix
ADN	Communardo	FiveP Australia
AlfaPeople	Compasso	Fujitsu
All for One Group	Compasso UOL	Fusion5
Allgeier	Computacenter	GBS
Altis Consulting	Computécnica	Generation-E
Amaris	Cosmos Consult	glueckkanja-gab
AppSphere	Crayon	GRVPPE
Arvato Systems	Cubesys	Hanu
Atos	Data One	HCL
Axians	Data#3	Henson Group
Barhead Solutions	Datacom	Hexaware
Bechtle	datec	HPE
BHS	Dedalus	HSO
Blueshift	Dell	IBM
Brasoftware	Deutsche Telekom (TSI)	Impeto
Bright Skies	Devoteam Alegri	Infogain
BT	Dicker Data	Infosys
CANCOM	DXC	infoWAN
Capgemini	Embratel	Ingram Micro
Claranet	Empired	Inove

Insight	NTT	Sonata
intellectcom	NTT DATA	Sonda IT
InterOp	Objektkultur	Sopra Steria
IPI	OOBE	SOU.cloud
ITCore	Orbit	Sycor
itelligence AG	Pentare	Synnex Westcon
Iteris	PlusServer	Synoptek
KonicaMinolta	Prime IT	Syntax Systems
KUMAVISION	Processor	TCS
Kumulus	ProCloud	Tech Mahindra
LAB3	Protiviti	Telefónica
Lattine	Publicis Sapient	Telekom Deutschland Geschäftskunden (TDG)
Layer 2	PWC	Telmex (Embratel)
Logicalis	q.beyond	Telstra
Logicalis Australia	Rackspace Technology	Teltec
Logicworks	Reply	TIVIT
LTI	Rhipe	Trianz
Macquarie Cloud Services	Scheer GmbH	T-Systems
Melbourne IT	Seidor	Unisys
Microservice	SGA	Velrada
Mindtree	Smart Consulting	Venha Pra Nuvem
Montreal	Smartronix	Veritec
MPS	Softline	Vigilant
Net at Work	Softtek	Wipro
NordCloud	SoftwareONE	Wolkenwerft
novaCapta	Solo Network	

ISG Star of Excellence™ – Call for nominations.

The Star of Excellence is an independent recognition of excellent service delivery based on the concept of “Voice of the Customer.” 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 existing first-hand advisor feedback that IPL leverages in context of its practitioner-led consulting approach.

Providers are invited to [nominate](#) their clients to participate. Once the nomination has been submitted, ISG sends out a mail 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

Contacts for this study



Smita Subhash
Global Project Manager



Craig Baty
Lead Author Australia, Singapore,
and Malaysia



Peter Crocker
Lead Author U.S.



Mark Purdy
Lead Author UK.



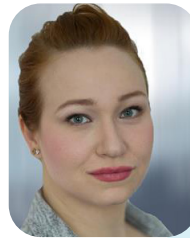
Holm Landrock
Lead Author Germany and
Switzerland



Sonam Chawla
Research Analyst



Mauricio Ohtani
Lead Author Brazil



Katharina Kummer
Research Analyst

Do you need any further information?

If you have any questions, please do not hesitate to contact us at Smita.Subhash@isg-one.com.

ISG Provider Lens™ QCRT Program Description

ISG Provider Lens offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context. In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three advisors participate as part of each study's Quality & Consistency Review Team (QCRT). The QCRT ensures each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the QCRT group and contribute at different levels depending on their availability and expertise.

The QCRT advisors:

- Help define and validate quadrants and questionnaires
- Advise on service providers inclusion, participate in briefing calls
- Give their perspectives on service provider ratings and review report drafts

The ISG Provider Lens QCRT program helps round out the research process, supporting comprehensive research-focused studies.

Quality and Consistency Review Team for this Study



Louis Pellegrino
Director



Anthony Drake (UK)
Director



Bill Huber
Global Partner – Digital
Platforms & Solutions



Gerry Clark
Partner



Mathias Schulze
Senior Consultant



Deepraj Emmanuel
Director