



***ISG** Provider Lens™

2021

Microsoft Ecosystem 2022 –
U.S. Public Sector

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; technology 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 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.



Table of Contents

Definition.....	4
Quadrants Research.....	5
Schedule.....	10
ISG Star of Excellence™ – Call for nominations.....	11
Partial list of companies being invited for the survey.....	12
ISG Provider Lens QCRT Program Description.....	14

© 2021 Information Services Group, Inc. All rights reserved. Reproduction of this publication in any form without prior permission is strictly prohibited. Information contained in this report is based on the best available and reliable resources. Opinions expressed in this report reflect ISG's judgment at the time of this report and are subject to change without notice. ISG has no liability for omissions, errors or completeness of information in this report. ISG Research™ and ISG Provider Lens™ are trademarks of Information Services Group, Inc.

Definition

Microsoft is one of the most established technology providers worldwide, with a network of thousands of partners that augment its capabilities and aid government agencies in adopting its technology. This network has been through a series of tectonic shifts over the past five years, as Satya Nadella transformed the technology giant and its commercial partner organization in his role as CEO. In that same period, digital transformation has taken over 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 to three core areas: its 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 usage of the Microsoft cloud services that comprise these core product areas. To succeed, service providers must provide government agencies with a robust set of services complete with forward-thinking capabilities, backed by a rich relationship with Microsoft that can inform future developments.

ISG Public Sector Provider Lens™ research studies examine, explain, and provide guidance regarding the business software platforms, solutions, tools, services, and providers that help improve how public sector organizations operate - and enable transformation toward digital realities. This study focuses on Microsoft Ecosystem services, transformation consulting services, and software platforms.

This ISG Provider Lens™ study offers the following to IT decision-makers in U.S. public sector organizations:

- Transparency in the strengths and weaknesses of providers/service providers.
- Differentiated positioning of service providers in relevant areas.
- Insight into the scope of capabilities and improvements that are available.
- A view of leading providers, rising stars, and contenders offering these services and software platforms.

This study serves as an important decision-making basis for positioning, key relationships and go-to-market considerations. ISG advisors and public sector clients also use information from these reports to evaluate their current solutions, provider relationships, and potential engagements.

Quadrants Research

The ISG Provider Lens™ U.S. Public Sector - Microsoft Partner Ecosystem 2022 study includes the following quadrants:

Microsoft Ecosystem 2022 – U.S. Public Sector	
Managed Services for Azure	Microsoft 365 Services
Power Platform Services	Dynamics 365 Services

Source: ISG 2021

Managed Services for Azure

This quadrant evaluates managed public cloud service providers (MSPs) 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 management of a customer's public cloud or multi-cloud environments. The aim is to maximize performance of cloud workloads, reduce costs and ensure compliance and security. Typically, specially developed or licensed cloud management platforms (CMPs) 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, microservices, 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 multi-cloud 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 in 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 agencies 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 agencies 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 to focus on a quick, device-independent, high-quality productivity suite that enables seamless teamwork, regardless 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 dispersed teams, which requires integration and implementation services. This quadrant will also include evaluations of support for Windows as a part of a provider's overall Microsoft 365 service portfolio.

Implementing SaaS-based workplace environments is a challenge for every enterprise client. ISG observes many pitfalls around collaboration, unified communication, file storage and performance, as well as license cost, provisioning procedures and maintenance plans. Additional challenges include efforts towards data integration, process integration and application integration. Providers in this space must be able to go beyond implementing Microsoft 365 at a basic level and address these deeper problems head-on.

Eligibility criteria:

- Service portfolio that 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 agency clients (for example, HoloLens development and Teams bot creation)
- Management of Microsoft Office APIs to ensure appropriate use and increased agency productivity
- Ability to migrate customer workplaces to modern cloud environments and Workplace-as-a-Service (WaaS) models.
- 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 (MDM) software (Intune or other).
- Strength of the provider's partnership with Microsoft, measured by the number and category of relevant certifications it holds (including Office 365, Intune, Windows and Azure), length of relationship with Microsoft and evidence of strategic cooperation between the provider and Microsoft around the modern workplace

Dynamics 365 Services

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

The services focus on the digitalization of business processes through the use of ERP and CRM software. Service providers and system integrators are eager to support the user companies in the analysis of non-digital processes and the transformation of these processes via solutions from Dynamics 365.

In addition, the 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, including escalation handling, change management, optimization and reporting. Providers in this space demonstrate a strong understanding of the way their services and the Dynamics 365 solution impact the missions of agencies.

Eligibility criteria:

- Scope and depth of the provider's service portfolio with regard to the implementation, customization, provisioning and support of Microsoft Dynamics 365
- Number and location of employees who provide Dynamics 365 services
- Ability to understand the client's workloads regarding the transformation of ERP or CRM software.
- Strength of the provider's partnership with Microsoft, measured by the number and category of relevant certifications held, duration of relationship with Microsoft and evidence of strategic cooperation between the provider and Microsoft
- Support of digital transformation processes in user agencies as a part of Dynamics 365 adoption
- Variety, applicability and maturity of pricing and payment models that match the needs of agencies adopting and using Dynamics 365
- Robustness of provider's process for implementation, including the use of Agile and DevOps methodologies, plus relevant automation for service delivery and quality

Power Platform Services

This quadrant evaluates providers that assist with implementation and offer advanced training related to the Microsoft Power Platform. Client agencies utilize the services delivered by the providers to create new and sophisticated software applications. The new solutions based on the Power Platform are intended to support digital transformation for the client agency, to provide new insights into operations and to optimize processes. Providers in this space not only use the Power Platform capabilities available, but also educate agencies on the best practices for development. They should master the integration with a variety of Microsoft and other business apps such as Office 365, Dynamics 365 and Azure, as well as advanced concepts such as DevOps, DataOps or MLOps.

The providers in this quadrant show the capabilities in understanding the agencies' objectives and missions, exhibit data literacy and skills for providing guidance to a client. Guidance should include a holistic approach, with an eye on details for realizing agency objectives.

Eligibility criteria:

- Services that support enterprise adoption of all Power Platform solutions — Power BI, Power Apps, Power Automate and Power Virtual Assistant
- Structured and proprietary offerings that enable easy adoption of Power Platform solutions and streamline ongoing operation of this software
- Technical support capabilities that assist agencies with the adoption and management of platform solutions
- Offer clear benefits related to the use of platform solutions
- Number and location of employees with relevant certifications for Power Platform

Schedule

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

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

November 03, 2021

November 03, 2021 - November 30, 2021

January 31, 2022

March 4, 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 the work identified by 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 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.

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

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.

Accenture (Avanade)	HCL	Protiviti
Arvato	Henson Group	PWC
Atos	Hewlett Packard Enterprise	Qwest Government Services
Capgemini	Hexaware	Rackspace Inc.
Carahsoft Technology	Hitachi America	Rand Corp.
Cloudreach	HSO Enterprise Solutions	Right! Systems, Inc. (RSI)
Cognizant	IBM	Softchoice
Crayon Software Experts	ICF International	SoftwareONE
Dell	Infogain	Sycor
Deloitte	Infosys	Synoptek
DXC	KPMG International	TCS
Encore	Lockheed Martin	Tech Mahindra
Ensono	Logicalis	Trianz
Fujitsu	LTI	Unisys
General Dynamics	Mindtree	Verizon Communications
Grant Thornton International	NTT DATA	Wipro

Contacts for this study

Do you need any further information?

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



Smita Subhash
Global Project Manager



Sonam Chawla
Research Analyst



Peter Crocker
Lead Author U.S. Public Sector



Katharina Kummer
Research Analyst



Bruce Guptill
Author U.S. Public Sector

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 & Consistency Review Team for this study



Jill Anderson
Director