



***ISG** Provider Lens™

2020

Microsoft Ecosystem 2020

imagine your future®

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Definition

Microsoft is one of the most established IT providers worldwide. In Germany, there are around 100 Microsoft partners with reference to Dax groups. Further 1,000 are worth mentioning in the business customer segment. In addition, there are tens of thousands more partners in the end customer environment with less relevance to corporate IT.

The core segments are on one hand the established Workplace environment in which Microsoft tries to defend its dominant position with Office 365. The other, very dynamic growth area comprises Microsoft Azure's portfolio for public and private clouds. The company from Redmond invests heavily in technological trends such as AI or IoT, robotics, infrastructures such as edge computing and HPC. The aim is to deliver a differentiated value across the cloud portfolio and thus on one hand to differentiate itself from the competition, to remain relevant and on the other hand to continue to achieve high cross margins.

As part of the ISG Provider Lens Microsoft Ecosystem 2020 study, ISG analyses the services and offers of Microsoft partners in Germany, U.S. and Brazil in selected segments. The findings from the analysis allow an assessment of the service providers operating in the defined segments with regard to the strength of their portfolio and their competitiveness in the market.

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 the service provider according to the segments

Our studies thus provide 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 new service provider relationships.

Quadrant Research

The ISG Provider Lens™ study on the topic “Microsoft Ecosystem” will contain the following 6 quadrants:

Simplified presentation

Microsoft Ecosystem 2020	
Managed Service for Azure	Midmarket
	Large Accounts
Office 365 and Modern Workplace	Midmarket
	Large Accounts
Sharepoint Integration	SAP on Azure

Source: ISG, 2018

Managed Services Provider for Azure

Managed Public Cloud Services Providers (MSPs) offer professional and managed services in addition to IaaS and PaaS hyperscale platforms for public clouds from third-party service providers. On a broader scale, these services include provisioning, real-time and predictive analysis, monitoring and operational management of the 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 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 micro services or virtual machine and/or container services
- Update and patching services for the operating system, middleware and application
- 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:

- Operational excellence and clearly defined, professional services
- Expertise in configuration management of platforms/systems as well as containers
- Experience in designing, building and managing public and multi-cloud environments

- Support in the development of software code, cloud native and legacy system integration
- DevOps experience
- Experience in API automation and cloud analytics
- Well-developed security processes
- Support for different customer roles such as technicians (IT) and developers
- Partnership with Microsoft with corresponding Managed Service Provider (MSP) certificate and more. Typically, MSPs must have customer cases and some consumer-driven and recurring revenue. In addition, they must also participate in joint business planning meetings and pass several certificates/audits to ensure their skills and knowledge for Azure:
- Azure CSP 1 or 2 partner with silver/ gold or expert status: Administrator, solutions architect, developer, DevOps / security / KI / data engineer, domain specialization and cloud platform

Office 365 and Modern Workplace

Office 365 has become the leading SaaS Office productivity solution in recent years. The introduction of Office 365 is not only about the integrated provisioning of Office client, Exchange Online, SharePoint Online, Skype for Business, in the context of AD and rights management. More importantly, it is about providing a quick, device-independent, high-quality productivity suite that enables seamless teamwork, regardless of location and adapted to the role of the user. In order to enable this, integration and implementation services are necessary. Service providers that offer dedicated services for migration, implementation and ongoing support services (support, managed services, etc.) of Office 365 are evaluated.

Eligibility criteria:

- Microsoft certification level for Office 365 and adjacent solutions such as Intunes and Azure
- Service portfolio from technical consulting to license purchases, integration of the various modules, implementation of a complete solution and operation
- The ability for enterprise customers to provide Microsoft Office APIs in a centralized environment to authenticated programming in a controlled manner.
- Ability to migrate customer workplaces also partially to modern cloud environments and WaaS models
- Provision of Office 365 based Unified Endpoint Suites through integration with state-of-the-art IAM technology and MDM (Intunes or other).
- Highly modular solutions that can be provided without significant integration effort.
- Reference projects in German market
- Financial stability of the service provider

SAP on Azure

Service providers that offer the provision of SAP systems such as SAP HANA or platforms on Microsoft Azure and its central management are evaluated.

The services regularly provided by these companies include architecture consulting and analysis of requirements for the application landscape, technical design with support for configuration, deployment, escalation management, change and fault management, support, optimization and reporting.

This selected group of professional IT service providers is thus responsible for implementation and ensuring subsequent operation. The service providers not only (exclusively) help to implement Azure as a sheer hardware replacement or hardware extension (IaaS) in the customer companies, but also optimize, design and develop new processes and business flows as part of platform management through a combination of their own services, SAP services and Microsoft Azure services.

Service providers in this category not only need special Microsoft certifications, e.g. for the Azure cloud platform, but also SAP focus or partnership in order to always be informed about SAP product and platform changes as well as their effects on IT system landscapes and applications right up to business processes.

Eligibility criteria:

- Scope and depth of service portfolio with regard to SAP application and services implementation, customization, provisioning, and support
- Size and locations of resources with regard to SAP offerings on Azure
- Awareness and number of customers of the service provider with regard to SAP applications and services provisioning and support on Azure
- Number and reputation of references with regard to SAP applications and services provisioning and support on Azure
- Experience as well as number of relevant certifications (gold). The minimum requirement is the Microsoft Partners for Azure Cloud Service Provider (CSP), leaders usually passed the quality level within the framework of the Azure Expert MSP Partner program
- An optimized process sequences and customer life cycle value management approach.
- The provisioning of a pay-as-you-go model
- The creation of a business unit around DevOps, automation and cloud native application design.

SharePoint Integration

As part of SharePoint integration, ISG evaluates service providers, integrators, consultants etc. who offer solutions and services all around SharePoint; in particular integration and implementation services for on-premises and hybrid scenarios. In addition to the actual integration of SharePoint, this also includes joint integration with widely used corporate systems such as SAP, Microsoft Dynamics 365, Salesforce etc.

Eligibility criteria:

- Scope and depth of service portfolio with regard to SharePoint integration
- Portfolio development (roadmap)
- Size of expert team with regard to SharePoint integration
- Awareness and number of customers of the service provider with regard to SharePoint integration
- Number and reputation of references with regard to SharePoint integration
- Experience as well as number (gold) certifications
- Position as a market innovator
- High degree of automation
- Is the provider among the service providers in Germany supported by Microsoft based on their qualifications and capabilities regarding SharePoint?

Schedule

The research and therefore main survey phase takes place between **Dezember 2019 and January/February 2020**, followed by the evaluation, analysis and validation phase between January and February/March.

Selected results will be presented to the media in **April 2019** and **May 2020**

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

U.S. and Germany

Milestones	Beginning	End
Launch	December 03, 2019	
Survey Phase	December 03, 2019	January 07, 2020
Sneak Preview	February 28, 2020	
Press release	April 2020	

Brazil

Milestones	Beginning	End
Launch	January 13, 2020	
Survey Phase	January 13, 2020	January 31, 2020
Sneak Preview	March 27, 2020	
Press release	May 2020	

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.

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.

*um (an Orange Business Services company)	ANS	Brascin
10th Magnitude	AppRiver	Brasoftware
2nd Watch	AppSphere	Bright Skies
3Cloud	Armis	Brilio
3kubik	Arvato Systems	BS
4 Seniors Brasil	Atmosfera	BT
7 Layer Solutions	Atos	Business Cloud Integration
7IT	Avanade	Campana & Schott
ABeam Consulting	Aviatec	CANCOM
Abel Solutions	AX4B	Capgemini
Accenture	Axians	CAPSiDE
Acclimation	B&R Business Solutions	Catapult Systems
adaQuest	Bechtle	CDW
AddIn365	beck et al.	Central Server
Adlon	BeeX	CenturyLink
ADN	Bennett Adelson	Chetu
Advanced Informática	BESPIN GLOBAL	Claranet
Aldax	Best Projects	Class
Alert Informática	Best Soft	Closer
Alfagates	BHS	Cloud Direct
Alfapeople	Big Brain	Cloud4C Services
All for One Group	Bitscape	Cloudreach
Allgeier	Bizapp	CloudWell
Amaris	BPA Solutions	Cluster Reply
	Bracta Tecnologia	codeHB

Cognizant	Edenhouse Solutions	Global Business Services (GBS)
Combined Knowledge	Embee	Glück & Kanja Consulting
Communardo	Empr. Paulista de Tecnologia	Green House Data
COMPAREX	Enimbos	GT Plus
Computacenter	Ensono	Hanu Software
COMPUTÉCNICA	EntServ Schweiz	hcf Utilit
Coretek Services	eSoftware Professional	HCL
Cosmos DB	ETZ	HCL
Crayon	Evolution IT Services	Henson Group
Crow Canyon Systems	Fábrica de Tecnologia	Hewlett Packard Enterprise (HPE)
CS Global	Fast Lane Intitute	Hexaware Technologies
Cyber	FJH (Grvppe)	HGSM
Dadoteca	FlexManage	HIRSCHTEC
Darede	Flintfox	HPE
Data One	FME	i3solutions
DataEX	FMT Consultants	IBM
Datapipe	Focal Point Solutions	IFI Techsolutions
Dataprise	Freudenberg IT	iGlobe
DATEV	Fujitsu	Ímpeto
Dedalus	Function 1	Infocomm TI
Dedalus Prime	Futurum	Infopulse
Delaware Consulting	G3 Ltda	Infoshot
Devoteam Alegri	GAB ExactlyIT Solutions	Infosys Technologies
Dimension Data	Geneses	infoWAN
direkt gruppe	Giant Swarm	Ingram Micro
DXC	Gijima	INNOVENT
Dynsys	GitLab	inNuvem

Inovti	Logicalis	Nuvm.online
Intel	Logicalis (PTLS)	Objektkultur
intellectum	logicworks	Optimum
Intelligent Decisioning	LRS	OPUS SOFTWARE
Intercept	LTS	Orange Networks
InterOp	Lyo Solutions	Orbis
Invent Cloud	M I Montreal Informática	PAIT Group
IPI Solutions	Medha Hosting	PCM.com
ITCORE	Memory Company	Pentare
itelligence	Mindtree	PHS Brasil
iteraon	Mirasoft	PixelMill
Iteris	MMPAES	PlusServer
ITSS	Mult Connect	Portnet Tecnologia
ITST	myCloudDoor	Presidio
IW Mentor	Naaraa	Processor
JFDI Consulting	NaviSite	ProCloud
K2M	Neoris	Programmer's Informática
KCS.net	Net at Work	Project Solution
Keyrus	NetApp	QDois
Keytree	Netsecurity	QSC
Kiefer Consulting Services	network1 (scansource)	R2MAX
Kochasoft	New Signature	Rackspace
Konia	Niteo	Rapid Circle
Konica Minolta	Nordcloud	ratiokontakt
Larsen & Toubro Infotech (LTI)	novaCapta	redbelt
Layer 2	NTT	Reply
LiveArena	NTT DATA	RGM

RHC	Syn IT	World Zone
SaaSplaza	Synergy	WP2
Scheer Group	Synergy Advisors	XTRATEGUS
Secure24	Syntax Systems	
Seidor	SysMap	
Sela Group	Tata Consultancy Services (TCS)	
Sempre IT	Techmaster	
Senita	Tecjump	
Sensei Project Solutions	Teevo S/A	
SharePoint Flex	Telekom Deutschland	
SHI International Corp	TELETEX	
skybow	Telstra	
Slalom	TFA	
SLMIT	TND Brasil	
Smartronix	T-Systems	
Softchoice	Unisys	
softline	UOL Diveo	
Softtek	Valorem Reply	
SoftwareONE	Valtech	
Sogeti	Venha Pra Nuvem	
Solo Network	Vexia	
Solutions2Share	Vexpro	
Solutis	Vexun	
Sonda IT	Web Focco	
SUPPORT	Westcon Brasil	
Supria	Wipro	
Sycor	Wolkenwerft	

Contacts for this study



Dr. Henning Dransfeld
Lead Author Germany
Email: henning.dransfeld@isg-one.com



Frank Heuer
Lead Author Germany
Email: frank.heuer@isg-one.com



Bruce Guptill
Lead Author U.S.
Email: bruce.guptill@isg-one.com



Mauricio Ohtani
Lead Author Brazil
Email: mauricio.ohtani@isg-one.com

Project Manager



Vanessa Scheffer
Project Manager
Email: vanessa.scheffer@isg-one.com

Do you need any further information?

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