

# Microsoft Cloud Ecosystem

The report highlights several market trends  
from global and regional perspective

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**DXC** TECHNOLOGY

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### Industry cloud offerings continue to grow in scale

Enterprises globally want to drive their cloud transformation journey and speed up innovation. Thus, they have started focusing on tailored industry-based solutions. On the one hand, enterprises are driving innovation with Microsoft Cloud industry solutions to get ahead of the curve, build resilience and deliver better client experiences. On the other hand, several service providers are expanding their collaboration with Microsoft regarding industry cloud to further benefit enterprises and create a scalable and transformative impact. The momentum toward the industry cloud has gathered further pace. Almost all leading providers are offering a range of industry cloud solutions for Azure and investing significantly in this space. These providers are often combining their existing industry assets and IPs with Microsoft's Clouds to create highly tailored offerings specific to industries such as healthcare, manufacturing, retail and financial services.

### Improved business processes through automation

Microsoft Power Automate is becoming increasingly popular as enterprises seek intelligent automation platforms to help overcome industry challenges and automate repetitive business processes to save time and energy. Microsoft Power Automate assists enterprises in lowering their total cost of ownership, reducing workflow development efforts, accelerating enterprise automation deployment and increasing return on investment. In addition, enterprises looking to upgrade from legacy RPA platforms to next-generation intelligent automation solutions are increasingly focusing on RPA migration or switching RPA tools.

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***Microsoft customers in the U.S. are retrenching as they digest the rapid IT investments made during the pandemic while Microsoft and providers are making strategic changes to adapt.***

Peter Crocker - Distinguished Lead Analyst, U.S.

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### **Modernizing and transforming the workplace remains a priority for enterprises**

Enterprises globally have now realized that modern workplaces and better employee experiences can critically impact business efficiency and growth. Hence, they continue to leverage Microsoft 365 and its suite of fully integrated applications to create a productive and collaborative hybrid workplace model, which is future-ready and immersive. The adoption and integration of Microsoft 365 services are becoming a critical aspect of an enterprise's efforts to transform the workplace and meet changing employee expectations. The demand for security implementation services for Microsoft 365 continues to grow, offering significant opportunities to providers to combine their productivity solutions with built-in security and compliance tools. This further empowers enterprises to unlock the full potential of their Microsoft 365 investments to create a unique, secure and collaborative workplace.

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*Microsoft cloud ecosystem is evolving globally, with enterprises and providers majorly focusing on end-user experiences, verticalized cloud offerings, and sustainability.*

Sonam Chawla - Senior Research Analyst

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### **Increasing demand for and benefits of migrating SAP workload to Azure**

Enterprises are migrating SAP workloads to Azure to optimize, design and develop new processes and business flows. Microsoft is investing extensively to establish state-of-the-art Azure data centers. Successfully running SAP on Azure and migrating workload to Azure improve application performance, positively impact operating expenditure, and provide cost-effectiveness and flexibility to enterprises. Providers are assisting IT teams and consulting them throughout the workload migration process to Azure. Furthermore, with SAP on Azure services focusing on AI, analytics and security, providers can adhere to security and compliance to ensure safe migration of workloads to Azure at all stages.



### **Improved business decision-making process with long-term customer relationships**

Dynamics 365 allows enterprises to monitor real-time insights with the help of a powerful Power BI interface. Its CRM streamlines business activities by facilitating easy management of customer relationships through its centralized services. As a result, retention rates rise, and enterprises gain greater insight into client activity. It helps enterprises increase productivity by eliminating manual and recurring tasks from the system using automation. It manages and connects all departments, automates the process to ensure smooth operations and combines with various integrations for better data flow. It also provides accurate data-driven insights to the users to work more efficiently and productively.

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*The Australian market has seen many local acquisitions by global players, making the market even more competitive than last year, but increasing the range of MS services available.*

Craig Baty - Distinguished Lead Analyst, APAC

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### **Enterprises in the U.S. focus on employee experience to create an enhanced workplace culture**

Enterprises in the U.S. continue to face a talent crunch and shifting market conditions that require them to build new strategies to attract, retain and engage employees with critical skill sets. Optimizing employee experience with Microsoft 365 services continues to be a priority for enterprises, as they have now started realizing that better employee experience can improve business efficiency and growth. High-quality, intuitive and immersive workplace experiences have become essential for enterprises in the U.S. to enhance productivity, workplace flexibility and collaboration. Enterprises in this region are, hence, emphasizing Microsoft 365 to enable their workforce to work from anywhere and connect remotely with a larger team.

### **Enterprises in the U.K. explore the ESG insights and cost benefits of Azure**

Over the past few years, ESG and sustainability have become the key focus areas for enterprises in the U.K. The demand for sustainability solutions remains resilient in this region, as enterprises want to reduce energy consumption and costs. They want to be energy efficient and manage carbon emissions by optimizing Azure cloud, multicloud and hybrid infrastructure. Hence, they are looking for service providers that have made significant commitments to ESG and sustainability through their offerings and technology solutions. Enterprises in the U.K. want to harness the Azure cloud to optimize the carbon impact of IT infrastructure and create analytical tools that help them achieve their wider net zero and ESG goals.

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*Despite a difficult economic environment in the U.K., enterprises remain receptive to solutions on Azure that reduce cloud costs, increase business flexibility, and improve sustainability outcomes.*

Mark Purdy - Lead Analyst, U.K.

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### **Robust high security and compliance are the top priorities in the German market.**

Security is a major concern for German enterprises, and they need extremely flexible solutions that provide a high level of protection. As a result, there is a high demand in the region for sovereign Collaboration Solutions and solutions with a high level of compliance and security. Microsoft's cloud-based security solutions, such as Azure Security Center, are gaining traction among German enterprises. Besides, Microsoft's cloud-based solutions are becoming increasingly popular in the region as businesses seek to reduce costs and increase efficiency. Companies are increasingly turning to cloud-based solutions to store and manage data and access applications and services. However, enterprises in the region generally prefer service providers with a local network of data centers for privacy and security reasons.

### **Growing focus on moving IT workloads to the public cloud**

Enterprises in Switzerland are showing their interest in IaaS and PaaS to facilitate the development of applications quickly and to increase flexibility, scalability and security. A growing number of enterprises in Switzerland are moving their IT workloads to hyperscalers' public cloud infrastructures. To support this, providers are offering an end-to-end approach involving comprehensive migration and transformation capabilities. In addition, Microsoft is investing in and focusing on transportation, airports, and power and utility sectors. Moreover, midsize organizations tend to prefer locally active providers with strong knowledge about the local operating environment and data protection laws, allowing them to build appropriate frameworks for workload migration.

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*The economy in Germany is facing hard challenges, but there is still a potential of user spendings on Azure transformation in Large Accounts while SMBs nevertheless need more specific care by providers.*

Holm Landrock - Lead Analyst, Germany

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### **Data-driven, industry insights help personalize the end-user experience in Australia**

The Australian enterprise sector and the public sector are accelerating cloud implementations. Organizations are looking to leverage the potential of Microsoft's security capabilities within the Microsoft 365 suite of services. Microsoft is responding to the increasing focus of organizations on employee experience through Viva and is continuing to innovate in this area. At the same time, many large consulting firms observe that customers are keen on tapping into their data to enhance workplace experiences. The Microsoft ecosystem is empowering employees to work from anywhere, enabling connectedness in the new hybrid working model. The growing trend of remote work and complex requirements of organizations wanting to collaborate internally and with clients are driving the widespread use of Microsoft platforms.

### **The Microsoft ecosystem in Singapore and Malaysia is evolving rapidly**

The ecosystem of Microsoft-certified service providers continues to evolve in Singapore and Malaysia. The Microsoft product set continues to advance rapidly across Microsoft 365 services, managed services for Azure, SAP on Azure, Dynamic 365 and Power Platform services. Enterprises are accelerating their digital transformation investment for faster, measurable results. Large IT consulting practices are shifting their focus from IT-centric to customer-centric approaches and emphasizing end-user experience more strongly to optimize business outcomes and customer journeys. Data-driven industry insights are helping them personalize end-user experiences across Singapore and Malaysia.

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*In Singapore/Malaysia, the market is dominated by several large global players, with some of the Big4 playing an increasingly important role, however local players also offer good options.*

Craig Baty - Distinguished Lead Analyst, APAC

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### **Microsoft partners are verticalizing cloud offerings in Brazil**

The adoption of cloud technology is becoming more popular in Brazil because companies are comprehending and familiarizing themselves with this technology. Even conservative enterprises are focusing on cloud technology, as it can reduce operations costs and bring many other advantages to businesses. Hence, new industry sectors are increasing cloud consumption. Consequently, service providers are verticalizing cloud platforms, transforming them into business platforms to match the demand from these growing industries. This can enable faster deployment, improved user experience and increased agility to develop applications in accordance with business models.

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*To meet an elevated level of customer demand, Microsoft engages with partners collaboratively to build specific and targeted solutions to the needs by leveraging their client's knowledge level.*

Mauricio Ohtani - Lead Analyst, Brazil

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This year's Microsoft Cloud Ecosystem study assessed 175 providers across five quadrants (varies by region) and seven regions.

Of the 175 providers evaluated, 81 are identified as Leaders and 18 as Rising Stars for multiple quadrants across regions.

### Strengths of Leaders

- **360-degree partnership with Microsoft:** Leaders in this space have a long-standing relationship with Microsoft and a dedicated Microsoft Business Group (MBG) focusing on providing continuous innovation and business value to enterprises. These providers have many Microsoft-certified professionals and aim to advance enterprises' cloud modernization journey by offering modern technology solutions and transformational outcomes.
- **Focus on employee experience:** Leading providers are experts in Microsoft 365 services, with strong expertise in consulting, implementations, and compliance and security. Leaders in this space differentiate their Microsoft 365 offerings with premium employee experience capabilities and user-centric solutions. These providers also support enterprises to leverage their Microsoft 365 investments and enhance employee experience and engagement by offering them Microsoft Viva capabilities.

- **Addressing wider sustainability and ESG goals:** The importance of sustainable workplaces has grown over the last few years, accelerating the enterprises' and service providers' plans to invest in sustainable services. Leading providers in this space align their sustainability initiatives with Microsoft with a focus on major factors, including carbon reduction, waste management and green infrastructure. These providers emphasize empowering enterprises in refining and scaling their sustainability initiatives and achieving their overall ESG goals.
- **Microsoft FastTrack partner:** Most leaders in the Microsoft Cloud Ecosystem study are FastTrack-ready partners, which are authorized to deliver FastTrack services on behalf of Microsoft and support enterprises in cloud deployment and adoption.

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*Local contacts, delivery and development capacities are still the very important features of a provider to Swiss clients according to their specific market size and demands.*

Holm Landrock - Lead Analyst, Switzerland

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## Common Leaders Identified Across Geographies for Microsoft Cloud Ecosystem 2023

Service Provider	Managed Services for Azure	Managed Services for Azure – Large Market	Managed Services for Azure – Mid Market	Microsoft 365 Services	Microsoft 365 Services – Large Market	Microsoft 365 Services – Mid Market	SAP on Azure Services	Dynamics 365 Services	Power Platform Services
4MSTech		●							
AC3	●								
Accenture & Avanade	● ● ● ●	● ●		● ● ● ●	● ●		● ● ● ● ● ●	● ● ● ● ● ●	● ● ● ● ● ●
Adesso									●
AlfaPeople								●	●
All for One Group			●				●		●
Allgeier	●					●		●	
Ambit Gruppe	●							●	●
AppSphere						●			

● Australia   ● Brazil   ● Germany   ● Singapore & Malaysia   ● Switzerland   ● U.K.   ● U.S.



## Common Leaders Identified Across Geographies for Microsoft Cloud Ecosystem 2023

Service Provider	Managed Services for Azure	Managed Services for Azure – Large Market	Managed Services for Azure – Mid Market	Microsoft 365 Services	Microsoft 365 Services – Large Market	Microsoft 365 Services – Mid Market	SAP on Azure Services	Dynamics 365 Services	Power Platform Services
Arvato Systems			●				●		●
Aveniq	●			●					●
Axians			●						
Baggenstos	●								
Barhead Solutions								●	●
Bechtle	●		●					●	
Best.Projects									●
BlueShift			●						
CANCOM						●			

● Australia   ● Brazil   ● Germany   ● Singapore & Malaysia   ● Switzerland   ● U.K.   ● U.S.



## Common Leaders Identified Across Geographies for Microsoft Cloud Ecosystem 2023

Service Provider	Managed Services for Azure	Managed Services for Azure – Large Market	Managed Services for Azure – Mid Market	Microsoft 365 Services	Microsoft 365 Services – Large Market	Microsoft 365 Services – Mid Market	SAP on Azure Services	Dynamics 365 Services	Power Platform Services
Cappgemini	● ● ●	● ●		● ●	●		● ● ● ● ● ●	● ●	● ● ●
Cognizant	● ●			● ●			●	● ●	●
Communardo						●			●
Computacenter					●				●
Customer Capital Consulting								●	●
Data One				●		●			●
Dedalus		●	●		●	●			
Deutsche Telekom			●			●		●	●
Devoteam M Cloud			●			●	●		

● Australia   ● Brazil   ● Germany   ● Singapore & Malaysia   ● Switzerland   ● U.K.   ● U.S.



## Common Leaders Identified Across Geographies for Microsoft Cloud Ecosystem 2023

Service Provider	Managed Services for Azure	Managed Services for Azure – Large Market	Managed Services for Azure – Mid Market	Microsoft 365 Services	Microsoft 365 Services – Large Market	Microsoft 365 Services – Mid Market	SAP on Azure Services	Dynamics 365 Services	Power Platform Services
DIGITALL			●					●	●
DXC Technology	●●●●	●		●●●●			●●●●●●	●●●●	●●●●
ELCA	●			●				●	●
EveryWare	●			●					
Eviden/Atos	●	●		●	●		●	●	●
EY									●
Fujitsu	●●			●●				●	●
glueckkanja-gab			●			●			
GRVPPE								●	

● Australia   ● Brazil   ● Germany   ● Singapore & Malaysia   ● Switzerland   ● U.K.   ● U.S.



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Service Provider	Managed Services for Azure	Managed Services for Azure – Large Market	Managed Services for Azure – Mid Market	Microsoft 365 Services	Microsoft 365 Services – Large Market	Microsoft 365 Services – Mid Market	SAP on Azure Services	Dynamics 365 Services	Power Platform Services
HCLTech	● ●			● ● ● ●			● ● ● ●	● ● ● ●	● ●
Hexaware	● ● ●			● ● ●				●	● ●
Infosys		●		● ●			●	● ● ●	● ●
Ingram Micro			●		●	●			
isolutions	●			●				●	
ITCore						●			
KUMAVISION								●	
Kumulus		●	●			●			●
Kyndryl	● ● ●			● ● ● ●	●		● ●	● ●	● ● ● ●

● Australia   ● Brazil   ● Germany   ● Singapore & Malaysia   ● Switzerland   ● U.K.   ● U.S.



## Common Leaders Identified Across Geographies for Microsoft Cloud Ecosystem 2023

Service Provider	Managed Services for Azure	Managed Services for Azure – Large Market	Managed Services for Azure – Mid Market	Microsoft 365 Services	Microsoft 365 Services – Large Market	Microsoft 365 Services – Mid Market	SAP on Azure Services	Dynamics 365 Services	Power Platform Services
L3								●	●
Lattine			●			●			●
Logicalis		●			●				
Logicalis Australia	●			●					
LTIMindtree	●						●		●
NCS	●			●			●	●	●
Nexer								●	
NTT DATA	●	●		●			● ●		
ORBIT						●		●	

● Australia   ● Brazil   ● Germany   ● Singapore & Malaysia   ● Switzerland   ● U.K.   ● U.S.





## Common Leaders Identified Across Geographies for Microsoft Cloud Ecosystem 2023

Service Provider	Managed Services for Azure	Managed Services for Azure – Large Market	Managed Services for Azure – Mid Market	Microsoft 365 Services	Microsoft 365 Services – Large Market	Microsoft 365 Services – Mid Market	SAP on Azure Services	Dynamics 365 Services	Power Platform Services
Pentare								Brazil	
Processor					Brazil	Brazil			
PwC					Germany			Australia, Germany, Singapore & Malaysia	Australia, Singapore & Malaysia
q.beyond						Brazil	Germany		
Rackspace Technology		Germany			Germany		Germany		
Scheer GmbH			Germany				Germany		
Skylink					Germany				
Smart Consulting								Brazil	Brazil
Softline	U.K.				U.K.				

● Australia   
 ● Brazil   
 ● Germany   
 ● Singapore & Malaysia   
 ● Switzerland   
 ● U.K.   
 ● U.S.



## Common Leaders Identified Across Geographies for Microsoft Cloud Ecosystem 2023

Service Provider	Managed Services for Azure	Managed Services for Azure – Large Market	Managed Services for Azure – Mid Market	Microsoft 365 Services	Microsoft 365 Services – Large Market	Microsoft 365 Services – Mid Market	SAP on Azure Services	Dynamics 365 Services	Power Platform Services
SoftwareONE	●	● ●	●	●	● ●	●	● ●		● ●
Solo Network					●	●			
Sopra Steria								●	
SOU.cloud			●						
Swisscom	●			●			●		●
Sycor								●	
TCS	● ● ● ●			● ● ● ●			● ● ● ● ●	● ● ● ● ●	● ● ● ●
Tech Mahindra							●		●
Telstra	●			●					●

● Australia   ● Brazil   ● Germany   ● Singapore & Malaysia   ● Switzerland   ● U.K.   ● U.S.










## Common Leaders Identified Across Geographies for Microsoft Cloud Ecosystem 2023

Service Provider	Managed Services for Azure	Managed Services for Azure – Large Market	Managed Services for Azure – Mid Market	Microsoft 365 Services	Microsoft 365 Services – Large Market	Microsoft 365 Services – Mid Market	SAP on Azure Services	Dynamics 365 Services	Power Platform Services
Teltec			●			●			
TIVIT		●	●				●		
T-Systems	●	●			●		● ● ●		
UMB	●								
Unisys	●			●					
Velrada								●	●
Venha Pra Nuvem		●	●		●	●			
Vivo					●				
Wipro	● ● ●	●		● ● ●	●		● ● ●	● ● ●	● ●

● Australia   ● Brazil   ● Germany   ● Singapore & Malaysia   ● Switzerland   ● U.K.   ● U.S.



## Rising Stars Across Geographies for Microsoft Cloud Ecosystem 2023

Quadrants	 Australia	 Brazil	 Germany	 Singapore & Malaysia	 Switzerland	 U.K.	 U.S.
Managed Services for Azure	HCLTech			Fujitsu	Eviden/Atos	Computacenter	
Managed Services for Azure – Large Market		Processor	HCLTech				
Managed Services for Azure – Mid Market		Processor	PCG				
Microsoft 365 Services				Capgemini		Computacenter	
Microsoft 365 Services – Large Market		Kumulus					
Microsoft 365 Services – Mid Market		Qualiserve	PCG				
SAP on Azure Services	SoftwareONE	Kyndryl		Fujitsu	Kyndryl		
Dynamics 365 Services	LTIMindtree	Best.Projects		Capgemini		Hexaware	LTIMindtree
Power Platform Services		Lanlink	DIGITALL	HCLTech	IOZ AG	Mastek	



## Who Should Read This

This report is relevant to executives and managers in enterprises who are adding or re-evaluating relationships with service providers working in the Microsoft cloud ecosystem. Readers should also consider the ongoing changes to Microsoft's product offerings and how service providers can best adapt to these changes. The report is of value to enterprises of all sizes and in all industries, especially the ones in the U.S., the U.K., Australia, Singapore/Malaysia, Brazil, Germany and Switzerland.

### Technology Professionals

Including CTOs and CIOs, play critical roles in the adoption and integration of Microsoft technology across enterprises, should read this report to understand the relative positioning and capabilities of partners, which will help them effectively consume Microsoft offerings.

### Digital Professionals

Who spearhead initiatives to build a resilient and future-proof organization, should read this report to understand how Microsoft offerings can impact an enterprise's ongoing transformation initiatives while identifying the benefits of cloud migration.

### Strategy Professionals

Should read this report to understand how service providers can help with the adaption of Microsoft technology, and the overall ERP functions of enterprise operations leaders. As Dynamics 365 and Microsoft 365 are deeply integrated into business processes, technical and business teams must collaborate to fully comprehend the implications of IT infrastructure decisions made in collaboration with service providers.

### Operational Professionals

Including Finance, HR, and HCM leaders should read this report to understand the positioning of partners that will influence the implementation of the software with which they interact on a regular basis as a critical part of their jobs.





Further Reading

**U.S.**

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

**U.K.**

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

**Germany**

Managed Services for Azure – Large Accounts  
Managed Services for Azure – Midmarket  
Microsoft 365 Services – Large Accounts  
Microsoft 365 Services – Midmarket  
Dynamics 365 Services  
SAP on Azure Services  
Power Platform Services

**Switzerland**

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

**Brazil**

Managed Services for Azure – Large Accounts  
Managed Services for Azure – Midmarket  
Microsoft 365 Services – Large Accounts  
Microsoft 365 Services – Midmarket  
Dynamics 365 Services  
SAP on Azure Services  
Power Platform Services

**Australia**

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



## Further Reading

### Singapore/Malaysia

Managed Services for Azure

Microsoft 365 Services

Dynamics 365 Services

SAP on Azure Services

Power Platform Services

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For more information about this and  
other ISG Provider Lens studies



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## Author & Editor Biographies



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**Senior Analyst**

Sonam Chawla is a senior analyst at ISG where she co-authors and supports Provider Lens™ studies on Microsoft Partner Ecosystem, and Future of Work – Services and Solutions. Sonam comes with more than six years of experience in the market research industry and is skilled in secondary research, report writing, blog writing and company profiling. Her areas of expertise include digital workplace, enterprise collaboration, employee experience services, and conversational AI.

She supports lead analysts in the research process and authors Enterprise Context and the Global Summary reports, highlighting regional as well as global market trends and insights. She also handles custom engagement requests from providers and advisors. Prior to this role she has worked as research analyst, where she was responsible for authoring syndicated research reports and consulting on research projects.



Author

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**Research Analyst**

Khyati Tomar is a Research Analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on the Microsoft Partner Ecosystem, the Future of Work – Services and Solutions, and OCM. She supports lead analysts in the research process and authors the Enterprise Context and Global Summary reports.

Prior to this, she had over 2.5 years of experience in the technology research industry and had carried out various consulting and custom projects and co-authored CIS reports, mostly focusing on the public sector vertical.





*IPL Product Owner*

**Jan Erik Aase**  
**Partner and Global Head – ISG Provider Lens™**

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, principal analyst and global head of 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.



### \*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 [website](#).

### \*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.

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Stamford, Conn., ISG employs more than 1,600 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](http://www.isg-one.com).



**APRIL, 2023**

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**GLOBAL SUMMARY: MICROSOFT CLOUD ECOSYSTEM**