ISG Provider Lens™

Microsoft Cloud Ecosystem

SAP on Azure Services

A study offering potential customers a base for decision-making regarding positioning and go-to-market

Customized report courtesy of:

DXC TECHNOLOGY

QUADRANT REPORT | MARCH 2023 | U.S.

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Report Author: Peter Crocker

Providers position themselves for a post-COVID world as Microsoft reorganizes its partner program

Microsoft plays a pivotal role in many businesses' digital transformation strategies and is one of the world's leading enterprise technology vendors. Its products form the backbone of digital transformation for companies across the U.S. As a U.S.-based company, Microsoft generates half its revenues from its home country and has a strong historical footing in the region, especially among larger firms. The tech titan subdivides its offerings into three main pillars: Microsoft 365, which includes Office 365 and Windows; Dynamics 365, a business application suite; and Azure, a hyperscale cloud platform that operates globally. Power Platform, a more recent addition to the Microsoft portfolio, is a low-code development platform that enables citizen developers to build apps and workflows, thus extending the capabilities of existing portfolios.

Service provider opportunity

Many organizations made rapid technology investment decisions during the COVID-19 pandemic and adopted new Microsoft technology. However, they still need help integrating the technology into their business processes. For many enterprises, navigating, implementing and ultimately integrating the Microsoft suite of technologies can be daunting. Costs, lack of familiarity with the technology, and inadequate skills, among other factors, can be significant hurdles to adoption.

ISG sees these challenges as significant opportunities where service providers can step in. Providers offer specialized expertise and employees with technical understanding who can help guide enterprises and drive implementation. Therefore, many enterprises turn to the Microsoft Cloud partner ecosystem for support, which is a complex and diverse group of global systems integrators (GSIs), IT providers, independent software vendors (ISVs), and specialist strategy and advisory firms that provide additional services and technology components atop the existing

Microsoft's new partner program shifts focus from products to customers' and solutions.

Microsoft platforms. In the U.S., engineering service companies and software resellers are increasingly providing services around Microsoft products as they look for new opportunities outside Silicon Valley.

Evolving Microsoft partner program and strategy

In October 2022, Microsoft revamped its partner program, eliminating and replacing the Microsoft Partner Network with the Microsoft Cloud Partner Program. The new approach enables service providers to highlight their expertise in new ways. It consolidated 18 competencies into six Solution Partner designations, which are the following:

- Business Applications
- Data & AI
- Digital & App Innovations
- Infrastructure
- Security
- Modern Work

This new program represents a change in focus from specific Microsoft products to customers' needs and partners' capability to deliver on them instead of around specific Microsoft offerings.

The shift in focus toward customer requirements and the built-in integration among all Microsoft offerings enable Microsoft and its partners to deliver solutions that span multiple products and can be uniquely integrated to provide real business value. For example, some service providers are seeing an increased demand for Viva for business applications as opposed to Modern Workplace. Customers are working with service providers to leverage solutions across the Microsoft ecosystem in new ways.

Azure MSP

The U.S. leads the world in migration to the cloud. As Microsoft Azure matures as a hosting platform, enterprises have advanced from just migrating to the cloud to leveraging its unique capabilities, enabling greater resilience and flexibility with multicloud and hybrid cloud environments. They are also re-platforming and refactoring applications and optimizing them to take advantage of the cloud's technical capabilities beyond reduced costs. For example, the transformation can include moving to modern microservices architectures using containerized applications and Kubernetes orchestration.

The Microsoft ecosystem and developer community in the U.S. are particularly broad and deep compared with other regions of the world. Enterprises draw on this ecosystem for many reasons. Many are new to the cloud and lack the expertise to manage migrations to Azure. Providers are equipped with ready-made frameworks and accelerators to right-size Azure deployments and ease migration. Enterprises often turn to managed services providers, seeking end-to-end support for managing Azure and other clouds. Managed services typically include a range of services such as scaling and provisioning resources, managing incidents, monitoring and managing licenses, assuring security, automating updates and ensuring policy compliance, governance and FinOps.

The adoption of automation is increasing across IT environments. Many innovative IT service providers are investing in automation to streamline the movement of applications and code to the cloud. With enterprises increasingly demanding access to data, service providers are focusing on modernizing databases and migrating them to the cloud.

Microsoft 365

The disruption caused by the COVID-19 pandemic created a huge demand for the Modern Workplace, which has become a must-have for distributed organizations. This drove significant technological investments within a short time to address abrupt changes. Organizations are now much more focused on capitalizing on these technology investments and incorporating them into business processes. The changing workforce requirements and the Great Resignation, which happened across the U.S., are driving Microsoft to reposition Microsoft 365 away from its original focus on employee communications and messaging toward a more rounded platform centered on employee experiences and learning. The introduction of Microsoft Viva is one example. Providers are beginning to take a more employee-experience-centric approach by taking steps such as incorporating wellness and micro-learning elements into the Microsoft 365 platform or using digital nudges to help employees increase its adoption. As investments in technology for hybrid office workers subside, a renewed focus on opportunities to support front-line workers is emerging.

SAP on Azure

SAP on Azure remains one of the most challenging areas for Microsoft ecosystem providers. The SAP environment is widely acknowledged to be extremely heterogeneous, with many legacy applications and databases still in existence and organizations coming from different starting points in their SAP development journey. These systems are also usually business-critical, which makes SAP migrations and database modernizations complex and risky to manage. Thus, SAP providers must understand the current SAP landscape of an enterprise to ensure a safe and cost-effective migration to Azure. This market has begun to mature in the U.S., and opportunities to add differentiated services are limited because many organizations have already moved their legacy SAP applications to the cloud. SAP is also bringing to market RISE with its modernization and cloud offering that helps clients not only move to the cloud but modernize their SAP applications. This new offering from SAP provides another option for modernization, competing with service providers.

Dynamics 365

Investing in business applications is increasingly an area where enterprises can generate significant ROI and solve business problems. The three discrete constituencies migrating to Dynamics 365 are enterprises seeking greenfield deployments of new capabilities, companies migrating from on-premises Dynamics installations, and businesses looking to move away from other business applications such as SAP and Salesforce. Leading providers in the U.S. market can address each of these use cases on a personalized and structured basis, as well as provide quick ROI, by leveraging their expertise. ISG sees the greatest value possible, particularly when enterprises can align with service providers that offer unique, industry-specific solutions. More competitive providers are moving beyond the technology piece of the solution by incorporating business processes and workflows. This is relevant, especially among U.S. enterprises that have moved to the cloud and are looking for new ways to leverage its benefits. The ability to provide solutions that have a direct impact on business outcomes enables providers to deliver added value to their clients.

Microsoft Industry Clouds provides established and standardized data models and configurations tailored for specific industries. Although this makes bringing industry-specific applications to the market easier, it forces service providers to move up the value chain because Microsoft Industry Clouds incorporate much of the value they provide in business apps.

Power Platform

ISG observes the rise of low-code, citizen-developer initiatives as a major trend across most leading technology providers in the U.S. These services empower the general workforce to create and use their own AI-enabled business apps and automation tools. Microsoft's Power Platform has helped spur the wider development of low-code initiatives, providing tools such as Power BI for data visualization and analysis and automation tools such as Virtual Agent and Power Automate. While many enterprises are experimenting with low-code initiatives to drive innovation within the workforce and liberate business professionals from the constraints of the IT department, they are doing so cautiously. Low-code initiatives can create significant risks around data access, policy compliance, license usage and overall governance. ISG notes that providers are now developing offerings specifically designed to put guardrails around low-code development and channel such efforts in ways that are safe, productive and compliant for enterprises. Additionally, they are establishing CoEs for citizen development, monitoring compliance and policy, creating templates for app development, establishing best-practice guidelines, undertaking training workshops, monitoring data and license use, scanning code for compliance, generating pre-configured APIs and determining templated release cycles.

As databases are increasingly migrated to the cloud and modernized, they become more accessible to applications. Providing citizen developers greater access to data to support decision-making can be one of the differentiators for service providers.

Many organizations made rapid technology investment decisions during the COVID-19 pandemic and adopted new Microsoft technology. However, they still need help integrating the technology into their business processes.

Provider Positioning

	Managed Services for Azure	Microsoft 365 Services	SAP on Azure Services	Dynamics 365 Services	Power Platform Services
Accenture & Avanade	Leader	Leader	Leader	Leader	Leader
Capgemini	Leader	Leader	Leader	Market Challenger	Market Challenger
Cloudreach	Product Challenger	Not In	Not In	Not In	Not In
Cognizant	Leader	Leader	Leader	Leader	Leader
Crayon	Contender	Not In	Contender	Not In	Not In
DXC Technology	Leader	Leader	Leader	Leader	Leader
Eviden/Atos	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Fujitsu	Product Challenger	Contender	Product Challenger	Contender	Market Challenger
Hanu Software	Contender	Contender	Contender	Not In	Not In
HCLTech	Leader	Leader	Leader	Leader	Leader

Provider Positioning

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	Managed Services for Azure	Microsoft 365 Services	SAP on Azure Services	Dynamics 365 Services	Power Platform Services
Henson Group	Not In	Not In	Not In	Not In	Contender
Hexaware	Leader	Leader	Product Challenger	Leader	Leader
Hitachi Solutions	Market Challenger	Contender	Not In	Market Challenger	Contender
HPE	Market Challenger	Market Challenger	Contender	Market Challenger	Market Challenger
IBM	Market Challenger	Market Challenger	Market Challenger	Contender	Market Challenger
Infogain	Contender	Contender	Not In	Contender	Contender
Infosys	Market Challenger	Leader	Leader	Leader	Leader
Kyndryl	Leader	Leader	Leader	Contender	Leader
Logicalis	Product Challenger	Product Challenger	Not In	Not In	Not In
Logicworks	Contender	Not In	Not In	Not In	Not In

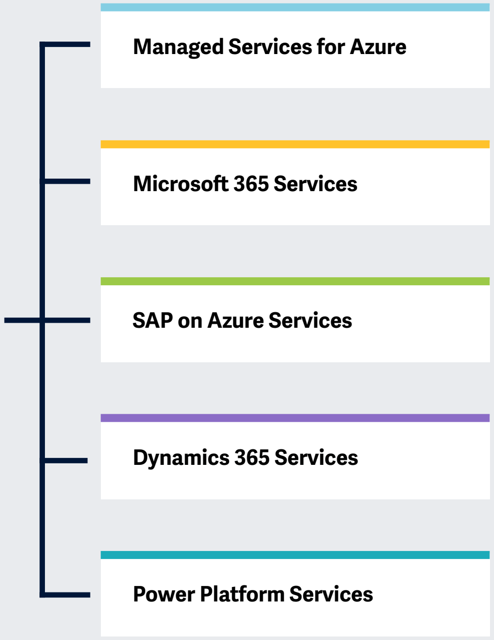
Provider Positioning

	Managed Services for Azure	Microsoft 365 Services	SAP on Azure Services	Dynamics 365 Services	Power Platform Services
LTIMindtree	Leader	Product Challenger	Leader	Rising Star ★	Leader
MSRCosmos	Not In	Not In	Contender	Not In	Not In
NTT DATA	Leader	Leader	Leader	Market Challenger	Market Challenger
Oxya	Not In	Not In	Contender	Not In	Not In
Protiviti	Not In	Contender	Not In	Contender	Contender
PwC	Not In	Contender	Contender	Market Challenger	Market Challenger
Rackspace Technology	Product Challenger	Contender	Market Challenger	Market Challenger	Contender
SMX	Contender	Not In	Contender	Not In	Not In
SoftwareONE	Product Challenger	Product Challenger	Contender	Contender	Product Challenger
Sonata Software	Contender	Contender	Not In	Contender	Contender

Provider Positioning

	Managed Services for Azure	Microsoft 365 Services	SAP on Azure Services	Dynamics 365 Services	Power Platform Services
Sycor	Not In	Contender	Contender	Not In	Contender
Synoptek	Not In	Not In	Not In	Contender	Contender
TCS	Leader	Leader	Leader	Leader	Leader
Tech Mahindra	Contender	Contender	Contender	Product Challenger	Contender
Trianz	Contender	Contender	Not In	Not In	Product Challenger
Unisys	Contender	Market Challenger	Not In	Not In	Not In
Wipro	Leader	Leader	Leader	Leader	Leader

This study focuses on what ISG perceives as most critical in 2023 for **Microsoft Cloud Ecosystem**.



Simplified Illustration Source: ISG 2023

Definition

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 focuses 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 only focused on the top competitors, both global firms and local providers, for each of the quadrants studied in each region.

Scope of the Report

In this ISG Provider Lens™ quadrant study, ISG includes the following five quadrants: Managed Services for Azure; Microsoft 365 Services; SAP on Azure Services; Dynamics 365 Services; Power Platform Services.

This ISG Provider Lens™ study offers IT-decision makers:

- Transparency on the strengths and weaknesses of relevant providers/ software vendors
- A differentiated positioning of providers by segments
- Focus on regional market

Our study serves as the basis for important decision-making in terms of positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing vendor relationships and potential engagements.

Provider Classifications

The provider position reflects the suitability of IT providers/software vendors for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions IT providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between $20 million and $999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above $1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product Challenger, Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens™ quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

Number of providers in each quadrant: ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

Provider Classifications: Quadrant Key

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/services and a follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not in means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

SAP on Azure Services

Who Should Read This Section

This report is relevant to enterprises across all industries in the U.S. for evaluating partners that support SAP on Microsoft Azure or migrate existing SAP instances to the Azure platform.

In this quadrant report, ISG lays out the positioning of providers that offer services around SAP on Azure and how they serve companies in the U.S.

Globally and in the U.S., the cloud is the primary enabler for business growth, and enterprises in this region continue to follow this trend. Several enterprises in this region are looking to design new cloud strategies to move from legacy infrastructure to Azure, aiming to optimize hybrid cloud transformation, including app migrations and modernization on Azure. These enterprises are migrating their SAP applications to Azure to meet the ever-increasing demands of their businesses and effectively manage organizational workflows. Thus, they are looking for service providers with extensive expertise in Azure migrations and certified SAP and Microsoft professionals who can offer an effective road map for digital transformation.

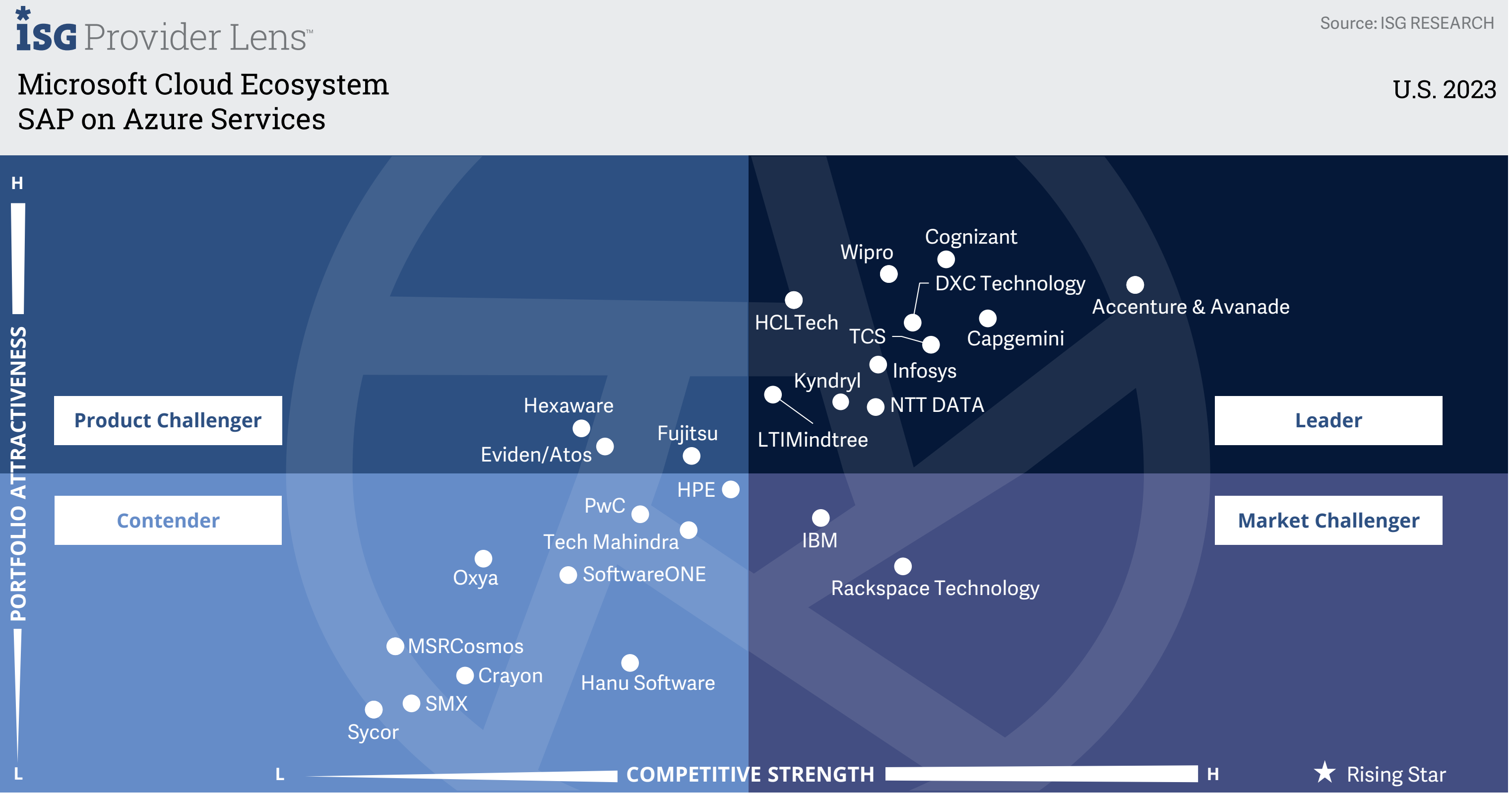
Enterprises in the U.S. are partnering with service providers with robust Azure capabilities. SAP on Azure specialization is an add-on for service providers in this region. Enterprises are trying to future-proof their SAP investments and assess the value and cost savings that SAP on Azure would bring to their business.

Technology professionals should read this report to understand the relative positioning of SAP on Azure service providers in the U.S. and how their technical capabilities match the enterprises' need to succeed with an SAP cloud transition.

Procurement professionals should read this report to understand the relative positioning of SAP on Azure service providers in the U.S. and the broader trends in the service ecosystem that may influence partner selection.

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 they interact with regularly as a critical part of their jobs.

Source: ISG RESEARCH



SAP migrations are complex, with many dependencies and risk factors. To combat these challenges, providers are increasingly focussing on **accelerators** and **automation tools** that can ease the transition.

Peter Crocker

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 is based on a holistic mindset of a provider that must be able to support its clients along the whole journey and have the resources to deliver. Since SAP has committed solution support till 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 the **migration of SAP workloads to SAP on Azure**, as well as 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**, as well as relevant **automation** for service delivery and quality

Observations

The SAP on Azure market continues to mature, and providers with experience in completing complex projects have a competitive advantage. Competition is also growing as SAP offers more opportunities for enterprises to move their cloud through RISE with SAP.

The spinoff of Kyndryl from IBM had a big impact on the quadrant this year. While it is unclear exactly which clients and services are still a part of IBM's portfolio, Kyndryl has successfully established itself as a Leader in the IT services space. IBM has shifted its focus to its product business and thus has been positioned as Market Challenger.

The merger of LTI with Mindtree enabled the new company to move into the Leader's quadrant, a feat neither company could achieve on its own.

Another major change in 2022 was the rebranding of HCL to HCLTech, which, combined with an improved portfolio and competitiveness, helped the company advance into the Leaders' quadrant.

Capgemini has also strengthened its competitiveness in the U.S. with an increased focus on the region.

From the 175 companies assessed for this study, 27 qualified for this quadrant, with 11 being Leaders.

accenture

Accenture & Avanade continue to leverage their unique relationship with Microsoft and tremendous scale to lead the market.

Capgemini

Capgemini has strengthened its portfolio and increased its focus on the region. Its environmental, social and governance (ESG) initiatives also play a prominent role in its strategy.

cognizant

Cognizant's business consulting capabilities and focus on cloud-native technology within its Microsoft Business Unit places it in the Leaders' quadrant.

DXC TECHNOLOGY

DXC Technology's flexibility in service delivery, unique channel agreement and industry focus enable the company to provide great value to its customers.

HCLTech

HCLTech is building its skilled workforce, investing in industry accelerators for faster migration and addressing data sovereignty to deliver advanced technology to its SAP on Azure customers.

Infosys

Infosys is well aligned with SAP and its offerings. It also offers vertical-specific packaged solutions.

Kyndryl

Kyndryl, the IBM spinoff company, has emerged with extensive experience in working with enterprises, SAP and Azure but now has much more flexibility in presenting its products to clients.

LTIMindtree

LTIMindtree is well positioned in the market as it leverages the complementary strengths, scale and resources, and the innovation and engineering capabilities of two leading GSIs.

NTT DATA

NTT DATA's unique federated approach to delivering services positions it in the Leader quadrant for SAP on Azure.

tcs TATA CONSULTANCY SERVICES

TCS' has a robust R&D partnership with Microsoft, which is a significant competitive differentiator.

wipro

Wipro is heavily investing in its cloud service business and growing its relationship with Microsoft as well as its collaborative ecosystem.

Leader

"DXC offers SAP on Azure in several different configurations, and it can help optimize value for clients through a unique distribution model."

Peter Crocker

DXC Technology

Overview

DXC Technology is headquartered in Virginia, U.S., and operates in 70 countries. It has more than 130,000 employees across over 130 global offices. In FY22, the company generated $16.3 billion in revenue, with Applications as its largest segment. DXC was the first GSI to achieve Microsoft SAP on Azure specialization. Worldwide, DXC Technologies has over 7,300 employees dedicated to Microsoft ecosystem practice and over 24,000 Microsoft certifications. The company also has over 5,000 Microsoft clients.

Strengths

End-to-end service: Through its Outsourcer Channel Agreement, DXC provides end-to-end services and manages workloads on Azure. These new indirect relationships reduced channel conflict with Microsoft and provided better value and greater accountability to customers.

Experience with SAP and Azure: Its 35 years of experience working with various SAP and Azure configurations better positions DXC to optimize environments and ensure business continuity. This experience is built into accelerators, landing zones and readiness assessments to ensure business continuity during migration.

Consumption-based model: DXC provides a range of SAP for Azure offerings. Its PaaS for SAP on Azure is particularly noteworthy. It provides SAP services based on full-stack SLAs (not just at the virtual machine (VM) level), pre-defined templates and automation tools, and capabilities to scale the provisioning of SAP resources according to organizational demands. DXC also supports hourly billing and simple controls that enable clients to stop, start, suspend and resume entire SAP environments.

Caution

In August 2022, DXC sold its niche SMB business line for Dynamics. Clients that value a holistic, long-term relationship with DXC should consider the implications of similar actions.

Appendix

The ISG Provider Lens™ 2023 – Microsoft Cloud Ecosystem report analyzes the relevant software vendors/service providers in the U.S. market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this report includes research from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of February 2023, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

All revenue references are in U.S. dollars ($US) unless noted.

The study was divided into the following steps:

1. Definition of Microsoft Cloud Ecosystem market
2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & use cases
4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)
5. Use of Star of Excellence CX-Data
6. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
7. Use of the following key evaluation criteria:
   * Strategy & vision
   * Tech Innovation
   * Brand awareness and presence in the market
   * Sales and partner landscape
   * Breadth and depth of portfolio of services offered
   * CX and Recommendation

Lead Author

Peter Crocker
Lead Analyst

Peter leads the Microsoft Ecosystem Provider Lens research for ISG for the United States and the US public sector. He is an experienced IT market analyst, entrepreneur, and content creator with over 15 years of experience covering software applications and services. Peter has founded multiple companies and has worked with many boutique research and consulting firms delivering marketing services and insights to software vendors, IT service providers, and telecom equipment vendors. His primary area of expertise is in mobile, cloud, digital transformation, and enterprise applications.

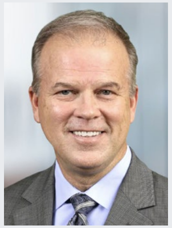
In addition to evaluating markets and IT service providers for ISG, Peter works with clients to produce thought leadership and product marketing messaging and content in the information technology sector. Peter holds an MBA in marketing from the College of William and Mary and BA in psychology from Rollins College.

Research and Global Overview Analyst

Sonam Chawla
Senior Research 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.

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 webpage.

ISG Research™

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ISG

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Founded in 2006, and based in 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 isg-one.com.

MARCH, 2023

REPORT: MICROSOFT CLOUD ECOSYSTEM