



***ISG** Provider Lens™

2020

Microsoft Ecosystem 2021

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
Quadrants by Region	10
Schedule	11
Partial list of companies being invited for the survey	12

© 2020 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 enterprises 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 enterprises with a robust set of services complete with forward-thinking capabilities, backed by a rich relationship with Microsoft that can inform future developments and drive business opportunities.

ISG's analysis will focus on how providers in Australia, Brazil, Germany and the U.S. are positioned, according to the strength of their portfolio and their competitiveness in the market. While there are thousands of providers in each of these markets delivering services for Microsoft products, this report will only focus on the top competitors for each of the quadrants. Those considered will include both global firms as well as local providers for each of the regions studied.

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

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

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

Quadrants Research

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

Simplified illustration

Microsoft Ecosystem 2021	
Managed Services for Azure	Office 365 – Modern Workplace
Dynamics 365	SAP on Azure

Source: ISG 2020

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

Managed Services for Azure

Managed Public Cloud Service Providers (MSPs) 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, monitoring and operational management of the customer's public cloud and multi-cloud environment. The aim is to maximize performance of enterprise cloud workloads, reduce costs and ensure compliance and security. Typically, specially developed or licensed cloud management platforms and tools are used to provide customers with the highest level of automation and the necessary transparency over the managed cloud resource pool in terms of capacity utilization and costs, including independent management. The provided services typically include:

- Professional services for the management and monitoring of CPU, memory, databases, operating systems as independent or micro services or virtual machine 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:

- 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 both implementing Agile and DevOps as well as integrating with enterprise clients' existing processes.
- Experience in API automation and cloud analytics.
- Well-developed security practices and capabilities.
- Number and location of provider resources that assist enterprises with Microsoft Azure.
- Strength of the provider's partnership with Microsoft, measured by the number and category of relevant certifications it holds, length of relationship with Microsoft and evidence of strategic cooperation between the provider and Microsoft around Azure.

Office 365 – Modern Workplace

This quadrant evaluates service providers that aid enterprises with the adoption, integration and ongoing operation of Office 365, Microsoft's SaaS-based productivity suite, as well as its suite of other modern workplace solutions.

These services go beyond provisioning and migrating to Office 365 to focus on a quick, device-independent, high-quality productivity suite that enables seamless teamwork, regardless of location and adapted to the role of the user. From the client's perspective Office 365 is about collaboration and the integration of globally dispersed teams. In order to enable this, integration and implementation services are necessary.

Eligibility criteria:

- Service portfolio that includes technical consulting, license purchases, integration of Office 365 modules, implementation and operation.
- Forward-thinking offerings that integrate with Office 365 to create a modern workplace for enterprise clients (for example, HoloLens development, Teams bot creation, etc.).
- Management of Microsoft Office APIs to ensure appropriate use and increased enterprise productivity.
- Ability to migrate customer workplaces 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 (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 and Azure), length of relationship with Microsoft and evidence of strategic cooperation between the provider and Microsoft around the modern workplace.

SAP on Azure

This quadrant evaluates service providers that offer capabilities relating to adopting, managing and using Microsoft's dedicated SAP on Azure suite of cloud solutions.

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. These providers must not only help customers migrate their SAP workloads to Azure, 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 require both Microsoft and SAP certifications. Providers need to have active and productive partnerships with both technology vendors as well as informed points of view on how the relevant underlying technology offerings are evolving. As a result, they should be able to articulate how product and platform changes will impact enterprises using this solution from technical architecture considerations to business impacts.

Eligibility criteria:

- Scope and depth of service portfolio with regard to migration of SAP workloads to SAP on Azure; SAP application and services implementation customization, provisioning, and support.
- Number and location of employees who provide SAP on Azure services.
- Ability and willingness to support hybrid cloud and hybrid provider environments.
- Strength of the provider's partnerships with SAP and Microsoft, measured by the number and category of relevant certifications it holds, length of relationship with both SAP and Microsoft and evidence of strategic cooperation between the provider and Microsoft around SAP on Azure.
- Support for multiple pricing models, including pay-as-you-go.
- Robustness of provider's process for implementation, including use of Agile and DevOps methodologies, as well as relevant automation for service delivery and quality.

Dynamics 365

This quadrant evaluates service providers that assist enterprises with the selection, integration, customization and operation of Microsoft's cloud-based Dynamics 365 ERP (Enterprise Resource Planning) and CRM (Customer Relationship Management) software.

These services should focus on the digitization of business processes through the use of ERP and CRM. This means that service providers and system integrators should support the user companies in the analysis of processes that have not yet been digitally mapped and the IT implementation of these processes via solutions from Dynamics 365.

In addition, this study will consider topics including data integration with and transfer from legacy systems. Furthermore, our market analysis examines how the providers handle the software lifecycle and user support. This also includes escalation handling, change management, optimization and reporting. Providers should also demonstrate a strong understanding of how their services and the Dynamics 365 solution impact enterprise clients' business.

Eligibility criteria:

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

Quadrants by Region

Quadrants	USA	Germany	ANZ	Brazil
Managed Services for Azure	√	√	√	√
Office 365 – Modern Workplace	√	√	√	√
SAP on Azure	√	√	√	√
Dynamics 365	√	√	√	√

Schedule

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

Selected results will be presented to the media in **April 2021**.

*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 20, 2020

November 20, 2020 – December 17, 2020

February 17, 2021

March 29, 2021

April 2021

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.

Partial list of companies being invited for the survey

Feel free to contact us to ensure your active participation in the research phase.

3ELM Consulting

Accenture

Accenture (Avanade)

Acumor

ADN

Adopt & Embrace

Advance Computing

Agility Networks

akinet dynamic projects

akquinet

AlfaPeople

All for One Group

Allgeier

Amaris

Antares International

AppSphere

ArcherPoint

Armis

Artis Group

Arvato Systems

Atmosera

Atos

Avivatec

Avnet

Axians

Barhead Solutions

Bechtle

Becloudsmart

BE-terna (+Leibzig)

BFK Enterprise

BHS

Big Brain

Bizapp

BizTech Software Services

Brascin

Brasoftware

Bright Skies

BT

Byte Information Technology

Calsoft Systems

CANCOM

Capgemini

Cased Dimensions

CenturyLink

Circle T Industries

Claranet

Cloudreach

codeHB

Cognizant

Communardo

Compasso
Computacenter
Computécnica Tecnologia
Converge
COSMOS Consult
Covenant Technology Partners
Crayon
Credera
Darede
Data One
Data#3 Limited
Datacom
DataEX
datec
Dedalus
Dell
Dell EMC
Deutsche Telekom (TDG)
Deutsche Telekom (TSI)
Devoteam | Alegri
Dialog
Dicker Data
Distribution Central
DQA
DXC

Eighty20 Solutions
Empired
Engage Squared
Ensono
ENSYST
EXEL BLUE Group
Experience Digital
Experteq IT Services
EY
FCamara
FiveP
FJH Sistemas de Informação
Flintfox
Fujitsu
Function 1
Fusion5
Futurum
G3 Solutions
GAB ExactlyIT
GBS
GC Blue
Generation-E
Geneses
Glück & Kanja
GWS Münster

H&S
Haas
Hammond Street Developments
Hanu Software
hcf Utilit
HCL
Henson Group
Hexaware
HGSM
Hitachi Solutions
HPC
HPE
HSO Enterprise Solutions
IBM
I-Comm
Impeto
INDUSTRIE IT
Infinite Computing Systems
Infoshot
Infosys
Infotech 123
infoWAN
Ingram Micro
Ingram Micro Cloud
inNuvem

Inovti Soluções em Informática
Insight
Insync Technology
Intalock Technologies
intellecom
Intelligent Systems Solutions
INTERACTIVE
InterOp Informatica
IPI
ITCORE
itelligence AG
iteracon
Iteris
ITST
Jasco Consulting
Keyrus
knk Business Software
Konica Minolta
KPMG
KSTI
KUMAvision
LAB3
Layer 2
LEAP CONSULTING (WA)
Lewan & Associates

Logicalis
Logicworks
LTI
M I Montreal Informática
Macquarie Telecom
MelbourneIT
MH3D
Microchannel Services
Mindtree
Missing Link Network Integration
Modis Consulting
MODUS Consult
MOQdigital
MSR Cosmos
myCloudDoor
Nest Solutions
Net at Work
Net Buster
Netsecurity
network1 (scansource)
Nexon Asia Pacific
Nihilent
Niteo
Nordcloud
novaCapta

NTT DATA
Objektkultur
Olikka
Oncave LLC
OOBE
OPUS SOFTWARE
Orange Networks
Orbit
OTT INC
PA Group USA
Pentare
PlusServer
Presidio
ProAlpha
Processor
ProCloud
Prodware
Professional Advantage
Programmer's Informática
Protiviti
Publicis Sapient
Purely Cloud
PWC
QDois
QSC

QUORUM SYSTEMS

R2MAX

Rackspace

Ray Business Technologies

redbelt

Reorder Informatica

Reply

RHC

Rhipe

Robert Bosch Technical & Business Solutions

Rödl Dynamics

RXP Services

Satalyst

Scheer

Seidor

Servian

Sete IT

SIMIEN

Simple i.D.

SIROCO LLC

SLMIT

Smart Consulting

Smartronix

softline

SoftwareONE

Solo Network

Solutis

Sonata Software

Sonda IT

Staples

Sycor

Synergy Advisors

SYNNEX

Synoptek

Syntax Systems

SysMap Solutions Software e Consultoria

Tata Consultancy Services (TCS)

Team Venti

Tech Data Advanced Solutions

Teevo S/A Comércio e Serviços de Informática

teksystems.com

Telefónica

TELETEX COMPUTADORES E SISTEMAS

Telstra

The Project Group (TPG)

Thomas Duryea Logicalis

TIVIT

TransactionSolutions

Trianz

TrimaxSecure

T-Systems

TT Solutions

Unisys

Valtech

Velrada

Venha Pra Nuvem

Veritec

Vexia

Vexpro

Vigilant.IT

WebVine

Westcon Brasil

WeThink Solutions

Wipro

Wolkenwerft

WP2

WPP AUNZ

XTRATEGUS

Contacts for this study

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



Sudheendra Tanthri
Project Manager
Email:
Sudheendra.Tanthri@isg-one.com



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



Blair Hanley Frank
Lead Author U.S.
Email:
blair.hanley.frank@isg-one.com



Craig Baty
Lead Author Australia
Email:
Craig.Baty@isg-one.com



Holm Landrock
Lead Author Germany
Email:
holm.landrock@isg-one.com

Do you need any further information?

If you have any questions, please contact us at Sudheendra.Tanthri@isg-one.com.