ISG Provider Lens™

Microsoft Ecosystem Partners

A research report comparing provider strengths, challenges and competitive differentiators

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Azure cloud acceptance growing in Switzerland – challenging CSPs.

Microsoft's Azure cloud has been established with its own region for Switzerland since the end of 2020. Since then, the commitment of IT service providers to the Azure cloud has increased considerably, encouraging ISG to conduct an independent ISG Provider Lens™ (IPL) study for Switzerland in 2022.

Two quadrant categories of service providers were identified for the study: Managed Services for Azure and Power Platform Services.

Experienced partners to the Swiss economy: For a service provider to be evaluated for Switzerland, it must have its headquarters in Switzerland or be active in the country on a large scale. Country-specific management, sales and marketing activities, delivery and support in local languages are also required to be included in this research. International providers with no capabilities for delivery from within Switzerland are not included in this study. Providers that have a sales office for Switzerland but offer services from abroad are also excluded. As per the research for this study, Switzerland-based user companies are reluctant to transform business processes and associated applications to the Azure cloud. The main concern is data security. User companies prefer local cloud providers.

Switzerland Azure region changed user behavior. IT security is one of the main concerns for users. In addition to ransomware blackmail, espionage contributes to this concern. Therefore, user companies are willing to invest very large sums in security solutions. To benefit

Azure share is growing – a challenge for Swiss CSPs

from these investments, providers need to demonstrate their capabilities through a complete and certified concept.

The market for Azure cloud managed services is already well divided in Switzerland. Typically, very large companies are served by large service providers, and midsize and small companies turn to local partners for their cloud computing needs. **Customers rarely change their providers.** The challenge for providers is to convince customers for digital transformation, with the Azure cloud as a basis. Many providers in this consideration are multicloud service providers. They choose a specific cloud provider from the stack of hyperscalers, including Microsoft Azure, according to customer preferences (and only when necessary, according to technical criteria).

Power Platform service providers were selected as a category for this first edition of ISG Provider Lens Microsoft Ecosystem – Switzerland. **ISG believes that when customers have decided to use various tools from Power Platform, it is no longer about introducing Power Apps, Power BI, etc. It is about creating flexibility for citizen software development for enterprise purposes.** On one hand, many customers in Switzerland are still reluctant to use citizen developers for software development, and on the other hand, service providers are often still reluctant to use Power Platform. It is interesting to see how services providers deal with this relatively complex topic for their customers.

Applications that are developed by people from specialized departments or other departments that are not directly a part of IT create certain challenges. This applies, in particular, to governance. Although Power Platform offers democratized programming for the new generation of citizen developers, users could potentially have access to sensitive data. Therefore, companies that are using Power Platform must implement strong data governance strategies to ensure data security and ensure that these tools are used correctly and responsibly.

The COVID-19 pandemic also had an influence. The pandemic changed the cloud market in Switzerland, like in other regions. During the first year of the pandemic, client enterprises were still encouraging the use of cloud solutions to allow their employees to work from home. This required significant efforts. In the second year of the pandemic, providers in Switzerland also had to deal with their customers' shrinking IT budgets. In addition to the technical parameters of their projects, price also played a significant role for customers, especially because of the pandemic.

Price pressure was hard in 2021, while budgets look good for security

Provider Positioning

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	Managed Services for Azure	Power Platform Services
Ambit Gruppe	Leader	Leader
Atos	Market Challenger	Not in
Avanade	Product Challenger	Leader
Aveniq	Leader	Leader
Axians	Contender	Market Challenger
Baggenstos	Leader	Not in
Bechtle	Leader	Not in
DataONE	Contender	Rising Star ★
DIGITALL	Rising Star ★	Leader
DXC Technology	Not in	Contender
Econis	Product Challenger	Not in
EveryWare	Leader	Not in

Provider Positioning

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	Managed Services for Azure	Power Platform Services
Infosys	Product Challenger	Product Challenger
SoftwareONE	Leader	Leader
Somnitec	Product Challenger	Not in
Sopra Steria	Market Challenger	Market Challenger
Swisscom	Leader	Leader
TCS	Contender	Contender
T-Systems	Leader	Market Challenger
UMB	Leader	Not in
Wipro	Contender	Not in
ELCA	Market Challenger	Not in
novaCapta	Product Challenger	Product Challenger
iSolutions	Market Challenger	Market Challenger

User behavior changed with Azure region for Switzerland.

Managed Services for Azure

Power Platforms Services

Simplified Illustration Source: ISG 2022

Definition

Microsoft is one of the world's most established technology providers, witha network of thousands of partners that augment its capabilities and support enterprises in adopting its technologies. This network has been through a series of tectonic shifts in the past five years, with Microsoft being 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: Azure cloud platform, the Microsoft 365 suite of productivity experiences, which include Windows 11 and Office 365, and the Dynamics 365 suite of business applications. Partners are now evaluated on their ability to drive the use 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 and backed by a strong relationship with Microsoft. This helps the provider keep abreast of its future developments and, in turn, drive business opportunities. ISG's analysis focuses on how providers in Australia, Brazil, Germany, Malaysia, Singapore, 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 in each of these regions to deliver services for Microsoft products, this report only focuses on the top competitors, both global firms and local providers, for each of the quadrants studied by region.

Scope of the Report

In this ISG Provider Lens™ quadrant study, ISG includes the following two quadrants: Managed Services for Azure and Power Platform Services.

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

- Transparency on the strengths and weaknesses of relevant providers
- 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 or software providers for a defined market segment. 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.

Managed Services for Azure

Who Should Read This

This quadrant focuses on the current market positioning of service providers targeting midsize to large enterprises and how they address the key challenges associated with managed services for Azure.

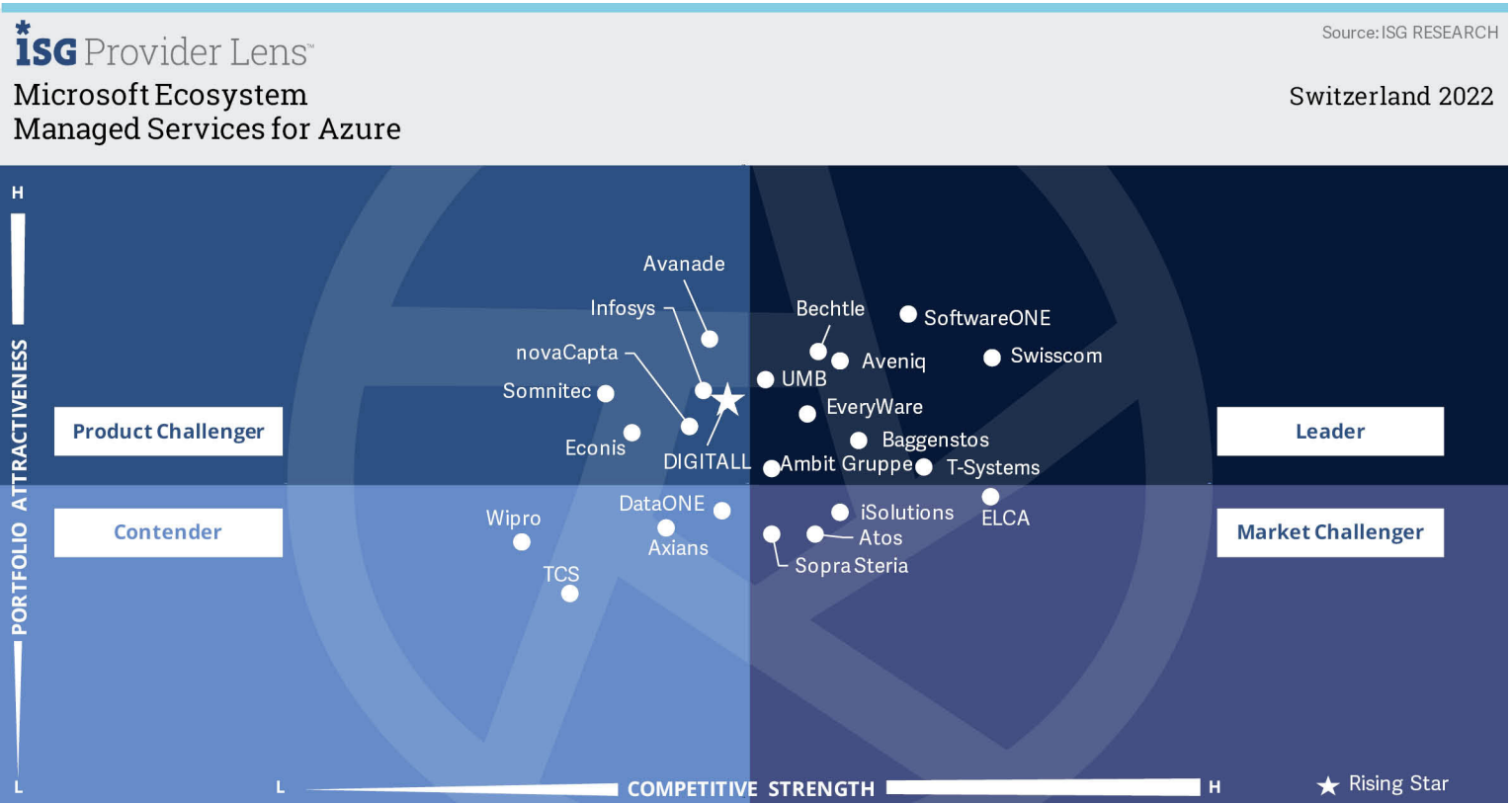
In the Switzerland market, there has been an increase in the overall adoption of cloud technologies due to the COVID-19 pandemic and associated changes in the IT budgets and operational strategies of enterprises. Most service providers in the market have clients that need innovative multicloud and workplace solutions. Besides data consolidation, clients need to adapt to governance-, compliance- and security-related complexities. These innovations are done using the newest cloud-native technologies, with Agile IT architecture.

The Switzerland market is characterized by significant innovation potential while attempting to maintain its local character, and enterprises in the market are willing to deploy cutting-edge technologies. Even though nearshore outsourcing has not been a highly accepted option for Swiss clients, many service providers have been opting for it, due to a lack of trained professionals in Switzerland.

IT leaders should read this report to understand the relative positioning and capabilities of partners that will help them effectively leverage services from Microsoft's cloud and how their technical capabilities square with the rest of the market.

Software development and technology leaders should read this report to understand the positioning of managed service providers and how their offerings and strategies can influence the demand for complementary software products and services.

Sourcing and procurement professionals should read this report to understand the provider ecosystem of managed services for Azure in Switzerland and gain knowledge about providers' service offerings beyond the standard initiatives.



Swiss providers dominate the competitive landscape of managed services for Azure in Switzerland. Cloud transformation has gained traction with **Swiss Cloud**, a separate **Azure region** for Switzerland.

Holm Landrock

Definition

This quadrant evaluates managed public cloud service providers that offer professional and managed services that complement Azure's built-in capabilities and functionality, including IaaS and PaaS. These services include deployment, real-time and predictive analytics, monitoring and operational management of a customer's public cloud and multicloud environment. The goals are to maximize cloud workload performance, reduce costs and ensure compliance and security. Most of the time, specially developed or licensed cloud management platforms and tools are used to offer customers the highest degree of automation and the necessary transparency regarding the managed cloud resource pool in capacity utilization and costs, including standalone administration.

The corresponding services usually include the following:

- Professional services for administering and monitoring CPU and operating systems as standalone services, microservices or virtual machine and container services
- Update and patching services for operating systems, middleware and applications
- Service portal for cost management, including chargeback and showback, and identity management or IT service management
- Governance and compliance management
- Support services such as incident management, configuration, security services and automation setup

Eligibility Criteria

1. Experience in developing, building and managing public and multicloud environments with a focus on Microsoft Azure
2. Support for software code development and integration of cloud native and legacy systems
3. Experience in implementing Agile and DevOps, including integration into existing customer company processes
4. Experience with application programming interfaces or API automation and cloud analytics
5. Well-developed security practices and capabilities
6. Number and location of workers providing support for Microsoft Azure

To be evaluated in a specific region, providers must be either headquartered in that country or have significant operations there. Country-specific management, sales and marketing activities, delivery and local language support are also required for onboarding. To be included in the Switzerland quadrant, a provider must either be headquartered in Switzerland or have significant, semi-autonomous staff in Switzerland.

Observations

The market for managed services for the Azure cloud is well divided in Switzerland. Swiss users show persistent reluctance to migrate to the cloud, and they rarely change their providers. A challenge for providers is to convince customers for digital transformation, with the Azure cloud as a basis. Many providers in this consideration are experienced and long-standing partners to client companies in Switzerland. They know their customers from previous IT projects. They hold the appropriate partner status from Microsoft.

Cloud transformation has gained traction with Swiss Cloud, a separate Azure region for Switzerland.

The providers evaluated in this study are based in Switzerland or have a separate business unit for Switzerland, in contrast to international providers that successfully offer their services but provide most of their services from other regions.

From the 149 companies assessed for this study, 20 providers qualified for this quadrant, with nine being Leaders and one Rising Star.

Ambit Group

Ambit Group is headquartered in Wetzikon, Switzerland, and focuses on scalability and saving technology costs. It offers cloud computing services on demand and as a self-service offering. Customers can decide on how to use its cloud offerings with a mouse click. Its comprehensive portfolio qualified Ambit Group as a Leader.

Aveniq

Aveniq has a diverse customer landscape, and it engages in long-term service partnerships. The company focuses on customer loyalty, user satisfaction and service customization. It has many certified employees and qualified as a Leader for this study.

Baggenstos

Baggenstos offers services for the entire IT lifecycle. As the first Azure Expert MSP in Switzerland, Baggenstos delivers IT services that help ease customers' IT tasks. It considers their specific needs for using regional data centers. The company's industry focus ensures specialized expertise.

Bechtle

As a new Azure Expert Managed Services Provider, **Bechtle** is one of Microsoft's strongest partners worldwide. Bechtle has 12 Microsoft Gold Partner certifications across verticals, and many of the company's consultants have an expert-level qualification. In Switzerland, Bechtle is transforming from a distributor and reseller to a successful full-service provider.

EveryWare

EveryWare's service portfolio for Microsoft Azure includes architecture consulting, services for access control, workplace security and service security for the secure operation of managed Azure servers. EveryWare's customers include finance, manufacturing, services and media enterprises. The geographical proximity of its support staff is an attractive factor for customers.

SoftwareONE

Some of **SoftwareONE's** strengths are strategic planning and quick implementation. The company is an Azure Expert Managed Services Provider and has the expertise to adequately allocate staff for cloud projects and to control deployment of workloads on the cloud. It has developed competencies to modernize applications on a large scale.

Swisscom

Swisscom is a long-standing and experienced Microsoft partner in Switzerland. It has customers for cloud applications from many verticals. Its services range from self-assessment to comprehensive advice. Predefined packages ease migrating to Azure. Swisscom supports both clients based in Switzerland and international companies.

T-Systems

T-Systems employs almost 600 people in Switzerland and supports user companies in their digital strategies and transformation. A unique selling point of T-Systems is its customer support in projects that cannot be managed with ready-made products. Extensions to the Microsoft Azure cloud are considered a special feature of its portfolio.

UMB

UMB uses Microsoft Azure as a key platform for the cloud migration of user companies. It was an early adopter of the Swiss Microsoft Azure cloud, and it has been a long-term supporter for migrations to Swiss Cloud. The provider has grown to more than 500 employees.

DIGITALL

DIGITALL is the Rising Star in this quadrant. With a close partnership with Microsoft and low-cost trials, DIGITALL makes it easy to start with the Azure cloud. It offers management/governance of cloud platforms and other cloud transformation aspects. ISG predicts that DIGITALL will become a Leader in an upcoming study.

Leader

"Swisscom maintains long-term relationships with Microsoft and other hyperscalers."

Holm Landrock

Swisscom

Overview

Swisscom is a telecommunication and IT service company. In 2020, with approximately 19,000 employees, it generated group sales of CHF 11.1 billion, which was a 3.1 percent decrease from the previous year. Swisscom successfully maintained its sales level in IT services and software, with more than 4,000 employees. For more than 15 years, it has been serving customers from all industries with IT consulting and outsourcing and a managed cloud services portfolio with end-to-end services.

Strengths

Long-standing and experienced Microsoft partner: As a cloud service provider that knows all hyperscalers, Swisscom is a competent partner for the Azure cloud. It has training programs that appeal to customers at every level of cloud usage.

Range of services: Swisscom's cloud migration preparation offerings range from self-assessment to assessment workshops. Azure Cloud Foundation is a predefined service package, spanning setup to cloud operations.

Azure cloud migration is the strategic approach for modern application environment: Swisscom knows how to migrate and modernize the application landscape based on customers' situations. It focuses on the potential of digital and automated business models.

Size, performance and regional proximity: With its number of certified experts, infrastructure offerings, local proximity and industry knowledge, Swisscom can be a perfect partner for many users. As a managed service provider for Azure cloud, it maintains long-term relationships with customers.

Caution

Being one of the largest companies in the ICT industry, Swisscom should strengthen employee loyalty with new programs to succeed in the talent war, for example, through more days for training.

The pandemic has given a major impetus to customer projects that require immediate action, and the company should convert the resulting momentum in the market into new, long-term customer relationships.

Power Platforms Services

Who Should Read This

This quadrant focuses on the current market positioning of service providers targeting midsize and large enterprises and how they address the key challenges associated with Power Platform services.

The Switzerland market features significant innovation potential while attempting to maintain its local character. Even though nearshore outsourcing has not been a highly accepted option for Swiss clients, many service providers have been opting for it, due to a lack of trained professionals in Switzerland.

In Switzerland, enterprises are willing to invest in cutting-edge technologies, and automating processes can help them leverage personnel more effectively. Power Platform services include data analysis, low-code application creation and recurrent business process automation. If utilized to the full potential, these can ease the overall pressure of the ongoing talent war in the market. Furthermore, citizen developers are valued as resources, and service providers are ready to invest in training them. Besides offering training, service providers are needed to monitor potential security breaches and implement preventive security measures. This is possible through a close professional partnership between enterprises and service providers in the region.

IT and technology leaders should read this report to better understand the relative strengths and weaknesses of service providers in the Microsoft ecosystem and understand how they are integrating the latest Power Platform services capabilities into their offerings.

Software development and technology leaders should read this report to understand the relative positioning of the providers of Power Platform services in Switzerland and understand the trends in the services ecosystem that may influence their decisions regarding partner selection.

Sourcing and procurement professionals should read this report to understand the potential of Power Platform services in Switzerland and gain knowledge about providers' service offerings beyond the standard usages of Power BI.

Power Platform is a constantly growing environment for the **agile development** of new apps. However, users need **support to integrate the solution** into corporate IT.

Holm Landrock

Definition

This quadrant evaluates providers that offer company-wide Power Platform implementations, support services and related advanced training services. Customer companies use these services to create new and sophisticated software applications for digital transformation, to gain new insights into business processes and for the smart optimization of business processes. The services offered by the providers not only leverage the strength of Power Platform but also educate companies on the best development practices. Providers in this field excel at integrating with a variety of Microsoft and other business applications, such as Office 365, Dynamics 365 and Azure, including advanced concepts such as DevOps, DataOps and MLOps. They can understand clients' goals, demonstrate their data competence and capabilities to provide the necessary guidance to customers and take a comprehensive approach with attention to detail to achieve the goals.

Eligibility Criteria

1. Services to support the company-wide use of all Power Platform solutions — Power BI, Power Apps, Power Automate and Power Virtual Assistant
2. Structured offerings and IP that enable easy adoption of Power Platform solutions and streamline ongoing software operations
3. Technical support services to support the deployment and management of platform solutions
4. Clear business advantages by using the platform solutions
5. Number and location of employees with relevant certifications for using Power Platform

To be evaluated in a specific region, providers must be either headquartered in that country or have significant operations there. Country-specific management, sales and marketing activities, delivery and local language support are also required for onboarding. To be included in the Switzerland quadrant, a provider must either be headquartered in Switzerland or have a significant semi-autonomous employee presence in the country.

Observations

For the first edition of ISG Provider Lens™ Microsoft Ecosystem – Switzerland, Power Platform Services was chosen as a quadrant because ISG believes that once customers have already decided to use various tools from Power Platform, it is no longer about introducing Power Apps and Power BI. It is more about development flexibility. On one hand, many customers in Switzerland are still reluctant to use citizen developers for software development, and on the other hand, service providers are often still reluctant to use Power Platform. It will be interesting to note how companies deal with this relatively complex topic for their customers.

The use of Power Apps and the development of new apps on Power Platform become complex because the new solutions need to be integrated into the rest of the existing IT landscape. This can be achieved only if developers follow the guidelines and test their solutions to meet all company specifications.

Therefore, providers have an important task of managing users. However, some service providers are still hesitant to face the related challenges, and vendor commitment to addressing this challenge is becoming increasingly difficult to assess.

The providers evaluated in this study are based in Switzerland or have a separate business unit for Switzerland, in contrast to international providers that provide most of their services in Switzerland from abroad.

From the 149 companies assessed for this study, 13 providers qualified for this quadrant, with six being Leaders and one Rising Star.

Ambit Group

Ambit Group is considering the development of low-code applications to digitalize new business processes in the CRM environment based on Dynamics 365 and Office 365. It has experience from various successful projects, which it applies in offering customized projects. Regional teams in Winterthur and Wetzikon are available for support.

Avanade

Avanade believes that low-code and no-code development by end users creates both risks and opportunities. Therefore, Avanade offers governance tools for data access, privacy and integrity. Its center of excellence includes various training, template and design models to keep activities on track. Many experts are available to implement projects.

Aveniq

As a recognized center of excellence and Microsoft Gold partner with advanced specializations, **Aveniq** is one of the leading IT service providers in Switzerland and is committed to the low-code development of Power Apps. Power Platform services are grouped into apps and additional services in the Ninja365 suite.

DIGITALL

DIGITALL was formed from the merger of ec4u and BULPROS. DIGITALL helps users efficiently implement governance-compliant technical projects. A highlight of its Power Platform services is App in a Day service. The provider's corporate culture has a positive influence on its employees successfully completing customers' projects.

SoftwareONE

SoftwareONE's offerings include consulting services, development tools, IT services and support for using Power Platform and related solutions and tools. With its experience and certified consultants, SoftwareONE helps customers with thorough planning, idea implementation and training for digital transformation.

Swisscom

With the help of **Swisscom** and Microsoft Power Platform, user companies can leverage their potential to modernize or optimize business processes. Technical experts from Swisscom provide customers with competent and comprehensive advice on modernization. Swisscom focuses on providing infrastructure for flexible and highly secure operations on data centers.

Data One

Data One (Rising Star) draws the attention of various Microsoft partners through proven best practices. The provider is known for quick implementation and strives for cost transparency, which is a challenging task, given the multiple price points in the Microsoft universe. Data One offers many services at a package price.

Leader

"Based on Power Platform, Swisscom helps customers harness the potential of employee development for new digital business processes."

Holm Landrock

Swisscom

Overview

Swisscom is a telecommunication and IT service company. In 2020, with approximately 19,000 employees, it generated group sales of CHF 11.1 billion, which was a 3.1 percent decrease from the previous year. Swisscom successfully maintained its sales level in IT services and software, with more than 4,000 employees. For more than 15 years, it has been serving customers from all industries with IT consulting and outsourcing and a managed cloud services portfolio with end-to-end services.

Strengths

Wide range of services for low-code development: Swisscom supports customers in developing corporate applications on Power Platform. User companies can use it to leverage new potential to modernize or optimize business processes. To ensure that the available employees and technical resources are used optimally when automating business processes, Swisscom supports Power Platform users; it is suitable for digitalizing processes even without expert software development skills.

Services are comprehensive: Technical experts from Swisscom provide customers with reliable advice on modernization, using proven methods and tools. These experts help users find the right environment for citizen developer solutions, considering security, governance, compliance and performance. The provider also has engineers with practical experience to oversee operations.

Infrastructure perspective: Cloud infrastructure, Power Platform and container technologies ensure the efficient use of new applications. Swisscom helps users provide customers with the infrastructure they need for the secure and flexible development and operation of Power Apps. The services can be adjusted through a self-service portal at any time. The infrastructure is operated on data centers with a high level of security.

Caution

The development of low-code, pro-code and no-code applications is the latest trend. Swisscom should focus more on offering governance around the apps developed by users. The key issue could be the integration of Power applications into user enterprises' IT environments. This is an important aspect, particularly for small and midsize companies.

Appendix

The ISG Provider Lens™ 2022 – Microsoft Ecosystem Partners research study analyzes the relevant software vendors/ service providers in the Switzerland 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 2022, 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:

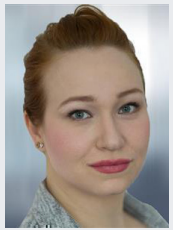
1. Definition of Microsoft Ecosystem Partners market
2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & use cases
4. Leverage ISG's internal databases & advisor knowledge & experience (wherever 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

Author

Holm Landrock
Distinguished Lead Analyst & Senior Advisor

As an ICT analyst, technical journalist and author of several books, Holm Landrock's core topics include technical-scientific computing, enterprise computing and trending topics such as e-health and quantum computing.

Holm Landrock can refer to almost 40 years in IT, running data centers, writing for enterprise IT and about enterprise IT as well analyzing IT providers. Mr. Landrock is a certified IT specialist and has gathered several years of professional experience in technical and enterprise IT for a larger German microelectronics company. Since 2011, Mr. Landrock has worked for Experton Group AG which is now integrated with ISG Research. Before, he worked both as senior editor for technical magazines and as a freelance journalist within the landscape of the German IT and technical press. He wrote several books on big data, e-health, drones and business management. With ISG, Landrock also provides clients with advisory services.



Research Analyst

Katharina Kummer
Research Analyst

Katharina Kummer is a research analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on Public Cloud Transformational Services, Private Hybrid Cloud Data Centre, Data Analytics, Microsoft Ecosystem and Cloud Native – Container Services. Her areas of expertise lie in cloud, data center, cloud native services, digital linguistics and NLP. Katharina develops content from an enterprise perspective and author the global summary report. Along with this, she supports the lead analysts in the research process and ad-hoc research assignments and writes articles about niche technologies, market trends and insights.

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 1,300 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.

ISG Provider Lens™

MARCH 2022

REPORT: MICROSOFT ECOSYSTEM PARTNERS