ISG Provider Lens™

Microsoft Cloud Ecosystem

Power Platform 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.

Table of Contents

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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

Page 2 of 4

	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

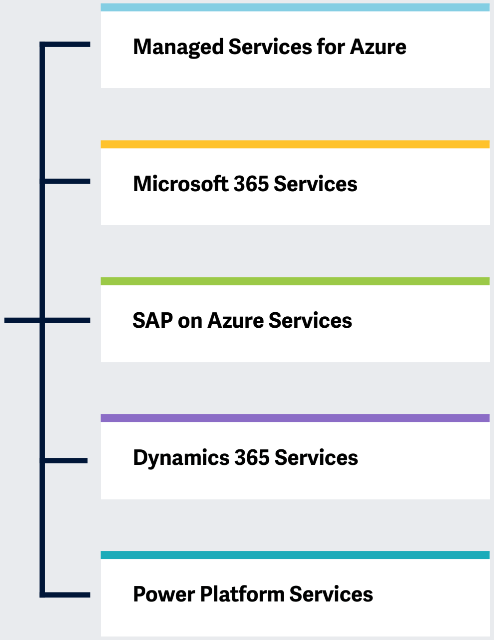
	Managed Services for Azure	Microsoft 365 Services	SAP on Azure Services	Dynamics 365 Services	Power Platform Services
LTIMindtree	Leader	Product Challenger	Leader	Rising Star ★	Leader
MSRCosmos	Not In	Not In	Contender	Not In	Not In
NTT DATA	Leader	Leader	Leader	Market Challenger	Market Challenger
Oxya	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.

Power Platform Services

Who Should Read This Section

This report is relevant to enterprises across all industries in the U.S. for evaluating Microsoft Power Platform services partners.

In this quadrant report, ISG highlights the current market positioning of Microsoft Power Platform service providers in the U.S. and how they address the key enterprise challenges in the region.

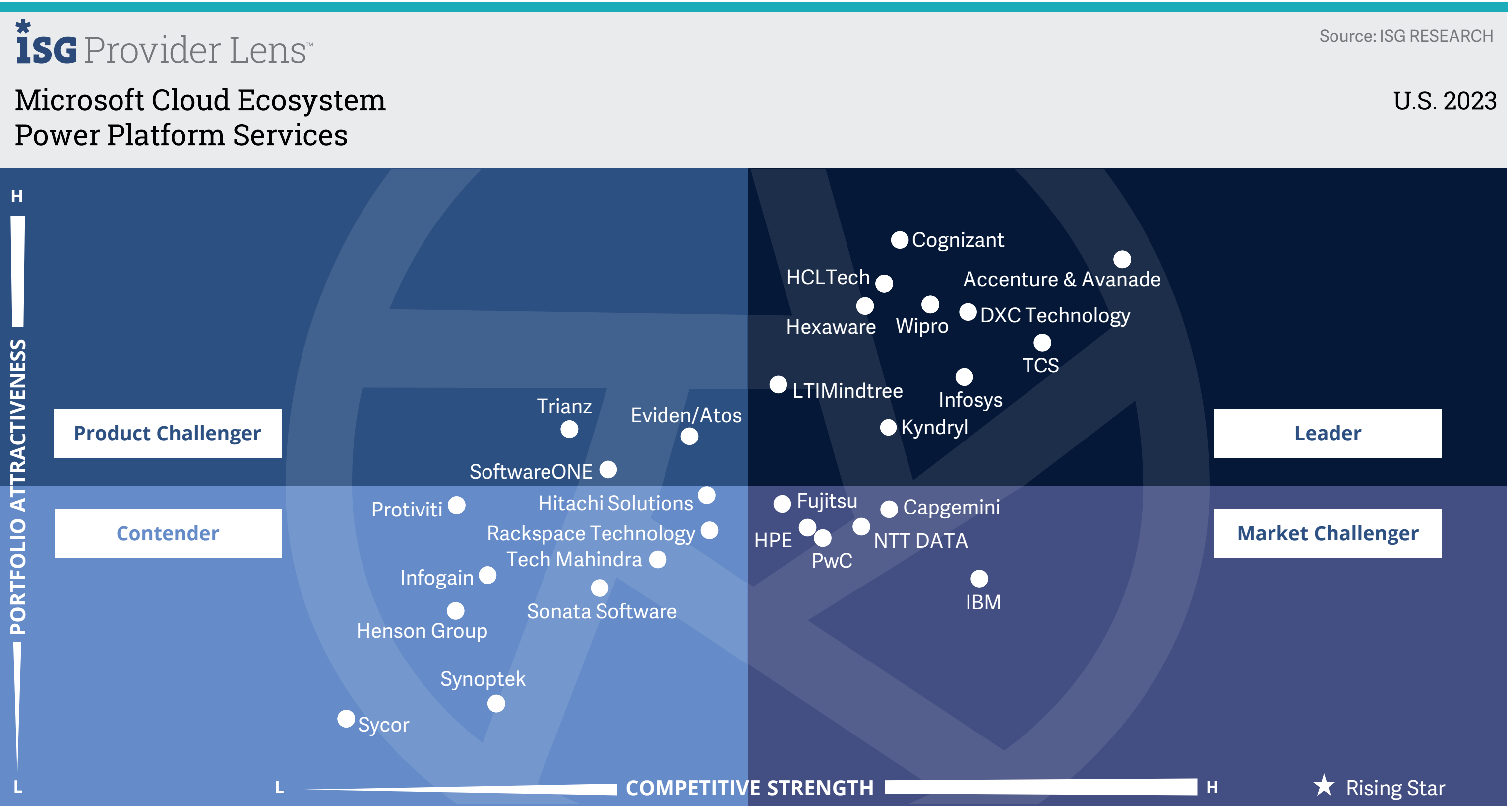
U.S.-based enterprises have started leveraging the Microsoft Power platforms, including Power BI, Power Apps, Power Automate and Power Virtual Assistants, to support their cloud transformation journeys, drive modernizations and accelerate digital innovation. These enterprises are adopting integrated technology platforms to save costs, time and resources and quickly develop business applications (BizApps). They also want to transform their business applications with low-code/no-code platform development and enable automation and AI for their workforce to improve productivity and employee engagement. These enterprises are looking for providers that can help accelerate their citizen developer programs while providing effective governance, compliance and security for these activities.

U.S.-based enterprises prefer service providers that can provide a comprehensive set of Power Platform services and help them deliver high-quality and personalized services to their clients. They also want to better understand Power Platform technologies and how well they can connect with enterprise ecosystems. Hence, they are seeking providers that can ace integrations with several Microsoft business apps, including Microsoft 365, Dynamics 365 and Azure.

Technology professionals should read this report to better understand providers' relative strengths and weaknesses in the Microsoft ecosystem and how they integrate the latest Power Platforms capabilities into their offerings.

Procurement professionals should read this report to understand the provider ecosystem for Microsoft Power Platform services in the U.S. and learn how providers compare with others.

Workplace technology professionals should read this report to understand how service providers can help them adopt Microsoft low-code/no-code and virtual assistant technologies and evaluate the potential partners for implementing and integrating Power Platforms.



Power Platform underpins **low-code, citizen developer** activities in enterprises. Enterprises are looking for a provider that can harness the innovation potential of the low-code revolution while providing strong **governance, cost** and **security** guardrails.

Peter Crocker

Definition

This quadrant assesses providers that offer services for the enterprise-wide implementation of Microsoft Power Platform, support services and related advanced training. Enterprise clients utilize the services offered by providers to create new and sophisticated software applications for digital transformation, obtain new insights on business operations and optimize business processes in a sophisticated manner. The services offered by these providers not only leverage the capabilities of Power Platform but also educate enterprises on the best practices for apps and solutions development. Providers in this space ace the integration with a variety of Microsoft apps and other business apps, for example, Office 365, Dynamics 365 and Azure, as well as advanced concepts such as DevOps, DataOps or MLOps.

The trending concept of citizen development shows a huge demand for service and support to govern and embed apps created by users using low-code and no-code development tools within and/or on Power Platform. Third-party tools' integration or migration is also important. Furthermore, Power Platform's analytics, process management, IT management and process automation capabilities should be supported by the providers evaluated in this quadrant.

The providers in this quadrant understand a client's objectives and use their data literacy and skills to provide the necessary guidance. With an eye for detail, these providers also take a holistic approach to drive client business performance.

Eligibility Criteria

1. Services that support enterprises' **adoption** 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 the ongoing operation of the software
3. Technical **support capabilities** that assist enterprises with the adoption and management of platform solutions
4. Clear **business benefits** tied to the use of platform solutions

Observations

The demand for automation and low-code app development is growing in the U.S. because it increases the ability of line-of-business workers to access data. With the market evolving quickly, players that do not continue to invest in advanced technologies lag behind. Atos fell out of the Leader's quadrant this year as it could not keep up with the market on account of the organizational/business changes that are consequently underway.

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, Kyndryl has successfully established itself as a Leader while IBM moved to the Market Challenger position owing to its shift in focus to product business.

From the 175 companies assessed for this study, 22 qualified for this quadrant, with 10 being Leaders.

accenture

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

cognizant

Cognizant's focus on cloud-native technology and business consulting within its Microsoft business unit positions the company in the Leader's quadrant.

DXC TECHNOLOGY

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

HCLTech

HCLTech is building its skilled workforce, rebranding and investing in innovation labs to deliver advanced technology to its customers.

HEXAWARE

Hexaware's focus on agile solutions and application and data modernization places the company in a strong position in the Microsoft ecosystem. The company is also investing heavily in its Microsoft partnership.

Infosys

Infosys' dedicated Power Platform practice and its breadth of offerings make the company a Leader in the market.

Kyndryl

Kyndryl, the spinoff from IBM, has emerged as a company with extensive experience working with enterprises and Microsoft. It now has much more flexibility in the products that it presents 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.

tcs TATA CONSULTANCY SERVICES

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

wipro

Wipro is making significant investments in its cloud service business and growing its relationship with Microsoft as well as its collaborative ecosystem.

Leader

"DXC is one of the largest partners providing services around BizApps and is differentiating its offering with greater integration and access to data."

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. The company has a significant client base to support its Power Platform business in the U.S. Worldwide, DXC's Microsoft service business serves 5,050 clients through over 15,000 FTEs and 24,000 Microsoft certifications. Thirty-eight percent of DXC's Microsoft revenue is generated in the U.S.

Strengths

Focus on verticals: DXC has created several accelerators, business-focused IP and industry solutions focused on a set of vertical markets that include banking, retail and consumer packaged goods (CPG), healthcare, manufacturing and the public sector.

Robust capabilities: DXC is the world's second-largest independent Dynamics Partner GSI, enabling it to provide expert service across regions and industries. With an extensive client base currently using Dynamics 365, DXC has an existing pool of clients to which it can extend Power Platform services. This strength, along with BizApps, helps the company provide robust capabilities around the Power Platform.

Focus on data: DXC has combined Power Apps with a data platform to build business apps quickly. The offering includes services and data connectors, enabling Power Platform to access data from various sources.

Power Platform integration: DXC is working to integrate Power Platform with existing IP built on other Microsoft products and third-party products. This includes existing template libraries and non-Microsoft services, such as SAP and Salesforce, to address the broad-reaching needs of enterprise clients.

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.

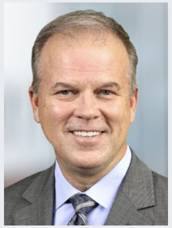
In addition to evaluating markets and IT service providers for ISG, Peter works with clients to produce thought leadership and product marketing messaging and content in the information technology sector. Peter holds an MBA in marketing from the College of William and Mary and BA in psychology from Rollins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

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

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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.

ISG Provider Lens™

MARCH, 2023

REPORT: MICROSOFT CLOUD ECOSYSTEM