

Microsoft Ecosystem Partners

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:



Executive Summary	3	Managed Services for Azure	14 – 20	SAP on Azure Services	28 – 33	Power Platform Services	41 – 46
Provider Positioning	6	Who Should Read This	15	Who Should Read This	29	Who Should Read This	42
Introduction		Quadrant	16	Quadrant	30	Quadrant	43
Definition	10	Definition & Eligibility Criteria	17	Definition & Eligibility Criteria	31	Definition & Eligibility Criteria	44
Scope of the Report	11	Observations	18	Observations	32	Observations	45
Provider Classifications	11	Provider Profiles	20	Provider Profiles	33	Provider Profiles	46
Appendix		Microsoft 365 Services	21 – 27	Dynamics 365 Services	34 – 40		
Methodology & Team	47	Who Should Read This	22	Who Should Read This	35		
Author & Editor Biographies	48	Quadrant	23	Quadrant	36		
About Our Company & Research	50	Definition & Eligibility Criteria	24	Definition & Eligibility Criteria	37		
		Observations	25	Observations	38		
		Provider Profiles	27	Provider Profiles	40		

Report Author: Peter Crocker

As one of the world's leading enterprise technology vendors, Microsoft plays a pivotal role for many businesses' digital transformation strategies. Its products form the backbone of digital transformation for companies across the U.S. where the company has a strong historical footing, especially 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 is a more recent addition to the Microsoft portfolio and is a low-code development platform that is designed to extend the capabilities of the existing portfolio by enabling citizen developers to build apps and workflows. While many

enterprises have already begun adopting these products and services, many of them fail to capitalize on the full value of what is available to them. That is where ISG sees significant opportunities for service providers. Providers offer specialized expertise and employees who can help guide enterprises and have the technical understanding to drive implementation.

Yet, for many enterprises, the challenges of 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. Therefore, for support, many turn to the Microsoft partner ecosystem, 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

IT service providers expertise with cloud and Microsoft products enable digital transformation for clients.



Executive Summary

components atop the existing Microsoft platforms. The Microsoft ecosystem and developer community in the U.S. is particularly broad and deep compared to 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 the migration process. In many cases, enterprises 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 of resources, managing incidents, monitoring and managing licenses, assuring security, automating updates, and ensuring policy compliance and governance. Some companies seek help simply updating legacy email and messaging systems to the Office 365 platform. As a U.S.-based company,

Microsoft generates half its revenues from this country.

The U.S. leads the globe in moving to the cloud, and as it begins to mature as a hosting platform, enterprises have shifted from migrating to the cloud to leveraging its unique capabilities. This means greater resilience and flexibility with multicloud and hybrid cloud environments. It also means replatforming and refactoring applications, optimizing them to take advantage of the technical capabilities of the cloud beyond reduced costs. For example, this can include moving to modern microservices architectures, using containerized applications and Kubernetes orchestration. The use of automation is increasingly being adopted across IT environments. More innovative IT service providers are also investing in automation and using it to streamline the move of applications and code to the cloud. While some vendors are offering more software

engineering services, many are choosing to focus on FinOps or helping customers optimize and manage the cost of cloud deployments.

ISG has observed the rise of low-code, citizen-developer initiatives as a major trend across most major technology providers in the U.S. These services are aimed at empowering 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, as well as automation tools such as Virtual Agent and Power Automate. While many enterprises are experimenting with low-code initiatives as a way 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 specific offerings, designed to put guardrails around low-code development and channel such efforts in ways that are safe, productive and compliant for the enterprise. These include the establishment of centers of excellence for citizen development, monitoring compliance and policy, creating templates for app development, establishing best-practice guidelines, undertaking training workshops, monitoring of data and license usage, code scanning for compliance, generating pre-configured APIs, and determining templated release cycles.

With the strong adoption of Azure and Microsoft 365, the tech titan has driven increased focus on Dynamics 365, its suite of cloud-based business applications. There are three discrete constituencies



Executive Summary

each migrating to Dynamics 365: enterprises seeking green field deployments of new capabilities, those companies migrating from on-premises Dynamics installations, and businesses looking to move away from other business applications like SAP and Salesforce. The top providers in the U.S. market are able to address each of these use cases on a personalized and structured basis, leveraging their expertise to provide quick return on investment. In particular, ISG sees the greatest value possible when enterprises can align with service providers that offer unique, industry-specific solutions. Providers that are more competitive in are moving beyond the technology piece of the solution by incorporating business processes and workflow. This is particularly relevant in the U.S. where many enterprises have already moved to the cloud and are looking of new ways to leverage its benefits. The ability to provide solutions that have a direct impact

on business outcome enables providers to deliver added value to their clients.

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 very different starting points in terms of their SAP development. They are also usually business critical, which makes SAP migrations and database modernizations complex and risky to manage. For SAP providers, being able to understand the current SAP landscape of an enterprise is critical to ensuring a safe and cost-effective migration to Azure. In the US this market as begun to mature as many organizations have already moved their legacy SAP applications to the cloud and opportunities to add differentiated services are limited.

The disruption caused by the COVID-19 pandemic is driving demand for the modern workplace, which has become a must-have for distributed organizations. The changing workforce requirements and the “great resignation” that has happened across the U.S. are also helping to drive Microsoft to reposition Microsoft 365 away from its original focus on employee communications and messaging, and toward a more rounded platform centered on employee experiences and learning. The introduction of Microsoft Viva is one example. ISG’s research with providers suggests that we are still in the early days of this transition, but we see the U.S. leading the way. Most providers and enterprises are still grappling with more prosaic challenges around integrating the current Microsoft 365 technologies and getting more value out of the platform. Nevertheless, we do see providers beginning to take a more employee-experience-centric approach, for example,

by incorporating wellness and micro-learning elements into the Microsoft 365 platform, or by using digital nudges to help employees increase the adoption and usage of the services it offers.

Service providers have correctly focused on enhancing their capabilities with Microsoft Teams, the collaboration software that has taken off with the COVID-19 pandemic. Even enterprises that avoided a strong messaging platform culture have been forced into using Teams as a result of co-located work restrictions brought on by stay-at-home orders. As a result, enterprises now have to deal with the sprawling channels and varied usage patterns that come from haphazard adoption. Service providers have invested heavily in deploying bots that users can interact with through Teams, as well as in some cases have developed services that can help combat sprawling deployments.



Provider Positioning

Page 1 of 4

	Dynamics 365 Services	Microsoft 365 Services	Managed Services for Azure	Power Platform Services	SAP on Azure Services
Accenture	Leader	Leader	Leader	Leader	Leader
Atos	Leader	Product Challenger	Product Challenger	Product Challenger	Product Challenger
BT	Not in	Not in	Not in	Not in	Not in
Capgemini	Contender	Leader	Product Challenger	Contender	Product Challenger
Cognizant	Leader	Leader	Leader	Leader	Leader
Crayon	Not in	Not in	Contender	Not in	Not in
DXC Technology	Leader	Leader	Leader	Leader	Leader
Encore	Contender	Not in	Not in	Not in	Not in
Fujitsu	Contender	Market Challenger	Market Challenger	Market Challenger	Market Challenger
Hanu	Not in	Not in	Contender	Not in	Contender



Provider Positioning

Page 2 of 4

	Dynamics 365 Services	Microsoft 365 Services	Managed Services for Azure	Power Platform Services	SAP on Azure Services
HCL	Rising Star ★	Product Challenger	Leader	Leader	Product Challenger
Hexaware	Leader	Leader	Leader	Leader	Product Challenger
Hitachi Vantara	Contender	Contender	Contender	Contender	Not in
HPE	Market Challenger	Market Challenger	Market Challenger	Product Challenger	Market Challenger
IBM	Leader	Leader	Leader	Not in	Leader
Infogain	Not in	Contender	Not in	Not in	Not in
Infosys	Leader	Leader	Market Challenger	Leader	Leader
Logicalis	Not in	Product Challenger	Product Challenger	Not in	Not in
Logicworks	Not in	Not in	Market Challenger	Not in	Not in
LTI	Product Challenger	Contender	Leader	Leader	Product Challenger



Provider Positioning

Page 3 of 4

	Dynamics 365 Services	Microsoft 365 Services	Managed Services for Azure	Power Platform Services	SAP on Azure Services
Mindtree	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger
MSRCosmos	Not in	Not in	Not in	Not in	Contender
NTT DATA	Market Challenger	Leader	Leader	Market Challenger	Leader
Protiviti	Contender	Contender	Not in	Contender	Not in
Rackspace Technology	Market Challenger	Market Challenger	Leader	Not in	Market Challenger
SMX	Not in	Not in	Contender	Not in	Not in
SoftwareONE	Contender	Product Challenger	Product Challenger	Product Challenger	Contender
Sonata Software	Not in	Not in	Not in	Contender	Not in
Sycor	Contender	Not in	Not in	Not in	Contender
Synoptek	Contender	Not in	Not in	Contender	Not in



Provider Positioning

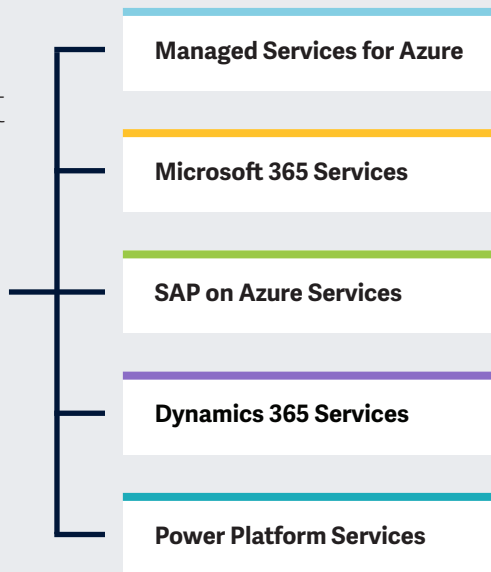
Page 4 of 4

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



This study focuses on what ISG perceives as most critical in 2022 for the five key areas of the Microsoft ecosystem in the U.S.

Simplified Illustration Source: ISG 2022



Definition

Microsoft is one of the most established technology providers in the world, with a network of thousands of partners that augment its capabilities and aid enterprises in adopting its technologies. This network has been through a series of tectonic shifts in the past five years, as Microsoft transformed 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: 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 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 that keeps them abreast of its future developments and, in turn, drive business opportunities.

ISG's analysis will focus 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, delivering services for Microsoft products, this report will only focus on the top competitors, both global firms and local providers, for each of the quadrants studied by region.



- 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.

Scope of the Report

In this ISG Provider Lens™ quadrant study, ISG includes the following 5 quadrants: Managed Services for Azure, Microsoft 365 Services, SAP on Azure, Dynamics 365 Services, 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 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 US\$20 million and US\$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 US\$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 and Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens quadrant may include service providers that ISG believes have 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 report is relevant to enterprises across all industries in the U.S. for evaluating managed service providers for Microsoft Azure.

In this quadrant report, ISG highlights the current market positioning of Azure managed service providers in the U.S., and explains how they address the key challenges faced by enterprises in the region.

Globally, the U.S. continues to be a leader in terms of cloud adoption. Enterprises in this region are now shifting their focus toward optimizing cloud spending and enhancing the scale and flexibility of the cloud. They are also now leveraging Microsoft Azure cloud platform due to its benefits when compared to other hyperscalers, including cost and scalability. Enterprises in the U.S. are

also focusing on multicloud strategies to mitigate the risks associated with server downtime and data loss.

These enterprises are seeking experienced managed service providers that can keep their Azure infrastructure stable and optimize expenses. They are also evaluating managed service providers based on automation, AI, analytics and security capabilities. Enterprises in this region are seeking skilled Azure professionals who can help them map their business requirements with Azure solutions. Serverless computing and consumption-based pricing are the new cloud computing trends observed in this region and are being adopted by enterprises due to high degree of scalability.



IT leaders should read this report to understand the relative positioning and capabilities of partners that will help them effectively consume services from Microsoft cloud and understand how these providers' technical capabilities compare with the rest of the market.



Sourcing and procurement professionals should read this report to understand the provider ecosystem for Microsoft Azure managed services in the U.S. and gain knowledge about how providers compare to one another.



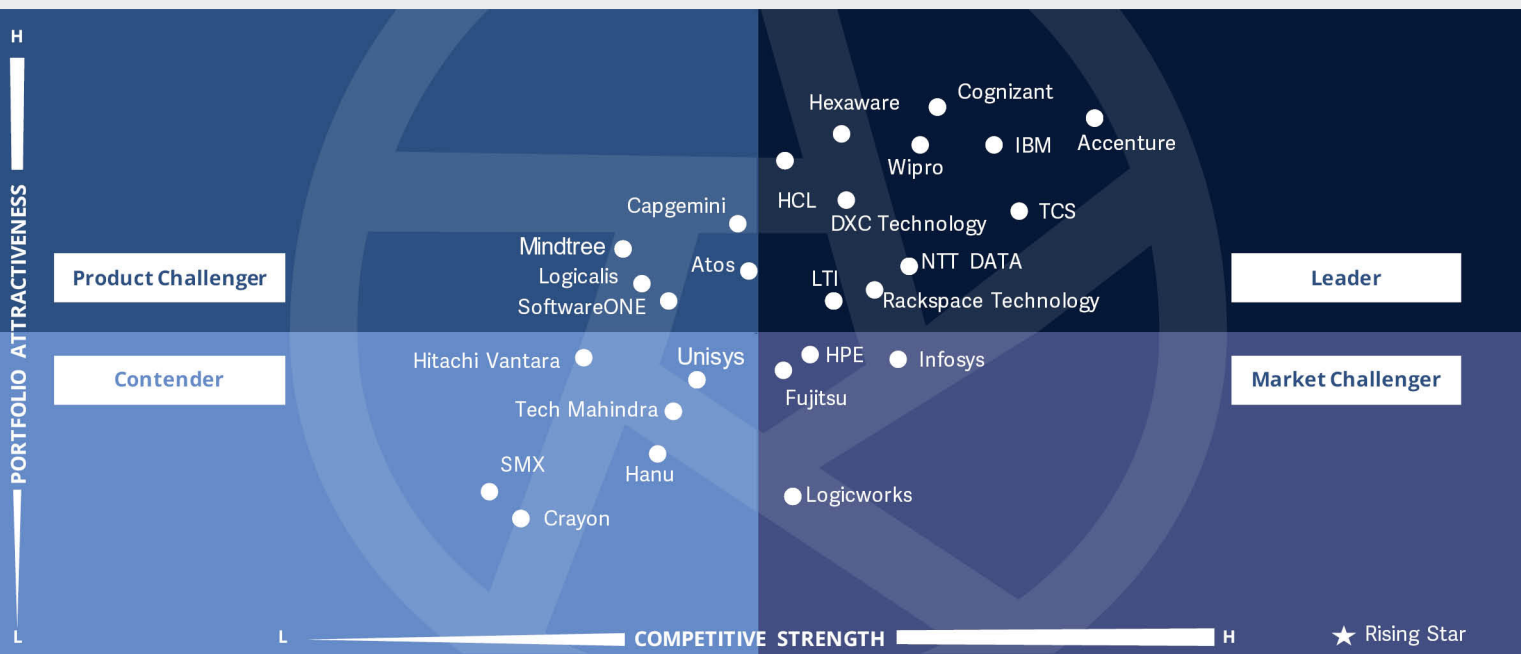
Software development and technology leaders should read this report to understand the positioning of managed service providers and how the providers' offerings can impact an enterprise's ongoing transformation initiatives, while identifying the benefits of moving to the cloud.



ISG Provider Lens™
Microsoft Ecosystem
Managed Services for Azure

Source: ISG RESEARCH

U.S. 2022



This quadrant assesses services providers offering professional and managed services to **augment the capabilities of the Azure Cloud**. We see an increasing focus on industry clouds, consumption-based usage models, and co-innovation capabilities.

Peter Crocker



Managed Services for Azure

Definition

This quadrant assesses managed service providers (MSPs) that 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, and monitoring and operational management of a client's public and multicloud environments. 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 microservices or virtual machine or container services
- Update and patching services for operating systems, middleware and applications
- Service portal for cost management (charge back and show back) and identity management or IT service management
- Governance and compliance management
- Support Managing services such as incident management, configuration, security services and automation setup

Eligibility Criteria

1. Experience in designing, building, and managing public and multicloud environments with a focus on Microsoft Azure
2. Support in the development of software code, cloud native and legacy system integration
3. Experience in implementing both Agile and DevOps as well as integrating with clients' existing processes
4. Experience in application programming interface (API) automation and cloud analytics
5. Well-developed security practices and capabilities
6. Number and location of provider resources that assist enterprises with Microsoft Azure
7. Strength of the provider's partnership with Microsoft, specifically around Azure. Partnerships will be measured by the number and category of relevant certifications, duration of relationship with Microsoft and evidence of strategic cooperation between the provider and Microsoft.



Managed Services for Azure

Observations

Providers in general were more clustered together in the portfolio attractiveness rating scale. This is primarily due to the maturing of the space and portfolios evolving into a state of greater parity.

LTI moves into the leadership quadrant due to their investment in Microsoft technologies as well as focus on solving specific business problems. HCL edges into the leadership quadrant with a greater focus on business outcomes and strategic application of cloud technologies. TCS improves its position in the leadership quadrant due to leverages its global scale, innovation, and expertise in core Microsoft technology. Infosys falls out of the leader primarily quadrant due to the company's failure to renew its Azure Expert MSP audit.

Late in 2021 IBM spun-out its managed service business to reduce channel conflict. This should make IBM a much better partner in the Microsoft ecosystems going forward.

From the 313 companies assessed for this study, 26 have qualified for this quadrant with 11 being Leaders.

accenture

Accenture, a seasoned Azure veteran with a long-established relationship with Microsoft via Avanade, is focusing on Sustainability Clouds on Azure to help businesses achieve their net-zero goals.

Cognizant

Cognizant, one of the most heavily credentialed Microsoft partners, is offering a triple set of modernization factories on Azure, covering infrastructure, data estates, and applications.

DXC Technology

DXC Technology, a 30-year strategic partner of Microsoft, is emphasizing its co-innovation capabilities on the Azure platform and its revamped best-sourcing model, combining local expertise with point expertise from its global innovation network.

HCL

HCL, a strategic partner of Microsoft for more than three decades, is a launch partner for industry clouds, offering Azure solutions for manufacturing, sustainability, and financial services.

HEXAWARE

Hexaware provides a comprehensive suite of services across the Azure platform, incorporating significant elements of automation from its Amaze intelligent automation tools.

IBM

IBM, a long-standing alliance partner of Microsoft, focusses heavily on cloud-native modernization through its Red Hat OpenShift on Microsoft Azure offering.

LTI Let's Solve

LTI, is taking a platform approach and is providing prebuilt apps on the Azure marketplace to add value to Azure deployments.

NTT DATA

NTT DATA is a Japanese based global IT service provider with telecommunications roots. Resources and telecom expertise are significant assets for NTT DATA.



Managed Services for Azure

TCS

TCS has a long-standing relationship with Microsoft as supplier, customer, and product developer and innovator. It has launched joint industry cloud solutions for manufacturing, retail, and financial services. It has seen significant traction for its managed services on Azure with major U.S.-based clients.



Wipro is focusing on its Cloud Studio offering to help enterprises find the right solution for their business on Azure, as well as offering Infrastructure as a Service (IaaS) and Platform as a Service (PaaS) on Azure.

Rackspace Technology

Rackspace Technology, a long-standing innovation leader, is highlighting its Elastic Engineering for Azure, providing on-demand Azure cloud expertise and resources to enterprises and guaranteeing delivery measured against business outcomes.





“DXC and its long standing enterprise relationships make it a leader in delivering managed services on Azure.”

Peter Crocker

DXC Technology

Overview

DXC Technology is a global software and service provider, combining a broad base of traditional enterprise IT, software and services expertise with leading-edge cloud software and services development. The company was formed in 2017 with the combination of CSC and HPE’s Enterprise Services group. DXC has approximately 600 FTEs supporting their global Azure practice and the company holds Azure Expert MSP certification, along with advanced certification in Windows and SQL Server migration to Azure.

Strengths

Flexibility: DXC provides its clients greater flexibility around service delivery, so they receive the right level of services for their dollar. Delivering the right combination of services or balance of near shore and offshore support helps clients get more value from their investments.

Tight mix of Infrastructure and business services: DXC’s portfolios and target market is very well defined. They are focusing on adding value throughout the software stack from mainframes to business processes. This integrated approach enables them to provide

compounded value and better business outcomes.

Deep Microsoft relationship: DXC’s cloud engineering teams are deeply connected with counterparts on the Microsoft Azure team, allowing the company to provide feedback and shape product development to benefit its clients.

Legacy enterprise relationships: The combination of CSC and HP Enterprise Services into a single firm leverages the long history of enterprise relationship built by the two firms. This enable the firm to help companies deliver high-quality and personalized services that are informed by clients’ existing architectures, challenges, and specific needs.

Caution

After some challenges, DXC has reorganized its delivery strategy to shift resources closer to the customer. While DXC is reinvesting in local delivery, over-aggressive cost-cutting measures from previous years may make it harder to rebuild.





Microsoft 365 Services

Who Should Read This

This report is relevant to enterprises across all industries in the U.S. that are evaluating Microsoft 365 integration partners.

In this quadrant report, ISG highlights the current market positioning of Microsoft 365 service providers in the U.S., and examines how they address the key challenges faced by enterprises in the region.

The global pandemic has drastically changed the demand for workplace services, making it more challenging for enterprises to implement SaaS-based workplace environments. Enterprises in the U.S. are seeking suitable service providers that can assist them in their digital transformations and modern workplace initiatives. Microsoft 365 adoption and integration forms a critical component of these efforts. Enterprises in

this region are also focused on ensuring a successful Microsoft 365 migration to enhance the operational productivity and reduce the overall IT costs.

Employee engagement, well-being and collaboration are among the trends observed in Microsoft 365 space, leading enterprises in the U.S. to seek service providers offering comprehensive portfolio that can be integrated with Microsoft 365. These enterprises are now focusing on employee experience-centric Microsoft 365 offerings to transform their workplaces and create a secure and effective hybrid working environment for employees.



IT and technology leaders should read this report to better understand the relative strengths and weaknesses of service providers in the Microsoft ecosystem and how they integrate the latest capabilities from Microsoft 365 into their offerings.



Workplace technology leaders should read this report to understand how service providers can help adopt Microsoft technology, especially as changes to the technology lead to significant organizational change management challenges. In addition, this report can help workplace leaders better evaluate the potential partners available to them for Microsoft 365 implementation and integration.

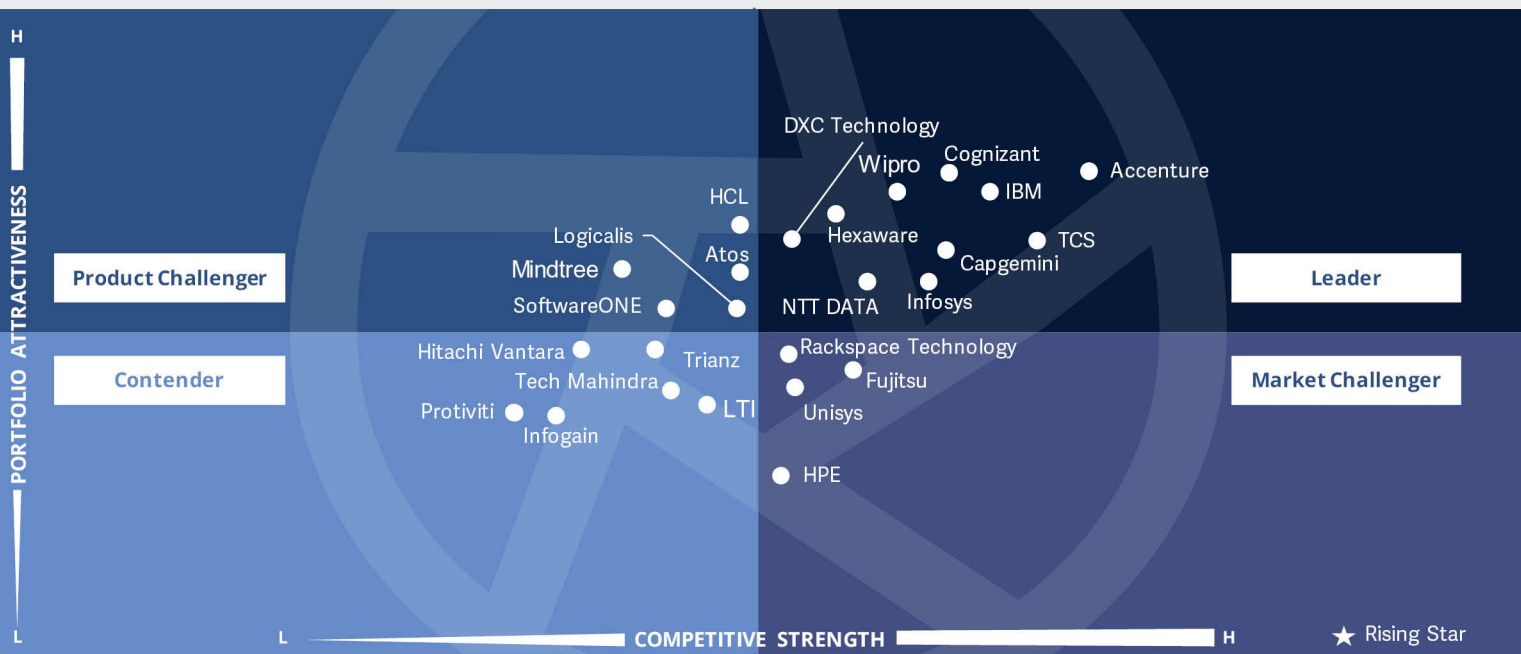


Information and knowledge management leaders should read this report to better understand the positioning of providers and the key trends in the provider ecosystem to evaluate the potential partners.



Sourcing, procurement and vendor management professionals should read this report to develop a better understanding of the current provider landscape for Microsoft 365 integration and help them distinguish between players in a competitive market.





This quadrant assesses service providers that aid enterprises with the **adoption, integration and ongoing operations** of Microsoft 365. We see an increasing provider focus on M365 as a **holistic employee-experience** and learning platform.

Peter Crocker



Microsoft 365 Services

Definition

This quadrant evaluates service providers that aid enterprises with the adoption, integration, and ongoing operation of Microsoft 365, Microsoft's SaaS based productivity suite.

These services go beyond provisioning and migrating to Microsoft 365 — they focus on offering a quick, device-independent, high-quality productivity suite that enables seamless teamwork, irrespective of location and is adapted to the role of the user. From the client's perspective, Microsoft 365 is about collaboration and the integration of globally dispersed teams which requires integration and implementation services. This quadrant also evaluates providers on the support they offer for Windows as a part of their overall Microsoft 365 service portfolio.

Implementing SaaS-based workplace environments is a challenge for every enterprise client. ISG observes many pitfalls around collaboration, unified communication, file storage and performance, as well as license cost, provisioning procedures, and maintenance plans. Additional challenges include efforts towards data integration, process integration, and application integration. Providers in this space must be able to go beyond implementing Microsoft 365 at a basic level and address these deeper problems head-on.

Eligibility Criteria

1. Service portfolio includes technical consulting, license purchases, integration of Microsoft 365 modules, technology implementation and system operation
2. Forward-thinking offerings that integrate with Microsoft 365 to create a modern workplace for enterprise clients (for example, HoloLens development and Teams bot creation)
3. Management of Microsoft Office APIs to ensure appropriate use and increased enterprise productivity
4. Ability to migrate customer workplaces to modern cloud environments and workspace-as-a-service (WaaS) device leasing models.
5. Provisioning of Microsoft 365-based unified endpoint suites through integration with state-of-the-art identity and access management technology (IAM) and mobile device management (MDM) (Intune or other).
6. Strength of the provider's partnership with Microsoft, measured by the number and category of relevant certifications held (including Office 365, Intune, Windows and Azure), duration of relationship with Microsoft and evidence of strategic cooperation between the provider and Microsoft around the modern workplace.



Observations

Providers in general were more clustered together in the portfolio attractiveness rating scale. This is primarily due to the maturing of the space and portfolios evolving into a state of greater parity.

TCS improves its position in the leadership quadrant due to its global scale, innovation, and expertise in core Microsoft technology. DXC loses some competitive footing due to missteps in managing localized delivery capability. While these challenges are being addressed, greater caution is warranted from customers in the near term. Cognizant has also lost some competitive capabilities due to less focus on solving specific business problems and talent retention struggles.

Late in 2021, IBM spun out its managed service business to reduce channel conflict. This should make IBM a much better partner in the Microsoft ecosystems going forward.

From the 313 companies assessed for this study, 26 have qualified for this quadrant with 10 being Leaders.

accenture

Accenture was named Employee Experience Partner of the Year by Microsoft in 2021. It offers a wide range of managed services for Microsoft 365, as well as Accelerate 365, which is an automated end-to-end platform for migrations to Microsoft 365.

Capgemini

Capgemini is a French global business and technology consulting and outsourcing service provider. The company brings to market global consulting experience and workplace services.

Cognizant

Cognizant has a holistic focus on employee experience on Microsoft 365, providing services for multi-device experience, AI-enabled self-services, information repositories for knowledge sharing, and collaboration tools across dispersed workforces.

DXC Technology

DXC Technology provides a full suite of Microsoft 365 solutions, as well as co-innovating solutions with Microsoft such

as HoloLens for engineers. It has also invested significantly in skill development through its Microsoft Cloud Academy.

HEXAWARE

Hexaware brings significant levels of intelligent automation to its Microsoft 365 services, ranging from testing to migration to management. Its Team Coco Bot can engage back-end systems and end users for more unified communications.

IBM

IBM provides a range of services for desktop virtualization to enable employees to work remotely and effectively. It also offers workplace analytics as a service to give organisations improved insights into their use of the platform and overall user experience.



Microsoft 365 Services



Infosys provides a range of highly automated managed services on the Microsoft 365 platform, including self-service tools and robotic process automation (RPA) for incident resolution. Its Live Enterprise platform connects with Microsoft 365 to create engaging and productive hybrid workplaces for employees.

NTT DATA

NTT DATA is a Japan-based global IT service provider with telecommunications roots. Resources and telecom expertise are significant assets for NTT DATA.

TCS

TCS offers complementary services for Microsoft 365, including consulting, implementation, and fully managed services. It focuses on employee experience with solutions for wellness,

first-line workers, micro learning, and digital nudges to ensure employee engagement and spur adoption.



Wipro has a large market share in the U.S. for its Microsoft 365 services, and a significant pool of dedicated resources. It is pioneering additional productivity tools for the platform, for example, ExACT intelligent assistant for meeting minutes capture and HoloLens solutions for field workers.





"DXC's experience in the enterprise and with communications provide it the know how to be a leader in the Microsoft 365 space."

Peter Crocker

DXC Technology

Overview

DXC Technology is a global software and service provider, combining a broad base of traditional enterprise IT, software and services expertise with leading-edge cloud software and services development. The company was formed in 2017 with the combination of CSC and HPE's Enterprise Services group. DXC has more than 20,000 Microsoft professionals on staff and holds Azure Expert MSP certification. DXC Technology's Microsoft 365 portfolio includes advisory, migration, implementation, integration and management services with strategic consultation.

Strengths

Deep Microsoft involvement: DXC is closely tied with Microsoft and, in turn, with its technology teams behind Microsoft 365 to provide feedback and shape product development to benefit its clients.

Focus on employee experience: DXC is focused on differentiating their offer with a premium employee experience through the UpTime platform that enables rapid access to new features, configurations and capabilities. Given the staggering number of different services available through Microsoft 365, this sort of user-centric solution is paramount.

Modern communications capability:

DXC has enabled a better Teams experience by integrating modern communications and helping customers eliminate their legacy IP PBX voice infrastructures. The company also has tools that help organizations manage governance around Teams and control Teams sprawl.

Caution

After some challenges, DXC have reorganized its delivery strategy to shift resources closer to the customer. While DXC is reinvesting in local delivery, over-aggressive cost-cutting measures from previous years may make it harder to rebuild.





SAP on Azure Services

Who Should Read This

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

In this quadrant report, ISG lays out providers' positioning, while offering services around SAP on Azure, and how they can serve companies in the U.S.

To meet the ever-increasing demands from their businesses, effectively manage organizational workflows and enhance ROI, U.S. enterprises are willing to migrate their SAP applications to Azure cloud. A few notable SAP on Azure challenges faced by enterprises in the U.S. include migration duration, network aspects, security and governance. As SAP is integrated into an enterprise's overall business process, any wrong step during

the migration can lead to operational losses. These enterprises are, thus, seeking service providers with extensive experience in Azure migration and with certified SAP and Microsoft professionals who can offer them effective roadmap for digital transformation.

Enterprises in this region are seeking service providers that can provide them secure infrastructure system and can help them manage significant workloads. Reduced IT costs, security and flexibility are the primary reasons for enterprises in the U.S. planning to migrate their SAP workloads on Microsoft Azure.



Enterprise IT leaders should read this report to understand the relative positioning of SAP on Azure service providers across the U.S., and how these providers' technical capabilities complement enterprises' requirements to succeed with a cloud transition for SAP.

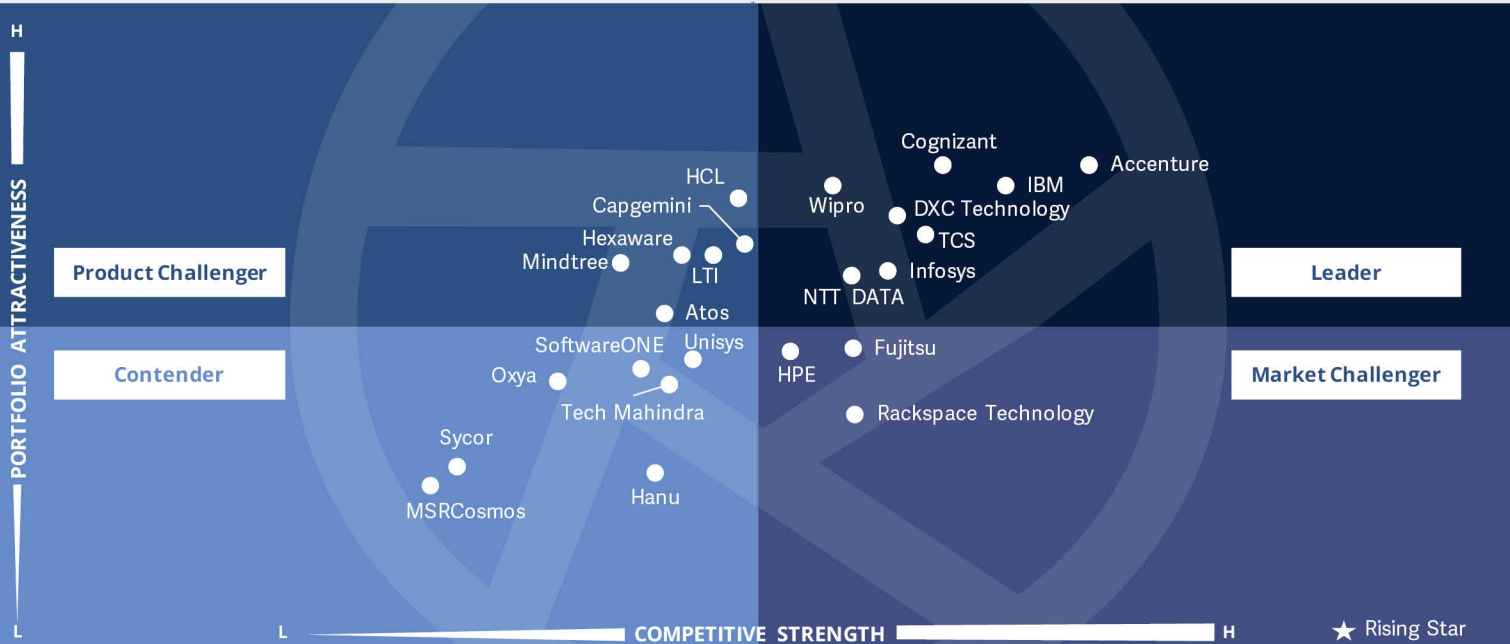


Finance, HR and HCM leaders should read this report to understand the positioning of partners that will influence implementation of the software they interact with on a regular basis as a critical part of their jobs.



Sourcing, procurement and vendor management professionals should read this report to understand the relative positioning of SAP on Azure service providers in the U.S. and understand broader trends in the service ecosystem that may influence decisions about partner selection.





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

Peter Crocker



SAP on Azure Services

Definition

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

The services typically provided by these companies include architecture consulting and requirements analysis for the application landscape. Technical design with support for configuration, deployment, escalation management, support, change and fault management, optimization and reporting are also common offerings. It is a must for providers evaluated in this category both to help their clients to migrate SAP workloads to Azure and to optimize, design and develop new processes and business flows. This must be provided as part of platform management through a combination of the provider's own services, SAP services and Microsoft Azure offerings.

Service providers in this category require both Microsoft and SAP certifications. Providers need to have active and productive partnerships with both technology vendors and be well versed with the evolution of the relevant underlying technology offerings. Consequently, they should be able to articulate how product and platform changes would impact enterprises using this solution — from technical architecture considerations to business impacts.

Eligibility Criteria

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



Observations

From the 313 companies assessed for this study, 24 have qualified for this quadrant, with eight being Leaders.

accenture

Accenture has decades of experience of working on both Microsoft and SAP projects and offers a full suite of implementation and managed services for SAP on Azure. It has migrated and managed large SAP systems for some of the largest and most complex global enterprises.

Cognizant

Cognizant has a Partner Managed Cloud joint offering with SAP. It offers an SAP managed cloud platform, with elements such as consumption-based pricing, one-click SAP provisioning,

metering, and monitoring. It also provides solutions specific to industries such as manufacturing and life sciences.

DXC Technology

DXC Technology has decades of SAP and Microsoft experience. It provides a range of services, including a platform- as-a-service (PaaS) for SAP offering, based on full-stack service agreements.

IBM

IBM has over four decades of SAP experience and an alliance with Microsoft going back 30 years. It offers a cost benefits estimator tool to help clients reckon return on investment from moving SAP applications to Azure.

NTT DATA

NTT DATA has a long history working with Microsoft and brings to market extensive networking expertise to support higher performing services in the cloud.

Infosys

Infosys is increasing its presence in the U.S. by hiring new workers. The company also offers more industry specific solutions to augment its SAP on Azure services.

TCS

TCS has a significant client base for its SAP on Azure offerings in the U.S. and a large and experienced pool of SAP on Azure professionals in the region. It has a comprehensive end-to-end offering for SAP on Azure and has undertaken projects for major U.S.-based clients.



Wipro has a significant market share in the US for its SAP on Azure offerings and a sizable base of related specialists. Its broad spectrum of services for SAP on Azure, stands out because of a raft of security features. Its partnership with Secude Halocore provides an additional layer of protections for its proprietary offerings while extracting confidential information from SAP systems.





“DXC’s long history with enterprise applications makes it a leader in deploying SAP on Azure.”

Peter Crocker

DXC Technology

Overview

DXC is a global IT service provider with \$17.7 billion in revenues serving 70-plus countries around the world. The company was formed in 2017 with the combination of CSC and HPE’s Enterprise Services group. DXC has approximately 720 FTEs supporting its U.S. Application Managed Services business.

Strengths

Legacy enterprise relationships: The combination of CSC and HP Enterprise Services Group into a single firm leverages the long history of enterprise relationships built by the two firms. This enables the firm to help companies deliver high-quality and personalized services that are informed by clients’ existing architectures, challenges and specific needs.

Consumption-based model: DXC provides a range of SAP for Azure offerings. Of particular note is its platform-as-a-service (PaaS) for SAP on Azure offering, which provides SAP services based on full-stack

service level agreements, pre-defined templates and automation tools, as well as capabilities to scale provisioning of SAP resources up or down according to organizational demands.

Experience with SAP and Azure: Its 35 years of experience working with various SAP and Azure configurations puts DXC in a better position to optimize environments to ensure business continuity.

Caution

While DXC seems to have righted the ship after experiencing some missteps in the market, lingering challenges may have adverse effects on deliverables to clients.





Dynamics 365 Services

Who Should Read This

This report is relevant to enterprises across all industries in the U.S. that are evaluating Microsoft Dynamics 365 partners.

In this quadrant report, ISG lays out the current market positioning of Dynamics 365 service providers in the U.S., and how they address the key challenges faced by the enterprises in the region.

Although enterprises in the U.S. have started leveraging Dynamics 365 services, they continue to face challenges related to data migration, selecting the service provider, flexibility and customization. These challenges can have a major impact on their business operations and productivity. Thus, enterprises in this region are seeking service providers with an ability to understand the current

workloads and support them in their digital transformation initiatives as a part of Dynamics 365 implementation.

Most enterprises in the U.S. want to modernize their business processes and are shifting their focus from legacy CRM and ERP deployments to standardized Dynamics 365 CRM and ERP. These enterprises are mainly focusing on enhancing productivity in field services, reducing customer requests handling times and ensuring better utilization of resources. ISG observed that enterprises in the U.S. significantly consider providers' ability to offer specialized and highly skilled resources locally as part of an engagement.



CIOs and senior IT leaders should read this report to understand how service providers can help adopt Microsoft technology. This report also helps them understand the advances in solution with ERP and CRM and how they integrate with other business systems.

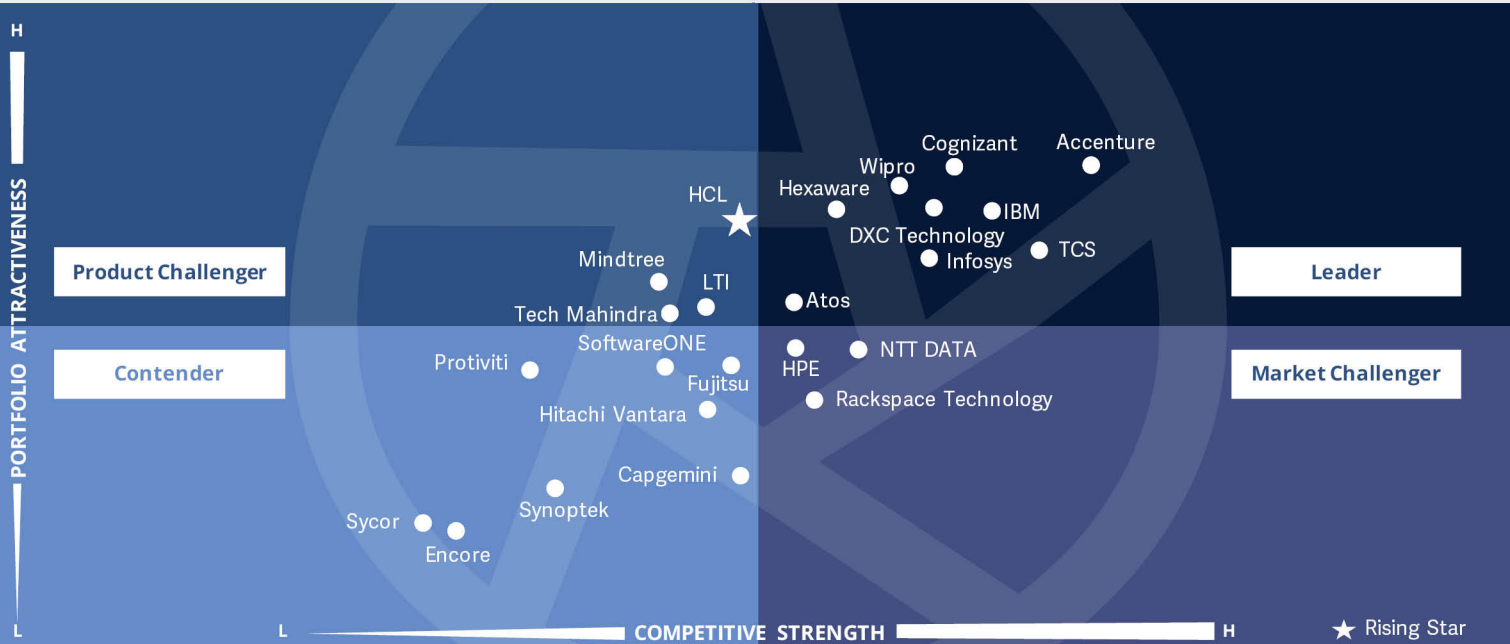


CMOs should read this report to understand how service providers can help adopt Microsoft technology. Marketing leaders and sales leaders leverage CRM functions of Dynamics 365 that directly impact the way their teams perform.



COOs should read this report to understand how service providers can help adopt Microsoft technology.





This quadrant evaluates service providers that assist enterprises with the customization, integration, and operation of the Dynamics 365 platform. Dynamics providers are increasingly branching into **industry solutions**, for example, in **health care, retail, financial services** and **utilities**.

Peter Crocker



Definition

This quadrant evaluates service providers that assist enterprises with the selection, integration, customization and operation of Microsoft's cloud-based Dynamics 365 enterprise resource planning (ERP) and customer relationship management (CRM) software.

These services focus on the digitalization of business processes using ERP and CRM software. In this context, service providers and system integrators should support user companies in the analysis of non-digital processes and the transformation of these processes via solutions from Dynamics 365.

In addition, this study considers topics, including data integration with and transfer from legacy systems. Furthermore, it examines the way providers handle software lifecycle and user support. It also covers areas such as escalation handling,

change management, optimization and reporting. Providers included in this quadrant also demonstrate a strong understanding of how their services combined with the Dynamics 365 solution impact enterprise clients' business.

Eligibility Criteria

1. Scope and depth of the provider's service portfolio regarding the implementation, customization, provisioning and support of Microsoft Dynamics 365, with special consideration for industry specific services and capabilities
2. Number and location of employees who provide Dynamics 365 services
3. Ability to understand the client's workloads regarding the transformation of ERP or CRM
4. Strength of the provider's partnership with Microsoft, measured by the number and category of relevant certifications
5. Support of digital transformation processes in user companies as a part of Dynamics 365 adoption.
6. Variety, applicability, and maturity of pricing and payment models that match the needs of enterprises adopting and using Dynamics 365.
7. 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 Services

Observations

Providers in general were more clustered together in the portfolio attractiveness rating scale. This is primarily due to the maturing of the space and portfolios evolving into a state of greater parity.

TCS improves its position in the leadership quadrant due to leverages its global scale, innovation, and expertise in core Microsoft technology. DXC loses some competitive footing due to missteps in managing localized delivery capability. While these challenges are being addressed, greater caution is warranted from customers in the near term. Cognizant has also lost some competitive capabilities due to less focus on solving specific business problems and talent retention struggles. HCL designated as a Rising Star due to its holistic and strategic approach to cloud services and Capgemini falls out of leadership quadrant due to its lack of focus on the region

Late in 2021, IBM spin-out is managed service business to reduce channel conflict. This should make IBM a much better partner in the Microsoft ecosystems going forward.

From the 313 companies assessed for this study, 23 have qualified for this quadrant with nine being Leaders and one Rising Star

accenture

Accenture's breadth of services and deep partnership with Microsoft mean it is positioned well to aid enterprises with their adoption of Dynamics 365 as part of a broader digital transformation. Accenture (Avanade) won three Microsoft 'Partner of the Year' awards in 2021.

Atos

Atos brings to market a deep expertise in the healthcare payer space and valuable Dynamics 365 extensions.

Cognizant

Cognizant offers a range of customer experience (CX) transformation services using Dynamics 365, including digital marketing and sales and operation. These incorporate a range of next-generation technologies such as AI and machine learning, conversational AI, internet of things (IoT), and augmented reality.

DXC Technology

DXC Technology offers a full spectrum of services across the Dynamics 365 platform and has more than 5,000 clients globally across this space. It also provides a range of industry specific solutions

for banking, manufacturing, retail, smart government, land development and volume home builders.

HCL

HCL offers services for Dynamics 365 through PowerObjects, a leading systems integrator for business applications it acquired in 2015. PowerObjects is notable for its education and support services, helping clients optimise their Dynamics 365 investments. It also offers many add-ons that build on the native capabilities of the Dynamics 365 platform, as well as a range of industry accelerators.

HEXAWARE

Hexaware has invested aggressively in Microsoft services capabilities. This fact makes the company well-positioned to seize Dynamics 365 deals as this growing market matures.



Dynamics 365 Services

IBM

IBM offers Dynamics Value Assessment, a customised series of workshops designed to help clients rethink and optimize their Dynamics 365 CRM platforms. The offering uses design thinking methodologies and is delivered by a team of experienced IBM professionals.



Infosys' rich set of vertical capabilities for Dynamics 365 services mean that it is well-situated to help enterprises across a wide range of industries adopt Microsoft's business applications. The company has also invested significantly in growing its workforce in the U.S.

TCS

TCS offers a wide range of industry specific solutions on the Dynamics 365 platform, catering to the utilities, manufacturing and financial services industries. It has delivered Dynamics-365-based CRM and enterprise resource planning (ERP) projects for an array of companies.



Wipro, offers a comprehensive suite of services for Dynamics 365 in the U.S., including a range of industry and point solutions for banking, utilities, and healthcare. It offers a variety of flexible pricing models, with some outcome-based and gain-sharing elements.





“Deep enterprise software and systems expertise puts DXC in the leaders quadrant for Dynamics 365 services.”

Peter Crocker

DXC Technology

Overview

DXC Technology is a global software and service provider, combining a broad base of traditional enterprise IT, software and services expertise with leading-edge cloud software and services development. The company was formed in 2017 with the combination of CSC and HPE’s Enterprise Services group. DXC has more than 20,000 Microsoft professionals on staff and holds Azure Expert MSP certification. Its DXC Eclipse subsidiary, which focuses on business applications, has more than 4,000 clients worldwide with Dynamics expertise and 19 years of experience working with Microsoft’s business application suite.

Strengths

Scale: DXC is the second largest Independent Dynamics partner GSI in the world.

Robust Dynamics talent base: DXC has invested heavily in providing services for Dynamics, even before Microsoft’s most recent effort to center its business applications as a core part of its overall technology platform. DXC Eclipse, the company’s arm for Dynamics consulting and integration, employs a host of longtime experts who can help both enterprises migrate to Microsoft’s business applications from legacy installs as well as those making a greenfield move to Dynamics 365.

Structured data transition process:

Due to DXC’s significant investment in Dynamics technology and talent, the company has a structured transformation service that can ease the transition of data from legacy systems to Dynamics 365 and then help maximize the potential benefit from that migration.

Deep vertical expertise: The combination of DXC’s parents CSC and HPE provide the company a long history of serving enterprises around the world. This combined with its Dynamics capabilities, provides the DXC with a strong base of industry-specific knowledge and capabilities to accelerate adoption of Microsoft’s business applications.

Caution

The company’s Microsoft capabilities are not a concern; however, turbulence in the market around DXC’s overall business circumstances amid a difficult turnaround may provide a distraction to service delivery and quality, especially in the short to medium term. These challenges are reflected in underperforming customer service scores.





Power Platform Services

Who Should Read This

This report is relevant to enterprises across all industries in the U.S. that are evaluating Microsoft Power Platform service 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 challenges faced by enterprises in the region.

The COVID-19 pandemic has pushed enterprises globally and in the U.S. to increase their efforts to drive innovation and collaboration. Microsoft Power Platform services are among those structured offerings that help enterprises build end-to-end business solutions, resulting in augmented digital transformation initiatives. Enterprises in this region are, thus, focusing more on

better understanding Power Platform technologies and how well they can connect with enterprise ecosystems.

Enterprises in the U.S. are already leveraging Power Platform to accelerate innovation with low-code/no-code applications and are looking forward to driving sustainable impact from other Power Platform products, including Power BI, Power Automate and Power Virtual Assistants. Enterprises in this region are mainly emphasizing on robust governance and security and are selecting service providers with automation, analytics experts and professionals with deep knowledge of Power BI.



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 capabilities from Power Platform into their offerings.

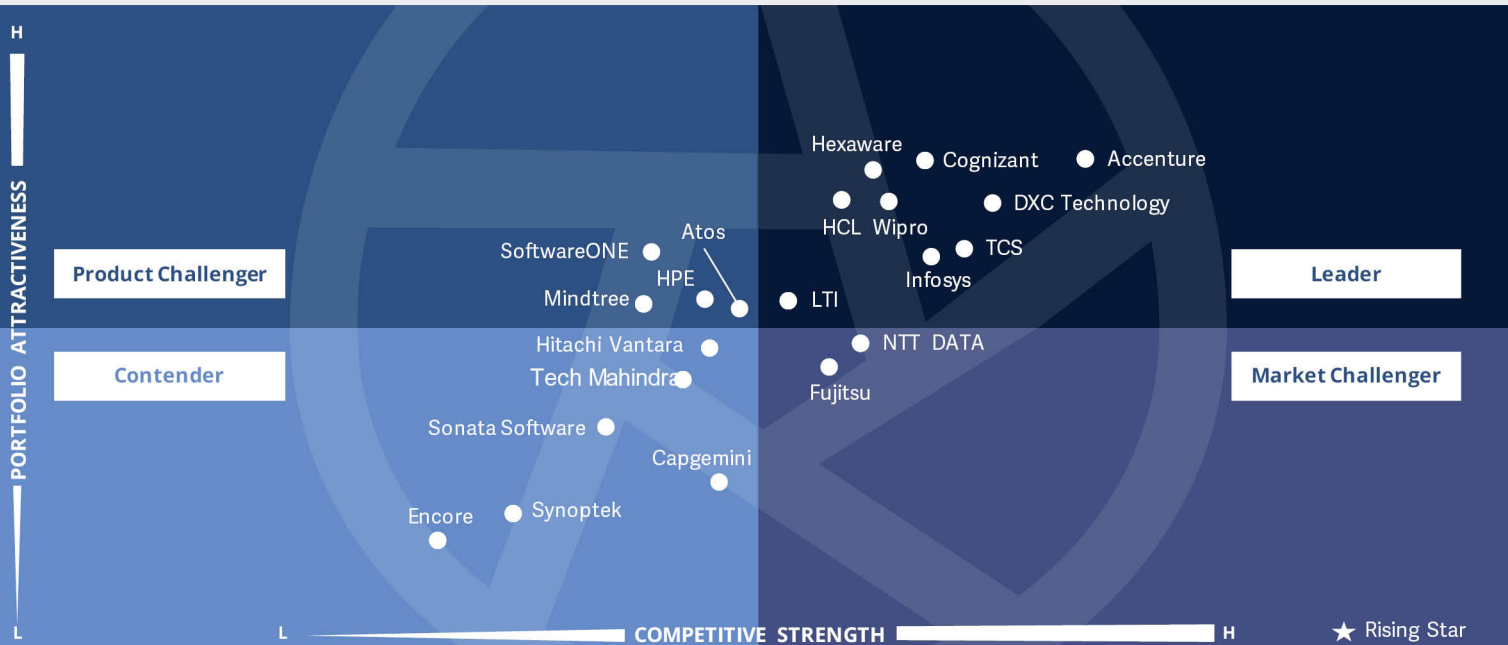


Workplace technology leaders should read this report to understand how service providers can help adopt Microsoft low-code/no-code and Virtual Assistant technologies and evaluate the potential partners available for effective implementation and integration of Power Platform.



Sourcing, procurement and vendor management professionals should read this report to understand the relative positioning of Power Platform service providers in the U.S. and understand broader trends in the service ecosystem that may influence decisions about partner selection.





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

Peter Crocker



Definition

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

The providers in this quadrant understand a client's objectives, demonstrate their data literacy and skills to provide the

necessary guidance to a client, and take a holistic approach, with an eye on details, for the realization of their objectives.

Eligibility Criteria

1. Services that support enterprise 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 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 use of platform solutions
5. Number and location of employees with relevant certifications for Power Platform use



Power Platform Services

Observations

From the 313 companies assessed for this study, 20 have qualified for this quadrant with nine being Leaders.

accenture

Accenture has a global advisory practice for Power Platform, with a depth of talent in analytics and automation and a strong focus on governance tools and safeguards for citizen developer initiatives.

Cognizant

Cognizant has considerable expertise and experience in implementing client solutions using Power Platform. It also offers a set of governance and solutions accelerators to help organizations speed up their citizen developer or low-code initiatives in a safe and effective manner.

DXC Technology

DXC Technology is helping customers establish their centers of excellence for low-code activities and offering an array of Data Visualization and Analytics tools using Power Platform.

HCL

HCL has a significant base of Power Platform professionals in the US. It offers education and training to help clients co-develop apps, as well as a power platform Development Factory.

HEXAWARE

Hexaware has invested strongly in Microsoft services capabilities. This fact makes the company is well-positioned to seize Power Platform deals as this market gains traction.

Infosys

Infosys has a large client base for its Power Platform services in the U.S., offering a wide spectrum of services with a particular focus on strong security and governance features.

LTI Let's Solve

LTI is taking a platform approach and is providing prebuilt apps on the Azure marketplace to add value to Power Platform deployments.

TCS

TCS has a dedicated Power Platform practice, with a comprehensive range of services and solution accelerators.



Wipro offers a series of carefully curated industry solutions on Power Platform, including banking and insurance, manufacturing, high tech, and energy and utilities.





Appendix

The ISG Provider Lens™ 2022 – Microsoft Ecosystem Partners research study 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 January 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 & Editor Biographies

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.

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Sonam Chawla
Senior Research Analyst

Sonam Chawla is a senior analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on Future of Work - Services and Solutions. Her area of expertise is Conversational AI and Digital Workplace. During her tenure, she has supported research authors and authored enterprise context and the global summary report with 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](#).

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***ISG**

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