Microsoft Cloud Ecosystem

Managed Services for Azure

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

Customized report courtesy of:

DXC TECHNOLOGY

QUADRANT REPORT | MARCH 2023 | U.S.

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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,

Executive Summary

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

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

Provider Positioning

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

Provider Positioning

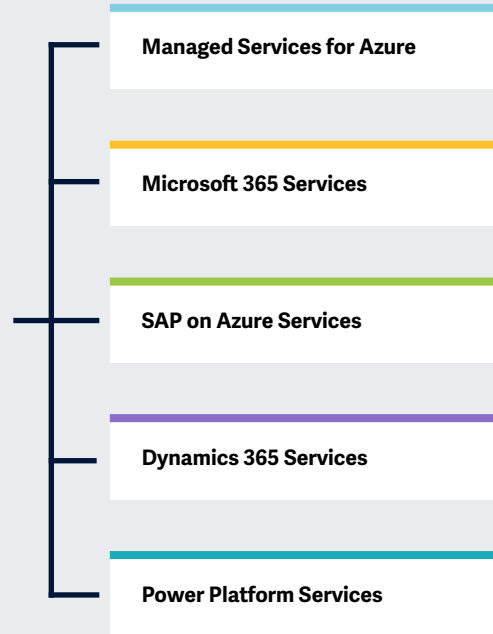|	Managed Services for Azure	Microsoft 365 Services	SAP on Azure Services	Dynamics 365 Services	Power Platform Services
LTIMindtree	Leader	Product Challenger	Leader	Rising Star ★	Leader
MSRCosmos	Not In	Not In	Contender	Not In	Not In
NTT DATA	Leader	Leader	Leader	Market Challenger	Market Challenger
Oxya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

Provider Positioning

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	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

- **Managed Services for Azure**
- **Microsoft 365 Services**
- **SAP on Azure Services**
- **Dynamics 365 Services**
- **Power Platform Services**

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.

★ **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.

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.

Managed Services for Azure

Who Should Read This Section

This report is relevant to enterprises across all industries in the U.S. for evaluating Microsoft Azure MSPs.

In this quadrant report, ISG highlights the current market positioning of Azure MSPs in the U.S. and how they address the key enterprise challenges in the region.

As per ISG Index data, hyperscalers globally are witnessing slower growth trajectories for the first time ever. This could be because enterprises in the U.S. have already realized the immediate benefits associated with cloud solutions and the transformation that Azure can bring. They are now focusing on optimizing their cloud costs and Azure investments. Therefore, enterprises in the region are collaborating with MSPs with deep Microsoft expertise and innovative cloud offerings to improve cost savings and efficiency during their Azure adoption journeys.

Enterprises in the U.S. are also looking beyond the traditional lift-and-shift approach due to its drawbacks, such as lack of scalability, unexpected costs and security concerns. They are focusing on undertaking an application-centric approach and are looking for Azure MSPs with strong security policies and governance protocols to help them manage effective cloud strategies and align business goals with Microsoft's cloud products. Enterprises prefer Gold Microsoft business partners that offer comprehensive cloud services and have a strong presence in the Azure marketplace.

Technology professionals should read this report to understand partners' relative positioning and capabilities, which will help them effectively consume services from Microsoft's cloud.

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

Digital professionals should read this report to understand how MSPs' Azure offerings can impact an enterprise's ongoing transformation initiatives while realizing the benefits of cloud migration.
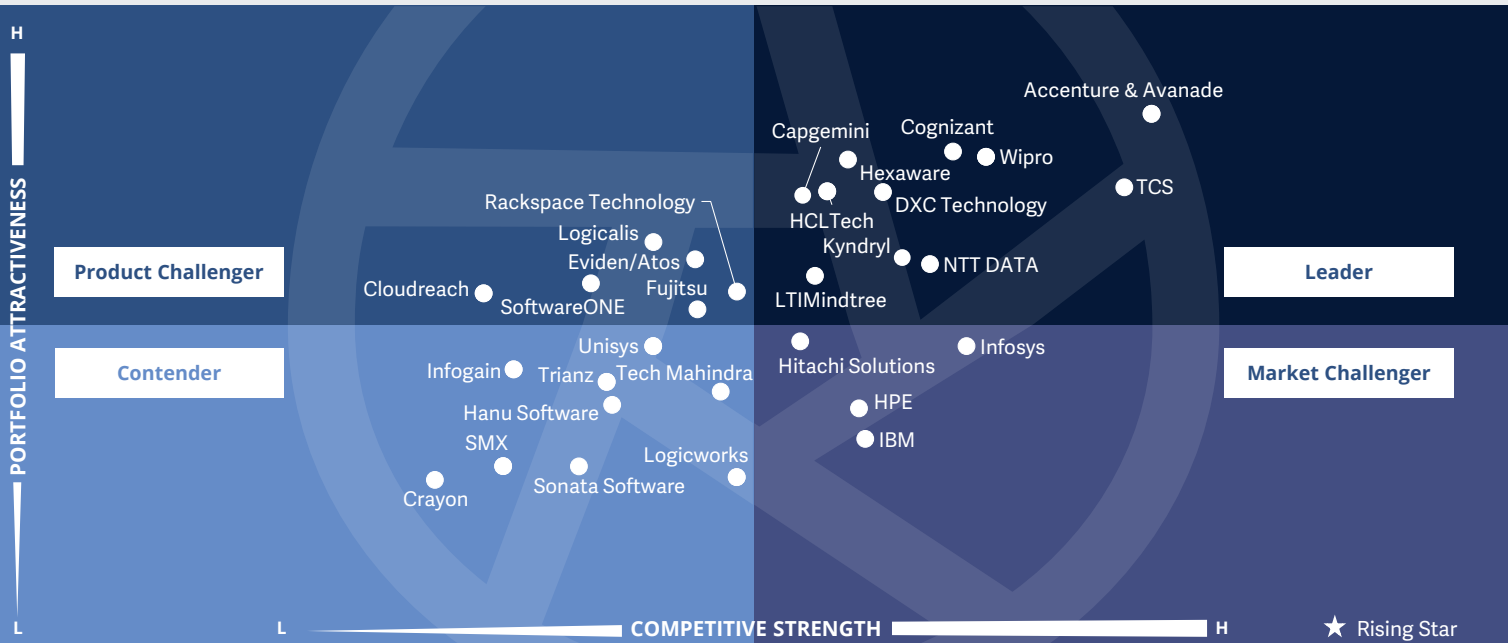
Cybersecurity professionals should read this report to learn how MSPs address significant compliance and security challenges while maintaining a seamless experience for enterprises.

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ISG Provider Lens™

Source: ISG RESEARCH

Microsoft Cloud Ecosystem Managed Services for Azure

U.S. 2023

PORTFOLIO ATTRACTIVENESS (H / L)

COMPETITIVE STRENGTH (L / H)

- Product Challenger
- Contender
- Leader
- Market Challenger

Accenture & Avanade
Capgemini
Cognizant
Wipro
Hexaware
TCS
DXC Technology
Rackspace Technology
HCLTech
Logicalis
Kyndryl
Eviden/Atos
NTT DATA
Cloudreach
Fujitsu
SoftwareONE
LTIMindtree
Unisys
Infosys
Infogain
Hitachi Solutions
Trianz
Tech Mahindra
HPE
Hanu Software
IBM
SMX
Logicworks
Crayon
Sonata Software

★ Rising Star

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 data accessibility.

Peter Crocker

Managed Services for Azure

Definition

This quadrant assesses managed public cloud service providers that offer professional and managed services that augment Azure's built-in capabilities, including infrastructure as a service (IaaS) and platform as a service (PaaS). These services include provisioning, real-time and predictive analysis, and the monitoring and operational management of a client's public cloud and multicloud environments. The aim is to maximize the performance of enterprise cloud workloads, reduce costs and ensure compliance and security.

Providers in this quadrant are considered based on their capabilities in the respective regions by both services and delivery, as well as sales, which might be supported by nearshore and offshore delivery.

Going well beyond the lift and shift of single workloads, service providers offer comprehensive tools, services and solutions to support clients' business-critical demands using the Azure cloud.

The services provided typically include:

- Professional services for managing and monitoring CPU, memory, databases and operating systems, either independently or as microservices (virtual machine or container services)
- Update and patching services for operating systems, middleware and applications
- Service portal for cost management (chargeback and showback), identity management and IT service management
- Governance and compliance management
- Supporting services such as incident management, configuration, security services and automation setup
- Services and solutions developed atop the Azure cloud to help clients meet their net-zero goals and other environmental, social and governance (ESG) targets

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 and cloud-native** and **legacy system integration**

3. Experience in implementing both **Agile and DevOps**, and in integrating with enterprise clients' existing processes

4. Experience in **application programming interface (API) automation and cloud analytics**

5. Well-developed **security practices and capabilities**

6. Strength of the provider's **partnership** with Microsoft, measured by the number and category of relevant **certifications**, duration of relationship with Microsoft and evidence of **strategic cooperation** between the provider and Microsoft (around Azure)

Observations

In 2022, the Microsoft ecosystem experienced a number of reorganizations as providers repositioned their businesses for the post-covid world. As the market shifts, companies that fail to adapt run the risk of lagging behind. This was one of the key reasons for excluding Rackspace Technology from the Leaders' quadrant. As a pureplay, the company performed well in the Managed Services for Azure market, but this model became less competitive and exerted pressure on the company to deliver on other aspects.

The spinoff of Kyndryl from IBM also had a large impact on the quadrant this year. While it is unclear exactly which clients and services remain part of IBM, Kyndryl has successfully established itself as a Leader. IBM moved to the Market Challenger position because of its shift in focus to its product business.

The merger of LTI with Mindtree enabled the new company to enter the Leaders quadrant, a feat they were not able to achieve as independent companies. Another change in 2022 was the rebranding of HCL to HCLTech.

From the 175 companies assessed for this study, 30 have qualified for this quadrant with 11 being Leaders.

accenture

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

Capgemini

Capgemini is rapidly growing their ACR as they regain momentum in the US Azrue Managed Services market. A focus on ESG, end-to-end capabilities and automation puts the company in the leaders quadrant.

cognizant

Cognizant's focus on cloud-native technology and business consulting within its Microsoft Business Unit positions it as a Leader.

DXC TECHNOLOGY

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

HCLTech

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

HEXAWARE

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

Kyndryl

Kyndryl, after its spinoff from IBM, has emerged with extensive experience in working with enterprises and Azure. It now has increased flexibility in the products that it presents to clients.

LTIMindtree

LTIMindtree is well positioned in the market owing to the merger of two leading GSIs with complementary strengths, scale and resources, combined with innovation and engineering.

NTT DATA

NTT DATA's unique federated approach to delivering services makes it a Leader in the Managed Services for Azure quadrant.

tcs TATA CONSULTANCY SERVICES

TCS' R&D partnership with Microsoft is robust and a significant competitive differentiator.

wipro

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

DXC Technology

"DXC Technology is redefining its relationship with Microsoft to ensure the two companies deliver the greatest value to customers."

Peter Crocker

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's Azure MSP business works with 81 clients across the U.S. Worldwide, DXC Technologies and has over 1,000 dedicated employees to its Azure managed service practice, of which 20 percent are in the Americas. DXC has over 24,000 Microsoft certifications.

Strengths

Industry-specific focus: While DXC operates in several industries and markets, it focuses its attention and innovation on three verticals: retail and consumer packaged goods (CPG); manufacturing and finance. The company is also focusing on data and integration, offering to meet the needs of these sectors and aligning with Microsoft's industry clouds in these verticals. It is working with Microsoft to launch data and AI accelerators based on Azure. DXC's industry-specific focus can position the company better in these market segments.

End-to-end services: DXC has launched its Outsourcer Channel Agreement, enabling it to provide end-to-end services and manage workloads on Azure through a unique economic model. These new indirect relationships reduce channel conflict with Microsoft. It also offers customers better value thought Azure bulk pricing from Microsoft and greater accountability from DXC.

Flexibility in service delivery: DXC provides its clients high flexibility around service delivery to ensure value for money. The right combination of services or a balance of nearshore and offshore support helps clients derive more value from their investments.

Strong Microsoft relationship: DXC's cloud engineering teams constantly remain connected with their counterparts on the Microsoft Azure team, allowing the company to provide feedback and shape product development to benefit its 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

Author & Editor Biographies

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.

About Our Company & Research

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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