

# Microsoft Cloud Ecosystem

## SAP on Azure Services

A study to offer potential customers the basis for  
decision-making regarding positioning and go-to-market

Customized report courtesy of:

**DXC** TECHNOLOGY

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**The Microsoft Cloud Ecosystem in Australia is characterised by both changes and opportunities.**

The ecosystem of Microsoft-certified service providers continues to evolve in Australia and globally, in tandem with changes in the Microsoft product sets across Microsoft 365 Services Managed Services for Azure, SAP on Azure, Dynamic 365, and the Power Platform.

Enterprises are accelerating investments in digital transformation for rapid, measurable results. Large IT consulting practices are witnessing an industry shift from IT-centric to customer-centric approaches and are increasingly focussing on improving end-user experience to optimise business outcomes. Data-driven, industry insights are helping to personalise end-user experience. Concurrently, the Australian business sector and the Australian government are accelerating cloud implementations. Organisations are looking to

leverage the potential of Microsoft's security capabilities within the Microsoft 365 suite of services.

Microsoft is responding to organisations' increasing focus on EX through Viva and is continuing to innovate in this area. At the same time, an increasing number of large consulting firms are noting that customers are keen on tapping into their data to enhance workplace experiences.

The Microsoft ecosystem is helping to empower employees to work from anywhere, enabling connectedness in the new hybrid working model. The growing trend of remote work and complex requirements of organisations wanting to collaborate internally and with clients is driving the widespread use of Microsoft's Teams and Viva platforms.

The global cloud market is becoming increasingly competitive as global MSPs are using high levels of automation to squeeze margin gains. In this scenario, investments must be increased to remain competitive. The Australian market is experiencing increasing competition from local providers, with many

Key Microsoft  
service providers in  
**Australia are global,**  
but **able local**  
**names also exist.**



## Executive Summary

beginning to challenge their larger, global counterparts. This trend is expected to only gain momentum over the next five years, with competition intensifying further.

Microsoft continues to evolve its AI development and implementation strategy across Azure, with growing interest in its use to augment human productivity. This is beginning to result in some level of differentiation of Azure implementations offered by MSPs and will result in an acceleration in the use of AI in Microsoft Azure platforms over the next few years. In this context, the use of intelligent, conversational AI to augment human abilities in various tasks is predicted to grow strongly over the next five years.

Customer expectations and demands with regards to the broader IoT landscape and requirements for advanced data analytics continue to grow rapidly in Australia as in the rest of the world. Over the next few years, Australian MSPs need to increasingly invest in AI-related capabilities and training to retain high levels of Microsoft Azure certifications and foster related partnerships.

The SAP on Azure market is highly specialised, with providers requiring specific skills. Australian customers are demanding strong knowledge and relevant certifications from their cloud partners. Although Microsoft Azure entered the cloud space three years after AWS, Microsoft has been able to leverage its brand recognition and strong partnership with SAP to establish a strong foothold.

Concurrently, there is now much focus on app-driven modernisation of the cloud. It is taking centre stage amongst Australian Microsoft Azure implementations as organisations embark on the next wave of cloud. This is making it a challenge for cloud service providers to realign their offerings. It requires an amalgamation of IP and fit-for-purpose tools to address issues related to legacy systems. At the same time, the traditional cloud managed services model too is facing an increasing number of challenges. The market is becoming highly competitive as global providers are using high levels of automation to save their margins and capture market share, which requires continuous investments to remain competitive.

Over the next 1-2 years, a range of new value-adds is expected to enter the Australian Dynamics 365 market in areas such as cloud migration, micro-verticalized Dynamics solutions, customer analytics and insights offerings, and the PowerApps factory. MSPs are noting increasing opportunities around some traditional Dynamics 365 modules that are evolving with new technologies such as IoT and remote assist around field service, project operations, dynamic marketing, and omnichannel offerings in customer service. COVID-19 saw the rapid scaling of some Azure projects due to the trend of remote working. It also accelerated the need for Australian clients to become more agile and focus on reducing costs, which has driven a greater adoption of a few cloud applications and seen more workloads move to the public clouds.

However, the challenge of an inadequate number of cloud-certified people and expertise in Australia persists related to certain technologies such as cyber security, IoT, and AI as client demands continue to rise. While it is still early days, Australian clients

will increasingly focus on realigning legacy applications to leverage data, insights, ML, and AI. The growing proliferation of digital touchpoints and unprecedented growth in technologies related to consumer segments such as wearables will provide Australian MSPs with strong opportunities over the next few years.

Microsoft 365 services involve the design and application of processes to support personalised employee experience, workforce productivity, collaboration, and innovation. It comprises traditional Microsoft products such as Office, Excel, PowerPoint, and SharePoint and newer collaboration tools such as Teams, OneDrive, Power Automate, and Power BI, in addition to enterprise mobility and security and Azure Cloud for data storage and backup.

Many consulting firms are seeing a huge demand for security implementation services for Microsoft 365. This trend is providing a significant opportunity for the adoption of Microsoft 365 E5 with its enhanced security features. Clients are looking at maximising



## Executive Summary

the use of their E5 license for advanced threat protection to displace legacy voice systems and migrate to Teams calls.

Clients are moving away from customised implementations, which are fragile and expensive to implement and maintain. With Microsoft offering starter templates and blueprints, consulting firms are able to implement complex solutions in a fraction of time and cost and move clients onto Microsoft 365 services more quickly than before.

Following the reshaping of Australian businesses because of COVID-19, many companies now have hybrid workplaces, with their workforce spread across office and work setups at home. Thus, collaboration solutions are needed to bridge the two environments. This requires revisiting the way meetings, information sharing, and application integration take place and ensuring that the integration of these aspects is done seamlessly. New virtual and virtual/physical hybrid teams and processes need agile technology deployments to function, and Modern Workplace 365 addresses these requirements by stitching together

the Microsoft 365 tools with enterprise-wide applications and services to support the new post-COVID-19 normal.

The SAP on Azure market is highly competitive, with providers requiring specialised skills/knowledge to deliver high-quality services. Australian customers are demanding that their cloud partners attest this knowledge with related certifications, especially with the complex requirements of SAP on Azure.

COVID-19 and ransomware attacks have resulted in accelerated cloud adoption amongst some Australian organisations. Many are now willing to migrate their business-critical proprietary systems to the cloud, providing added opportunities for Australia-based Azure providers.

The market for SAP on Azure services in Australia continues to grow as more Australian clients look to migrate from their on-premises server environment to the cloud. Many have attained a relatively mature cloud adoption status due to the high use of cloud-based technologies.

Many Australian companies have already migrated low to medium-complex applications to the cloud and are now positioned to migrate the more complex ones such as SAP to the public cloud. At the same time, some Australian organisations are yet hesitant to migrate these high-impact critical business applications. Cloud providers in Australia need to continue to educate the market on how migrations of large complex workloads such as SAP on Azure cloud can be done with relative ease and involve low risk.

SAP has aggressively moved to embrace the cloud, driving the SAP on Azure market both in Australia and the rest of the world. It has undertaken the restructuring of its core business model, partnerships, development and support, much like other large-scale enterprise business management software providers such as Oracle and IBM. The rate of SAP on Azure implementations has recently accelerated as SAP has globally announced the end-of-life for legacy, on-premises development and support. Microsoft's Dynamics 365 platform continues to evolve at a very rapid pace. The market has

recently seen the introduction of new products and significant shifts in existing applications as the platform continues to evolve. MSPs are responding to the trend of an amalgamation of technologies across ERP, CRM, dataverse, and digital services on the periphery of the Dynamics 365 product set as it evolves to increasingly become modular and seamlessly connected.

Customer experience, and the need to personalise it, is a primary driver for Dynamics 365 initiatives as smart businesses seek to offer customers a variety of ways to connect (omnichannel CX), to capture customer data at every touchpoint, and leverage the same using AI and ML. Dynamics 365 service providers in Australia are now integrating technologies such as AI-powered chatbots and RPA to continually enhance CX.

The key providers in the Dynamic 365 landscape in Australia are global MSPs, however, more Australia-based providers are now emerging, and some are gaining global recognition. MSPs in Australia will need to innovate and develop custom solutions that will offer agile



and flexible systems that empower companies to optimise resources with IoT integration and result in zero downtime in the back-office space. The addition of the Power Platform and customer insights requires staff to have new and different skill sets beyond traditional Dynamics 365 offerings.

Clients now are looking for secure networks that primarily support remote employees to work on Teams, backed up by collaboration tools and business applications that help deliver exceptional CX.

As the Australian market moves into a true hybrid work-from-anywhere environment, the need for access to a safe, secure cloud environment, coupled with an increased demand for automation of applications, has led to growth across all five service offerings for Microsoft covered in this study.




## Provider Positioning

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	Managed Services for Azure	Microsoft 365 Services	SAP on Azure Services	Dynamics 365 Services	Power Platform Services
AC3	Leader	Not In	Not In	Not In	Not In
Accenture & Avanade	Leader	Leader	Leader	Leader	Leader
Barhead Solutions	Not In	Not In	Not In	Leader	Leader
Capgemini	Leader	Leader	Product Challenger	Leader	Leader
Cognizant	Product Challenger	Product Challenger	Contender	Contender	Contender
Data#3	Product Challenger	Product Challenger	Not In	Not In	Not In
Datacom	Product Challenger	Product Challenger	Not In	Product Challenger	Product Challenger
Dicker Data	Product Challenger	Not In	Not In	Not In	Not In
DXC Technology	Leader	Leader	Leader	Leader	Leader
Engage Squared	Not In	Not In	Not In	Not In	Product Challenger
Eviden/Atos	Contender	Contender	Contender	Not In	Not In



 Provider Positioning

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	Managed Services for Azure	Microsoft 365 Services	SAP on Azure Services	Dynamics 365 Services	Power Platform Services
EY	Not In	Not In	Not In	Contender	Contender
FiveP Australia	Not In	Contender	Not In	Not In	Not In
Fujitsu	Leader	Leader	Product Challenger	Product Challenger	Product Challenger
Fusion5	Not In	Not In	Not In	Contender	Contender
Generation-E	Not In	Contender	Not In	Not In	Not In
HCLTech	Rising Star ★	Leader	Leader	Leader	Product Challenger
Hexaware	Leader	Leader	Not In	Product Challenger	Contender
Hitachi Vantara	Not In	Not In	Not In	Contender	Not In
IBM	Market Challenger	Market Challenger	Contender	Market Challenger	Market Challenger
Infosys	Product Challenger	Product Challenger	Product Challenger	Leader	Product Challenger






## Provider Positioning

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	Managed Services for Azure	Microsoft 365 Services	SAP on Azure Services	Dynamics 365 Services	Power Platform Services
Insight	Market Challenger	Not In	Not In	Not In	Not In
Kyndryl	Leader	Leader	Product Challenger	Leader	Leader
LAB3	Product Challenger	Not In	Not In	Not In	Not In
Logicalis Australia	Leader	Leader	Contender	Not In	Not In
LTIMindtree	Contender	Product Challenger	Market Challenger	Rising Star ★	Contender
Macquarie Cloud Services	Product Challenger	Not In	Not In	Not In	Not In
NTT DATA	Market Challenger	Market Challenger	Contender	Market Challenger	Market Challenger
Publicis Sapient	Product Challenger	Contender	Not In	Contender	Contender
PwC	Contender	Not In	Not In	Leader	Leader
Rackspace Technology	Not In	Not In	Market Challenger	Not In	Not In



 Provider Positioning

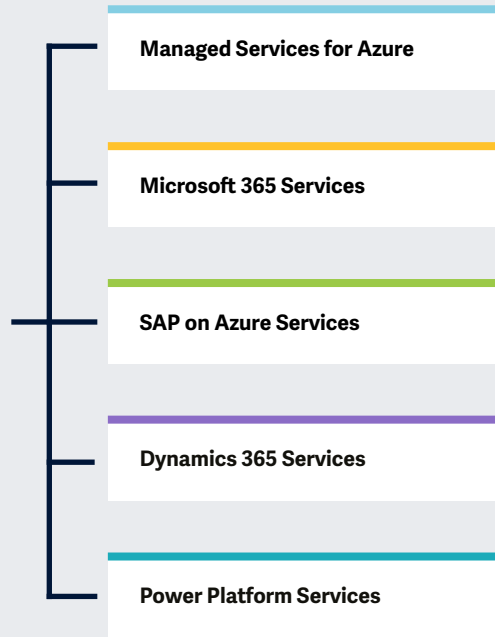
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	Managed Services for Azure	Microsoft 365 Services	SAP on Azure Services	Dynamics 365 Services	Power Platform Services
Rhipe	Not In	Not In	Product Challenger	Not In	Not In
SoftwareONE	Contender	Contender	Rising Star ★	Contender	Not In
Sonata Software	Not In	Not In	Not In	Product Challenger	Not In
TCS	Leader	Leader	Leader	Leader	Leader
Tech Mahindra	Product Challenger	Product Challenger	Leader	Product Challenger	Contender
Telstra	Leader	Leader	Market Challenger	Not In	Leader
Unisys	Leader	Leader	Not In	Not In	Not In
Velrada	Not In	Not In	Not In	Leader	Leader
Veritec	Not In	Not In	Product Challenger	Product Challenger	Not In
Wipro	Leader	Leader	Leader	Leader	Leader



This study focuses on what ISG perceives as most critical in 2023 for **Microsoft Cloud Ecosystem**.

Simplified Illustration Source: ISG 2023



**Definition**

Microsoft is one of the most established technology providers in the world. It has a network of thousands of partners, which augments its capabilities to aid enterprises in adopting its technologies. This network has been through a series of shifts in the past five years, as Microsoft changed itself as part of a massive cloud transformation. In the same period, digital transformation has become a priority in the enterprise technology landscape, requiring a new generation of software and services from Microsoft and its partners.

To address these needs, Microsoft has honed its focus on three core areas: the Azure cloud platform; the Microsoft 365 suite of productivity experiences, which includes Windows 10 and 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 by 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 focussed 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 will only focus on the top competitors, both global firms and local providers, for each of the quadrants studied by region.



### Scope of the Report

In this ISG Provider Lens™ quadrant study, ISG includes the following five quadrants: Managed Services for Azure; Microsoft 365 Services; SAP on Azure Services; 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 ICT 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 \$20 million and \$999 million with central headquarters in the respective country, usually privately owned.

- **Large Accounts:** Multinational companies with 5,000 or more employees or revenue above \$1 billion, with activities worldwide and globally distributed decision-making structures.

**Segmentation into Midmarket and Large accounts was not conducted for Australia** due to the smaller scale of the market.

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.

**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.

**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.

**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.





# SAP on Azure Services

### Who Should Read This Section

This quadrant report is relevant to enterprises in Australia that are evaluating providers of SAP on Azure services. This quadrant highlights the current market positioning of these providers and addresses key challenges enterprises in this region face.

In the competitive SAP on Azure integration landscape, MSPs are establishing dedicated SAP on Azure CoE teams that specialise in handling SAP and Microsoft Cloud solutions and clients' end-to-end migration needs.

Consequently, enterprises are presented with innovative migration models for SAP on cloud, for partial to full conversion, and the ability to select rollout by component, environment or region.

Enterprises look to MSPs to simplify their SAP transformation journeys, without compromising on endpoint protection. To ensure this, security tools, be it a third-party state-of-the-art protection tool or Microsoft Defender, are implemented on each workload.



**Technology professionals** should read this report to understand the relative positioning of SAP on Azure service providers and comprehend how their technical capabilities match with enterprise needs.

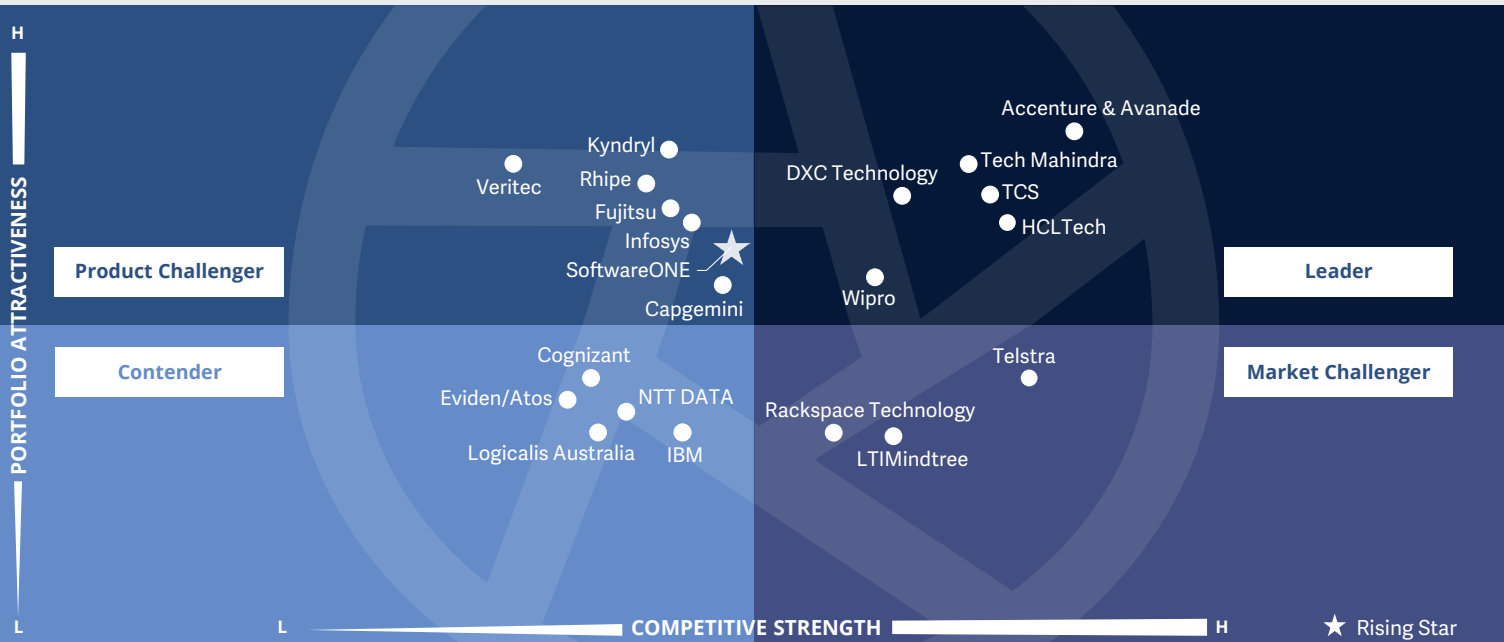


**Operational professionals** such as in finance and HCM, should read this report to understand the positioning of partners that will support the implementation of software critical for their regular work.



**Procurement professionals** can learn the relative positioning of SAP on Azure service providers and the broader trends in the service ecosystem that may influence partner selection.





This quadrant evaluates providers offering support for adopting, managing, and using **Microsoft's dedicated SAP on Azure suite**. The providers help **clients migrate SAP workloads to Azure** to optimise, design, and develop new business flows.

Craig Baty





### 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 an analysis of requirements for the application landscape and technical design with support for configuration, deployment, escalation management, change and fault management, support, optimization and reporting. It is a must for providers evaluated in this category to help their clients migrate SAP workloads to Azure and to optimise, design and develop new processes and business flows. This must be provided as a part of platform management through a combination of the provider's own services, SAP services and Microsoft Azure services.

Running SAP on Azure is based on a holistic mindset of a provider that must be able to support its clients along the whole journey and have the resources to deliver. Since SAP has committed solution support till 2040 and

beyond, providers considered in this quadrant should provide a clear roadmap encompassing the next two decades.

Service providers in this category require both Microsoft and SAP certifications and need to have active and productive partnerships with both companies. They must also be well-versed in how the relevant underlying technology offerings are evolving. 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 the service portfolio with regard to the **migration of SAP workloads to SAP on Azure**, as well as SAP application and services implementation customization, provisioning and support
2. Ability and willingness to **support hybrid cloud** and hybrid provider environments
3. Strength of the provider's **partnerships with SAP and Microsoft**, measured by the number and category of **relevant certifications, duration of relationship with both SAP and Microsoft**, and evidence of strategic cooperation between the provider and Microsoft around SAP on Azure
4. Support for **multiple pricing models**, including "pay as you go"
5. Robustness of the provider's process for implementation, **including the use of Agile and DevOps methodologies**, as well as **relevant automation for service delivery** and quality



## SAP on Azure Services

### Observations

The SAP on Azure market is highly competitive, with providers requiring specialised skills to deliver high-quality services. Australian clients are demanding strong knowledge and certifications from their cloud partners, especially in the segment of SAP on Azure with its high complexity requirements.

COVID-19 and ransomware attacks have accelerated cloud adoption in local organisations. Many are now willing to migrate their business-critical proprietary systems to the cloud, providing added opportunities for Australia-based Azure providers.

The SAP on Azure services market in Australia continues to grow as an increasing number of Australian customers look to migrate from their on-premises server environment to the cloud. Many Australian clients have attained a relatively mature cloud adoption status due to the high adoption of cloud-based technologies in the region. However, some continue to be hesitant to migrate high-impact critical business applications such as SAP to the cloud.

Some significant changes took place in the market in 2022, and these are reflected in the quadrant. Of particular note is the successful spin off of Kyndryl from IBM; the former now appears in a similar (but slightly lower) position compared with IBM's position last year. IBM has, as a result, moved to the Market Challenger position. SoftwareONE has been designated as a Rising Star in this quadrant based on ISG's assessment of its performance potential in the next 12 months and reinforced by the recognition received from Microsoft for the APAC. Tech Mahindra also features in this year's study as a Leader.

From the 175 companies assessed for this study, 22 have qualified for this quadrant, with six being Leaders and one a Rising Star.

### accenture

**Accenture & Avanade** is a leading provider of innovative digital and cloud services, business solutions and design-led experiences in the Microsoft ecosystem. Avanade has obtained the most Microsoft certifications, including all 18 Gold-level Microsoft competencies.

### DXC TECHNOLOGY

**DXC Technology** provides a full range of services, including consulting, advisory, transformation, integration, and operational management in Australia. It offers a broad range of SAP on Azure services and has a strong heritage of SAP implementations.

### HCLTech

**HCLTech** is an Indian multinational IT services and consulting technology company that has had a strong presence in Australia for more than 20 years. It has deep SAP expertise and has the distinction of successfully completing the world's first SAP on Azure implementation for a client.



**TCS** is one of the world's leading global IT services, consulting and business solutions companies, headquartered in India. TCS' investment in the Zero-Trust Lab for the SAP on Azure environment ensures the implementation of the latest, and easy to adopt, security solutions for clients.



## SAP on Azure Services



**Tech Mahindra** is a leading technology provider of digital transformation, consulting and business reengineering services and solutions across 92 countries. Its strategic priorities for SAP on Azure include generating data-driven insights using Azure Data Lake and AI.



**Wipro** is a global IT, consulting and business process services provider headquartered in India, and has had a relationship with Microsoft for more than two decades. Its Azure services share Microsoft's vision of Intelligent Cloud and Intelligent Edge and it has been recognised as an Azure Growth Partner.

## SoftwareOne

**SoftwareOne** (Rising Star) is a global provider of end-to-end software and cloud technology solutions and is headquartered in Switzerland. It has one of the industry's largest SAP and hyperscaler-certified technical team. It has completed more than 80 SAP cloud migration and SAP S/4HANA conversion projects.





“DXC has been audited by SAP for its global delivery centres that were rated as excellent.”

*Craig Baty*

# DXC Technology

## Overview

DXC Technology is headquartered in Virginia, U.S. and operates in 70 countries. It has more than 130,000 employees across over 130 global offices. In FY22, the company generated \$16.3 billion in revenue, with Applications as its largest segment. DXC employs more than 10,000 people across Australia and has a regional delivery centre in Adelaide. The company has a broad range of SAP services covering all aspects of SAP on Azure, including design, deployment, migration, running, maintenance, and licensing.

## Strengths

### Strong security and compliance procedures:

DXC provides comprehensive and advanced security embedded in all solutions, including solutions for regulated industries. It deploys a complete endpoint protection tool on each workload of SAP on Azure, using either a third-party state-of-the-art protection tool or Microsoft Defender for Servers, and provides an option for Sentinel integration.

### Strong heritage in SAP implementations:

DXC has more than 35 years of experience as a top SAP partner; it was the first service integrator to obtain the SAP on Azure Advanced Specialization certification.

### Broad range of SAP on Azure services:

DXC offers a comprehensive range of industry-specific and line-of-business SAP application management services. It has capabilities for optimising landscapes before a migration, together with near-zero downtime approaches to ensure customer business continuity during the SAP to Azure journey. DXC can harness the expertise of its service partner, smartShift, to support migration.

## Caution

DXC Technology continues to be a strong leader in the SAP on Azure services market in Australia. As mentioned in last year's study, DXC is not making enough noise in the market about its long history and strong capabilities in this space in Australia. Increased promotion may lead to stronger positioning.





# Appendix

The ISG Provider Lens™ 2023 – Microsoft Cloud Ecosystem report analyzes the relevant software vendors/service providers in the Australian 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

Author



**Craig Baty**  
**Distinguished Lead Analyst**

Distinguished analyst and author Craig Baty has extensive research and thought leadership experience in the Asia Pacific and Japan ICT markets. Craig is Principal and Founder of DataDriven an Asia/Pacific based research and advisory firm. Craig has over 30 years of executive and board level experience in the ICT industry, including as a Group VP and Head of Gartner Research AP/J, CEO of Gartner Japan, Global VP Frost & Sullivan, and more recently as VP Global Strategy and VP Digital Services in Fujitsu Tokyo HQ. As a well know ICT commentator and analyst, Craig has written more than 200 research pieces, and presented at over 1500 events globally.

He is also regularly quoted in regional media. Craig is actively involved in the ICT community as a board member of the Australian Information Industry Association (AIIA) and Immediate Vice Chair of the Australian Computer Society NSW (ACS).

Co-author



**Phil Harpur**  
**Principal Analyst**

Phil Harpur is an Australia-based technology analyst and consultant with over 25 years of experience across telecommunications, the cloud, data centres and digital media. His expertise spans over 35 countries across Asia. He also works as an analyst and writer in the financial services industry, with a focus on the technology sector.

Phil is currently part of the DataDriven team, which is the Asia Pacific research partner for ISG, and has contributed to the creation of tens ISG Provider Lens™ reports. Prior experience includes Gartner, Frost & Sullivan, and BuddeComm. He has been quoted in multiple global publications and appeared on business TV programs

including Bloomberg, CNBC, Fox Business, and ABC. He has also presented at numerous local and international conferences. Phil has a bachelor of science degree, with majors in computing and statistics from Macquarie University and holds a graduate certificate in applied finance and investment from the Securities Institute of Australia.



## Author & Editor Biographies



*Research Analyst*

**Angie Kho**  
**Regional Support Analyst**

Angie Kho is a regional support analyst at ISG and is responsible for supporting and contributing to Provider Lens™ studies for the APAC markets.

Angie is part of the DataDriven team, which is the Asia Pacific research partner for ISG and has contributed to tens IPL reports.

Her areas of expertise lie in IT services management and enterprise planning services. Angie develops content from an enterprise perspective and writes Global Summary reports for Provider Lens studies. She also supports the lead analysts in the research process and ad hoc research assignments.



*IPL Product Owner*

**Jan Erik Aase**  
**Partner and Global Head – ISG Provider Lens™**

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor.

Now as a research director, principal analyst and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.





### ISG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens™ research, please visit this [webpage](#).

### ISG Research™

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

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### ISG

ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 900 clients, including more than 75 of the world's top 100 enterprises, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis.

Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,600 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.

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