

Microsoft Cloud Ecosystem

A report comparing provider capabilities to help decision-makers in sourcing services

Customized report courtesy of:



Executive Summary	03
Provider Positioning	06
Introduction	
Definition	09
Scope of Report	10
Provider Classifications	11
Appendix	
Methodology & Team	42
Author & Editor Biographies	43
About Our Company & Research	45
Star of Excellence	39
Customer Experience (CX) Insights	40

Managed Services for Azure	12 – 18
Who Should Read This Section	13
Quadrant	14
Definition & Eligibility Criteria	15
Observations	16
Provider Profile	18

Microsoft 365 Services	19 – 25
Who Should Read This Section	20
Quadrant	21
Definition & Eligibility Criteria	22
Observations	23
Provider Profile	25

SAP on Azure Services	26 – 32
Who Should Read This Section	27
Quadrant	28
Definition & Eligibility Criteria	29
Observations	30
Provider Profile	32

Power Platform Services	33 – 38
Who Should Read This Section	34
Quadrant	35
Definition & Eligibility Criteria	36
Observations	37

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Insights into the Microsoft Azure ecosystem become critical as SLED organizations shift to cloud.

State, local and education (SLED) organizations increasingly embrace cloud computing for core IT infrastructure due to several compelling advantages.

Cloud provides exceptional scalability, enabling organizations to easily adjust computing power, networking and storage to meet fluctuating demands. Cloud platforms offer enhanced security, with robust data centers, advanced data protection and qualified staff, protecting sensitive information. The cloud enables organizations to embrace agility and innovation, facilitating the adoption of technologies, modernizing existing systems and operations, and implementing digital services quickly and efficiently. Finally, cloud technology combined with qualified IT service providers enables the alignment of IT and business strategies, with seamless planning,

execution and enhancement independent of frequently inaccessible in-house resources.

Microsoft has made Azure clouds integral with the core office, communications, server and storage applications used by most organizations, establishing Azure as the de facto standard cloud platform for more than half of U.S. SLED organizations. Using the expertise of IT service providers alongside the innovations within the Azure ecosystem, state and local governments in the U.S. can strategically equip themselves to provide effective and impactful services to their citizens amid the challenges of a dynamic technological environment. Partnering with experienced IT service providers within the Azure ecosystem is instrumental in navigating this evolving landscape and maximizing Azure's benefits.

Azure and its ecosystem are experiencing continuous evolution, offering ever-expanding capabilities and requiring more and varying knowledge. Key developments that warrant close attention and which typically benefit from collaboration with and outsourcing to IT service providers include the following:

Most information about Azure, and **what providers** do for SLED clients with it, is **rapidly outdated.**



1. Enhanced Security and Compliance:

- **Focus on zero-trust architecture:** Azure's security features are evolving toward a zero-trust model, continuously verifying access and minimizing the impact of potential breaches. This feature aligns with the increasing focus on cybersecurity among U.S. SLED organizations.
- **Compliance with evolving regulations:** Microsoft invests heavily in Azure compliance with key government regulations, including FedRAMP, HIPAA and CJIS. This investment makes it easier for organizations to ensure their cloud solutions adhere to strict data privacy and security standards.
- **Collaboration with IT service providers:** IT service providers with expertise in Azure security can help organizations implement zero-trust principles, navigate complex compliance requirements and conduct security assessments.

2. AI and ML for Public Services:

- **Improved citizen engagement:** Azure offers AI-powered chatbots, virtual assistants and sentiment analysis tools, enabling organizations to enhance communication and personalize citizen interactions.
- **Data-driven decision-making:** Azure empowers organizations to use data analytics and ML to optimize resource allocation, predict service demand and identify emerging issues proactively.
- **Ethical considerations and bias mitigation:** IT service providers can assist organizations in developing responsible AI frameworks, ensuring fairness and inclusivity in AI-powered solutions while mitigating potential biases.

3. Cloud-based Infrastructure for Efficiency and Cost-effectiveness:

- **Scalability and agility:** Azure's on-demand cloud infrastructure allows organizations to scale resources up or down as needed, minimizing upfront costs and adapting to fluctuating demands.

- **Modernization of legacy systems:** Migrating to Azure enables organizations to modernize aging IT infrastructure, applications, data sources and formats, improving efficiency and reducing operations and maintenance costs.
- **Expertise in cloud migration:** IT service providers can guide organizations through the cloud migration process, ensuring seamless transitions and maximizing the benefits of the cloud environment.

4. Migration, Modernization, Integration and Interoperability with Existing Systems:

- **Hybrid and multicloud capabilities:** Azure can seamlessly integrate with on-premises infrastructure and other cloud platforms, allowing organizations to use existing investments while adopting and adapting to cloud solutions.
- **Open-source technologies:** Azure's support for open-source technologies fosters adaptability and customization for organizations with unique needs, empowering them to innovate effectively.

- **Interoperability expertise:** IT service providers can help organizations navigate the complexities of hybrid and multicloud environments, ensuring smooth data exchange and interoperability between diverse systems.

5. Sustainability and Environmental Impact:

- **Focus on clean energy and carbon reduction:** Microsoft's commitment to sustainability aligns with the growing emphasis by governments on environmentally responsible practices. Azure utilizes renewable energy sources and energy-efficient infrastructure.
- **Sustainability reporting and analytics:** Azure offers tools for measuring and analyzing the environmental impact of cloud usage, enabling organizations to track progress toward sustainability goals.
- **Collaboration with sustainability-focused providers:** IT service providers with a strong focus on sustainability can offer insights and solutions to help organizations optimize their cloud usage for minimal environmental impact.



This report assesses and summarizes the capabilities and offerings of qualified IT service providers that partner with Microsoft to develop, improve and deliver services and solutions regarding the above. ISG's assessment only includes providers with known and established government businesses. Entities with the most significant presence and sector influence are positioned toward the right on the X-axis in ISG's quadrant structure. Those with portfolios that include the services most likely to be used by and most suitable for the current and future business value needs of SLED clients are positioned higher on the vertical Y-axis. The Leaders quadrant in the upper right includes entities that combine the most remarkable presence and influence with the highest portfolio suitability and value. Portfolio attractiveness includes providers' ability and track record in complying with SLED security and regulatory requirements regarding data, infrastructure and related concerns and needs.

Providers' presence and influence include the availability and quality of resources in the U.S. and in near-shore and offshore locations. This is because of SLED organizations' typical preferences for, and frequent legislative requirements for, data sovereignty, service provider communication and collaboration, local job creation and economic impact, and critical infrastructure concerns related to political and economic conditions.

Finally, this report is used as a summary of ISG research and an indicator of available and suitable offerings and the providers of the same. This report does not intend to provide a complete source of information or guidance. U.S. SLED organizations should consider working with third-party advisors when evaluating, negotiating, contracting and working with outsourced IT service providers. Advisors provide objective assessments and can offer a neutral, market-driven perspective.

The assessments help organizations better evaluate and compare service providers and choose the best fit based on needs, not influenced by internal politics. Secondly, advisors possess extensive knowledge of the IT outsourcing landscape. They understand market trends, pricing models and the diverse capabilities of various providers. This expertise allows them to guide organizations through selecting qualified vendors, negotiating contracts and structuring the outsourcing arrangement effectively. Finally, advisors can mitigate risks associated with outsourcing. They help identify pitfalls like security vulnerabilities, hidden costs and contract loopholes. Additionally, they can assist in developing key performance indicators (KPIs) to ensure the chosen provider meets performance expectations.

Microsoft Azure and its ecosystem partners, serving state and local government and educational organizations, continue to advance their capabilities by leaps and bounds. Close partnerships enable codevelopment and delivery of new or improved offerings almost daily for app migrations and modernization, digital workplaces and collaboration, citizen developer advancement, and GenAI tools, solutions and applications.






Provider Positioning

Page 1 of 3

	Managed Services for Azure	Microsoft 365 Services	SAP on Azure Services	Power Platform Services
Accenture & Avanade	Leader	Leader	Leader	Leader
Capgemini	Product Challenger	Leader	Leader	Product Challenger
Cognizant	Leader	Leader	Leader	Leader
Crayon	Contender	Not In	Contender	Not In
DXC Technology	Leader	Leader	Leader	Leader
Eviden (an Atos Business)	Product Challenger	Not In	Product Challenger	Product Challenger
Fujitsu	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Hanu Software	Contender	Not In	Contender	Not In
HCLTech	Rising Star ★	Rising Star ★	Rising Star ★	Rising Star ★
Hexaware	Rising Star ★	Product Challenger	Product Challenger	Leader
Hitachi Digital Services	Product Challenger	Contender	Contender	Contender



 Provider Positioning

	Managed Services for Azure	Microsoft 365 Services	SAP on Azure Services	Power Platform Services
HPE	Market Challenger	Market Challenger	Market Challenger	Market Challenger
IBM	Leader	Leader	Leader	Leader
Infogain	Contender	Not In	Contender	Contender
Infosys	Leader	Leader	Leader	Leader
Kyndryl	Leader	Leader	Leader	Leader
Logicalis	Product Challenger	Product Challenger	Contender	Not In
Logicworks	Contender	Not In	Not In	Not In
LTIMindtree	Product Challenger	Product Challenger	Product Challenger	Product Challenger
NTT DATA	Leader	Leader	Leader	Market Challenger
Protiviti	Not In	Contender	Not In	Contender
PwC	Product Challenger	Product Challenger	Product Challenger	Product Challenger





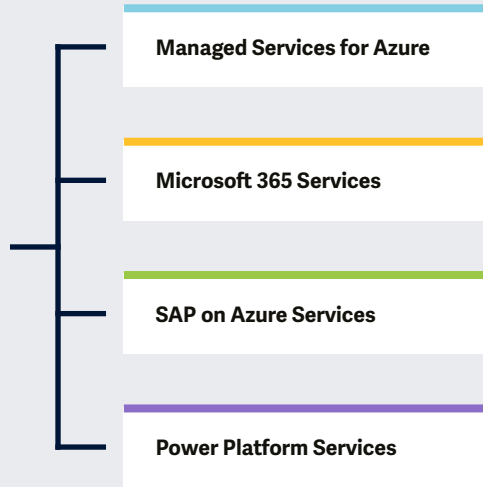
Provider Positioning

Page 3 of 3

	Managed Services for Azure	Microsoft 365 Services	SAP on Azure Services	Power Platform Services
Rackspace Technology	Leader	Leader	Market Challenger	Market Challenger
SMX	Contender	Not In	Not In	Not In
SoftwareONE	Product Challenger	Product Challenger	Contender	Product Challenger
Sonata Software	Contender	Contender	Not In	Not In
TCS	Leader	Leader	Leader	Leader
Tech Mahindra	Contender	Contender	Product Challenger	Contender
Trianz	Contender	Contender	Contender	Product Challenger
Unisys	Leader	Leader	Leader	Market Challenger
Wipro	Leader	Leader	Leader	Leader



This study evaluates providers' capabilities based on their product portfolio and competitiveness around the **Microsoft Cloud ecosystem.**



Simplified Illustration; Source: ISG 2024

Definition

Microsoft is an influential technology provider among public sector agencies. Its extensive partner network develops, sells and supports Microsoft's offerings with sector-focused solutions and services. As Microsoft has transformed into a cloud-first entity, its partners have likewise changed — and continue to change — making selecting providers and services more challenging.

Microsoft's new model emphasizes three cloud environments: the Azure cloud platform; the Microsoft 365 suite of productivity offerings, which include Windows 10 and 11 and Office 365; and business and automation applications via Dynamics 365 and Power Platform. Its partners, ranging from large IT service providers to local value-added resellers (VARs), must offer robust and cost-optimizing services complemented with forward-thinking capabilities and supported by a strong relationship with Microsoft. Providers should demonstrate awareness of future developments within Microsoft's cloud offerings. They should also showcase

the ability to adapt to changing workplaces, staffing shortages and IT environments undergoing massive shifts to the cloud.

This study focuses on Microsoft service and solution partners enable and deliver sustainable business value, including business improvement for U.S. public sector agencies. ISG evaluates Microsoft partners' portfolio strengths and sector competitiveness relative to what we ISG see as both important and emerging client requirements. While there are thousands of providers that deliver services for Microsoft products in the public sector, this study specifically focuses on the leading competitors, both global firms and local providers, in each quadrant studied by region.



Scope of the Report

This ISG Provider Lens™ quadrant report covers the following five quadrants for services/solutions: Managed Services for Azure, Microsoft 365 Services, SAP on Azure Services, 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 (quadrants)
- Focus on the regional market

Our study serves as the basis for important decision-making by covering providers' 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 \$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 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.

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.





Managed Services for Azure

Managed Services for Azure

Who Should Read This Section

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

Enterprises are seeking service providers with a demonstrated presence and experience within public sector businesses and IT organizations. They are looking for providers with expertise in designing, building and managing public cloud and multicloud environments, particularly focusing on Microsoft Azure. Additionally, enterprises seek support in implementing Agile and DevOps methodologies and integrating them with their existing processes. Furthermore, they prioritize service providers with a strong partnership with Microsoft, including a significant number and category of relevant certifications.

Service providers are offering comprehensive tools, services and solutions on Azure to address clients' business-critical needs beyond the simple lift-and-shift of individual workload. In comparison, some providers are building legacy government agency relationships and offering advisory services to assist enterprises in developing a multicloud strategy supported by thorough analysis and business case artifacts.



Technology professionals should read this report to understand potential partners' relative positioning and capabilities to help them effectively use Microsoft cloud services.



Procurement professionals should read this report to understand the provider ecosystem for Microsoft Azure managed services in the U.S. public sector and compare one another.



Digital professionals should read this report to understand how MSP's Azure offerings can impact an enterprise's ongoing transformation initiatives while identifying the benefits of cloud migration.

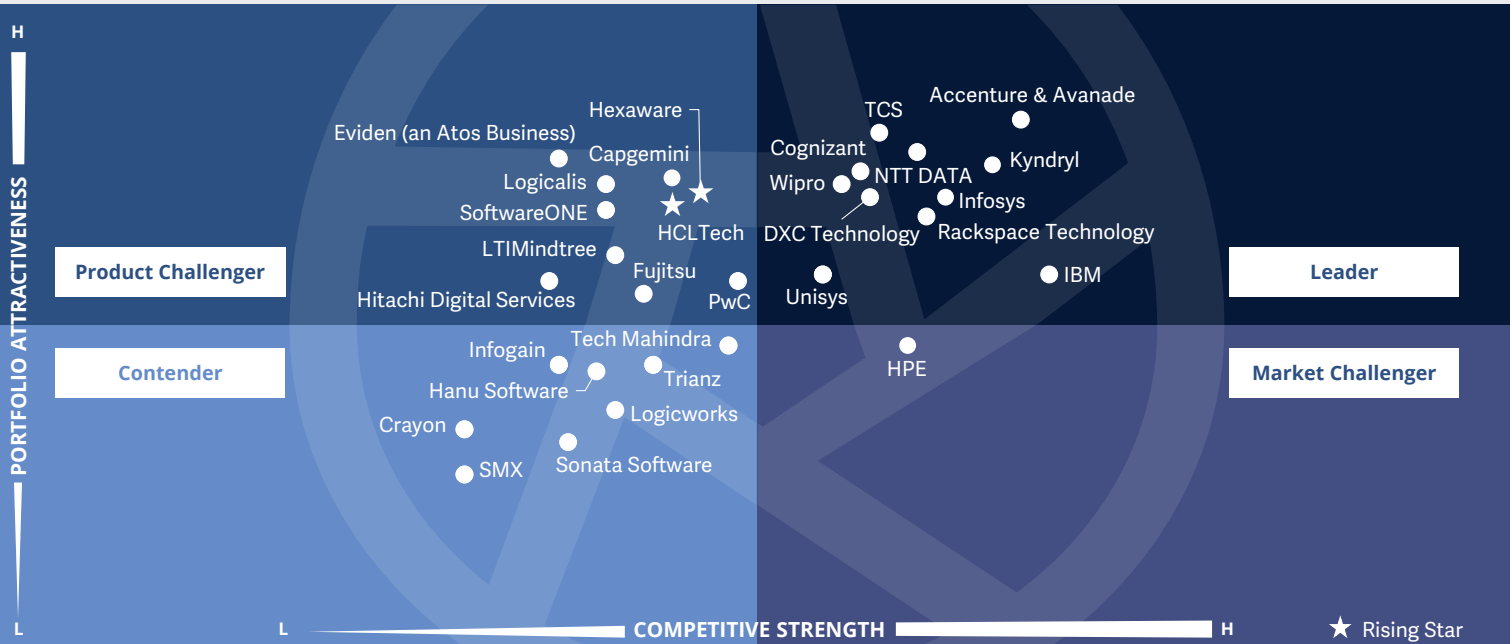


Cybersecurity professionals should read this report to learn how MSPs address significant compliance and security challenges while maintaining a seamless enterprise experience.



**Microsoft Cloud Ecosystem
Managed Services for Azure**

U.S Public Sector 2024



The race by SLED organizations is on and the pace is accelerating. While **Microsoft Azure, including Azure Government Cloud**, is very well suited to SLED need, the use of expert MSPs to **enable maximum Azure value** becomes more critical by the day.

Bruce Guptill



Managed Services for Azure

Definition

This quadrant assesses managed public cloud service providers that offer professional and managed services, augmenting Azure's built-in capabilities, including IaaS and PaaS. These services include provisioning, real-time and predictive analysis, monitoring and operational management of clients' public cloud and multicloud environments. The aim is to maximize enterprise cloud workload performance, reduce costs and ensure compliance and security.

Providers in this quadrant are evaluated based on their sector-relevant services, delivery, sales and support, which may be complemented by a combination of onshore, nearshore and offshore resources. 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 the following:

- Professional services for managing and monitoring CPUs, memory, databases and operating systems, either independently or as microservices (virtual machines 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
- Support services such as incident management, configuration, security and automation setup
- Services and solutions built on the Azure cloud to help clients meet their net-zero goals and environmental, social and governance (ESG) targets.

Eligibility Criteria

1. Demonstrated **presence and experience within public sector** businesses and IT organizations
2. Experience in designing, **building and managing public cloud and multicloud environments**, with a key focus on Microsoft Azure
3. Support in the development of software code and **cloud-native and legacy system integration**
4. Experience in **implementing Agile and DevOps** methodologies and integrating them with enterprise clients' existing processes
5. Experience in **API automation** and cloud analytics
6. **Well-developed security** practices and capabilities
7. Strong **partnership with Microsoft**, including the number and category of relevant certifications, duration of the relationship with Microsoft and evidence of strategic cooperation (around Azure) between the provider and Microsoft



Managed Services for Azure

Observations

U.S. SLED organizations have experienced significant changes in their need for and use of managed services for Microsoft Azure since 2022.

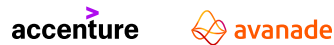
The need for agility in workplaces and IT and business operations during the pandemic fueled a rapid rise in the adoption of Azure Government Cloud. As a result, SLED organizations began encountering significant cloud use and management challenges. This increase in challenges created a larger market for specialized managed services catering to public sector needs.

Managed service providers (MSPs) began expanding their portfolios to encompass the full Azure lifecycle, offering services such as well-architected design, automated deployment, security management and ongoing optimization. The use and value of compliance frameworks such as FedRAMP and HIPAA became crucial for handling sensitive data, driving demand for expansion, modernization and optimization of compliance capabilities and execution by SLED organizations.

MSPs also began placing greater emphasis on helping SLED clients optimize Azure spending through FinOps methodologies and cost-management tools. The continuing evaporation of cloud-relevant IT skillsets within SLED organizations added pressure to the need for resource implementation, operation and management capabilities.

Finally, Microsoft's late 2021 introduction of Azure OpenAI Service to its Azure Government Cloud opened a vast range of possibilities and confusion regarding all aspects of AI use in cloud environments, especially regarding security requirements. Outsourcing to Azure MSPs, among SLED organizations, was completely underway by the end of 2023.

From the 170 companies assessed for this study, 30 qualified for this quadrant, with 11 being Leaders and two Rising Stars.



Accenture & Avanade use deep sector expertise, Accenture's sector presence, recent acquisitions and GenAI, with their strong Microsoft partnership, to deliver robust managed services for Azure in the U.S public sector.



Cognizant's Azure managed services for its public sector clients include end-to-end Microsoft-centric cloud solutions. It leverages its Microsoft Business Group's expertise and proprietary platforms such as GO, 10vū™ and Drivetrain™ with dedicated Azure security services.



DXC Technology offers comprehensive managed services on Azure for public sector clients, leveraging its extensive experience serving over 250 government agencies with strategic acquisitions and partnerships.



IBM facilitates rapid managed service deployment on Azure, emphasizing integrated infrastructure services, security services and hybrid cloud application management services, most of which use consumption-based pricing.



Infosys offers tiered Azure managed services for the public sector. It leverages its expertise and tools for reliable, scalable cloud operations, including fundamental tasks, and advanced features such as AI and hybrid cloud management.



Kyndryl uses resources dedicated to public sector clients to offer core Azure managed services (IaaS, PaaS, containers and hybrid extensions), along with workload management, cloud optimization, network integration, security and AI-driven data solutions.



NTT DATA offers expertise in DevOps, automation and cloud-native design to optimize and secure clients' Azure environments, all under a flexible pay-as-you-go (PAYG) model. A dedicated CoE enables ongoing guidance.



Managed Services for Azure



Rackspace Technology empowers public sector clients with dedicated resources and expertise supporting a comprehensive portfolio, including cloud migration, application modernization, security and on-demand support models.



TCS uses deep public sector expertise with a successful skilling strategy to seamlessly migrate and manage Azure infrastructure for its clients. Its automation-rich Migration Factory Approach accelerates transitions and migrations.



Unisys provides public sector clients with migration, security, optimization, compliance and application management services with Azure managed cloud solution. Its CloudForte platform rapidly and automatically deploys a flexible, cost-efficient, secure and compliant cloud environment.



Wipro codevelops joint solutions with Microsoft for modernization and Azure-centered cloud migration, along with own sector-optimized solutions. It has strong security expertise, ensuring enhanced compliance and protection.



HCLTech (Rising Star) focuses on SLED clients, partners with Microsoft on Azure development, invests in Microsoft skills and collaborates on innovation to integrate with Microsoft offerings.



Hexaware (Rising Star) focuses on agility and innovation, offering rapid solutions such as Azure migration and data modernization through its strong Microsoft partnership. It generates half its revenue from Microsoft services.



Unisys



“Strong Microsoft relationships, extensive partnership competencies, a sturdy managed services portfolio and a substantial legacy sector presence position Unisys as a U.S. public sector quadrant Leader in Managed Services for Azure.”

Bruce Guptill

Overview

Unisys is headquartered in Pennsylvania, U.S. It has more than 16,200 employees across 64 offices in 28 countries. In FY23 the company generated \$2.0 billion in revenue, with Enterprise Computing Solutions as its largest segment. Unisys, recognized as a Microsoft Azure Expert MSP for Microsoft’s Azure Migration and Modernization Program (AMMP), holds several Microsoft Solution Partner designations, including Security, Data and AI, Digital and App Innovation, Infrastructure and Modern Work, with more than 14 Microsoft partner competencies. Unisys is a two-time Microsoft Azure Innovation Partner of the Year and has been providing IT services to U.S. public sector clients since 1946.

Strengths

Longstanding managed services suite for Azure: Unisys first released its CloudForte™ comprehensive managed service offering for Microsoft Azure in 2019 and has continually updated it with Microsoft since then. CloudForte enables clients to deploy and manage flexible, cost-efficient, secure and compliant cloud environments automatically and rapidly.

Outstanding public sector experience and expertise: Unisys has delivered IT solutions and services to help government organizations for more than six decades. The company currently supports several dozen SLED clients and U.S. and foreign central government agencies.

Core consulting, advisory and managed services portfolio:

Unisys offers public sector clients a comprehensive suite of managed services for Microsoft Azure. These include migrating applications, data and workloads, monitoring, optimization and cost management, security services, including threat detection, vulnerability management, access management and compliance, data management and application support, DevOps services and hybrid cloud integration.

Caution

ISG has concerns about Unisys’ recent Microsoft Azure developments within the sector. The firm has invested in relevant domain- and operation-optimized solutions for years. However, Unisys risks of trailing other leaders in clients’ perception of its broader strengths in the public sector.





Microsoft 365 Services

Who Should Read This Section

This quadrant report focuses on the current market positioning of service providers targeting midsize and large enterprises within the U.S. public sector and how they address the key challenges associated with Microsoft 365 services.

Enterprises encounter a multitude of challenges in this domain. The challenges are mainly associated with the implementation of SaaS-based workplace environments, collaboration, unified communication, file storage, performance, license costs, provisioning procedures and maintenance plans. Furthermore, challenges arise in data integration, process integration, application integration and other related processes. Hence, enterprises seek innovative solutions that seamlessly integrate with Microsoft 365 to establish a modern workplace.

In response to this, service providers implement a federated approach to the market, combining the services of many subsidiary organizations to give public sector entities access to the greatest expertise and capability. They also deliver technical consulting, facilitate license procurement and enable integration for implementing and operating Microsoft 365. Additionally, providers focus on building robust partnerships with Microsoft, including the acquisition of relevant certifications (Office 365, Intune, Windows and Azure) and collaborative development of modern workplace solutions with Microsoft and its partners.



Technology professionals should read this report to analyze providers in the Microsoft ecosystem and understand how they integrate the latest Microsoft 365 capabilities into their offerings.



Workplace technology professionals should read this report to understand organizational change management challenges and evaluate partners available for Microsoft 365 implementation and integration.

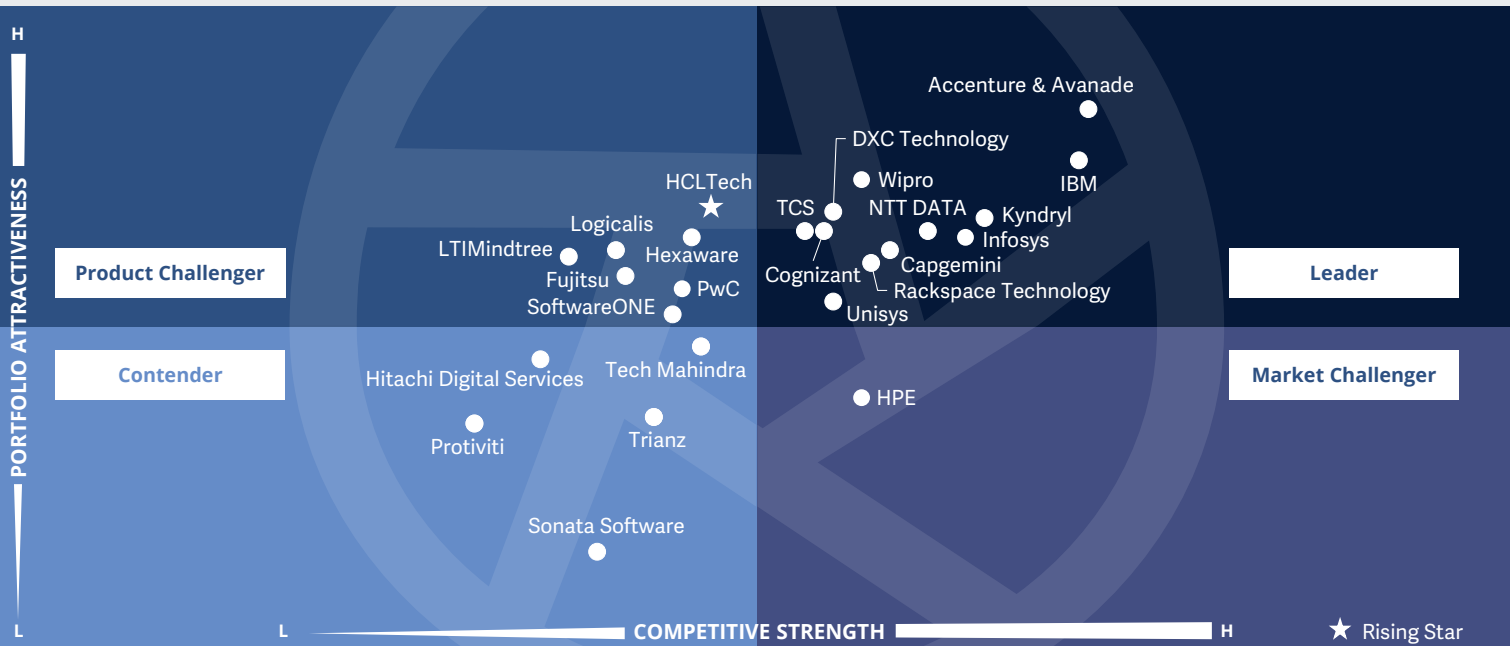


Knowledge management professionals should read this report to understand providers' positioning and key trends in the provider ecosystem and identify their potential partners.



**Microsoft Cloud Ecosystem
Microsoft 365 Services**

U.S. Public Sector 2024



Despite agility and collaboration gains, U.S. **SLED agencies face implementation hurdles** with Microsoft 365 on Azure. Increased awareness of **MSPs' provisioning and management expertise** is crucial for smoother deployments and support.

Bruce Guptill



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 extend beyond deployment and migration to Microsoft 365. They focus on offering a quick, device-independent, high-quality productivity suite that enables seamless teamwork, irrespective of the location and adapts to users' roles. From the clients' perspectives, Microsoft 365 is about collaboration and integration for globally dispersed teams. Integration and implementation services are necessary to enable such collaboration. This quadrant evaluates providers based 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 enterprise clients. ISG notes many challenges around collaboration, unified communication, file storage, performance, license costs,

provisioning procedures and maintenance plans. There are also challenges associated with data integration, process integration and application integration and other processes. Providers must extend their capabilities beyond implementing Microsoft 365 at a basic level to address such challenges proactively.

Providers in this quadrant are required to perform assessments and offer consulting services and solutions to support clients during their digital journeys. This level of support requires clear and open regional communication and unique selling propositions beyond providing workplace environments based on Microsoft's desktop and collaboration solutions.

Eligibility Criteria

1. Demonstrated **presence and experience within public sector businesses and IT organizations**
2. Technical **consulting, license purchases and integration** for Microsoft 365 implementation and operation
3. **Forward-thinking** offerings that integrate with Microsoft 365 to create a modern workplace for enterprise clients
4. Use of **Microsoft Office APIs**
5. **Migration of customer workplaces to cloud and workspace-as-a-service models**
6. Suitable proficiency with **identity and access management (IAM) solutions and mobile device management software** (Intune or others)
7. Depth and breadth of **partnership with Microsoft**, including relevant certifications (Office 365, Intune, Windows and Azure), relationship with Microsoft and evidence of modern workplace development collaboration with Microsoft and partners



Microsoft 365 Services

Observations

Microsoft 365 on Azure (including Azure Government Cloud and Teams) offers significant value to SLED clients, particularly through digital workplace enablement. It acts as a central hub, fostering collaboration via chat, video meetings and file sharing across departments, boosting efficiency and project management. It also enables remote work and citizen engagement, increasing responsiveness and service delivery. Integration with existing systems and third-party tools facilitates smoother data flow and simplifies administrative tasks. On the critical issue of data security, Microsoft 365 on Azure enables data residency within the U.S., with rigorous controls and enforced adherence to strict policy and compliance standards such as FedRAMP. Meanwhile, SLED organizations face unique challenges managing Microsoft 365 due to the following:

- Limited IT resources: Many have smaller IT teams compared to larger businesses, struggling to handle the complexities of deploying, securing and maintaining the platform.
- Strict compliance regulations: Organizations must comply with specific data privacy and security regulations, requiring expertise in configuring Microsoft 365's features to meet these standards.
- Evolving cybersecurity threats: Constant vigilance against cyberattacks is crucial, demanding ongoing monitoring and threat detection skills.

MSPs specializing in Microsoft 365 for SLED organizations provide expert staff and skills to manage the platform and optimize its value. Their expertise helps navigate the complexities of regulatory compliance. They offer proactive monitoring, threat detection and incident response capabilities, bolstering clients' cybersecurity posture.

From the 170 companies assessed for this study, 26 qualified for this quadrant, with 12 being Leaders and one Rising Star.



Accenture & Avanade use deep U.S. public sector experience and Microsoft expertise to offer comprehensive services, including Productivity Studio and Copilot for Microsoft 365, to empower digital transformation and enhance user experience with AI-driven solutions.



Capgemini helps clients create impactful digital employee experiences via implementation, customization, adoption, security and ongoing support, using best practices and immersive living labs to clearly understand potential benefits.



Cognizant emphasizes its WorkNext platform for Microsoft 365 to offer robust Azure cloud security encompassing threat management, identity protection and data security. Cognizant also uses Microsoft tools to provide clients with actionable sustainability insights.



DXC Technology creates secure, personalized work environments using its UPtime platform to streamline productivity tools and integrate with Teams for a seamless user experience. Its DaaS solutions promote sustainability through device optimization.



Microsoft 365 Services



IBM's comprehensive Microsoft 365 services on Azure include strategy, migration and application development with ongoing managed services. IBM offers backup, storage, security and AI tools to enhance Microsoft 365 functionality and user experience.



Infosys leverages its workplace-as-a-service offering with its CoE and Microsoft partnership to provide a human-centric approach, prioritizing the application of AI across UX, CX, EX and OX.



Kyndryl highlights digital workplace transformation, offering automation, modularity and deep expertise. It leverages GenAI with its intelligent process automation and digital workplace automation to enhance collaboration and user experience.



NTT DATA's approach emphasizes collaboration & communication, AI-powered Copilot features and industry-tailored solutions, all backed by strong and growing core services and managed options.



Rackspace Technology offers transformation, advisory and managed services for Microsoft 365, including migration, security and customization. It provides nine related subscription-based hosting services and have a strong reputation among public sector industries.



TCS focuses its employee-centric Microsoft 365 solutions on user experience and secure collaboration. Office 365 Engage fosters adoption with tailored content and gamification, while its Sustainability@Workspace enables ESG goal setting and real-time data analysis.



Unisys' Managed Microsoft 365 and Teams platform help ensure successful adoption with measurable productivity gains via expert deployment and support services leveraging decades of public sector experience.



Wipro optimizes collaboration and productivity using Microsoft 365, while its security and compliance offering safeguards data and ensures regulatory adherence. Its Cloud & AI Academy fosters innovation via continuous learning.



HCLTech (Rising Star) improves EX with AI-powered tools and self-service options, dedicated labs, training and certifications, and a focus on front-line workers with enhanced mobility and secure access.



Unisys



"A strong Microsoft relationship, extensive partnership competencies, a sturdy managed services portfolio and substantial legacy sector presence position Unisys as a U.S. public sector Leader in Microsoft 365 Managed Services."

Bruce Guptill

Overview

Unisys is headquartered in Pennsylvania, U.S. It has more than 16,200 employees across 64 offices in 28 countries. In FY23 the company generated \$2.0 billion in revenue, with Enterprise Computing Solutions as its largest segment. A Microsoft Azure Expert MSP for Microsoft's Azure Migration & Modernization Program (AMMP), Unisys holds numerous Microsoft Solution Partner designations, including in Security, Data & AI, Digital & App Innovation, Infrastructure and Modern Work, with more than 14 Microsoft partner competencies. Unisys is a two-time Microsoft Azure Innovation Partner of the Year. Unisys has provided IT services to U.S. public sector clients since 1946.

Strengths

Digital work experience unification:

Unisys' Unified Experience Management offering helps clients evaluate and improve digital employee experience and track its progress. This is accomplished using Unisys' PowerSuite Experience software and automation services to monitor employee experience, and offer proactive and predictive insights to improve performance, reliability, usability, and even end-user sentiment.

Unifying and consolidating tools with AI:

Unisys' digital workplace advisory services help clients consolidate and unify disparate Microsoft 365 toolsets and personalize services by business role. Its IntelliServe digital workplace support platform helps automate and manage consolidation and unification.

Longstanding managed services suite:

Unisys' Managed Microsoft 365 and Teams solution is designed to ensure successful adoption with measurable productivity gains via expert deployment and support services. This approach not only maximizes worker usage but also helps to boost and govern the ongoing adoption of Microsoft's continually expanding software features.

Outstanding public sector experience and expertise:

Unisys has provided IT solutions and services to U.S. government organizations for more than six decades. The company currently supports several dozen SLED clients in addition to U.S. and foreign central government agencies.

Caution

ISG has concerns about a lack of recent, highly visible sector Microsoft cloud and solutions developments by Unisys. The firm has been investing in domain- and function-focused solutions for years. However, Unisys risks falling behind other Leaders in clients' perception of its overall Microsoft public sector strengths.





SAP on Azure Services

Who Should Read This Section

This quadrant report focuses on the current market positioning of service providers with midsize to large enterprises within the U.S. public sector as their target clients and how they address the key challenges associated with SAP on Azure services.

Enterprises seek providers with a proven track record and extensive experience supporting public sector and IT organizations. They they seek providers that can help them in migrating SAP workloads to Azure, along with implementing, customizing and providing SAP-related applications and services. Enterprises value the robustness of a provider's implementation processes, including using Agile and DevOps methodologies and automation to enhance service delivery and quality.

Service providers offer consulting and advisory services and assist government agencies with migrating SAP workloads to Azure. They also focus on optimizing, designing and developing new processes and workflows for platform management. Providers are acquiring Microsoft and SAP certifications, ensuring productive partnerships with both companies and stringent security and compliance standards.

Enterprises seek providers with expertise in advanced analytics, strong reporting capabilities and the ability to offer solutions that can seamlessly integrate with their existing systems. Furthermore, enterprises prioritize solutions that have high availability and are secure, compliant and scalable to ensure uninterrupted operations.



Technology professionals should read the report to understand the positioning of SAP on Azure service providers and discern how their technical abilities align with SAP cloud transition needs.



Procurement professionals should read this report to understand providers' relative positioning in the Microsoft service ecosystem and broader trends influencing partner selection.

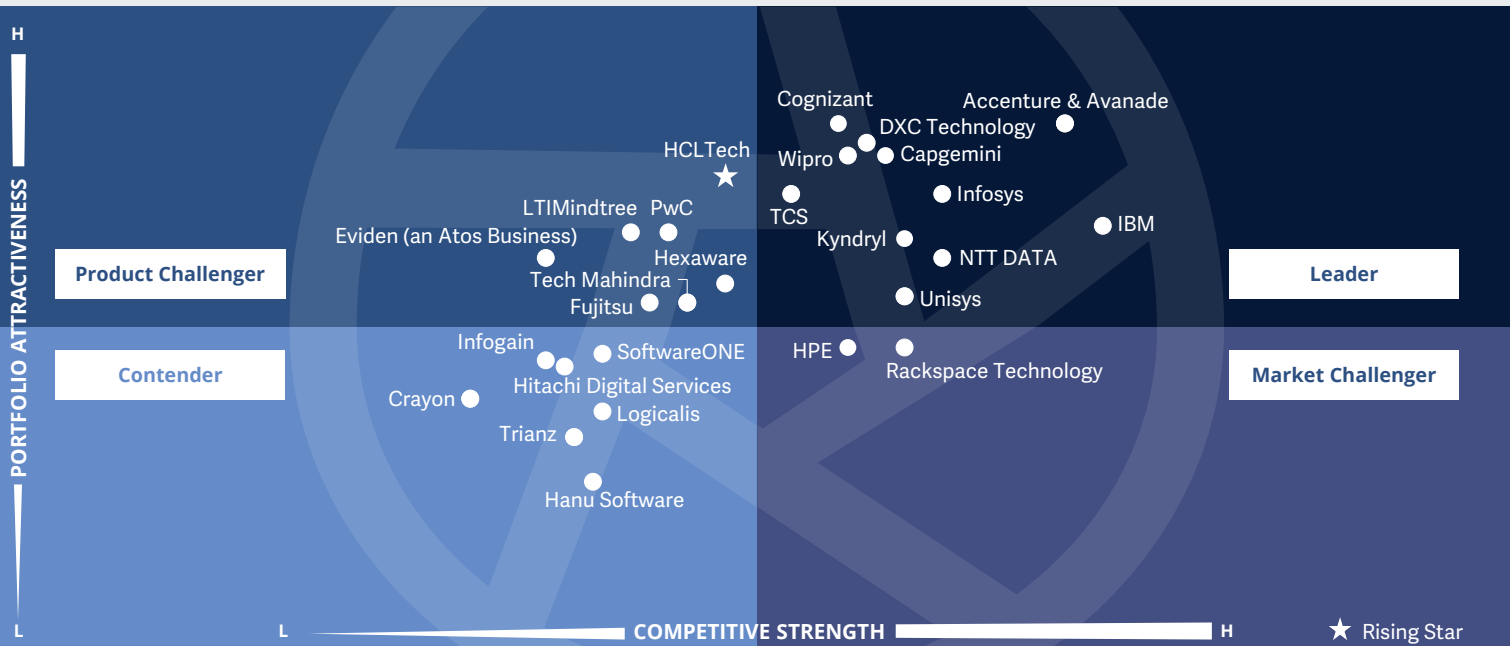


Operational professionals, including finance, HR and HCM leaders, should read this report to understand the positioning of potential partners that can influence software deployment.



**Microsoft Cloud Ecosystem
SAP on Azure Services**

U.S. Public Sector 2024



While SAP will continue to support legacy instances of Business Suite 7 through 2027, SLED clients should be addressing transition of their workloads to the cloud. **Landscape complexity of these clients is significantly greater than typically considered for migrations; a period of two years is not an unusual timeframe for such clients.**

Bruce Guptill



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.

Services these companies typically offer include architecture consulting, application landscape requirement analysis and technical design with support for configuration, deployment, escalation management, change and fault management, optimization and reporting. Providers in this quadrant must help clients migrate SAP workloads to Azure and optimize, design and develop new processes and business flows as a part of platform management, by combining providers' in-house services, SAP services and Microsoft Azure services.

Running SAP on Azure requires providers to possess the necessary resources for supporting clients along their digital journeys. Considering SAP's commitment to solution support through 2040 and beyond, providers in this quadrant should provide a clear roadmap that extends for the next two decades.

Service providers in this category should acquire Microsoft and SAP certifications and must 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 solutions, covering technical architecture considerations and business impacts.

Eligibility Criteria

1. Demonstrated **presence and experience** within public sector businesses and IT organizations
2. **Scope and depth of portfolio** for migrating SAP workloads to SAP on Azure and SAP application and services implementation customization, provisioning and support
3. Support for **hybrid cloud** and hybrid provider environments
4. Robust **partnerships with SAP and Microsoft**, including the number and category of relevant certifications, duration of the relationships with 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 the provider's **process for implementation**, including the use of Agile and DevOps methodologies and relevant automation for service delivery and quality



Observations

Utilizing SAP on Azure clouds offers clear and evident benefits: enhanced security and scalability with reduced cost, simplified maintenance and significantly improved user accessibility. So, it comes as no surprise that there have been year-over-year increase of approximately 15 percent in SLED organizations transitioning their SAP landscapes to cloud. This certainly increases SLED clients' interest in service providers' ability to migrate SAP to Azure and related immediate and future costs. There is no shortage of qualified providers serving U.S. SLED clients with SAP migration and modernization, as observed. This study assessed 27 highly qualified providers in total, with 11 qualifying as outstanding Leaders.

A popular misconception regarding SAP and cloud is that SAP is ending support for on-premises implementations and that clients need to migrate or switch to cloud-supported versions immediately. The reality is that SAP is gradually phasing out support for older versions. Mainstream maintenance

for Business Suite 7 will end on December 31, 2027. However, SAP will offer extended maintenance for an additional fee until December 31, 2030. And while SAP still provides mainstream maintenance and support for on-premise versions of S/4HANA, it encourages customers to migrate to the cloud version (S/4HANA Cloud) for access to the latest features and functionalities. Proper selection and contracting with qualified service providers will enable a well-planned and smooth transition as and when such becomes necessary.

From the 170 companies assessed for this study, 27 qualified for this quadrant, with 11 being Leaders and one Rising Star.



Accenture & Avanade combine extensive experience, a wide range of SAP solutions and powerful tools to help clients migrate and manage SAP systems in Azure and hybrid and multicloud environments.



Capgemini offers outstanding expertise in cloud migration, digital transformation and SAP on Azure. It offers comprehensive, client-centric services across the entire solution lifecycle. It has collaborated with SAP on sustainability initiatives.



Cognizant unlocks business value through SAP BTP expertise, integrating and extending SAP solutions for growth. Its dedicated SAP consulting and frameworks such as cCAT and LEAP guarantee efficient cloud migration, maximizing client value.



DXC Technology's PaaS offers flexible costs and pre-built tools, empowering efficient resource management. Deep SAP and Azure expertise enables smooth migration and continuous operations, while end-to-end services deliver value and accountability.



IBM offers multiple methodologies such as Rapid IMPACT and Azure Rapid Discovery to assess cost-benefit and strategize SAP migrations to cloud platforms. Its accelerated move center facilitates swift technical upgrades to S/4HANA on Azure.



Infosys offers preconfigured SAP and Azure solutions tailored to specific industries, along with comprehensive tools and support for seamless cloud migration. Strong partnerships with Azure and SAP solidify its position as a leading provider of SAP on Azure services.



Kyndryl provides a centralized view and management of SAP HANA, ERP, middleware and Azure servers, with customizable service levels and cost optimization. Its expanded partnership includes codeveloped tools and a dedicated SAP center of expertise.



SAP on Azure Services

NTT DATA

NTT DATA uses its SAP expertise, RISE with SAP capability, strong Microsoft alliance and global talent pool to deliver comprehensive and efficient SAP modernization and migration to Azure, maximizing client business value.



TCS offers a comprehensive suite of SAP on Azure solutions. This includes expert resources, a wide range of services and tools, C-suite-focused solutions and AI-powered enhancements built on Azure.

Unisys

Unisys streamlines SAP migration and modernization with its IPIM solutions, complemented with sector-experienced consulting, advisory and managed services for a secure and efficient cloud journey.



Wipro's SAP on Azure capabilities include assessment, migration, transformation and management. Its strong Microsoft alignment and Safe Passage to Azure Cloud methodology, with proprietary tools, ensure efficient SAP Azure deployments.

HCLTech

Rising Star **HCLTech** offers consulting, managed and implementation services for SAP on Azure. Automation tools and co-innovation with SAP and Microsoft enable advanced solutions for various client needs.



Unisys



“Client presence, strong Microsoft relationships, extensive partnership competencies, a sturdy managed services portfolio and substantial legacy sector presence position Unisys as a U.S. public sector Leader in SAP on Azure services.”

Bruce Guptill

Overview

Unisys is headquartered in Pennsylvania, U.S. It has more than 16,200 employees across 64 offices in 28 countries. In FY23 the company generated \$2.0 billion in revenue, with Enterprise Computing Solutions as its largest segment. A Microsoft Azure Expert MSP for Microsoft’s Azure Migration & Modernization Program (AMMP), Unisys holds numerous Microsoft Solution Partner designations and more than 14 Microsoft partner competencies, including SAP on Azure. Unisys is a two-time Microsoft Azure Innovation Partner of the Year. The company has been providing IT services to U.S. public sector clients since 1946.

Strengths

Highly relevant SAP partnerships: Unisys joined SAP PartnerEdge program in 2013 as a SAP Services Partner, specializing in high-security, public sector engagements. In 2023, Unisys announced the availability of its Integrated Portfolio and Investment Management (IPIM) solution on the SAP Store online marketplace in 2023. IPIM enables seamless integration with SAP S/4HANA and SAP Analytics Cloud to streamline approval flows and integration for cohesive vision across agencies and departments. During SAP S/4HANA migration, IPIM seamlessly works with legacy SAP modules, requiring minimal integration.

Core consulting, advisory and managed services portfolio: Unisys offers public sector clients a comprehensive suite of

managed services for Microsoft Azure, including migrating applications, data and workloads, monitoring, optimization and cost management, security services, including threat detection, vulnerability management, access management and compliance, data management, application support including DevOps services and hybrid cloud integration.

Outstanding public sector experience and expertise: Unisys has provided IT solutions and services to U.S. government organizations for more than six decades. The company currently supports several dozen SLED clients in addition to U.S. and foreign central government agencies.

Caution

ISG has concerns about a lack of notable Microsoft Cloud and solutions developments by Unisys targeting public sector environments. Unisys risks falling behind other Leaders in clients’ perception of its overall Microsoft public sector strengths.





Power Platform Services

Who Should Read This Section

This quadrant report focuses on the current market positioning of service providers with midsize and large enterprises within the U.S. public sector as their target clients and how they address the key challenges associated with Power Platform services.

Enterprises seek service providers that facilitate the adoption of Power Platform solutions, including Power BI, Power Apps, Power Automate and Power Virtual Assistant. They look for structured offerings that make it easy to adopt Power Platform solutions and streamline the software's ongoing operation. Additionally, they value technical support capabilities that help adopt and manage platform solutions and clear business benefits associated with using Power Platform solutions.

Service providers meet these needs by offering comprehensive support in adopting Power Platform and governance tools around data access, privacy and integrity. Some providers offer global advisory practice for Power Platform solutions to help public sector organizations design, structure and tailor their low-code activities toward concrete business outcomes.

Furthermore, providers in this category understand clients' objectives and utilizes their data literacy skills to offer the necessary guidance. With meticulous attention to detail, these providers take a holistic approach to driving client business performance and seamlessly integrate various Microsoft applications, such as Office 365, Dynamics 365 and Azure, and advanced concepts, including DevOps, DataOps and MLOps.



Technology professionals should read the report to know providers' strengths and weaknesses in the Microsoft ecosystem and how they integrate Power Platform capabilities into their offerings.



Procurement professionals should read this report to understand the provider ecosystem for Microsoft power platform services and how these providers compare with others.

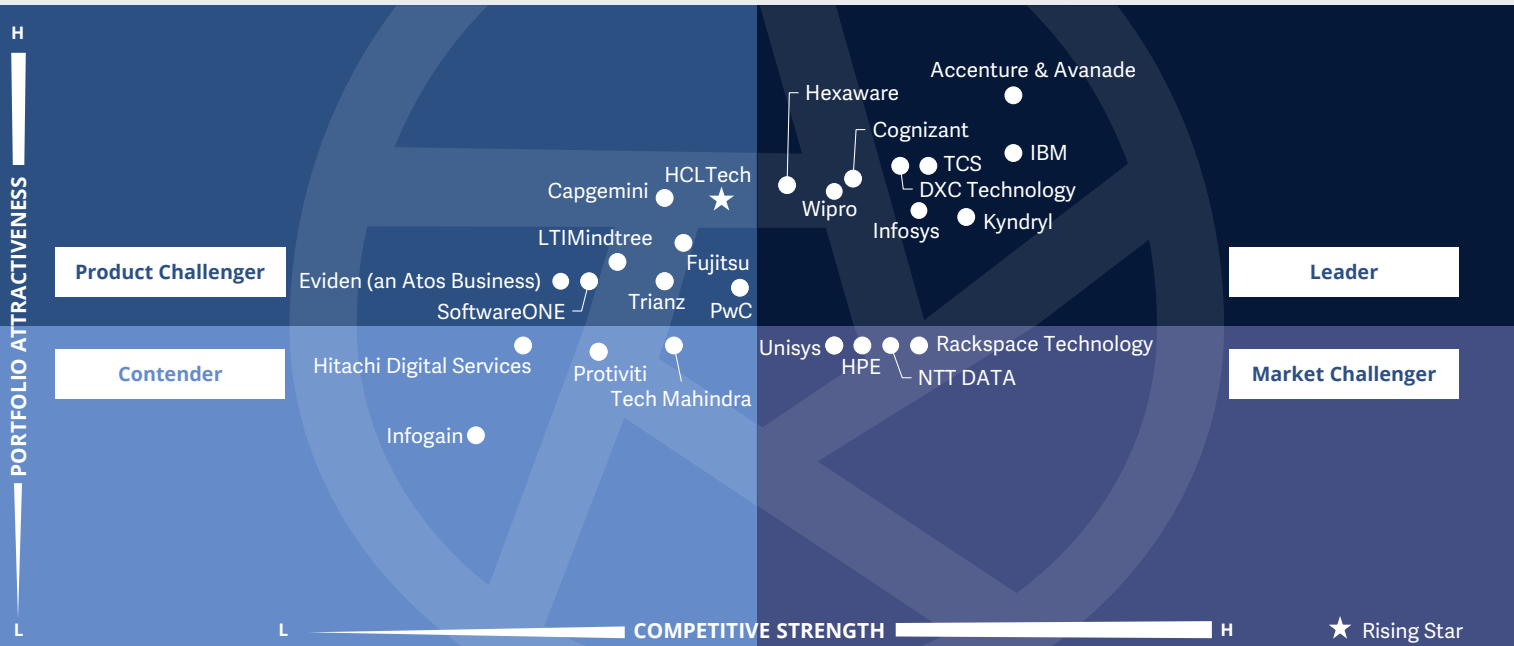


Workplace technology professionals should read this report to understand how providers support the adoption of Microsoft low-code/no-code and virtual assistant technologies and evaluate them.



**Microsoft Cloud Ecosystem
Power Platform Services**

U.S. Public Sector 2024



By empowering citizen developers with user-friendly tools, **Power Platform on Azure enables U.S. SLED clients to streamline workflows, improve service delivery and empower employees and citizens alike, while enabling control, governance and guidance.**

Bruce Guptill



Power Platform Services

Definition

This quadrant assesses providers that offer services for the enterprise-wide implementation of Microsoft Power Platform, support services and related advanced training. Enterprise clients utilize services providers offer to create new and sophisticated software applications for digital transformation, obtain new insights on business operations and optimize business processes in a sophisticated manner. These services not only leverage the capabilities of Power Platform but also educate enterprises on the best practices for developing low-code applications and solutions. Providers in this quadrant excel in seamlessly integrating a range of Microsoft apps such as Office 365, Dynamics 365 and Azure and advanced concepts such as DevOps, DataOps and MLOps.

The trending concept of citizen development results in a massive demand for service and support to govern and embed apps created by users using low-code and no-code development tools on the Power Platform. The ability to integrate or migrate third-party tools is also important. Furthermore, providers in this quadrant should support Power Platform's analytics, process management, IT management and process automation capabilities.

Providers in this quadrant understand clients' objectives and use their data literacy skills to provide necessary guidance. With an attention to detail, these providers undertake a holistic approach to drive client business performance.

Eligibility Criteria

1. Demonstrated **presence and experience** within public sector businesses and IT organizations
2. Services that **help clients adopt Power Platform solutions** — Power BI, Power Apps, Power Automate and Power Virtual Assistant
3. Structured offerings and intellectual properties that enable easy Power Platform solutions adoption and **streamline the software's ongoing operation**
4. **Technical support capabilities** that assist enterprises with adopting and managing platform solutions
5. **Clear business benefits** associated with using Power Platform solutions



Power Platform Services

Observations

A great deal of the allure of Power Platform is the enablement of citizen-developer capabilities through low-code/no-code functionality. Power Apps empowers non-coders to build custom applications for specific needs such as internal portals for department communication, case management tools for social services, or data visualization dashboards for budget tracking. This reduces reliance on IT resources and fosters departmental autonomy. Organizations can foster innovation by enabling employees with technical and non-technical backgrounds to experiment and develop innovative solutions to address unique organizational, process or local challenges, promoting a culture of innovation within departments. However, organizations still need to guide, govern and control the reach and impact of citizen development, to avoid security breaches and system crashes.

Power Apps is often used to create mobile apps for staff and citizens, facilitating activities such as appointment scheduling, reporting potholes and tracking program applications. This enhances the possibility of citizen engagement and improves service delivery. Power Apps also assists significantly with automating repetitive tasks and streamlining processes in areas such as permit applications, license renewals or grant submissions. This automation frees up employee time for more complex work.

Qualified service providers enabling and supporting Power Platform in Azure offer increased efficiency, expertise and security, including expedited deployment and configuration regardless of clouds used. Dedicated experts enable policy and security compliance. They also offer training to foster internal knowledge base development and reduce reliance on external support over time.

From the 170 companies assessed for this study, 25 qualified for this quadrant, with 9 being Leaders and one Rising Star.



Accenture & Avanade offer complete Power Platform Services prioritizing user experience through design thinking and collaboration studios. The company also champions low-code adoption with training and governance to empower users and mitigate risks.



Cognizant enhances Power Automate Desktop to migrate from competitive RPA with improved data accuracy and broader code coverage. Strong Microsoft expertise, platform-native GO framework and integrated change management address key client concerns.



DXC Technology optimizes Power Platform solutions for cost reduction, faster development and industry specific needs through integration, automation and verticalization, all under its centralized Microsoft consulting arm.



Hexaware emphasizes modernizing legacy apps, including innovative solutions for Domino/Lotus Notes migration. Its Microsoft expertise and self-service offerings with guaranteed outcomes ensure client success.



IBM complements Microsoft's Power Platform, optimizing client cloud investments and gain a competitive edge. Its services include Power Platform CoE for adoption, Azure migration and management, industry-specific solutions and integration with IBM Cloud.



Power Platform Services



Infosys helps companies use Microsoft Business Apps through its Platform of Possibilities Framework, dedicated power platform practice and vertical-specific services, offering flexible pricing models.



Kyndryl bridges mainframe data to Power Platform for secure low-code app development and automates tasks within digital workplaces, boosting user satisfaction. Its experts consult, advise and train clients to unlock Power Platform's full potential.



TCS offers extensive Power Platform services (assessment, foundation and automation) and tools, catering to various client needs with a democratization approach through graduated services such as Power Move and Power Build.




Wipro's Power Platform helps build and analyze business apps using Microsoft Dynamics 365, with a CoE for support. Its FullStride Cloud Studio accelerates digital transformation through cloud solutions and robust governance features.



HCLTech (Rising Star) offers extensive Power Platform services, with a focus on low-code solutions, empowering users with automation and UI/UX tools. It invests in accelerators and integration tools and offers a unique subscription-based support program for comprehensive assistance.





Star of Excellence

A program, designed by ISG, to collect client feedback about providers' success in demonstrating the highest standards of client service excellence and customer centricity.



Appendix

The ISG Provider Lens 2024 – Microsoft Cloud Ecosystem study analyzes the relevant service providers in the global 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 March 2024, 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



Bruce Guptill
Distinguished Analyst and Executive Advisor

Bruce Guptill brings more than 30 years of technology business and markets experience and expertise to ISG clients. Bruce has helped develop and lead ISG's enterprise research development and delivery, global ISG Research operations, and Research client support. His primary research and analysis for ISG clients has focused on IT services market development, disruption, adaptation and change. He currently leads U.S. Public Sector research for ISG's Provider Lens global research studies, and also leads IPL studies in procurement and software vendor partner ecosystems.

Bruce holds a Masters' degree in Marketing and Finance, and a B.A. combining business and mass media communication psychology. He also holds certifications in a wide range of software, hardware, and networking technologies, as well as in mechanical and electrical engineering disciplines.

Research Analyst



Khyati Tomar
Research Analyst

Khyati Tomar is a Research Analyst at ISG and is responsible for supporting and coauthoring Provider Lens™ studies on the Microsoft Partner Ecosystem, the Future of Work - Services and Solutions, and OCM. She supports lead analysts in the research process and authors the Enterprise Context and Global Summary reports.

Prior to this, she had over 2.5 years of experience in the technology research industry, and had carried out various consulting and custom projects and co-authored CIS reports, mostly focusing on the public sector vertical.





Study Sponser

Aman Munglani
Director and Principal Analyst

Aman Munglani leads the ecosystems and custom research practice for ISG. He brings over twenty years of expertise in emerging technologies and industry trends. His career is marked by significant contributions in guiding top executives from Global 2000 companies, offering strategic advice on digital transformation, start-up partnerships, driving innovation, and shaping technology strategies.

In his tenure exceeding twelve years at Gartner, Aman focused on providing CIOs and IT executives across Asia Pacific and Europe with insights on the practical implementation and advancement of new technologies, the evolution of infrastructure, and detailed vendor assessments.



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.

ISG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: [Public Sector](#).

For more information about ISG Research™ subscriptions, please email contact@isg-one.com, call +1.203.454.3900, or visit research.isg-one.com.

ISG

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

For more information, visit isg-one.com.





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