ISG Provider Lens™

Microsoft Cloud Ecosystem

Managed Services for Azure

A report that compares provider performances to support decision-makers in the procurement of services

Customized report courtesy of:

BECHTLE

QUADRANT REPORT | APRIL 2024 | SWITZERLAND

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Report Author: Axel Oppermann

A new era for using Microsoft Clouds begins with Copilot and GenAI

Presently, Switzerland's late majority market is embracing cloud services, with digital sovereignty becoming an emerging trend. The late majority market refers to the phase in which a product or technology is accepted by a broad mass of consumers following its adoption by innovators and early adopters. Service providers possess the unique opportunity to effectively use their experience accumulated in recent years to acquire new customers in this target group. Using automation concepts, proprietary blueprints and the experience curve presents opportunities for optimizing margins amidst the intensifying competition. Therefore, providers need to examine how to optimize legacy services. There are also opportunities for existing and new customers to address topics such as digital sovereignty and explore additional revenue sources through new service concepts.

Digital sovereignty refers to the ability of a person, organization or state to gain complete control over its digital data, processes and infrastructures. A sovereign cloud is a highly controlled and autonomous cloud infrastructure where customers and organizations have full authority over their digital data and operations in the cloud. This implies that they have complete control over the storage, processing and transmission of sensitive information without relying on external service providers. Such self-determination creates a sense of security and independence, as users are no longer dependent on third parties, and potential risks such as data loss, unauthorized access or manipulation are minimized. Service providers should design their offerings to support their customers' digital sovereignty and convince them by defining optimal architectures and operating concepts and justifying the higher price points through value-added services.

Increasing dissemination of cloud services does not imply that the market is in a saturation phase. On the contrary, new or adapted fields of application and solutions are fostering long-term growth.

Microsoft's **turning point**: AI promotes **partnerships** and **expansion.**

The year 2024 will see rapidly increased demand for cloud services, with networking increasing significantly. As a pioneer, Microsoft is establishing standards by integrating AI and cloud technologies with products such as Azure, Microsoft 365 and Dynamics 365. The progressive introduction of generative AI (GenAI) catalyzes groundbreaking solutions and fundamentally changes the Microsoft ecosystem. Microsoft's strategic direction strengthens its position as an innovation leader and promotes sustainable growth and productivity gains. Partners also benefit from GenAI services and security and integration services in the context of data management.

GenAI and various Copilot services are central to Microsoft's market development strategy. Microsoft is aggressively promoting Copilot on a massive scale and recognizing its role as a sales door opener for other AI solutions. AI, Copilot and related offerings are increasing competitive pressure in the market.

The launch of Copilot represents a historic turning point for Microsoft. This innovation underlines Microsoft's ambition to consolidate and commercialize its leading position in GenAI. An impressive example of this innovation is GitHub's YoY revenue growth of more than 40 percent. Such success reflects the overall growth of the platform and is primarily due to the popularity of GitHub Copilot, the world's leading AI development tool. With more than 1.3 million paying subscribers and over 50,000 organizations using GitHub Copilot to increase their development teams' productivity, GitHub Copilot is a testament to the practicality and value of this technology.

Developing zero-trust security architectures is another strong growth area for AI in the context of Copilot (Copilot for Security) and GenAI. Microsoft's vision is to use AI to prevent cyberattacks and significantly contribute to cyberspace security.

With increasing cybersecurity risks, GenAI is becoming established as a key component for zero-trust security architectures. GenAI enables a new type of prevention by analyzing large amounts of data in real-time to detect anomalies and potential threats at an early stage. It supports adaptive authentication mechanisms that consider contextual factors such as location and user behavior and enables security policies that are precisely tailored to individual needs. GenAI also efficiently automates and orchestrates security processes, improves network security through continuous monitoring and strengthens the security culture through targeted employee training. These developments offer service providers extensive opportunities to actively participate in designing advanced security solutions and consolidating their role in the cybersecurity ecosystem. Thus, GenAI plays a key role in promoting secure and resilient digital environments.

Microsoft partners have the opportunity to tap into new markets with innovative solutions and industry- and customer-specific services enabled by Azure GenAI Services.

Microsoft's focus on AI is evident through its substantial investment in infrastructure and partnerships. The company is also rapidly entering into forward-looking partnerships. The collaboration with OpenAI marked a pivotal moment of immense significance for Microsoft. The strategic alliance with Mistral AI, based on supercomputing infrastructure, market development and AI research, and the announcement of extensive financial investments in expanding AI and cloud infrastructures demonstrate Microsoft's commitment to global innovation and digital skills improvement. These measures highlight the company's ambition to be at the forefront of digital transformation and the ethical application of AI technologies. Microsoft partners can benefit from these and other strategic partnerships. It is important to maintain an overview and actively seek collaboration with these technology pioneers.

Although Microsoft's focus on AI is attracting significant interest in Switzerland, it does not necessarily imply that all customers are aligning their priorities with Microsoft's. The maturity level of Microsoft users in Switzerland is heterogeneous, which implies that varied market needs are being realized simultaneously. Certain companies that are pioneers in implementing new services are working intensively on topics such as automating cloud operations and targeted optimization of their expenses — keyword FinOps. The team telephony topic — particularly integrating mobile telephony and Power Platform — is gaining prominence. Some customers are curious about what comes after Microsoft 365 E5 and how Windows 365 can be logically integrated into their overall strategy.

However, many user companies are still beginning their journey and have recently started exploring essential functions and services of Microsoft 365 and Azure to achieve significant success and added value. This situation presents service providers with an opportunity and a challenge: they are required to refine their offerings and focus on the most profitable and sustainable services without limiting their potential for revenue growth. It is essential to analyze the lifecycle of individual managed services and determine the value contribution and cost recovery ratio at the customer level while optimizing the portfolio and aligning it with the future. GenAI's role in increasing performance efficiency should also be evaluated.

Microsoft is consistently focusing on AI and sees it as a strategic priority. This focus represents a challenge and a significant growth opportunity for Swiss service providers. It is time to carefully evaluate different options for market entry and design a targeted strategy.

> Microsoft is increasingly investing in AI; these include billions in investments and strategic partnerships with ETH Zurich and leading Swiss companies. Such investments present not only numerous opportunities but also challenges. It is crucial to take advantage of the new era of networking in Microsoft's technology ecosystem.

Provider Positioning

	Managed Services for Azure	Microsoft 365 Services	SAP on Azure Services	Power Platform Services	Generative AI Services for the Microsoft Clouds
Accenture & Avanade	Product Challenger	Not In	Market Challenger	Not In	Leader
Adesso	Not In	Not In	Not In	Not In	Leader
All for One Group	Not In	Not In	Leader	Not In	Not In
Allgeier	Leader	Not In	Not In	Not In	Not In
Ambit Group	Leader	Not In	Not In	Leader	Not In
Arvato Systems	Not In	Not In	Leader	Not In	Not In
Aveniq	Leader	Leader	Not In	Leader	Not In
Axians	Contender	Not In	Not In	Not In	Not In
Baggenstos	Leader	Product Challenger	Not In	Not In	Not In
Bechtle	Leader	Rising Star ★	Not In	Product Challenger	Not In

Provider Positioning

	Managed Services for Azure	Microsoft 365 Services	SAP on Azure Services	Power Platform Services	Generative AI Services for the Microsoft Clouds
BitHawk	Rising Star ★	Leader	Not In	Not In	Contender
BS_Team	Not In	Not In	Not In	Product Challenger	Not In
Capgemini	Not In	Not In	Leader	Market Challenger	Not In
Data One	Not In	Leader	Not In	Leader	Not In
Devoteam M Cloud	Not In	Not In	Leader	Not In	Not In
DIGITALL	Product Challenger	Product Challenger	Not In	Leader	Not In
DXC Technology	Product Challenger	Market Challenger	Product Challenger	Contender	Product Challenger
Econis	Product Challenger	Not In	Not In	Not In	Not In
ELCA/EveryWare	Leader	Leader	Not In	Leader	Not In
Eviden (an Atos Business)	Market Challenger	Not In	Rising Star ★	Not In	Leader

Provider Positioning

	Managed Services for Azure	Microsoft 365 Services	SAP on Azure Services	Power Platform Services	Generative AI Services for the Microsoft Clouds
Fujitsu	Not In	Not In	Contender	Not In	Product Challenger
Infosys	Product Challenger	Contender	Product Challenger	Product Challenger	Not In
IOZ AG	Not In	Contender	Not In	Market Challenger	Not In
isolutions	Leader	Leader	Not In	Market Challenger	Not In
itesys	Not In	Not In	Product Challenger	Not In	Not In
Joker IT	Not In	Contender	Not In	Not In	Not In
Kyndryl	Leader	Leader	Market Challenger	Rising Star ★	Rising Star ★
MDW	Not In	Not In	Not In	Leader	Leader
MIG X	Not In	Contender	Not In	Not In	Not In
novaCapta	Product Challenger	Market Challenger	Not In	Product Challenger	Product Challenger

Provider Positioning

	Managed Services for Azure	Microsoft 365 Services	SAP on Azure Services	Power Platform Services	Generative AI Services for the Microsoft Clouds
NTT DATA	Not In	Not In	Product Challenger	Not In	Not In
PwC	Not In	Not In	Not In	Not In	Leader
Rackspace Technology	Not In	Not In	Not In	Not In	Product Challenger
Scheer	Market Challenger	Not In	Contender	Not In	Not In
SmartIT Services	Contender	Not In	Not In	Not In	Not In
SoftwareONE	Leader	Leader	Leader	Leader	Contender
Somnitec	Product Challenger	Contender	Product Challenger	Not In	Not In
Sopra Steria	Contender	Not In	Not In	Contender	Not In
Swisscom	Leader	Leader	Leader	Leader	Leader
TCS	Contender	Not In	Not In	Not In	Product Challenger

Provider Positioning

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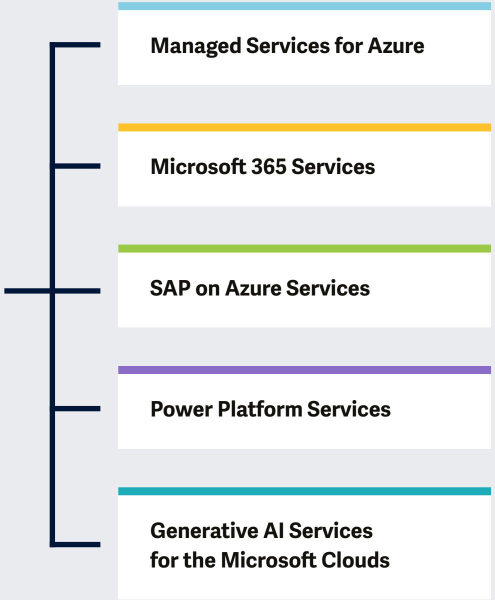
	Managed Services for Azure	Microsoft 365 Services	SAP on Azure Services	Power Platform Services	Generative AI Services for the Microsoft Clouds
Trans4mation	Contender	Product Challenger	Not In	Not In	Not In
T-Systems	Leader	Product Challenger	Leader	Market Challenger	Not In
UMB	Leader	Market Challenger	Product Challenger	Not In	Not In
Vistasys	Not In	Contender	Not In	Not In	Not In
Wipro	Contender	Not In	Contender	Not In	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 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 several core areas: The Azure cloud platform; the Microsoft 365 suite of productivity offerings encompassing Windows 10 and 11 and Office 365; and business, automation and AI applications provided through Dynamics 365, Power Platform and Microsoft Copilot.

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 also demonstrate a keen awareness of future developments in the Microsoft clouds and show the ability to drive innovations.

ISG's analysis will focus on how providers in Australia, Brazil, Germany, Mexico, Singapore & Malaysia, Switzerland, the U.K. and the U.S. are positioned based on the strength of their portfolios and their competitiveness in the respective markets. While there are thousands of providers delivering services for Microsoft products in each of these regions, this report will solely focus on the leading competitors within each of the quadrants studied, encompassing both global and local providers for each specific 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 and Generative AI Services for the Microsoft Clouds.

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 an important decision-making basis for positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their current 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.

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/services and a follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not in means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

Managed Services for Azure

Who Should Read This Section

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

Swiss enterprises face a multitude of challenges in meeting their needs for managed services for Azure. The complexity of migrating existing systems to Azure poses a significant hurdle, given the size and complexity of the data involved. Moreover, striking a balance between performance and expenses while optimizing costs related to infrastructure, data management, and Azure services presents a notable challenge.

Although enterprises have shown some caution regarding cloud migration, they are selecting service providers with local operations that can meet their stringent security and compliance requirements. As per ISG, factors such as a reputation for security, reliability and the overall quality of services are driving the growth of the public cloud market in Switzerland.

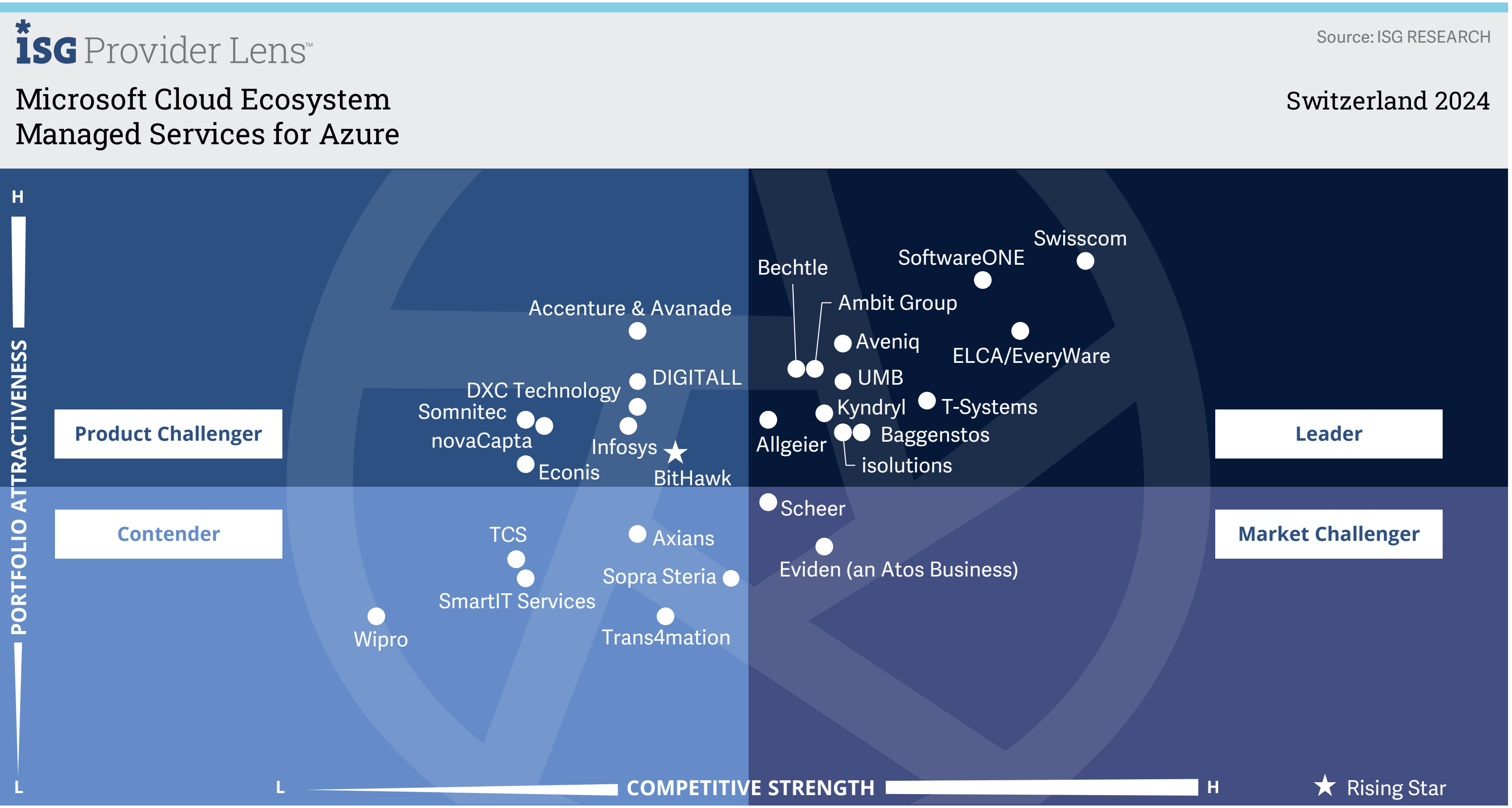
In response to the abovementioned concerns, Switzerland-based service providers are dedicated to offering customized solutions and local support, striving to meet the unique requirements of Swiss enterprises as they embark on their adoption of managed services for Azure. Additionally, these providers are actively supporting enterprises by facilitating the integration of cloud-native and legacy systems. They are also providing services such as cloud architecture and IT assessment, cloud readiness assessment, Azure operation assessment and management tool advice, alongside offering training and conducting migrations.

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

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

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

Procurement professionals should read this report to understand the ecosystem of Microsoft Azure managed service providers in Switzerland and to compare providers.



Service providers are benefiting from increasing and thematically diversifying demand, yet simultaneously investing in **automation and employee skills** to meet the dynamic marketplace challenges.

Axel Oppermann

Definition

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

Providers within this quadrant were evaluated according to their regional capabilities in services, delivery and sales, which may be complemented by both nearshore and offshore delivery options. Going well beyond the lift-and-shift of single workloads, service providers offer comprehensive tools, services and solutions to support clients' business-critical demands using the Azure cloud.

The typical services offered include:

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

Eligibility Criteria

1. Experience in **designing, building and managing** public cloud and multicloud environments, with a focus on Microsoft Azure
2. Support in the development of software code and **cloud-native and legacy system integration**
3. Experience in implementing both **Agile and DevOps**, as well as integrating with enterprise clients' existing processes
4. Experience in API **automation and cloud analytics**
5. Well-developed **security** practices and capabilities
6. Strong **partnership with Microsoft**, measured by the number and category of relevant certifications, duration of the association with Microsoft, and evidence of strategic cooperation between the provider and Microsoft around Azure

Observations

The cloud market in Switzerland exhibits a distinct dynamism that is evident across the public and private sectors. The financial, healthcare, manufacturing and retail industries are driving the developments. The growing demand for cloud solutions that support local data storage to meet high security and data protection standards is striking — a sign of increased awareness regarding data sovereignty in highly regulated industries.

Leading hyperscalers such as Microsoft are expanding their presence in Switzerland to meet the growing demand. Microsoft's establishment of two networked Azure regions illustrates its ambition to support Swiss authorities, companies and ISVs in their cloud initiatives.

In parallel with the technology infrastructure expansion, IT service providers and managed service providers (MSPs) are refining their offerings through increased automation. These initiatives promise to deliver high-quality and secure services, emphasizing the need for continuous adaptation to technical innovations and designing efficient and secure services. The flexibility and innovative spirit of the IT services industry are crucial to address the individual requirements of different sectors.

The dynamism of the market is reflected in the latest valuations. BitHawk has established itself as a Rising Star. Kyndryl has transitioned to become a Leader, and providers such as Swisscom, ELCA/EveryWare and SoftwareONE are impressing with their portfolios.

From the 46 companies assessed for this study, 28 qualified for this quadrant, with 12 being Leaders group and one a Rising Star.

Allgeier

Under the motto Empower your Infrastructure, **Allgeier** offers secure and customized IT solutions for cloud and hybrid environments. Individual consulting and managed services make the company a key partner for efficient IT strategies.

Ambit Group

The **Ambit Group** is known for its strong customer focus and extensive industry expertise in supporting digital transformation.

AVENIQ

Aveniq specializes in sectors such as finance and healthcare and offers tailormade cloud solutions in Switzerland. With its in-depth industry knowledge and over 100 Azure experts, Aveniq offers services ranging from consulting to compliance, all from a single source.

Baggenstos

Baggenstos' managed services integrate seamlessly into business processes, minimizing interruptions and promoting business success with targeted Azure solutions. Offerings are enhanced by professional operations and transparent costs.

BECHTLE

Bechtle offers managed services and customer consulting covering IT strategy to modern workplace solutions. It prioritizes efficient Azure cloud infrastructure utilization through training and know-how transfer, thereby enhancing quality, security and proactive maintenance.

ELCA/EveryWare

ELCA/EveryWare demonstrates technical excellence and offers end-to-end support. With a focus on security, compliance and customer-centric consulting, the company establishes standards in network management, high availability and multicloud expertise.

isolutions

With Azure Operations as a Service (AOaaS), **isolutions** facilitates cloud migration, from landing zones to data security, for companies of all sizes and promotes customer satisfaction.

kyndryl

Kyndryl leads in cloud modernization and digital transformation with strategies aligned to business goals. It leverages Azure technologies for optimization. The integration of DevSecOps and AIOps improves efficiency and security.

SoftwareONE

SoftwareONE, with its 360-degree expertise, offers close customer proximity and customized Azure cloud solutions. It specializes in cost optimization and migration and promotes efficient cloud use and modernization.

swisscom

With its multicloud strategy and the Cloud Center of Excellence, **Swisscom** offers exceptional flexibility and comprehensive compliance, supported by innovative sustainability solutions.

T Systems

T-Systems guarantees maximum security and compliance and offers flexible price structures. Its comprehensive Microsoft solution expertise and affiliation with Deutsche Telekom strengthen its market position.

UMB
Transformation
Technology

UMB strengthens the IT landscape in Switzerland, offers comprehensive solutions from managed services to consulting, and focuses on efficient service delivery and compliance to meet customer-specific requirements.

BitHawk

BitHawk (Rising Star) offers Microsoft Azure Cloud Services with standardized building blocks. It efficiently combines cloud and legacy systems and focuses on productivity and automation for future-oriented IT solutions.

Leader

"Bechtle is a leading IT service provider for Azure services in Switzerland. It offers a diverse portfolio of managed services that enable clients to use their IT more efficiently."

Axel Oppermann

Bechtle

Overview

With over 600 employees at 10 locations in Switzerland, Bechtle is a reliable and established provider. The company employs over 14,800 people worldwide, spread across 85 branches in 14 countries. In FY22 the company generated €6.0 billion in revenue, with a key focus on IT system house work and managed services. With more than 2,000 service experts, Bechtle assumes operational responsibility for over 450,000 workstations, 25,000 virtual servers, 18,000 switches and 55,000 security endpoints.

Strengths

Consulting and cloud concepts: Bechtle has a comprehensive range of consulting services. The company conducts Azure Operations Assessments and advises on selecting suitable management tools. It develops customized tools that enable rapid migration to the Azure cloud for select industries.

Training and knowledge transfer: Bechtle focuses on training by offering courses across various locations, ranging from configuration to optimization of Azure environments. With this offering, Bechtle underlines its position to support customers during the transformation process and provide them with the necessary knowledge to efficiently use and maintain their cloud infrastructures.

Managed services and customer focus: Bechtle offers a comprehensive portfolio of managed services that help companies use their IT resources more efficiently. The offering ranges from IT strategy to solutions for collaboration, infrastructure and modern workplaces. With a key focus on quality, security and proactive maintenance, Bechtle aims to simplify IT administration and offer customers more flexibility for their core businesses.

Caution

Bechtle could benefit from expanding its offering through an even more intensive focus on developing and implementing state-of-the-art automation technologies. Furthermore, expanding its FinOps services could help the company target new customer groups.

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.

Source: ISG Star of Excellence™ research program, Insights till January 2024

In the ISG Star of Excellence™ research on enterprise customer experience (CX), clients have given feedback about their experience with service providers for their **Microsoft Cloud Ecosystem** services.

Based on the direct feedback of enterprise clients, below are the key highlights:

Client Business Role

▲ **Most satisfied**
Asia

▼ **Least satisfied**
Middle East

Region

▲ **Most satisfied**
Public sector

▼ **Least satisfied**
Chemicals

Industry

▲ **Most satisfied**
Information Technology

▼ **Least satisfied**
Procurement / Vendor Management

Industry Average CX Score

▲ Highest CX: 94
▼ Lowest CX: 55.6

CX Score: 100 most satisfied, 0 least satisfied
Total responses (N) = 766

Most Important CX Pillar

Execution and Delivery

Service Delivery Models	Avg % of Work Done
Onsite	50.6%
Nearshore	18.2%
Offshore	31.2%

Appendix

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

Axel Oppermann
Lead Analyst

With nearly 20 years of experience as an IT market analyst and advisor, Axel Oppermann is a sought-after expert in marketing and technology advisory in German-speaking countries. He specializes in strategic consulting for technology companies and their customers. His comprehensive analyses of the German and European IT markets have been featured in leading publications.

Axel is a highly requested interlocutor for journalists and innovators, in demand for his controversial, fresh and new perspectives. He is known for his precise and profound analysis.

Enterprise Context and Global Summary

Khyati Tomar
Research Analyst

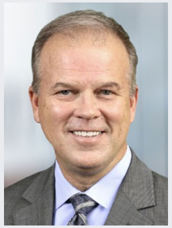
Khyati Tomar is a Research Analyst at ISG and is responsible for supporting and coauthoring Provider Lens™ studies on the Microsoft Partner Ecosystem, the Future of Work - Services and Solutions, and OCM. She supports lead analysts in the research process and authors the Enterprise Context and Global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

Aman Munglani

Director Ecosystem Studies,
Custom Research & Digital innovator series

A recognized thought leader and industry advisor with over 23 years of experience in emerging technologies, Emerging vendors and infrastructure, Aman Munglani has spent much of his professional life advising the C-suite of Global 2000 companies on digital strategies, start-up engagement, innovation, technology roadmaps and vendor management. Prior to ISG, Aman spent twelve plus years at Gartner guiding CIOs and IT managers across Asia Pacific and Europe on emerging technologies, their use cases and maturity, infrastructure trends and technologies, vendor comparisons, and RFP reviews. He also advised many global and Asia-Pacific vendor organizations on their go to market, product and pricing strategies and applicable competitive scenarios.



IPL Product Owner

Jan Erik Aase

Partner and Global Head – ISG Provider Lens™

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

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

ISG Provider Lens™

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

For more information about ISG Provider Lens™ research, please visit this webpage.

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