Microsoft Cloud Ecosystem

Microsoft 365 Services

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

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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.**

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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

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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.

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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
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

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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
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

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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

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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
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

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Provider Positioning

	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

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

- **Managed Services for Azure**
- **Microsoft 365 Services**
- **SAP on Azure Services**
- **Power Platform Services**
- **Generative AI Services for the Microsoft Clouds**

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.

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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).

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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.

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Microsoft 365 Services

Who Should Read This Section

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

Enterprises in Switzerland are often looking for various features and capabilities in Microsoft 365 to enhance their productivity, collaboration tools and security. Switzerland-based enterprises are in search of a solution that addresses challenges associated with the implementation of SaaS-based workplace environments, file storage, and unified communication. They are also seeking guidance on license costs, provisioning procedures, maintenance plans, technical inquiries, software deployment, consulting services and adoption.

In response to these challenges, service providers are offering a diverse array of innovative capabilities and services to assist clients with the design, planning, implementation and ongoing optimization of Microsoft 365 solutions. Through a wide range of service offerings, tailored governance models, blueprints and best practice approaches for user adoption (including training and rollout concepts), providers are striving to ensure that their clients fully leverage the extensive capabilities of Microsoft 365 and achieve significant synergies.

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.

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

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

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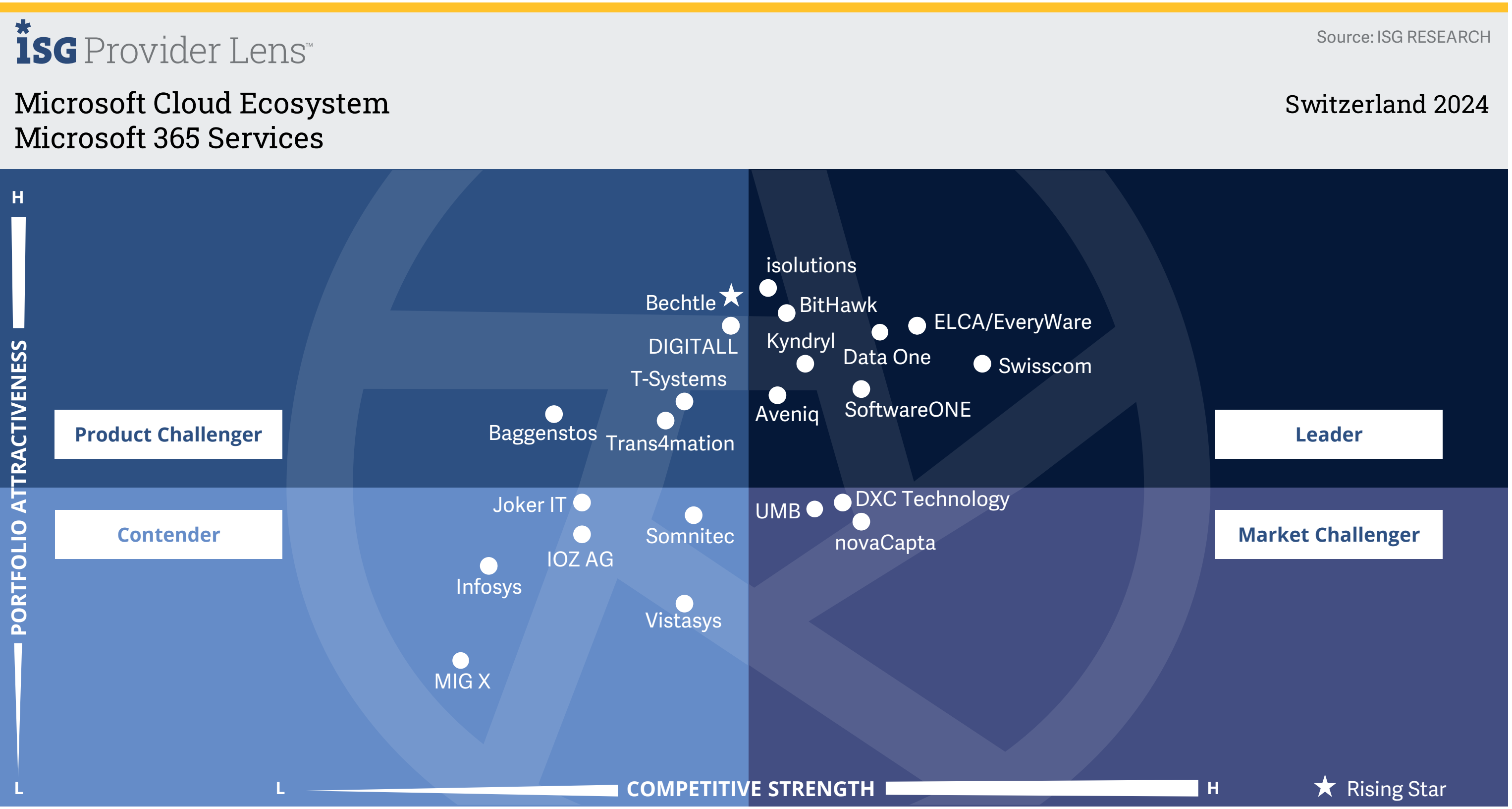

Efficiency, continuous optimization, highly secure systems and AI innovations are shaping discussions in the market. **The interaction of Copilot with Microsoft 365 and Power Platform** will lead to a new type of demand this year.

Axel Oppermann

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Definition

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

These services go beyond provisioning and migrating to Microsoft 365; they focus on offering a quick, device-independent, high-quality productivity suite that enables seamless teamwork, irrespective of location. These services are also adaptable to the role of the user. From clients' viewpoint, Microsoft 365 revolves around fostering collaboration and seamlessly integrating geographically dispersed teams on a global scale. To enable this, integration and implementation services are necessary. This quadrant also evaluates providers on the support they offer for Windows as a part of their overall Microsoft 365 service portfolio.

Implementing SaaS-based workplace environments is a challenge for every enterprise client. ISG notes a plethora of challenges around collaboration, unified communication, file storage, performance, license costs, provisioning procedures and maintenance plans. There are also challenges in data integration, process integration, application integration, and other processes. Providers operating in this domain must extend their capabilities beyond the basic implementation of Microsoft 365 to proactively address the associated challenges.

Providers considered in this quadrant are expected to offer assessment, consulting services, and solutions to assist clients in their digital transformation journeys. This necessitates clear and transparent-communication within the specific region and unique selling propositions that extend beyond the provision of workplace environments relying on Microsoft's desktop and collaboration solutions.

Eligibility Criteria

1. Service portfolio covering **technical consulting, licenses, and Microsoft 365 module integration, implementation and operation**
2. Innovative offerings that integrate with Microsoft 365 to create modern workplaces, such as **HoloLens** and Teams
3. Microsoft Office **API management** for appropriate use and enhanced productivity
4. Ability to **migrate** workplaces to modern cloud environments and offer **workspace-as-a-service models**
5. Provisioning of Microsoft 365–based **unified endpoint suites** integrated with state-of-the-art IAM technology and mobile device management (Intune or others)
6. Strong **partnership with Microsoft**, measured by the number and category of certifications (including Office 365, Intune, Windows and Azure), duration of association with Microsoft, and evidence of strategic modern workplace cooperation between the provider and Microsoft

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Observations

There is a trend toward continuous development in security, compliance and governance in the dynamic Swiss market for Microsoft 365 and related services. This development is aligned with the drive for higher work productivity and better quality of operational processes. Key elements here are automation and introducing new workflows. It is further supported by the increasing integration of data from different platforms into Microsoft 365 applications, which enables users to rethink traditional working methods and train employees. This approach promotes an open corporate culture that embraces innovation and continuous improvement.

Service providers are challenged with the task of sustainably integrating and managing technological innovations in their customers' corporate landscape. The focus is on creating tangible added value through high-quality service that has a positive impact on user experience and increases the acceptance and efficiency of new solutions in daily business operations. Providers identified as Leaders in this quadrant regularly meet these requirements; they extend the boundaries of what is feasible and pave the way for future-oriented working environments.

From the 46 companies assessed for this study, 22 qualified for this quadrant, with eight being Leaders and one a Rising Star.

AVENIQ

Aveniq offers comprehensive support for Microsoft 365, from planning to optimization, with a focus on security, compliance and innovative platform solutions to increase process efficiency and digital transformation.

BitHawk

BitHawk promotes workplace modernization through training and technologies, supports innovation with Microsoft 365 Copilot and Azure AI, and improves safety and efficiency through regular assessments in the digital transformation context.

Data One

Data One integrates Microsoft 365 into flexible working environments, strengthens digital security and provides comprehensive IT support to foster productive communities and equip companies for future challenges.

ELCA/EveryWare

ELCA/EveryWare offers a comprehensive Microsoft 365 managed offering, reinforced by advanced security services and future-oriented cloud governance, to optimize collaboration and support a secure IT environment.

isolutions

isolutions develops workplaces with a holistic Microsoft 365 framework. It designs individual implementation strategies and promotes know-how in the use of Microsoft 365 through targeted training.

kyndryl

Kyndryl elevates IT support to a new level with omnichannel approaches and automation. It offers customized desktop virtualization and comprehensive device management for secure and efficient IT solutions.

SoftwareONE

SoftwareONE promotes hybrid working models and cost control for Microsoft 365. The company offers comprehensive consulting and services such as backup and recovery and drives innovation and optimized communication with Microsoft 365.

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Swisscom offers Microsoft 365 solutions with comprehensive know-how, unparalleled local support in Switzerland and customized cloud solutions for efficient resource use and increased productivity.

Bechtle (Rising Star) addresses regulatory challenges with industry-specific cloud solutions for the healthcare and financial sectors, establishes the highest security standards and offers strategic consulting for customized cloud strategies.

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Bechtle

Rising Star

"Bechtle is positioned as a Rising Star this year owing to its continuously optimized and expanded portfolio that covers customer needs more comprehensively. Its many years of comprehensive expertise help the company maintain a dynamic market presence."

Axel Oppermann

Overview

Bechtle is a reliable and established provider with over 600 employees across 10 locations in Switzerland. The company has over 14,800 employees in 85 branches across 14 countries worldwide. In FY22 the company generated €6.0 billion in revenue, with IT System House and Managed Services as its largest segment. 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

Industry-specific cloud solutions: Bechtle addresses industry-specific challenges with specialized cloud solutions for the healthcare and financial services industries. The solutions consider regulatory requirements and enable seamless integration into existing processes. In the healthcare sector, Bechtle's Azure Managed Services for IoT demonstrate how innovative technologies can be used efficiently.

Highest security standards: Bechtle prioritizes security and compliance. Its security architecture is based on Azure Sentinel and Microsoft Defender, supplemented by multifactor authentication. These measures protect sensitive data and help companies meet high-security standards. In this way, Bechtle guarantees comprehensive protection and supports customers in meeting compliance requirements.

Strategic consulting and implementation: Bechtle offers best-in-class IT solutions based on its extensive experience and close partnership with Microsoft. The company employs certified Azure experts who use their knowledge to develop customized cloud strategies tailored to customer needs. This approach enables effective optimization of cloud usage and increases competitiveness.

Caution

It would be advantageous for Bechtle to intensify the development and integration of advanced automation tools into its portfolio to increase process efficiency and customer satisfaction. The company should also focus on FinOps services to attract new customers.

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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

83.2

▲ 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%

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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

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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.

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Aman Munglani

Director Ecosystem Studies,
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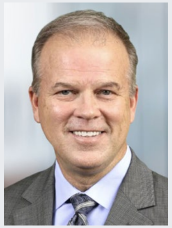
A recognized thought leader and industry advisor with over 23 years of experience in emerging technologies, Emerging vendors and infrastructure, Aman Munglani has spent much of his professional life advising the C-suite of Global 2000 companies on digital strategies, start-up engagement, innovation, 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.

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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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