

Microsoft Ecosystem

Managed Services Providers (MSP) for Azure
- Large Accounts

Germany 2020

Quadrant
Report



A research report
comparing provider
strengths, challenges
and competitive
differentiators

Customized report courtesy of:

Atos

March 2020

About this Report

Information Services Group Inc. is solely responsible for the content of this report. Unless otherwise cited, all content, including illustrations, research, conclusions, assertions and positions contained in this report were developed by, and are the sole property of Information Services Group Inc.

The research and analysis presented in this report includes research from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of February 2020, 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 lead authors for this report are Henning Dransfeld and Frank Heuer. The research analyst is Srujan Akurathi and the data analyst is Kankaiah Yasareni.

ISG Provider Lens™

ISG Provider Lens™ delivers leading-edge and actionable research studies, reports and consulting services focused on technology and service providers' strengths and weaknesses and how they are positioned relative to their peers in the market. These reports provide influential insights accessed by our large pool of advisors who are actively advising outsourcing deals as well as large numbers of ISG enterprise clients who are potential outsourcers.

For more information about our studies, please email ISGLens@isg-one.com, call +49 (0) 561-50697537, or visit ISG Provider Lens™ under [ISG Provider Lens™](#).

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.

For more information about ISG Research™ subscriptions, please email contact@isg-one.com, call +49 (0) 561-50697537 or visit research.isg-one.com.



- 1** Executive Summary
- 3** Introduction
- 15** Managed Services Providers (MSP) for Azure - Large Accounts
- 28** Methodology

© 2020 Information Services Group, Inc. All rights reserved. Reproduction of this publication in any form without prior permission is strictly prohibited. Information contained in this report is based on the best available and reliable resources. Opinions expressed in this report reflect ISG's judgment at the time of this report and are subject to change without notice. ISG has no liability for omissions, errors or completeness of information in this report. ISG Research™ and ISG Provider Lens™ are trademarks of Information Services Group, Inc.



EXECUTIVE SUMMARY

The market for consulting, integration and implementation of Microsoft products is witnessing strong growth. Innovations in Microsoft product suites and the growing complexity of integration in numerous application areas have led to the dynamic market development of professional services in the areas of consulting, design, integration, implementation and managed services for Microsoft applications and the cloud environment. In this report, ISG has observed some common trends in the digital technology market:

- **Small and mid-sized enterprises becoming a dynamic market environment:** Smaller companies are developing more technological competence in-house and their end-users are also expecting an increasingly mobile, universal workplace.
- **Many companies actively migrating to Microsoft Teams:** Communication and collaboration continue to be the key tools for reshaping the way individuals work in offices. SharePoint is increasingly used by customers through Microsoft Teams.
- **Customers demanding employee-centric approach to technology:** As the transition is often quite complex, it should be accompanied by a change management program to get all end users on board.
- **Reduction of downtime and disturbances to end users:** Common sources of error, such as password problems, are increasingly resolved through self-service portals and chatbots. In addition, higher automation capabilities are expected in standard processes such as onboarding or distribution of new software.

- **Growing demand for transparent WaaS service model:** Some companies are engaged in the introduction of workplace as a service (WaaS) and similar software as a service (SaaS) solutions. At the same time, IT organizations should be set up in such a way to drive shorter release cycles.
- **Client requirements becoming more complex:** Large organizations are increasingly demanding automation, DevOps and containerization for setting up and managing cloud platforms. Their pricing models are result oriented and reflect user behavior.
- **Relevant experience in public cloud:** Nearly a third of all companies have already set up workloads on Azure, primarily through the hybrid cloud approach.
- **Microsoft among the top hyperscalers and gaining rapid traction:** The Microsoft Azure platform is currently the second best player after AWS owing to its growing market penetration and the popularity of Azure and Azure Stack services. The competitive gap between both platforms has narrowed significantly, with many programmers shifting towards Azure. There is also a growing interest in using Azure Stack as a platform for operating unconnected cloud services (Azure Stack disconnected mode) for high-security clients and as a platform for OpenShift and other cross-platform solutions and technologies.

- **Azure preferred by SAP:** SAP is shifting away from its own hosting solutions and has approached hyperscalers, specifically Microsoft Azure, with its Project Embrace. The company runs internal SAP applications on Azure, and the recent announcement of the Embrace partnership positions Azure well in the market.
- **Application scenarios shifting from lift and shift to goal-oriented architectures with migration to HANA/S4HANA:** With S4HANA, which is well established with five previously released versions, clients expect a better return on investment. The first step is to flexibility transfer SAP's basic operations to the cloud (to minimize risk based on a proven approach).



Introduction

Simplified illustration

Microsoft Ecosystem 2020 - Germany	
Managed Services Providers (MSP) for Azure	Midmarket
	Large Accounts
Office 365 Integration	Midmarket
	Large Accounts
SharePoint Integration	SAP on Azure

Source: ISG 2020

Definition

Microsoft is one of the most established IT service providers worldwide. In Germany, the firm has around a hundred partners listed on the DAX index. It has around a thousand partners in the business customer sector and tens of thousands in the retail environment with less relevance to corporate IT. The firm leads the established workplace environment with its Office 365 suite. Another dynamic growth area is the Microsoft Azure portfolio for public and private clouds. The Redmond-based company invests heavily in technological trends such as artificial intelligence (AI), internet of things (IoT), robotics process automation (RPA), edge computing and high-performance computing. It aims to deliver differentiated value across the cloud portfolio and remain relevant while continuing to achieve high cross-margins.

Definition

Scope of the Study

ISG has identified six dedicated fields in Germany for enterprise clients seeking Microsoft services. This study assesses providers of managed services on Azure, managed services for SAP on Azure, SharePoint and Office 365 Integration. Based on different market requirements in the region, Office 365 integration and managed services on Azure for large customers and small and mid-sized enterprises (SMEs) were assessed separately.

ISG has divided the German market for Microsoft ecosystem into the following six market segments (five have already been analyzed in 2019; the market for managed services on Azure for SMEs is new):

Office 365 Integration Services for Large Accounts: Office 365 Integration Services for Large Accounts: Office 365 combines Office 365 productivity solutions with Windows usage rights, mobile management software and security services. The product bundle forms the basis for modern workplace concepts and solutions using Microsoft technologies.

Office 365 Integration Services for Midmarket: This segment is focused on the market launch of Office 365 in the midmarket segment (1,000–5,000 employees).

SharePoint Integration: This segment is focused on the mature market for SharePoint integration. Service providers in this space offer integration and implementation services for on-premise and hybrid scenarios with respect to SharePoint.

Managed Services for Azure — Large Accounts: This segment assesses managed service providers (MSPs) that support large account customers during the transition to cloud and in the implementation of all cloud solutions. The tasks/services range from consulting and migration to operations and management.

Managed Services for Azure — Midmarket: This area is focused on mid-sized businesses with 50 to 4,999 employees who support customers in the transition to cloud and in the implementation of all cloud solutions. The tasks and services range from consulting and migration to operation and management.

Managed Services for SAP on Azure: This segment evaluates vendors (service providers) that offer SAP systems on Azure with central management.

Definition

Managed Services Providers (MSP) for Azure

A cloud MSP is a service provider that supports customers in all aspects of the transition to cloud and in the implementation of cloud solutions. The tasks/services range from consulting and migration to operations and management. These service providers differentiate themselves by building a business unit around DevOps, automation and cloud-native application design. They act as a one-stop shop for clients and employ the pay-as-you-go business model. The services are an integral part of other areas of performance such as exemplary hosting, system integration, resale and application design. Managed service providers are also characterized by optimized operational processes and customer life cycle value management approaches.

SAP on Azure

Vendors (service providers) that offer SAP systems on Azure with central management are evaluated. Some of their services include architecture consulting, support with configuration, deployment, escalation management, change and fault management, optimization and reporting. They not only offer Azure as a pure hardware replacement or hardware extension (IaaS) for enterprise clients, but also optimize and develop new processes or business procedures through a combination of their own services and those of SAP and Microsoft Azure.

SharePoint Integration

This segment covers service providers, system integrators and consultants that offer solutions and services around SharePoint, especially the integration and implementation services for on-premise and hybrid scenarios. In addition to the actual integration of SharePoint, it also looks into the integration of widely used enterprise systems such as SAP, Microsoft Dynamics 365 and Salesforce.

Definition

Office 365 Integration

Office 365 has become the leading SaaS office productivity solution in recent years, covering integrated deployment of Office Client, Exchange Online, SharePoint Online, and Skype for Business with respect to active directory and rights management. It is a fast, device-independent, high-quality productivity suite that enables seamless teamwork regardless of location and can adapt as per the user's role in integration and implementation services. Service providers that offer dedicated services for the migration, implementation and ongoing support (support, managed services, etc.) for Office 365 are evaluated in this segment.



Provider Classifications

The ISG Provider Lens™ quadrants were created using an evaluation matrix containing four segments, where the providers are positioned accordingly.

Leader

The “leaders” among the vendors/providers have a highly attractive product and service offering and a very strong market and competitive position; they fulfill all requirements for successful market cultivation. They can be regarded as opinion leaders, providing strategic impulses to the market. They also ensure innovative strength and stability.

Product Challenger

The “product challengers” offer a product and service portfolio that provides an above-average coverage of corporate requirements, but are not able to provide the same resources and strengths as the leaders regarding the individual market cultivation categories. Often, this is due to the respective vendor’s size or their weak footprint within the respective target segment.

Market Challenger

“Market challengers” are also very competitive, but there is still significant portfolio potential and they clearly lag behind the “leaders.” Often, the market challengers are established vendors that are somewhat slow to address new trends, due to their size and company structure, and have therefore still some potential to optimize their portfolio and increase their attractiveness.

Contender

“Contenders” are still lacking mature products and services or sufficient depth and breadth of their offering, while also showing some strengths and improvement potentials in their market cultivation efforts. These vendors are often generalists or niche players.

Provider Classifications (cont.)

Each ISG Provider Lens™ quadrant may include a service provider(s) who ISG believes has a strong potential to move into the leader's quadrant.

Rising Star

Rising stars are mostly product challengers with high future potential. When receiving the “rising stars” award, such companies have a promising portfolio, including the required roadmap and an adequate focus on key market trends and customer requirements. Also, the “rising stars” has an excellent management and understanding of the local market. This award is only given to vendors or service providers that have made extreme progress towards their goals within the last 12 months and are on a good way to reach the leader quadrant within the next 12-24 months, due to their above-average impact and innovative strength.

Not In

This service provider or vendor was not included in this quadrant as ISG could not obtain enough information to position them. This omission does not imply that the service provider or vendor does not provide this service.

Microsoft Ecosystem - Quadrant Provider Listing 1 of 4

	Managed Services for Azure for Midmarket	Managed Services for Azure for Large Accounts	Office365 Integration for Midmarket	Office365 Integration for Large Accounts	SAP on Azure	SharePoint Integration
Accenture	● Not In	● Leader	● Not In	● Not In	● Not In	● Not In
Accenture (Avanade)	● Not In	● Not In	● Not In	● Leader	● Leader	● Leader
ADN	● Not In	● Not In	● Contender	● Not In	● Not In	● Not In
All for One Group	● Market Challenger	● Product Challenger	● Product Challenger	● Contender	● Leader	● Market Challenger
Allgeier	● Not In	● Not In	● Product Challenger	● Product Challenger	● Not In	● Not In
AppSphere	● Not In	● Not In	● Leader	● Leader	● Not In	● Leader
Arvato Systems	● Leader	● Leader	● Not In	● Leader	● Leader	● Leader
Atos	● Not In	● Leader	● Not In	● Leader	● Leader	● Leader
Axians	● Leader	● Not In	● Leader	● Product Challenger	● Not In	● Leader
Bechtle	● Not In	● Not In	● Leader	● Product Challenger	● Not In	● Product Challenger
Bright Skies	● Product Challenger	● Product Challenger	● Not In	● Not In	● Not In	● Not In
BT	● Not In	● Product Challenger	● Not In	● Product Challenger	● Product Challenger	● Not In
Campana & Schott	● Not In	● Not In	● Not In	● Not In	● Not In	● Product Challenger
CANCOM	● Leader	● Market Challenger	● Leader	● Leader	● Product Challenger	● Leader
Capgemini	● Not In	● Leader	● Not In	● Leader	● Leader	● Not In

Microsoft Ecosystem - Quadrant Provider Listing 2 of 4

	Managed Services for Azure for Midmarket	Managed Services for Azure for Large Accounts	Office365 Integration for Midmarket	Office365 Integration for Large Accounts	SAP on Azure	SharePoint Integration
Claranet	● Contender	● Contender	● Not In	● Not In	● Not In	● Not In
Cognizant	● Not In	● Leader	● Not In	● Not In	● Not In	● Product Challenger
Communardo	● Not In	● Not In	● Not In	● Not In	● Not In	● Market Challenger
Computacenter	● Not In	● Market Challenger	● Not In	● Leader	● Not In	● Leader
Data One	● Not In	● Not In	● Leader	● Not In	● Not In	● Not In
datec	● Not In	● Not In	● Product Challenger	● Not In	● Not In	● Not In
Deutsche Telekom (TDG)	● Not In	● Not In	● Leader	● Not In	● Not In	● Not In
Deutsche Telekom (TSI)	● Not In	● Not In	● Not In	● Leader	● Leader	● Leader
Devoteam Alegri	● Leader	● Not In	● Leader	● Product Challenger	● Leader	● Leader
DXC	● Not In	● Leader	● Not In	● Leader	● Leader	● Not In
fme	● Not In	● Not In	● Not In	● Not In	● Not In	● Contender
Fujitsu	● Not In	● Not In	● Not In	● Not In	● Leader	● Not In
GAB ExactlyIT	● Product Challenger	● Not In	● Leader	● Product Challenger	● Contender	● Product Challenger
GBS	● Not In	● Not In	● Product Challenger	● Not In	● Not In	● Not In
Glück & Kanja	● Not In	● Not In	● Leader	● Product Challenger	● Not In	● Not In

Microsoft Ecosystem - Quadrant Provider Listing 3 of 4

	Managed Services for Azure for Midmarket	Managed Services for Azure for Large Accounts	Office365 Integration for Midmarket	Office365 Integration for Large Accounts	SAP on Azure	SharePoint Integration
Hexaware	● Not In	● Product Challenger	● Not In	● Market Challenger	● Not In	● Not In
IBM	● Not In	● Not In	● Not In	● Not In	● Market Challenger	● Product Challenger
Infosys	● Not In	● Leader	● Not In	● Not In	● Product Challenger	● Not In
infoWAN	● Not In	● Not In	● Rising Star	● Product Challenger	● Not In	● Product Challenger
intellectcom	● Not In	● Not In	● Contender	● Not In	● Not In	● Not In
IPI	● Not In	● Not In	● Market Challenger	● Contender	● Not In	● Contender
iteraon	● Not In	● Not In	● Contender	● Not In	● Not In	● Not In
Konica Minolta	● Not In	● Not In	● Contender	● Not In	● Not In	● Not In
Layer 2	● Not In	● Not In	● Product Challenger	● Not In	● Not In	● Not In
Logicalis (Orange Networks)	● Product Challenger	● Product Challenger	● Market Challenger	● Product Challenger	● Not In	● Not In
LTI	● Not In	● Not In	● Not In	● Product Challenger	● Not In	● Not In
Net at Work	● Not In	● Not In	● Contender	● Not In	● Not In	● Not In
Nordcloud	● Product Challenger	● Product Challenger	● Not In	● Not In	● Not In	● Not In
novaCapta	● Not In	● Not In	● Market Challenger	● Not In	● Not In	● Product Challenger
NTT DATA	● Not In	● Not In	● Not In	● Not In	● Market Challenger	● Not In

Microsoft Ecosystem - Quadrant Provider Listing 4 of 4

	Managed Services for Azure for Midmarket	Managed Services for Azure for Large Accounts	Office365 Integration for Midmarket	Office365 Integration for Large Accounts	SAP on Azure	SharePoint Integration
Objektkultur	● Not In	● Not In	● Contender	● Not In	● Not In	● Not In
Orbit	● Not In	● Not In	● Contender	● Not In	● Not In	● Not In
PlusServer	● Product Challenger	● Product Challenger	● Not In	● Not In	● Not In	● Not In
ProCloud	● Not In	● Contender	● Not In	● Not In	● Not In	● Not In
QSC	● Contender	● Contender	● Not In	● Product Challenger	● Market Challenger	● Not In
Rackspace	● Product Challenger	● Not In	● Not In	● Not In	● Not In	● Not In
Reply	● Not In	● Not In	● Product Challenger	● Not In	● Not In	● Not In
Scheer	● Not In	● Not In	● Not In	● Not In	● Leader	● Not In
SoftwareONE	● Market Challenger	● Contender	● Product Challenger	● Product Challenger	● Not In	● Product Challenger
Sycor	● Not In	● Not In	● Not In	● Not In	● Contender	● Not In
Syntax Systems	● Contender	● Contender	● Not In	● Not In	● Product Challenger	● Not In
TCS	● Not In	● Rising Star	● Not In	● Product Challenger	● Rising Star	● Market Challenger
Wipro	● Not In	● Leader	● Not In	● Market Challenger	● Product Challenger	● Market Challenger
Wolkenwerft	● Contender	● Contender	● Product Challenger	● Not In	● Not In	● Not In



Microsoft Ecosystem Quadrants



ENTERPRISE CONTEXT

Managed Services Providers (MSP) for Azure - Large Accounts

This report is relevant to large enterprises across all industries in Germany to evaluate managed service providers for Microsoft Azure.

In this quadrant report, ISG lays out the current market positioning of Azure managed service providers in Germany and how they address key enterprise challenges in the region. Cloud managed service providers can help enterprises tailor the experience of using Azure to particular organizations' needs. While German firms have been slow to adopt cloud platforms such as Microsoft Azure, ISG sees a growing interest in migration among those companies, especially as the offerings and approaches of cloud providers mature.

German enterprises, like others across the globe, are often turning to the cloud for benefits such as the flexibility and agility in provisioning of computing resources and easy access to new capabilities. These companies are specifically picking Azure because of their longstanding business relationships with Microsoft, the cloud's enterprise focus, and capabilities around IoT and analytics workloads. Larger enterprises in Germany and around the world are more likely than smaller firms to be interested in pursuing a multi-cloud strategy with workloads in at least two major cloud environments. This means they need to consider their potential partner's capabilities not only with Microsoft's cloud, but with other environments as well.

Because Azure has so many capabilities, managed services for the cloud platform take many forms. While an enterprise may opt to make a move to Microsoft's cloud for one set of capabilities, maintaining flexibility for the services that they acquire and use is important for deriving the best value from Azure migration.

For German companies, it is critical to select service provider partners that understand the compliance needs for different industries. ISG finds that arduous compliance requirements inhibit overall cloud growth in Germany, but knowledgeable service providers can help address this difficulty.

German enterprises, along with their counterparts worldwide, need to be aware of and concerned about their service providers' approach to security, because moving to the cloud requires different tools, techniques and expectations than a traditional, on-premises environment.

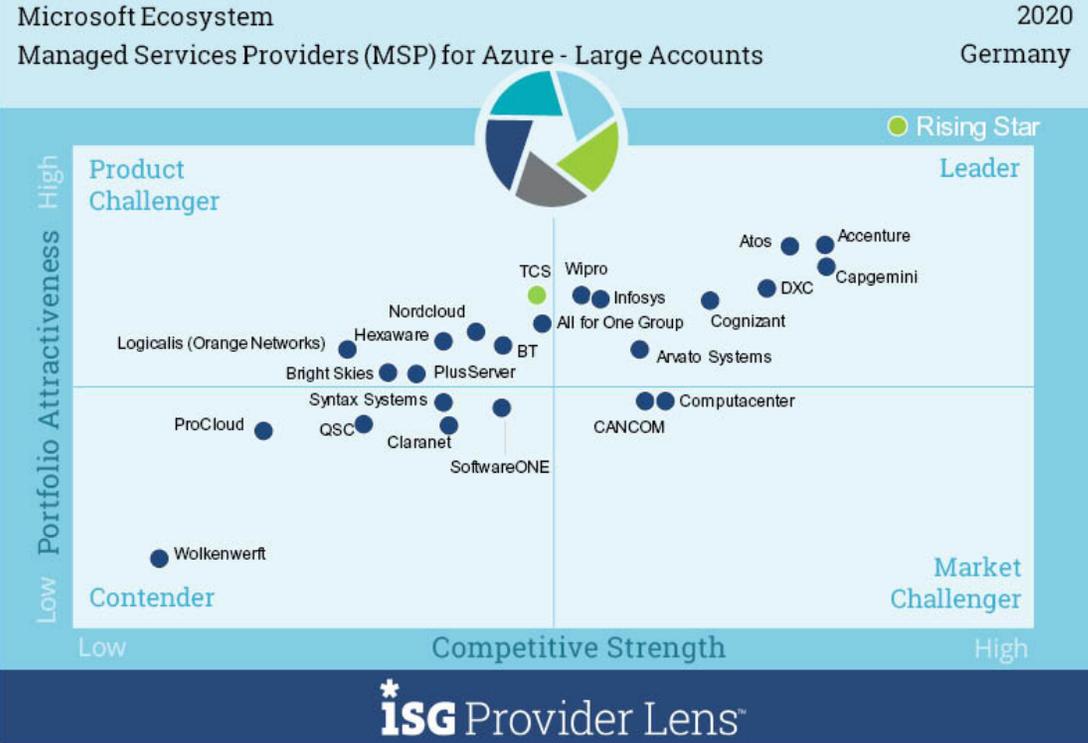
IT and technology leaders should read this report to understand the relative positioning and capabilities of partners that will help them effectively consume services from Microsoft's cloud and how their technical capabilities square with the rest of the market.

Sourcing and procurement professionals should read this report to understand the provider ecosystem for Microsoft Azure managed services in the German market and learn how providers compare to one another.

MANAGED SERVICES PROVIDERS (MSP) FOR AZURE - LARGE ACCOUNTS

Definition

Cloud MSPs support their clients during the transition to cloud technologies and in the overall operation of cloud solutions. The tasks/services range from consulting and migration to operation and management. MSPs for Azure differentiate themselves by building a business unit around DevOps, automation and cloud-native application design. They act as a one-stop shop for customers and usually adopt the pay-as-you-go business model. The MSP services are an integral part of other areas of performance such as exemplary hosting, system integration, resale or application design. Managed service providers are also characterized by optimized operational processes and customer lifecycle value management approaches.



Source: ISG Research 2020

MANAGED SERVICES PROVIDERS (MSP) FOR AZURE - LARGE ACCOUNTS

Eligibility Criteria

The following criteria were used to evaluate the providers of managed services for Azure in the large enterprise client segment in Germany:

- Operational excellence and clearly defined professional services
- Expertise in configuration management of both platforms/systems and containers
- Experience in designing, building and managing public and multi-cloud environments
- Support for the development of software code, cloud native and legacy system integration
- DevOps experience
- Experience in application programming interface (API) automation and cloud analytics
- Mature safety processes
- Support for various customer roles such as IT technicians and developers
- Microsoft partnership along with appropriate MSP certificates and other certifications; should have customer cases and some consumption-driven and recurring revenue; attend joint business planning meetings and pass several certificates/audits to demonstrate skills and knowledge for Azure.

MANAGED SERVICES PROVIDERS (MSP) FOR AZURE - LARGE ACCOUNTS

Observations

The traditional IT outsourcing market is witnessing drastic changes with many companies opting for public cloud offerings and solutions. A service provider therefore faces special requirements for both multi- and hybrid cloud solutions in combination with classic data center infrastructures.

- **Client requirements becoming more complex:** Large organizations are increasingly demanding automation, DevOps and containerization for setting up and managing cloud platforms. Their pricing models are result oriented and reflect user behavior.
- **Relevant experience in public cloud:** Nearly a third of all companies have already set up workloads on Azure, primarily through the hybrid cloud approach.
- **Microsoft among the top hyperscalers and gaining rapid traction:** The Microsoft Azure platform is currently the second-best player after AWS owing to its growing market penetration and the popularity of Azure and Azure Stack services. The competitive

gap between both platforms has narrowed significantly, with many programmers shifting towards Azure. There is also a growing interest in using Azure Stack as a platform for operating unconnected cloud services (Azure Stack disconnected mode) for high-security clients and as a platform for OpenShift and other cross-platform solutions and technologies.

Cloud MSPs support their clients during the transition to cloud technologies and in the overall operation of cloud solutions. The tasks/services range from consulting and migration to operation and management. MSPs for Azure differentiate themselves by building a business unit around DevOps, automation and cloud-native application design. They act as a one-stop shop for customers and usually adopt the pay-as-you-go business model. The MSP services are an integral part of other areas of performance such as exemplary hosting, system integration, resale or application design.

These providers must be certified partners of Microsoft Azure CSP and should have already achieved the new quality level within the Azure Expert MSP Partner Program. In this segment, the following managed service providers were positioned as leaders or rising stars:

MANAGED SERVICES PROVIDERS (MSP) FOR AZURE - LARGE ACCOUNTS

Observations (cont.)

- **Accenture** has more than 30,000 infrastructures, data centers and cloud managed service experts globally of which a large portion are specialized in Microsoft through the Avanade joint venture.
- **Atos** has 3,000 employees with cloud certifications, most of which cater to the German market for Azure implementations.
- **Arvato Systems** offers extensive managed services for Azure. These range from consulting, design, integration and managed services for cloud infrastructures to application optimization and change management.
- **Capgemini** is a visionary global provider of public cloud transformation services and is one of the key supporters of Microsoft Azure implementations in Germany.
- **Cognizant** is a global integrator with more than 6,000 certified Microsoft experts and has been expanding its presence in the German market. The company has its own Azure business unit that provides end-to-end technology and vertical end-to-end services.
- **DXC** is one of the most important global managed services partners for Microsoft. Its services and transformation portfolio addresses highly complex clients scenarios with a focus on DAX-listed companies and the public sector.
- **Infosys** is an established Microsoft partner for Azure managed services and is strongly active in the German market. It offers a comprehensive integration and platform engineering portfolio for Azure and has won the Microsoft Global Alliance SI Partner of the Year Award in 2019.
- **Wipro** is a global partner for Microsoft Azure managed services and integration services. It has nearly 80 qualified full-time employees in various roles in Germany to support cloud migration projects with Azure.
- **TCS** is a long-established partner for providing Azure managed services and has nearly 200 resources to support Microsoft projects in Germany. Its Azure portfolio covers consulting, design, development, migration to public or hybrid cloud infrastructures, DevOps and managed services.

ACCENTURE (AVANADE)

Overview

Accenture has 30,000 infrastructures, data centers and cloud managed service experts globally. With most of its experts specialized in Microsoft through the Avanade joint venture, the company covers every complexity in cloud transformation, especially for Azure.

Strengths

Highly qualified team of Azure experts: Accenture's has numerous experts with high-level knowledge and experience in Microsoft-compliant cloud services that cover strategy, architecture design, implementation, migration and managed services.

Access to Microsoft development departments: Through the Avanade strategic alliance, Accenture's clients benefit from the optimal implementation of innovations provided by the Azure portfolio at an early stage.

Accenture's innovative solution offering: Accenture offers comprehensive Azure managed services with a high level of automation and advanced robotics. Even complex scenarios such as hybrid and multi-cloud systems can be integrated via the Accenture Cloud Platform (ACP).

Caution

Growing pressure on price and price transparency: Global service providers with complex structures are witnessing an increased competition from smaller players that are highly agile and focused. To address this challenge, Accenture should ensure innovation and complex transformations offer more modular services with transparent pricing structures.

Unilateral focus on Microsoft Azure: Accenture's focused experience and expertise may not appeal to clients that do not want to commit to just one hyperscaler and want an independent managed service provider that can distribute cloud applications, for e.g., on Azure and AWS platforms.



2020 ISG Provider Lens™ Leader

Accenture is optimally positioned for complex transformations with its resources, expertise and strong focus on Azure.

ATOS

Overview

Atos has more than 3,000 cloud-certified employees globally with a large portion supporting Azure implementations in the German market. Its core business covers key components of the cloud managed service offering, including consulting, system integration, migration of IT infrastructures, industry-specific IT solutions and professional operations.

Strengths

Constantly expanding Azure range and corresponding qualifications: Atos hit a milestone by receiving the Expert MSP certification in 2019. It has also been standardizing hybrid and public cloud managed services scenarios for several years.

Extensive services portfolio: Atos' portfolio includes complete end-to-end services covering the entire cloud lifecycle, from consulting and migration services to transformation and application modernization. It has been maintaining high technological standards by leveraging extensive automation.

Strong partner for international distribution of Azure-based applications: Clients with international requirements benefit from Atos' Microsoft certification as a reseller in more than 20 countries.

Caution

Global suppliers with complex structures are increasingly coming under pressure owing to the rise of smaller, focused market participants. Atos should ensure innovation and complex transformations and offer more modular services with transparent pricing structures.



2020 ISG Provider Lens™ Leader

Atos is a highly qualified service provider and has made heavy investments in technology to serve clients with high international requirements.

ARVATO SYSTEMS

Overview

Arvato Systems is an IT service provider of the Bertelsmann Group with a focus on the retail, media and utility industries. It offers a comprehensive managed services portfolio for Azure, covering consulting and design, integration and managed services for cloud infrastructures, application optimization and change management.

Strengths

Extensive portfolio for migration to Microsoft Azure: Arvato Systems' managed services range from application and infrastructure transformation to industry-specific managed services. The portfolio is flexibly designed and is backed by 24x7 support models to address individual requirements.

Internationally positioned despite size: With 2,700 qualified resources in 25 countries, the company is ideally positioned to support international Azure Cloud projects.

Numerous Microsoft certifications through strategic investments: As a longstanding CSP partner with the Gold Cloud Platform certification, Arvato Systems has further upskilled its own employees recently and added more certifications.

Caution

Arvato Systems should address the gap in its Azure portfolio to help clients effectively use Microsoft-specific tools during their digital transformation. It still has potential to gain new clients for disaster and recovery services and further expand the usage and demand for Azure managed services.



2020 ISG Provider Lens™ Leader

Arvato Systems is a highly qualified provider of Azure Cloud MSP services, especially for clients with international requirements.

CAPGEMINI

Overview

Capgemini is a highly visionary provider of public cloud transformation services around the globe. It is one of the major service providers for Microsoft Azure implementations in Germany.

Strengths

Strong global pool of experts: Capgemini has 50 Microsoft Azure experts in Germany, supported by 700 additional global specialists and 24,000 Microsoft experts. The strong knowledge base enable the firm to also cover highly complex international requirements in 35 countries.

Robust Azure MSP portfolio: Capgemini's broad, high-quality portfolio covers services ranging from architecture consulting to application development and cloud optimization.

High market momentum: The firm's growth rate for Azure implementations in Germany is in the high double-digit range.

Experienced Microsoft Gold Partner: Capgemini is a Gold Certified Partner of Microsoft in essential application areas such as Cloud Platform, Gold Cloud Productivity, Gold Customer Relationship Management and Gold Datacenter. It offers a broad portfolio for Microsoft and a wide range of delivery options with accelerated delivery centers and various right shore delivery options.

Caution

Global providers with complex structures are witnessing intense competition from smaller players that are highly focused and agile. Capgemini should ensure innovation and complex transformations and offer more modular services with transparent pricing structures.

Focus on multi-cloud implementations: Capgemini should further demonstrate its extensive experience with all public cloud providers, such as Microsoft, and the service portfolio capabilities. Additionally, it should gain the Azure Expert MSP certification soon as clients are seeking such certified vendors.



2020 ISG Provider Lens™ Leader

Capgemini is one of the leading managed service providers for Azure, especially for clients with high international requirements.

COGNIZANT

Overview

Cognizant is a global integrator with more than 6,000 certified Microsoft experts and a wide presence in Germany. The offering to migrate workloads to Azure public, private or hybrid cloud infrastructures starts with an assessment and optimization program that spans the entire existing IT infrastructure of the customer if required. The company has its own Azure business unit that provides technology and vertical end-to-end services.

Strengths

Comprehensive migration program to Microsoft Azure: Cognizant's "modernize with Azure" approach is designed to make the entire organization's IT efficient, scalable, agile and future proof while generating an enhanced end-user experience.

Enriched Azure managed service portfolio with differentiated vertical solutions: Industry-specific platforms are available such as Temenos for the financial sector or TriZetto for healthcare. On TriZetto, central applications for services such as billing can be seamlessly integrated into the Azure Cloud infrastructure.

Flexible pricing options: Depending on clients requirements, the pricing models range from time and material to those based on business outcome for clients. The company has developed robust pricing mechanisms to price services for engagements associated with multiple variables such as development expenses, service-level agreements, support coverage and managed devices.

Caution

Cognizant is a popular choice for implementing cloud solutions, particularly Azure. However, it lacks strong customers references in the German market.



2020 ISG Provider Lens™ Leader

Cognizant is a global provider of Azure migration services and is particularly suitable for clients with vertical requirements in select industries such as finance and healthcare.

DXC

 Overview

DXC is a major global managed services partner for Microsoft and offers a services and transformation portfolio to address highly complex client scenarios. The firm is primarily focused on catering to DAX-listed corporations and the public sector.

 Strengths

Strong portfolio and market presence: DXC covers a broad spectrum of managed public cloud services ranging from consulting to operations, even in highly complex hybrid scenarios for large clients. It has around 20 branches in Germany, which were formerly managed by HPE and CSC.

Wide international reach for global clients: The company offers Azure services in all the 142 countries catered by Microsoft. It provides billing services in over 70 countries and ensures direct availability of CSP licenses in 48 countries.

Consistently expanding Microsoft expertise: Over the last nine months, DXC has increased the number of qualified Azure experts by almost 60 percent to almost 2,000 employees. It is one of the global Microsoft partners with the highest quality of certifications and 14 gold competencies in key areas such as cloud, data centers, applications and analytics.

 Caution

Global providers with complex structures and especially a high focus on individual projects are witnessing intense competition from smaller players that are highly focused and agile. DXC should ensure innovation and complex transformations and offer more modular services with transparent pricing structures.



2020 ISG Provider Lens™ Leader

DXC is a highly relevant provider for large clients with complex requirements for Azure public and hybrid cloud setups.

INFOSYS

Overview

Infosys is an established Microsoft partner for Azure managed services and is highly active in the German market. The company offers a comprehensive integration and platform engineering portfolio for Azure and was named the Microsoft Global Alliance SI Partner of the Year in 2019.

Strengths

Well-structured Azure integration portfolio: Infosys' modular solution modules include cloud platform engineering, cloud migration services, mainframe modernization services, cloud native development services and cloud managed services.

Consulting approach for professional migration: Infosys' advisory engagement covers the right cloud strategy, including a vision for the technical migration and architecture standards, introduction with the right delivery model, roles and responsibilities, SLA management and roadmaps for migration. It also offers a Cloud Transformation Office, a complete implementation program that also includes governance and vendor management.

Technical competence demonstrated by partnership status: With the Microsoft Global Alliance SI Partner of the Year 2019 award, Infosys demonstrates a strong and deep knowledge in integration.

Caution

Enterprise clients in Germany have been demonstrating an increased level of awareness of integration services in recent years, but Microsoft Azure still lacks presentable references. Infosys should strengthen its sales and marketing strategies to maintain its position in this space.



2020 ISG Provider Lens™ Leader

Infosys is a technically competent option to support end users in their Azure migration.

WIPRO

Overview

Wipro is a close international partner for Microsoft Azure managed services and integration services. In Germany, it currently has around 80 qualified full-time employees in various roles for cloud migration projects with Azure, a significant increase compared to last year. The Indian service provider offers end-to-end services to bring business applications into the Azure Cloud or the Azure Stack for private cloud.

Strengths

Innovative portfolio: Together with Dell, Wipro has built a Wipro-Dell EMC Intelligent Edge solution and has developed its own variant for the enterprise hybrid cloud based on the HPE ProLiant server for Microsoft Azure. It also offers comprehensive monitoring services for various public cloud services.

Early focus on automation and agility: Cloud bots and mass migrations (factory-based) are part of Wipro's standard portfolio. The company also offers refabricated application blueprints for rapid migration or transformation based on industrialized reference architectures.

Close cooperation with Microsoft: Wipro invests heavily in its partnership with Microsoft. This is demonstrated by its Gold sponsorship at the Microsoft Ignite 2019 event and weeks of Microsoft Cloud training for employees at internal Wipro events.

Caution

Wipro is strengthening its market position in Germany with many resources and has good references in Europe but none in Germany. The firm should further boost its sales and marketing activities in order to maintain its foothold.



2020 ISG Provider Lens™ Leader

Wipro is a highly innovative international provider of Azure managed services with an ever-growing presence in Germany.

RISING STAR: TCS

Overview

TCS is an early MSP partner for Azure and has almost 200 resources dedicated to Microsoft projects. It has several hundred additional professionals available who can be deployed on a project-specific basis in Germany. Its Azure portfolio covers consulting, design, development, migration to public or hybrid cloud infrastructures, DevOps and managed services.

Strengths

Extensive Azure managed services portfolio: TCS' employs the Migration Factory approach to offer services with associated reusable components and test tools and accelerators.

Flexible pricing models: These models include time and material, fixed price for standard modules, price on an application basis, and billing according to current consumption.

Growing focus on innovative solutions in automation: TCS' portfolio also offers bot-supported service desks for AI operations from its own cloud platform.

Caution

TCS is well-known service provider in the Germany and is increasingly taken into account in tenders, but the first good customer reference is still missing.



2020 ISG Provider Lens™ Rising Star

TCS is a technically competent Microsoft Azure partner and further expanding its presence in Germany.



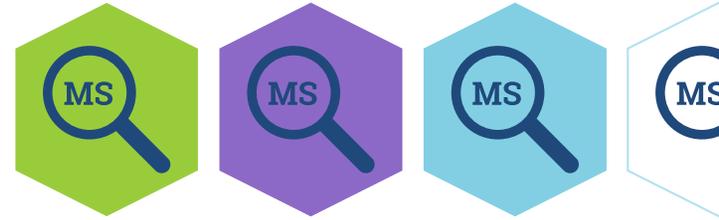
Methodology

METHODOLOGY

The research study “ISG Provider Lens™ 2020 – Microsoft Ecosystem” analyzes the relevant software vendors/service providers in the German region. market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

The study was divided into the following steps:

1. Definition of Microsoft 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. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
6. Use of the following key evaluation criteria:
 - Strategy & vision
 - Innovation
 - Brand awareness and presence in the market
 - Sales and partner landscape
 - Breadth and depth of portfolio of services offered
 - Technology advancements



Authors



Dr. Henning Dransfeld, Lead Author

Principal, Research

Mr. Dransfeld is a thought leader regularly publishing on trends related to the mobile enterprise, the digital workspace and IoT markets. As an analyst, ICT strategist and go-to market expert he has developed deep insights into portfolio development and changing customer requirements. Through his experience as analyst and marketing strategist, he is in a strong position to support the definition and execution of go-to-market strategies for ICT services.

Henning is a known expert in the evaluation of supplier strategies, competitive landscapes and differentiation with over 20 years of experience in the ICT sector. In addition, Henning advises providers on key messages in marketing and sales communications. In the context of in-depth market analyses on the German supply side through vendor benchmarks, he derives sustainable strategies for the digital transformation. Henning is an experienced trilingual speaker on international conferences.

Henning holds a Ph.D. from the University of Wales, Swansea College in management science and wrote his theses on “Interactive TV and its potential for retailing in the luxury car industry”; he also holds a Diplôme d’Etudes Supérieures Spécialisées on international management from the Université de Rennes and a diploma in strategic Marketing from Henley Management College.

Authors



Frank Heuer, Lead Author

Senior Advisor

Mr. Heuer is a Manager Advisor at ISG Germany. His main areas of coverage include the digital workspace, communications, social business & collaboration, cloud computing with a special focus on workspace/unified communications & collaboration as a service, and security.

Frank supports and advises renowned IT and telecommunications companies on their go to market, competitive analyses, business planning and general strategic and operational marketing issues. He is the author of many white papers, press releases and articles, blog posts and newsletter contributions on current ICT topics and has co-authored various books on topics such as the workplace of the future / UCC and security. Frank acts as client service manager and editor of the customer newsletter and is engaged in close and regular contact with our DACH customers.

Frank completed training as a banker and holds a master's degree in business administration of the University of Trier (marketing, statistics and English).

Editor



Blair Hanley Frank, Lead Editor

Principal Analyst

Blair serves as an ISG enterprise analyst covering topics including artificial intelligence, cloud computing and Agile/DevOps transformation. This year, he is providing enterprise context for ISG Provider Lens reports on the service provider ecosystems around Private/Hybrid Cloud, Public Cloud, Microsoft, SAP and Next-Gen ADM. He provides enterprise IT decision makers with market-leading advice on key technology trends through research notes and personal consultation. Since joining ISG in 2018, Blair has provided clients with insights about how their strategy fits with emerging technology trends that are shaping markets worldwide, and how new technologies can help them drive better business value.

ISG Provider Lens™ | Quadrant Report

March 2020

© 2020 Information Services Group, Inc. All Rights Reserved



ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 700 clients, including more than 75 of world's top 100 enterprises, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis. Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,300 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 www.isg-one.com.