ISG Provider Lens™

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

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The research and analysis presented in this report includes research from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of February 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.

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ISG Provider Lens™

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.

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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 acrive 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
intellecom	Not In	Not In	Contender	Not In	Not In	Not In
IPI	Not In	Not In	Market Challenger	Contender	Not In	Contender
iteracon	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.

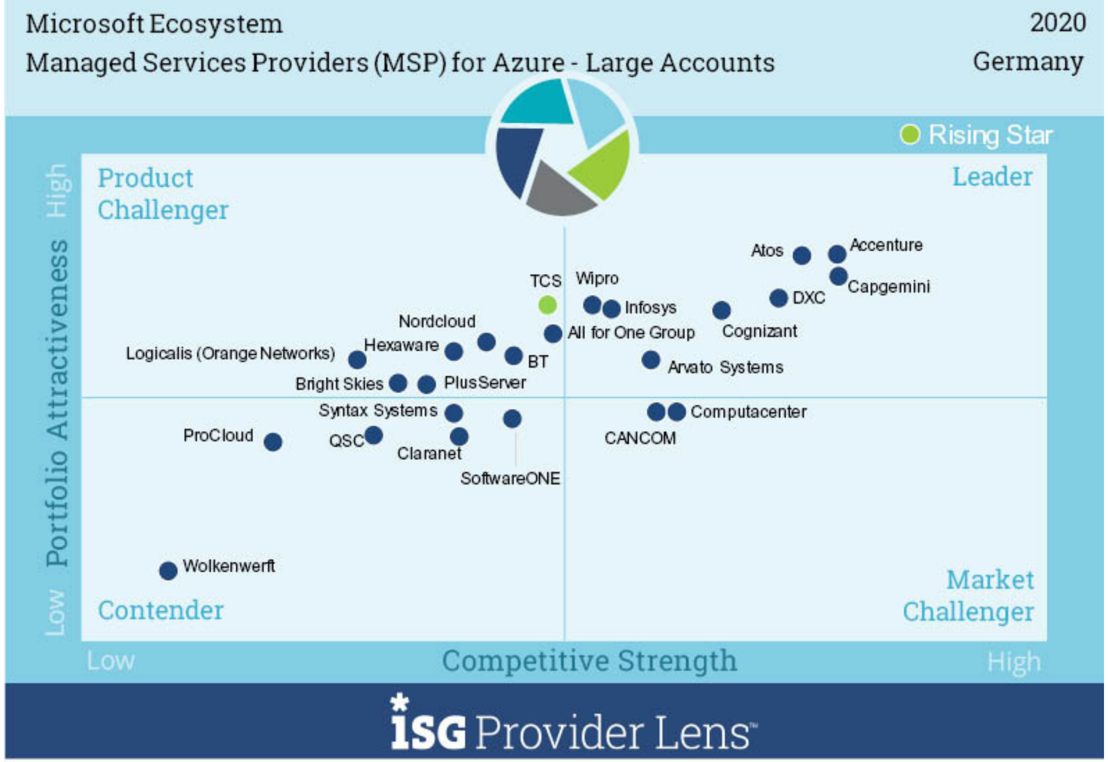
IT and technology leaders should read this report to understand the relative positioning and capabilities of partners that will help them effectively consume services from Microsoft's cloud and how their technical capabilities square with the rest of the market.

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.

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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 an 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.

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.

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.

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.

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.

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

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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 Superieures Spécialisées on international management from the Université de Rennes and a diploma in strategic Marketing from Henley Management College.

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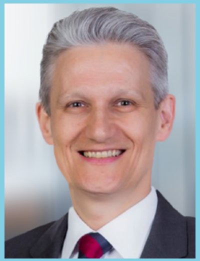

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ISG Provider Lens™ | Quadrant Report
March 2020

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