ISG Provider Lens™

Microsoft Ecosystem

Office 365 Integration - 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

Office 365 Integration - Large Accounts

This report is relevant to large enterprises across all industries in Germany that are evaluating Office 365 integration partners.

In this quadrant report, ISG lays out the current market positioning of Office 365 service providers in Germany and how they address the key challenges faced by large enterprises in the region.

Most of the issues ISG sees with implementing Microsoft's productivity suite in large German firms are organizational in nature. It can be difficult to convince a large group of employees to change the way they work. Moreover, enterprises in the region are increasingly worn out by Microsoft's rapid pace of change and feature deployment in Office 365, which is mirrored by other enterprises worldwide. Business leaders need partners that can help with Office implementation not just on a technical level, but also on a cultural one.

New capabilities within the Microsoft Graph APIs, which allow business users to build powerful applications using company data, may cause difficulties for German companies that have strong data protection requirements for their employees specified in contracts with trade unions. Leadership must continue to enable innovation while also retaining the necessary compliance measures.

The Microsoft partner ecosystem in Germany is shifting. ISG sees a growing number of mid-sized providers offering highly specialized services such as email migration and Active Directory management. Because large enterprises are more comfortable with managing a diverse set of suppliers, these smaller providers can be an appealing choice. Indian technology services firms are also taking a more mature approach to the German market and are better positioned to challenge the traditional dominance of American and French vendors. Enterprises can use this report to better understand those shifts and gain access to improved service delivery as a result.

IT and technology leaders should read this report to better understand the relative strengths and weaknesses of service providers in the Microsoft ecosystem and how they integrate the latest capabilities from Office 365 into their offerings.

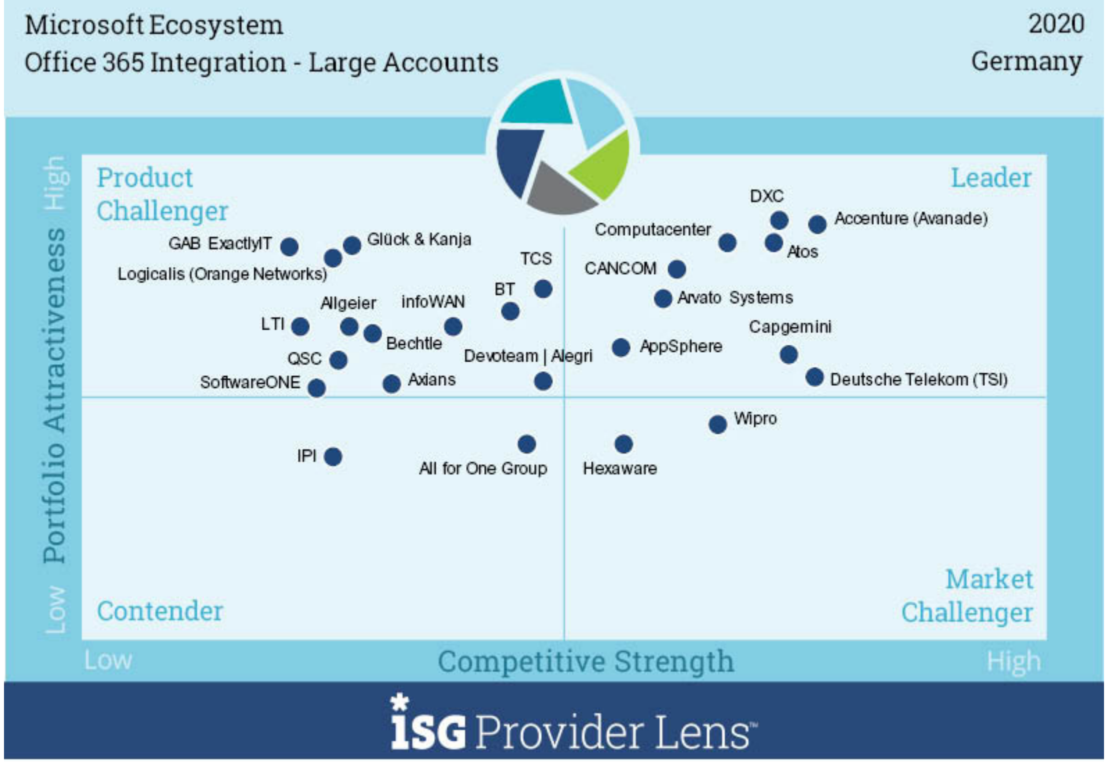
Workplace technology leaders should read this report to understand how service providers can help with the adoption of Microsoft technology, especially as changes to the technology lead to significant organizational change management challenges. The report can also help workplace leaders evaluate the universe of potential partners available to them for Office 365 implementation and integration more effectively.

Sourcing, procurement and vendor management professionals should read this report to develop a better understanding of the current provider landscape for Office 365 integration in Germany as well as the key considerations for evaluating service provider capability.

OFFICE 365 INTEGRATION - LARGE ACCOUNTS

Definition

Office 365 combines office productivity solutions with Windows usage rights, mobile management software and security services. The product bundle forms the basis for modern workplace concepts and solutions based on Microsoft technologies. Service providers that plan, implement and/or support modern workplace solutions based on Office 365 at the user's premises are evaluated. These providers regularly offer a combination of Microsoft cloud services and their own solutions. These services may also be supplemented by additional services provided by third parties and corresponding in-house services.



Source: ISG Research 2020

OFFICE 365 INTEGRATION - LARGE ACCOUNTS

Eligibility Criteria

- Service offering to include professional services or managed services, or both, for consulting, design, architecture and operations
- Scope of services offered in terms of architecture and strategy consulting, migration, administration/contract management and operation
- Office 365 solution portfolio, including specifically used or developed tools
- Experience (history, number of employees, certifications) from Microsoft, especially for Office 365 packages
- Market presence with large accounts in Germany; number of customers, partner network, references, awareness, etc.
- Innovations and roadmap for Office 365 offering

Observations

For the Office 365-based workplace, most clients are expecting access to productivity applications and collaboration tools to be made available irrespective of location, device and time. With the growing demand for pure integration of Office 365 in the cloud, many companies in Germany have introduced the service. With SharePoint via Teams or Dynamics, they are still relatively in the first stage. ISG has observed the following trends in this market:

- **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 to Office 365 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.

OFFICE 365 INTEGRATION - LARGE ACCOUNTS

Observations (cont.)

- **Growing demand for transparent WaaS service model:** Some companies are engaged in the introduction of 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.

In Germany, extensive implementation services in the corporate customer segment are accompanied by professional services, which include consulting services for decision makers in the specialist departments and in the area of corporate strategy. The following are Germany's leading service providers in this segment:

- **Accenture (Avanade)** is a joint venture between Microsoft and Accenture with a focus on integrating Microsoft products into the corporate world. It has a high number of several million workstations that are already equipped with Office 365, making it one of the strongest competitors in the corporate customer segment.
- **AppSphere** is a relatively small and focused provider with no managed services offering that covers a very broad Office 365 portfolio. The service catalogue ranges from transformation consulting to solution design up to technical implementation. The company has been able to develop through its very good market momentum from Rising Star 2019 to Leader in the year 2020.
- **Atos'** partnership with Microsoft spans over two decades and has been integrating Office products in Germany for many years. Office 365 Services has been anchored into its portfolio as a strategic element since 2014. The French service provider is continuously investing in establishing a global delivery center in India with a focus on migration and onboarding.
- **Arvato Systems** is an IT company of the Bertelsmann group and is well established in the third-party market as a service provider of Microsoft solutions. It provides consulting, implementation, support, and various other services related to Office 356 implementations.
- **CANCOM** is one of the major implementation partners for Office 365 solutions in Germany with a strong focus on cloud-based offerings. Its Office 365 services cover all deployment services from consulting to operation.
- **Capgemini** is one of Microsoft's leading global service partners with 25,000 experts worldwide. The firm emerged as a leader in this space, employing a holistic approach across consulting, change management and integration for all end devices.

OFFICE 365 INTEGRATION - LARGE ACCOUNTS

Observations (cont.)

- **Computacenter** is a well-established provider with a comprehensive range of Office 365 services and strong market presence in Germany. Its services span across the lifecycle beginning with consulting for the migration until the retirement of Windows servers in end-life scenarios.
- **Deutsche Telekom (TSI)** is a leading provider of Microsoft solutions in Germany. It has a highly qualified experts to support Office 365 implementations with a strong focus on adhering to compliance guidelines.
- **DXC** is one of the largest Microsoft implementation partners worldwide. It is a Gold Partner in 14 categories and received the Partner of the Year 2017/18 award. The U.S.- based vendor has strong resources for Office 365 integrations. Its provides consulting, design, implementation and operation services for Office 365 solutions.

ATOS

Overview

Atos' partnership with Microsoft spans over two decades and has been integrating Office products in Germany for many years. Office 365 services have been anchored into its portfolio as a strategic element since 2014. The French service provider is continuously investing in establishing a global delivery center in India with a focus on migration and onboarding.

Caution

In addition to the intense competition from Indian companies, Atos should take note of smaller yet highly agile companies that are increasingly winning major contracts in Germany.

Strengths

Comprehensive portfolio: Atos offers a globally standardized portfolio of Office 365 services that range from consulting on integration to operations. It also offers associated services to provide a complete solution, such as network design and management, security and mobile device management, giving customers a one-stop shop approach.

Growing portfolio; quick in implementing innovations: Atos already offers dedicated modules for programming or providing Office 365 APIs via Graph. It achieves a high degree of automation in its solutions by tapping into its advanced knowledge base (for e.g., Atos Virtual Assistant).

Extensive experience with Office 365 cloud migrations: Atos is one of the first service providers that supported complex implementations in the public cloud for customers as well as for those in the German market.

Global capabilities: Atos has strong international resources to successfully implement highly complex Office 365 migration projects for large enterprises. Clients benefit from its global best practice experience.

2020 ISG Provider Lens™ Leader

Atos is one of the most experienced providers of Office 365 migration services for large companies 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

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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.

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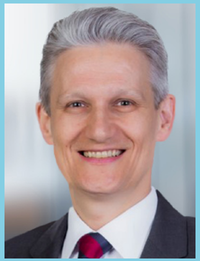

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