

**\*ISG** Provider Lens™

# Microsoft Ecosystem

SharePoint Integration

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](mailto: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](mailto:contact@isg-one.com), call +49 (0) 561-50697537 or visit [research.isg-one.com](http://research.isg-one.com).



- 1** Executive Summary
- 3** Introduction
- 15** SharePoint Integration
- 19** 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

---

### SharePoint Integration

This report is relevant to enterprises across all industries in Germany that are evaluating Microsoft SharePoint integration partners.

In this quadrant report, ISG lays out the current market positioning of SharePoint service providers in Germany and how they interact with key enterprise challenges in the region. ISG sees a fundamental difficulty in the provider ecosystem: because they are all delivering services atop a common set of Microsoft-built functionality, it can be difficult to differentiate providers.

In the German market, there are some companies that are best positioned to work with companies in the Mittelstand. At the same time, they are willing and able to take on projects with larger enterprises as well. However, enterprises must evaluate the capabilities of those providers to ensure they can address the needs of a larger business, depending on the engagement.

While ISG has evaluated the capabilities of Office 365 integration partners separately, Microsoft's architecture choices mean that most enterprises in Germany, like their counterparts in the U.S., work with one provider for integration of both SharePoint and Office 365.

ISG also finds that German companies face organizational change management challenges with adoption of new functionality in SharePoint and Office 365. It is critical for firms, no matter their size, to find service provider partners that can help them manage this complexity.

**IT and technology leaders** should read this report to better understand the relative strengths and weaknesses of service providers in the SharePoint ecosystem.

**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 SharePoint implementation and integration more effectively.

**Sourcing and vendor management professionals** should read this report to develop a better understanding of the current provider landscape for SharePoint integration and help them distinguish the players in a crowded field.

**Information and knowledge management leaders** should read this report to better understand the positioning of providers as well as the key trends in the provider ecosystem so they can identify their potential partners.

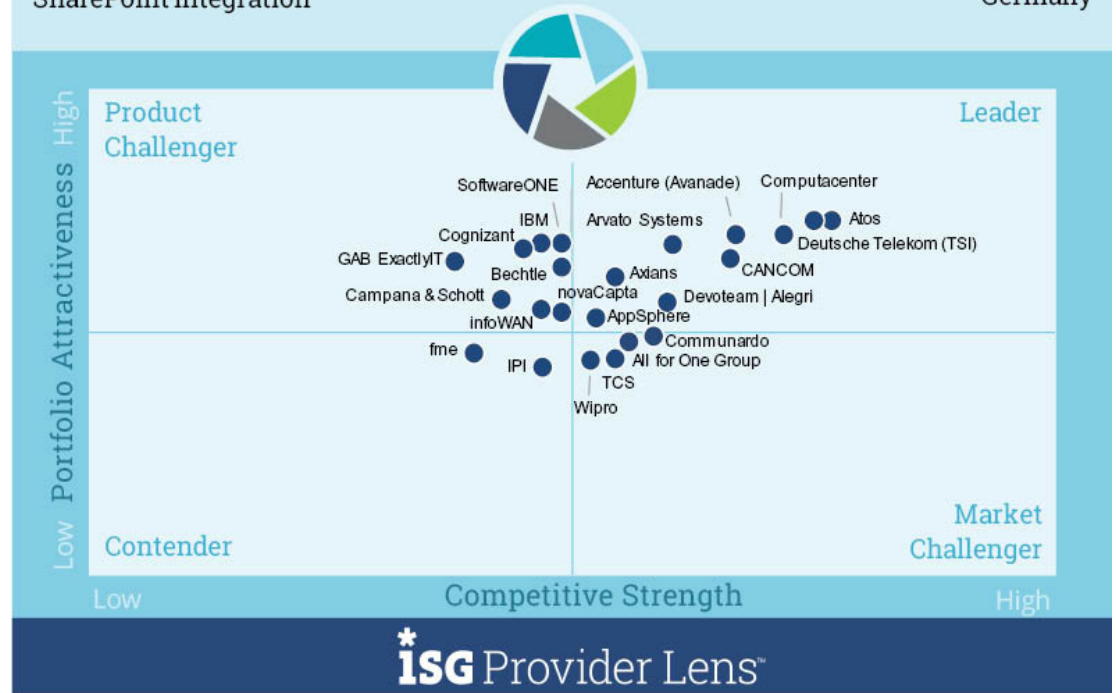
## SHAREPOINT INTEGRATION

### Definition

In this quadrant, ISG evaluates service providers, integrators, consultants, etc. that offer solutions and services for SharePoint, especially integration and implementation services for on-premise and hybrid scenarios. In addition to the actual integration of SharePoint, it also assesses the joint integration with widely used corporate systems such as SAP, Microsoft Dynamics 365 and Salesforce.

Microsoft Ecosystem  
SharePoint Integration

2020  
Germany



Source: ISG Research 2020

## SHAREPOINT INTEGRATION

### Eligibility Criteria

For evaluating providers of SharePoint integration services in Germany, the following criteria were considered:

- Scope and depth of the service portfolio for SharePoint integration
- Size of the team of experts
- Awareness level and number of clients
- Number and reputation of references
- Experience and number of (Gold) certifications
- Qualifications and skills provided

### Observations

Over the years, the market for SharePoint integration in Germany has reached a high degree of maturity. This is reflected in the large number of services providers and their competitive strength, particularly in terms of portfolio attractiveness. The mid-sized enterprise segment has above-average potential due to its lower market penetration compared to large enterprises. SharePoint integrations are often realized together with Office365 projects.

In this quadrant, 23 companies were identified as relevant service providers in Germany market for SharePoint integration. ISG has identified the following 9 as leaders: Accenture (Avanade), AppSphere, Arvato Systems, Atos, Axians IT Solutions, CANCOM, Computacenter, Devoteam | Alegri and Deutsche Telekom (TSI).

- **Accenture (Avanade)** occupies a special market position considering its close cooperation with Microsoft.
- **AppSphere** is successful with individual SharePoint solutions in the mid-sized business market.
- Although the Bertelsmann subsidiary **Arvato Systems** is not among the most well-known providers for SharePoint integration, it can distinguish itself with numerous standardized services in this space.

## SHAREPOINT INTEGRATION

### Observations (cont.)

- **Atos** is one of the largest service providers for SharePoint integration and is an opinion leader in the collaboration space. It is continuing to strengthen its leading position in the SharePoint services market.
- **Axians IT Solutions** draws significant attention to its broad SharePoint service portfolio with public relations measures.
- **CANCOM** has positioned itself as a collaboration specialist for SharePoint projects, especially in mid-sized companies.
- **Computacenter**, with its broad portfolio and expanding team, is well equipped to meet the requirements for SharePoint integration in Germany.
- **Deutsche Telekom (TSI)** or T-Systems offers various reference models for SharePoint solutions to address all types of client requirements.
- **Devoteam | Alegri's** customers benefit from its extensive experience as a pioneer of SharePoint integration in Germany. It was the first SharePoint-Enterprise-Partner of Microsoft in 2002 in the region.

## ATOS

### Overview

Atos is a French IT service provider that offers a range of SharePoint solutions. Its services cover consulting, integration with business solutions such as business intelligence and enterprise resource planning as well as a managed SharePoint service on various platforms.

### Strengths

**Pioneer in collaboration space:** With provocative theses on modern cooperation in companies, Atos has gained a lot of attention.

**Wide range of services:** Over the past year, Atos has been expanding its range of services (ongoing or managed), most of which are available as out-of-the-box solutions.

**High-level partnership with Microsoft:** Atos has acquired all Gold certifications from Microsoft.

**Renowned references:** Compared to last year, the firm has a longer list of relevant customer references for SharePoint projects.

**Large expert team:** Atos has deep expertise in implementing extensive and complex projects. This capability has further strengthened its position in the market.

### Caution

Atos is well positioned in the manufacturing industry in Germany. It still has potential to extend its capabilities to other sectors. The firm should consider accelerating its marketing activities outside the traditional market.



## 2020 ISG Provider Lens™ Leader

Atos, an opinion leader in the collaboration space, is continuing to strengthen its position as a leading provider of SharePoint services.



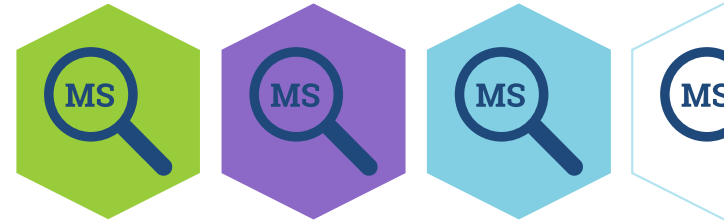
# Methodology

## 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](http://www.isg-one.com).