ISG Provider Lens™

# Microsoft Ecosystem Partners

A research report comparing vendors' and service providers' strengths, challenges and competitive differentiators

Customized report courtesy of:

Atos

**QUADRANT REPORT | MARCH 2022 | U.K.**

Table of Contents

*Report Author: Mark Purdy*

**The Microsoft Ecosystem is becoming more complex, diversified and innovation-driven.**

In recent years, Microsoft's products, services, and technologies have been widely adopted by businesses of all types and sizes, both in the U.K. and abroad. The U.S. technology titan's three flagship clouds — Azure, Microsoft 365, and Dynamics 365 — play a critical role in sustaining the day-to-day activities of thousands of enterprises, shaping the way they operate; sell goods and services; enable employee communications and productivity; and ultimately connect with their customers, suppliers, and other stakeholders. Azure Cloud provides businesses with scale and flexibility across their IT operations; Microsoft 365 enables employees to work from anywhere remotely and instantly connect with the wider enterprise; Dynamics 365 marshals customer, supplier, and finance data from all corners of an organisation for improved insights and decision-making. Power Platform, the newest addition to the Microsoft portfolio, is helping to empower low-code automation and citizen developer activities within enterprises.

Yet, for many enterprises, the challenges of navigating, implementing and ultimately integrating the Microsoft suite of technologies can be daunting. Costs, lack of familiarity with the technology, and inadequate skills, among other factors, can be significant hurdles to adoption. Therefore, for support, many turn to the Microsoft partner ecosystem, a complex and diverse web of global systems integrators (GSIs), IT providers, independent software vendors (ISVs), and specialist strategy and advisory firms

Enterprises are choosing Microsoft to transform both business and workforce.

that provide additional services and technology components atop the existing Microsoft platforms. Enterprises draw on this ecosystem for many reasons. Many are new to cloud and lack the expertise to manage migrations to Azure. Providers are equipped with ready-made frameworks and accelerators to right-size Azure deployments and ease the migration process. In many cases, enterprises turn to managed services providers, seeking end-to-end support for managing Azure and other clouds. Managed services typically include a range of services such as scaling and provisioning of resources, managing incidents, monitoring and managing licences and seats, assuring security, automating updates, and ensuring policy compliance and governance. In many cases, enterprises are also looking for platform modernisation, for example, moving to modern microservice architectures, using containerised applications and Kubernetes orchestration, or updating legacy email and messaging systems to the Office 365 platform.

Despite the much-vaunted cost advantages of the cloud, relative to data-centre provision, enterprises are increasingly looking to ecosystem providers that can help with cloud economics or FinOps. Managed service providers can offer a single point of control for managing and negotiating licence and transaction costs, while also helping to streamline legacy databases and applications. Cloud data ingress and egress charges are also increasingly falling under the spotlight: These can quickly and unexpectedly mount up, particularly during major migrations such as SAP on Azure that might involve simultaneous operations and testing. Service providers play a crucial role in right-sizing cloud capacity and landing zones — too low and performance may be affected, too high and the enterprise can face rapidly escalating cloud costs. Most GSIs offer a range of automated tools and frameworks to optimise operating costs across the various Microsoft platforms.

For Microsoft technologies, the human element is no less important than the technologies in driving adoption and effective usage. The move to all three Azure clouds involves significant reskilling and workforce adaptation, both for IT specialists and the general workforce. Even enterprises that have made the transition to Microsoft 365 often feel that they are failing to make the full use of the platform due to employee unfamiliarity with all the functionalities. Many providers offer complementary training modules to facilitate transition to the Microsoft platforms as well as frameworks for change management and communication. **Most of the major providers invest heavily in training and credentialling their workforces in the various Microsoft specialist competencies, with some running specific Microsoft Cloud academies and groups, often on an industrial scale.**

Above all, enterprises are looking to the Microsoft ecosystem for providers that can weave together multiple strands of Microsoft technologies into technology and business solutions, helping them to create new markets, new channels to customers, new ways of working and innovating — in short, drive their business transformation agenda. An important trend, and a major thrust of Microsoft’s cloud strategy, is the increasing focus on industry clouds — Azure cloud platforms that are precision-cut to serve the needs of specific industries such as insurance, banking, manufacturing (connected factory solutions), retail (contactless shopping) and healthcare. A notable development this year is the increased focus on sustainable or green clouds on Azure, with a suite of solutions designed to help enterprises reduce energy consumption and carbon emissions and ultimately realize their 2030 net-zero objectives.

ISG has observed a major trend across most major technology providers — the rise of low-code, citizen developer initiatives, aimed at empowering the general workforce to create and use their own AI-enabled business apps and automation tools. Microsoft's Power Platform has helped spur the wider development of low-code initiatives, providing tools such as Power BI for data visualisation and analysis as well as automation tools such as Virtual Agent and Power Automate. While many enterprises are experimenting with low-code initiatives as a way to drive innovation within the workforce and liberate business professionals from the constraints of the IT department, they are doing so cautiously. Low-code initiatives can create significant risks around data access, policy compliance, licence usage and overall governance. ISG notes that providers are now developing specific offerings, designed to put guard rails around low-code development and channel such efforts in ways that are safe, productive and compliant for an enterprise. These include the establishment of centres of excellence for citizen development, monitoring compliance and policy, creating templates for app development, establishing best-practice guidelines, undertaking training workshops, monitoring data and licence usage, code scanning for compliance, generating pre-configured APIs, and determining templated release cycles.

SAP on Azure remains one of the most challenging areas for Microsoft ecosystem providers. The SAP environment is widely acknowledged to be extremely heterogeneous, with many legacy applications and databases still in existence and organizations at very different starting points in terms of SAP development. They are also usually business critical, which makes SAP migrations and database modernisations complex and risky to manage. For SAP providers, being able to understand the current SAP landscape of an enterprise is critical to ensuring a safe and cost-effective migration to Azure.

Finally, we continue to see a rapid evolution in the **Microsoft 365 platform. Microsoft is consciously repositioning the platform away from its original focus on employee communications and messaging, and towards a more rounded platform centred on employee experiences and learning, as exemplified by the introduction of Microsoft Viva.** ISG's research with providers suggests that this transition is still in its early days. Most providers and enterprises are still grappling with more prosaic challenges around integrating the current Microsoft 365 technologies and getting more value out of the platform. Nevertheless, we do see providers beginning to take a more employee-experience-centric approach. For example, some providers are incorporating wellness and micro-learning elements into the Microsoft 365 platform, and others are using digital nudges to help employees increase the adoption and usage of the services it offers.

The Microsoft ecosystem continues to evolve at speed. Within the U.K., ISG notes a highly variegated pattern of service providers emerging — full-suite GSIs alongside a penumbra of much smaller, niche or sectoral providers, perhaps focussing on one or two clouds such as Microsoft 365 or Dynamics 365 or serving a particular sector. Several providers are particularly focussed on public-sector organizations, for example, local authorities or healthcare providers. ISG research has shown that UK enterprises are relying heavily on digital technologies to drive their post-pandemic growth strategies, switching to cloud-based platforms to manage complex supply-chain needs and support on-line channels to customers.[1] UK enterprises are also looking to digital technologies such as cloud to help meet their decarbonisation and sustainability goals. The Microsoft ecosystem of technologies and providers seems set to play a pivotal role in the continued digital transformation of UK enterprises.

Move to all three clouds requires reskilling and adaptation for both IT personnel and the general workforce.

# Provider Positioning

**Page 1 of 4**

| | Managed Services for Azure | Microsoft 365 Services | SAP on Azure Services | Dynamics 365 Services | Power Platform Services |
|---|---|---|---|---|---|
| Accenture | Leader | Leader | Leader | Leader | Leader |
| Agilisys | Contender | Product Challenger | Not in | Not in | Contender |
| ANS | Product Challenger | Not in | Not in | Contender | Product Challenger |
| Atos | Leader | Leader | Product Challenger | Product Challenger | Leader |
| Birlasoft | Not in | Product Challenger | Not in | Product Challenger | Contender |
| Brillio | Not in | Not in | Contender | Not in | Not in |
| BT | Contender | Contender | Not in | Not in | Not in |
| Bytes Software | Product Challenger | Product Challenger | Not in | Not in | Not in |
| Capgemini | Market Challenger | Market Challenger | Product Challenger | Market Challenger | Product Challenger |
| Capita | Contender | Contender | Not in | Not in | Product Challenger |
| Claranet | Product Challenger | Not in | Not in | Not in | Not in |

## Provider Positioning

**Page 2 of 4**

| | Managed Services for Azure | Microsoft 365 Services | SAP on Azure Services | Dynamics 365 Services | Power Platform Services |
|---|---|---|---|---|---|
| Cognizant | Leader | Leader | Leader | Leader | Leader |
| Content+Cloud | Not in | Rising Star ★ | Not in | Product Challenger | Product Challenger |
| Crayon | Not in | Contender | Not in | Contender | Not in |
| DXC Technology | Leader | Leader | Leader | Leader | Leader |
| Espire Infolabs | Contender | Contender | Not in | Contender | Contender |
| EY | Contender | Market Challenger | Product Challenger | Market Challenger | Leader |
| Fujitsu | Leader | Leader | Rising Star ★ | Leader | Leader |
| Genpact | Product Challenger | Not in | Not in | Not in | Not in |
| HCL | Leader | Leader | Product Challenger | Leader | Leader |
| Hexaware | Leader | Leader | Not in | Product Challenger | Product Challenger |

# Provider Positioning



| | Managed Services for Azure | Microsoft 365 Services | SAP on Azure Services | Dynamics 365 Services | Power Platform Services |
|---|---|---|---|---|---|
| Hitachi Vantara | Product Challenger | Not in | Not in | Not in | Contender |
| HSO | Not in | Not in | Not in | Product Challenger | Product Challenger |
| IBM | Leader | Leader | Leader | Leader | Market Challenger |
| Infosys | Product Challenger | Leader | Product Challenger | Market Challenger | Leader |
| Logicalis | Contender | Not in | Not in | Not in | Not in |
| Lumen | Not in | Not in | Product Challenger | Not in | Not in |
| Mindtree | Not in | Not in | Product Challenger | Not in | Not in |
| NTT DATA | Product Challenger | Not in | Product Challenger | Not in | Not in |
| Phoenix Software | Not in | Product Challenger | Contender | Not in | Not in |
| PwC | Not in | Not in | Market Challenger | Not in | Not in |

# Provider Positioning



| | Managed Services for Azure | Microsoft 365 Services | SAP on Azure Services | Dynamics 365 Services | Power Platform Services |
|---|---|---|---|---|---|
| Rackspace Technology | Rising Star ★ | Product Challenger | Not in | Not in | Not in |
| Risual | Not in | Not in | Not in | Contender | Contender |
| Softcat | Product Challenger | Not in | Not in | Not in | Not in |
| SoftwareONE | Not in | Not in | Product Challenger | Not in | Not in |
| Sonata Software | Not in | Contender | Not in | Rising Star ★ | Product Challenger |
| Sopra Steria | Not in | Not in | Contender | Not in | Not in |
| TCS | Leader | Leader | Leader | Leader | Leader |
| Tech Mahindra | Product Challenger | Product Challenger | Contender | Product Challenger | Not in |
| Transparity | Not in | Not in | Not in | Not in | Contender |
| Wipro | Leader | Leader | Leader | Leader | Leader |

This study focuses on five key areas of the Microsoft ecosystem.

- **Managed Services for Azure**
- **Microsoft 365 Services**
- **SAP on Azure Services**
- **Dynamics 365 Services**
- **Power Platform Services**

Simplified Illustration Source: ISG 2022

## Definition

Microsoft is one of the most established technology providers in the world, with a network of thousands of partners that augment its capabilities and aid enterprises in adopting its technologies. This network has been through a series of tectonic shifts in the past five years, as Microsoft transformed itself as part of a massive cloud transformation. In the same period, digital transformation has become a priority in the enterprise technology landscape, requiring a new generation of software and services from Microsoft and its partners.

To address these needs, Microsoft has honed its focus on three core areas: Azure cloud platform; the Microsoft 365 suite of productivity experiences, which includes Windows 10 and Office 365; and the Dynamics 365 suite of business applications. Partners are now evaluated on their ability to drive the use of the Microsoft cloud services that comprise these core product areas. To succeed, service providers must provide enterprises with a robust set of services, complete with forward-thinking capabilities, and backed by a strong relationship with Microsoft that keeps them abreast of its future developments and, in turn, drive business opportunities.

ISG's analysis will focus on how providers in Australia, Brazil, Germany, Malaysia, Singapore, Switzerland, the U.K. and the U.S. are positioned, based on the strength of their respective portfolios and their competitiveness in the market. While there are thousands of providers in each of these regions, delivering services for Microsoft products, this report will only focus on the top competitors, both global firms and local providers, for each of the quadrants studied by region.

## Scope of the Report

In this ISG Provider Lens™ quadrant study, ISG includes the following 5 quadrants: Managed Services for Azure, Microsoft 365 Services, SAP on Azure, Dynamics 365 Services, and Power Platform Services.

This ISG Provider Lens™ study offers IT-decision makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments
- Focus on regional market

Our study serves as the basis for important decision-making in terms of positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing vendor relationships and potential engagements.

## Provider Classifications

The provider position reflects the suitability of IT providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions IT providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

**Midmarket:** Companies with 100 to 4,999 employees or revenues between US$20 million and US$999 million with central headquarters in the respective country, usually privately owned.

**Large Accounts:** Multinational companies with more than 5,000 employees or revenue above US$1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product and Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens quadrant may include service providers that ISG believes have strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

**Number of providers in each quadrant:** ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

## Provider Classifications: Quadrant Key

**Product Challengers** offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

**Leaders** have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

**Contenders** offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/services and a follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

**Market Challengers** have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

**Not in** means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

# Managed Services for Azure

## Who Should Read This

This report is relevant to enterprises across industries in the U.K. for evaluating providers of managed services for Microsoft Azure.

In this quadrant, ISG highlights the current market positioning of Azure managed service providers in the U.K. and how they address the key enterprise challenges in the region.

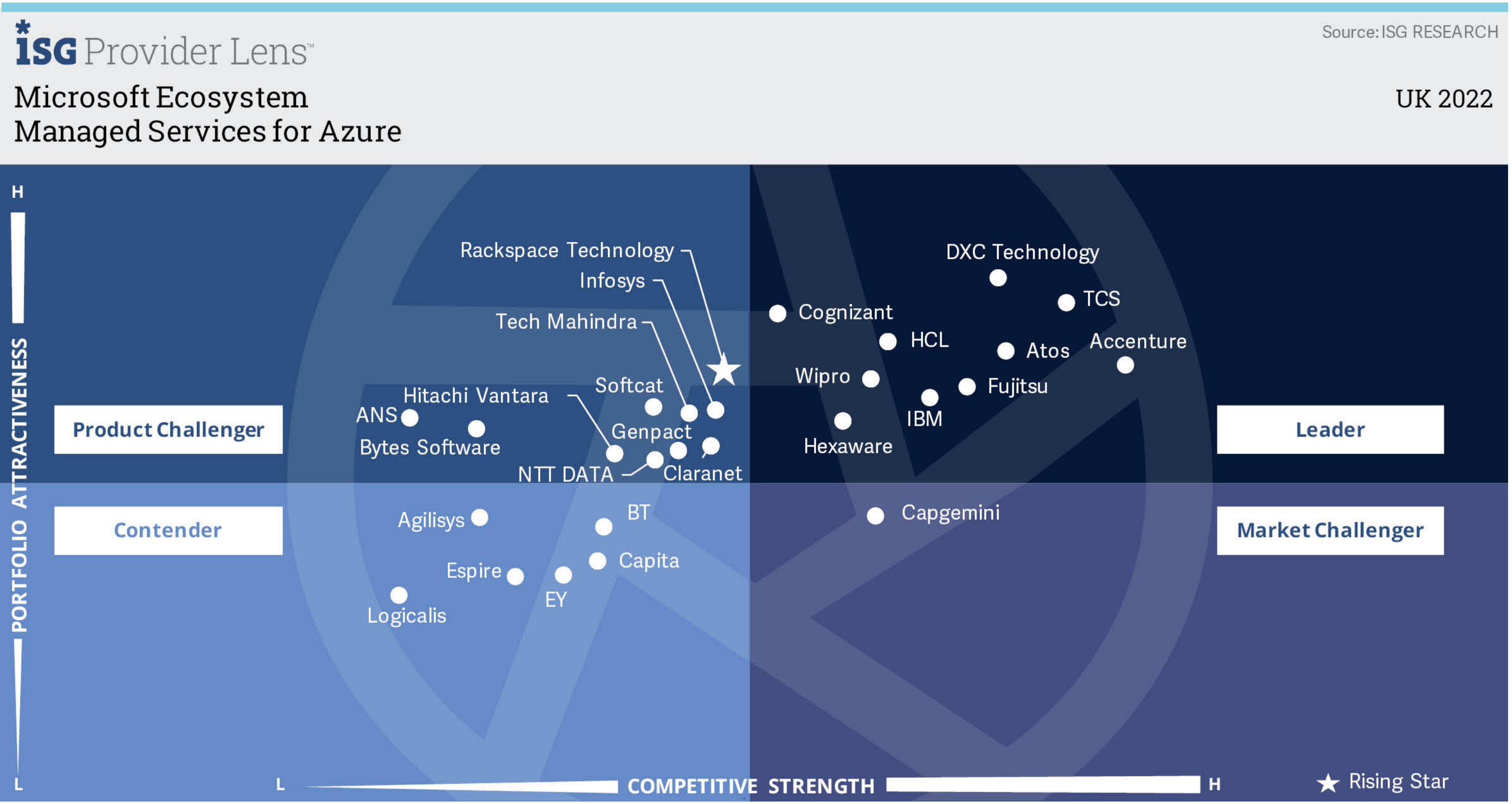
The global pandemic has accelerated cloud adoption among enterprises in the U.K., but has also presented them with a new set of challenges, including cloud visibility, cost and security issues. Many enterprises, especially in the small and midsize category, are entering the public cloud space for the first time to support remote work, collaboration or both. Therefore, enterprises in this region are looking for Azure managed service providers with strong security policies and governance protocols, which can help them manage an effective cloud strategy.

Enterprises in the U.K. are looking at cloud migration to enhance business agility and reduce payback times. Gaining a competitive advantage, maximizing cost savings and enhancing sustainability initiatives are among the other key drivers for Azure adoption in this region. Enterprises here are considering MSPs that can support them in optimizing the Azure environment and in reducing cloud expenses, especially licensing costs and data egress and ingress charges. As a part of their technology investments, these enterprises will continue to focus on transformational strategic initiatives including AI, cloud migration and environmental, social and governance (ESG) performance.

**IT leaders** should read this report to understand the relative positioning and capabilities of providers that will help them effectively consume services from Microsoft's cloud, as well as understand how the technical capabilities of the providers fare in the context of the market.

**Software development and technology leaders** should read this report to understand the positioning of managed service providers and how their offerings and strategies can influence the demand for complementary software products and services.

**Sourcing and procurement professionals** should read this report to understand the provider ecosystem for Microsoft Azure managed services in the U.K. and gain knowledge about how providers can be compared to one another.




This quadrant assesses services providers offering **professional and managed services** to augment the capabilities of the Azure Cloud. We see an increasing focus on **industry clouds, consumption-based** usage models, and **co-innovation** capabilities.

*Mark Purdy*

## Definition

This quadrant assesses managed public cloud service providers that offer professional and managed services that augment Azure's built-in capabilities, including IaaS and PaaS. These services include provisioning, real-time and predictive analysis, and monitoring and operational management of a client's public cloud and multicloud environment. The aim is to maximize performance of enterprise cloud workloads, reduce costs and ensure compliance and security. Typically, specially developed or licensed cloud management platforms and tools are used to provide customers with the highest level of automation and the necessary transparency over the managed cloud resource pool, in terms of capacity utilization and costs, including independent management.

The provided services typically include:

- Professional services for the management and monitoring of CPU, memory, databases, and operating systems as independent or **microservices** or **virtual machine** or **container services**
- **Updating** and **patching** services for operating systems, middleware, and applications
- Service portal for **cost management** (charge back and show back) and identity management or IT service management
- **Governance** and **compliance** management
- Supporting services such as **incident management**, configuration, security services, and **automation** setup

### Eligibility Criteria

1. Experience in designing, building and managing public and **multicloud environments** with a focus on Microsoft Azure
2. Support in the development of software code, **cloud native** and legacy system integration
3. Experience in implementing both **agile** and **DevOps** as well as integrating with enterprise clients' existing processes
4. Experience in application programming interface (API) **automation** and cloud analytics
5. Well-developed **security** practices and capabilities
6. Number and location of **provider resources** that assist enterprises with Microsoft Azure
7. Strength of the provider's partnership with Microsoft, measured by the number and category of relevant **certifications**, duration of relationship with Microsoft and evidence of strategic cooperation between the provider and Microsoft (around Azure).

## Observations

This is the first year in which ISG has evaluated providers in the managed services for Azure quadrant for the U.K. Driven by the shift to remote working and online consumption during the pandemic, the market for managed services on Azure continues to evolve at a dizzying pace. Yet there are also signs that the broad-based cloud services market is beginning to mature—in effect, become commoditised—increasing the pressure on providers to differentiate their wares and offerings more prominently from competitors. One of the biggest trends ISG has observed this year is the increasing focus on industry cloud services for Azure, where providers offer Azure solutions designed to serve the distinct needs of specific industries and sectors, such as financial services, healthcare, or manufacturing. Following last year's COP26 Summit in Glasgow and the focus by business on meeting net-zero carbon goals by 2030, some providers are now emphasizing green or sustainable clouds, providing services and solutions to help enterprises reduce energy consumption or otherwise improve the carbon footprint of their operations, products and services. With many enterprises—particularly in the mid-tier range—still relatively new to the cloud, providers continue to emphasize cloud-native modernization and migration services, for example, through modernization factories or specially developed Azure cloud accelerators designed to speed deployment. Providers are also aiming to differentiate their offering through the use of flexible consumption models, as well as their ability to bring co-innovation and product development capabilities to services on Azure.

The following providers achieved a Leader or Rising Star position in this report.

**Accenture,** a seasoned Azure veteran with a long-established relationship with Microsoft via Avanade, is focussing on Sustainability Clouds on Azure to help businesses achieve their net-zero goals.

### Atos

**Atos**, a strategic partner of Microsoft for over 20 years, has been designated a worldwide Microsoft Partner for the new industry clouds, with a specific focus on clouds for financial services, healthcare, and sustainability.

**Cognizant**, one of the most heavily credentialed Microsoft partners, is offering a triple set of modernisation factories on Azure, covering infrastructure, data estates, and applications.

### DXC Technology

**DXC Technology**, a 30-year strategic partner of Microsoft, is emphasising its co-innovation capabilities on the Azure platform and its revamped best-sourcing model, combining local expertise with domain expertise from its global innovation network.

**Fujitsu** has a more than a 40-year relationship with Microsoft worldwide. It stands out for its rich array industry and horizontal solutions on Azure, including COLMINA for manufacturing and Trust & Trace Core Platform for supply chains.

HCL

**HCL**, a strategic partner of Microsoft for more than three decades, is a launch partner for industry clouds, offering Azure solutions for manufacturing, sustainability, and financial services.

HEXAWARE

**Hexaware** provides a comprehensive suite of services across the Azure platform, incorporating significant elements of automation from its Amaze intelligent automation tools. It has a large base of Azure professionals in the U.K.

## IBM

**IBM**, a long-standing alliance partner of Microsoft, focusses heavily on cloud-native modernisation through its Red Hat OpenShift on Microsoft Azure offering.

## TCS

**TCS** has a long-standing relationship with Microsoft as supplier, customer, and product developer and innovator. It has launched joint industry cloud solutions for manufacturing, retail, and financial services. It has seen significant traction for its managed services on Azure with major U.K.-based clients.

wipro

**Wipro** is focussing on its Cloud Studio offering to help enterprises find the right solution for their business on Azure, and it is also offering Infrastructure as a Service (IaaS) and Platform as a Service (PaaS) on Azure.

## Rackspace Technology

**Rackspace Technology**, a Rising Star for the U.K., is highlighting its Elastic Engineering for Azure, providing on-demand Azure cloud expertise and resources to enterprises and guaranteeing delivery measured against business outcomes.

# Atos

Leader

"Atos combines its deep industry expertise with cloud-native tools on the Azure platform."

*Mark Purdy*

## Overview

Atos is a publicly listed company, headquartered in Paris, providing digital solutions, products, and consultancy services across 71 countries worldwide. Its Global Microsoft practice includes enterprise-level services across Microsoft's entire portfolio. A Strategic Partner of Microsoft for over 20 years, Atos is an Azure Expert MSP, with six Advanced Specialisations. Its managed services for Azure generate a significant revenue and involves a sizable workforce in the U.K., a region where it has experienced rapid growth in the recent years.

## Strengths

**Comprehensive offering:** Atos' two core offerings help enterprises migrate to Azure in a secure and effective way, and use the platform optimally: Atos OneCloud focusses on the migration journey, bringing together advisory capabilities, pre-built cloud accelerators, and expertise in application modernisation to ensure a safe and speedy cloud migration; Azure Digital Cloud Services aims to augment the native capabilities of the Azure platform, bringing Azure-native tooling, intelligent policy and event-driven architecture, governance frameworks, and strong security and compliance features.

**Industry clouds:** Due to its considerable industry and domain expertise, Atos has been designated a worldwide Microsoft Partner for new industry clouds, specifically the sustainability cloud, financial services cloud, and healthcare cloud.

**Unique proprietary offerings:** Atos has created a number of proprietary solutions to help enterprise clients understand their IT landscape and the efforts and outcomes from their Azure cloud journey, including the migration of individual or group of applications.

## Caution

Given its focus on helping clients achieve transformative IT and business outcomes, Atos should consider introducing a broader range of pricing models, for instance, encompassing gain share and risk share elements.

# Microsoft 365 Services

## Who Should Read This

This report is relevant to enterprises across industries in the U.K. for evaluating providers of Microsoft 365 integration services.

In this quadrant, ISG highlights the current market positioning of Microsoft 365 service providers in the U.K. and how they address the key enterprise challenges in the region.

The COVID-19 pandemic has presented U.K. enterprises with several challenges related to creating a secure and effective remote or hybrid working environment for their employees. Scalability, cost reduction and accelerating workplace modernization are just a few of the workplace-related concerns. These challenges have increased the demand for Microsoft 365 services to support workplace collaboration and communication in the region. These enterprises are looking to redefine their digital strategies and provide employees with the right digital tools to enhance collaboration and engagement.

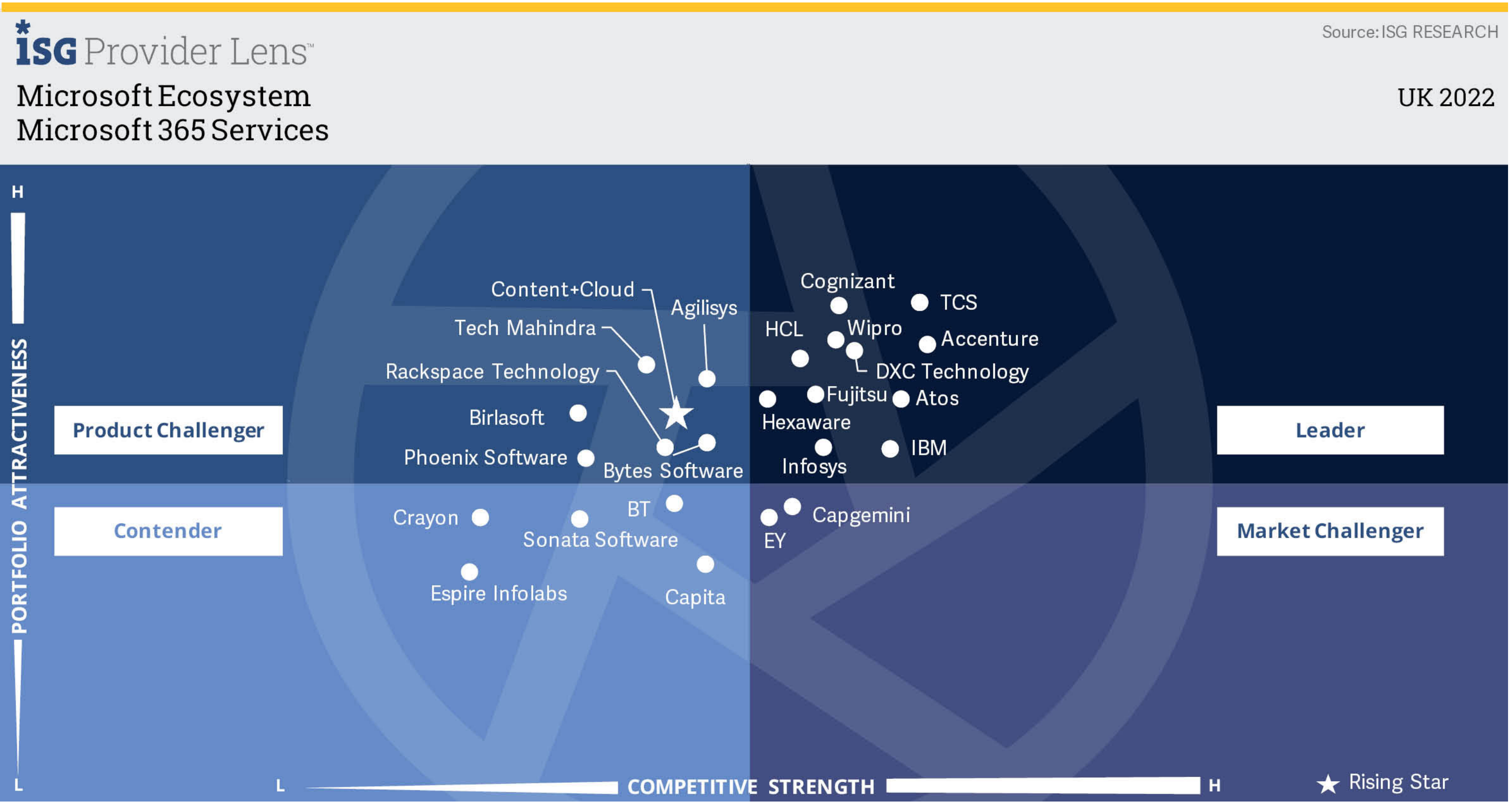
U.K.-based enterprises are looking for service providers that can understand the exact requirements of their respective businesses and recommend flexible solutions to streamline costs, increase productivity and enhance user experience. Hybrid working environments, virtual desktop implementation, employee wellness are among the key trends observed among enterprises in the region. They are also looking for flexible pricing models, based on their specific workplace requirements.

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

**Workplace technology leaders** should read this report to understand how service providers can help with adoption of Microsoft solutions, especially as changes to related technologies  trigger significant organizational change management challenges. In addition, this report can help workplace leaders better evaluate the ecosystem of potential partners for the effective implementation and integration of Microsoft 365.

**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 to evaluate potential provider partners.

**Sourcing, procurement and vendor management professionals** should read this report to develop a better understanding of the current provider landscape for Microsoft 365 integration and distinguish between players in this competitive market.




This quadrant assesses service provides that aid enterprises with the adoption, integration and ongoing operations of Microsoft 365. We see an **increasing provider focus on Microsoft 365 as a holistic employee-experience** and learning platform.

*Mark Purdy*

## Definition

This quadrant evaluates service providers that aid enterprises with the adoption, integration and ongoing operation of Microsoft 365 – Microsoft's SaaS based productivity suite. These services go beyond provisioning and migrating to Microsoft 365 – they focus on offering a quick, device-independent, high-quality productivity suite that enables seamless teamwork, irrespective of location and is adapted to the role of a user. From the client's perspective, Microsoft 365 is about collaboration and the integration of globally dispersed teams. To enable this, integration and implementation services are necessary. This quadrant also evaluates providers on the support they offer for Windows as a part of their overall Microsoft 365 service portfolio. Implementing SaaS-based workplace environments is a challenge for every enterprise client. ISG notes a plethora of pitfalls around collaboration, unified communication, file storage and performance, as well as licence costs, provisioning procedures, maintenance plans. In addition, enterprises are moving towards data integration, process integration and application integration, among other processes. Providers in this space must be able to go beyond implementing Microsoft 365 at a basic level to addressing these challenges head-on.

### Eligibility criteria:

1. Service portfolio includes **technical consulting**, license purchases, integration of Microsoft 365 modules, implementation, and operation
2. Forward-thinking offerings that integrate with Microsoft 365 to create a modern workplace for enterprise clients (for example, **HoloLens** development and **Teams bot creation**)
3. Management of Microsoft Office application programming interfaces (**APIs**) to ensure appropriate use and increased enterprise productivity
4. Ability to migrate customer workplaces to modern cloud environments and **workspace-as-a-service** models.
5. Provisioning of Microsoft 365-based **unified endpoint suites** through integration with state-of-the-art identity and access management technology and mobile device management (Intune or another).
6. Strength of the provider's partnership with Microsoft, measured by the number and category of relevant **certifications** (including Office 365, Intune, Windows, and Azure), duration of relationship with Microsoft, and evidence of strategic cooperation between the provider and Microsoft around the modern workplace.

## Observations

With remote and hybrid working now widespread across the U.K. workforce, Microsoft 365 has become one of the leading cloud platforms for workforce communication, collaboration and productivity. Migration and workforce adaption services remain much in demand, as many enterprises, especially in the small to medium category, are still in the process of modernizing their workplace services on Microsoft 365. However, providers are also looking to expand the scope, nature and reach of Microsoft services. ISG sees an increasing focus on providing services not just for office or remote (at home) workers, but also related to communication and content access services and device management for frontline workers such as field operatives and engineers. While many enterprises are still focused on getting the most out of their current Microsoft 365 investments, Microsoft is consciously pivoting the platform beyond collaboration and communication to one centered on employee experiences, notably through services such as Viva. We see providers responding to this trend in different ways. For example, some providers are offering micro-learning or wellness services, and others use AI and digital nudges to motivate increased employee engagement and interaction with the platform.

The follow providers achieved a Leader or Rising Star position in this report.

accenture

**Accenture**/Avanade was named Employee Experience Partner of the Year by Microsoft in 2021. It offers a wide range of managed services for Microsoft 365, as well as Accelerate 365, which is an automated end-to-end platform for migrations to Microsoft 365.

### Atos

**Atos** provides complementary services for every aspect of Microsoft 365 migration, deployment, and management, and it is able to call on its base of Microsoft 365 talent in the U.K. to support its clients.

Cognizant

**Cognizant** has a holistic focus on employee experience on Microsoft 365, providing services for multi-device experience, AI-enabled self-services, information repositories for knowledge sharing, and collaboration tools across dispersed workforces.

### DXC Technology

**DXC Technology** provides a full suite of Microsoft 365 solutions, as well as co-innovating solutions with Microsoft such as HoloLens for engineers. It has also invested significantly in skill development through its Microsoft Cloud Academy.

FUJITSU

**Fujitsu** has recently been awarded for its Advanced Specialization in Identity and Access Management, and it is a selected partner for the Microsoft 365 JumpStart Program. It focusses on employee experiences, end-point modernisation and on enabling front-line workers.

HCL

**HCL** has a large Modern Workplace practice, with the U.K. as one of its largest markets for Microsoft 365. It specialises in Microsoft 365 rollouts for large, complex enterprises.

**Hexaware** brings significant levels of intelligent automation to its Microsoft 365 services, including testing, migration and management. Its Team Coco Bot can engage back-end systems and end users for more unified communications.

### IBM

**IBM** provides a range of services for desktop virtualization to enable employees to work remotely and effectively. It also offers workplace analytics as a service to give organisations improved insights into their use of the platform and overall user experience.

**Infosys** provides a range of highly automated managed services on the Microsoft 365 platform, including self-service tools and robotic process automation (RPA) for incident resolution. Its Live Enterprise platform connects with Microsoft 365 to create engaging and productive hybrid workplaces for employees.

### TCS

**TCS** offers complementary services for Microsoft 365, including consulting, implementation, and fully managed services. It focusses on employee experience with solutions for wellness, first-line workers, micro learning, and digital nudges to ensure employee engagement and spur adoption.

**Wipro** has a large market share in the U.K. for its Microsoft 365 services and a significant pool of dedicated resources. It is pioneering additional productivity tools for the platform, for example, ExACT intelligent assistant for meeting minutes capture and HoloLens solutions for field workers.

### Content+Cloud

**Content+Cloud** a U.K.-based technology and managed service provider, is a Rising Star in the region. It offers a comprehensive suite of services, covering all aspects of Microsoft 365 migration, adoption, and management. It particularly specialises in integrating related communications and messaging platforms such as Yammer, Microsoft exchange and voice and data services.

# Atos

Leader

"With its one-stop solutions and deep talent base, Atos is a Leader in Microsoft 365 services."

*Mark Purdy*

## Overview

Atos is a public listed company, headquartered in Paris, providing digital solutions, products and consultancy services across 71 countries worldwide. A strategic partner of Microsoft for over 20 years, it has attained Advanced Specializations in the following competencies: adoption and change management, calling for Microsoft Teams, and meetings and meeting Rooms for Microsoft Teams. Atos has a large pool of FTEs and a significant client base for its Microsoft 365 solutions in the U.K.

## Strengths

**One-stop shop for Microsoft 365:** Atos provides a full portfolio of services to help clients with every aspect of Microsoft 365 migration, deployment, and management. Its consulting services include development of Microsoft 365 roadmaps, user adoption workshops, and organisational change management to help enterprises get the right solution and make the necessary adaptation. Additional components focus on localisation and customisation of Microsoft 365 and on technical aspects such as mailbox migration and voice and video team integration.

**Deep U.K. talent:** Atos has a deep talent pool of experts in the U.K. that cover all aspects of administration, security, and development related to Microsoft 365.

**Migration factory:** Atos offer a range of Deployment Factory services, support towers and teams to implement various aspects of Microsoft 365.

## Caution

Atos' pricing options for Microsoft 365 are predominantly fixed price or based on time and materials. Given its focus on transformative outcomes for clients, it should consider introducing a wide range of pricing options such as outcome-based or gain-share approaches.

# SAP on Azure Services

## Who Should Read This

This report is relevant to enterprises across industries in the U.K. for evaluating providers to help them adop SAP on Microsoft Azure or migrate existing SAP instances to the Azure platform.

In this quadrant, ISG highlights providers' positioning while offering services around SAP on Azure and how they can serve companies in the U.K.

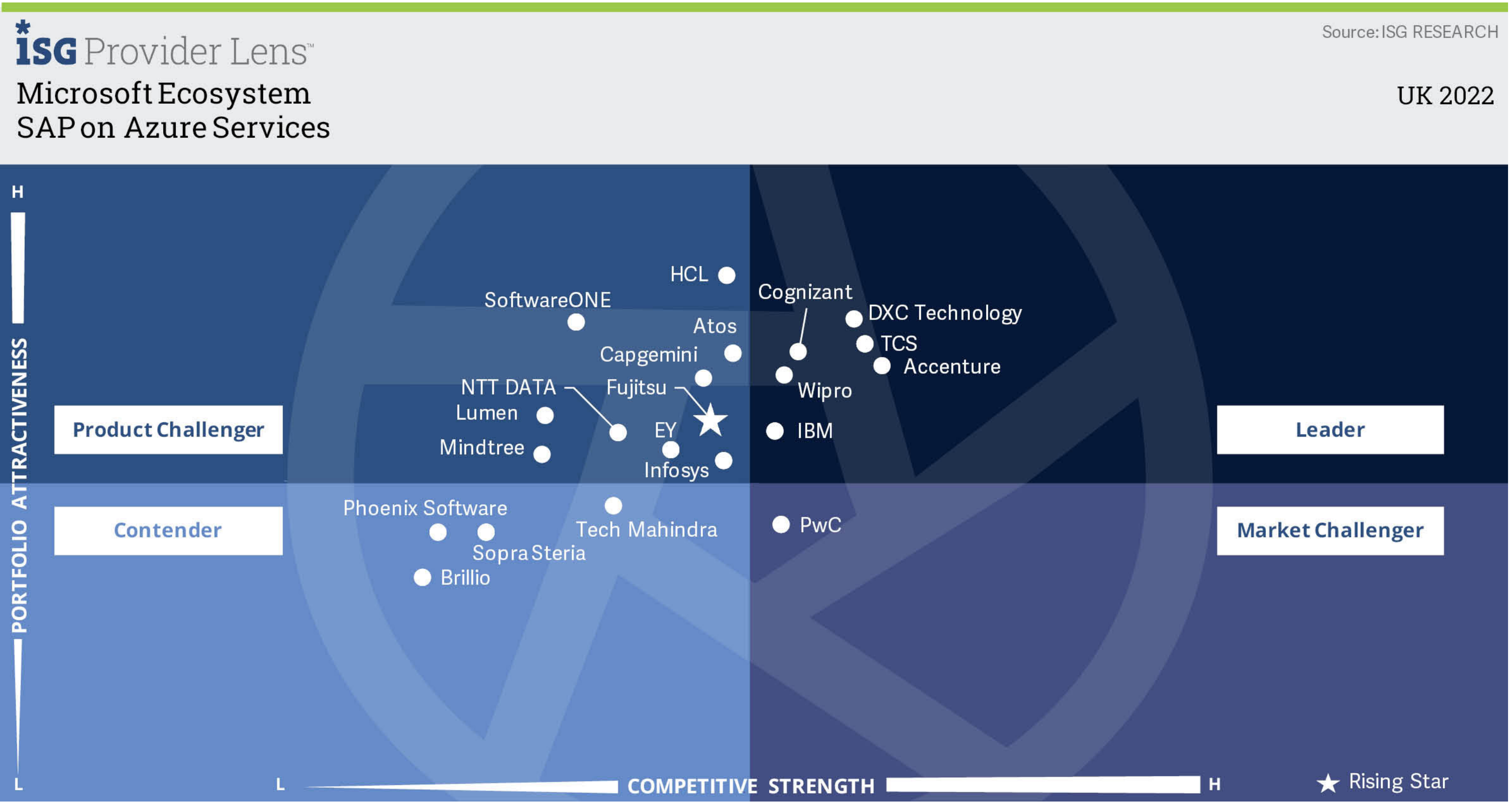
To thrive in this current disruptive business environment, enterprises in the region have started moving their SAP workloads to the cloud. Microsoft Azure is one of the leading choices for enterprises here. They are looking for service providers with strong expertise and capabilities to smoothly migrate SAP workloads on Azure. In this context, a service provider's partnership with SAP and Microsoft, along with relevant certifications, play a major role as enterprises are looking for quick migrations with reduced downtime.

Enhanced transparency and effective use of data intelligence are some of the key benefits that enterprises are looking for from SAP on Azure. Enterprises in this region are also looking for service providers that offer a full-stack offering for accelerating their SAP transformation journeys that can address all the challenges and complexities associated with SAP migrations.

**Enterprise IT leaders** should read this report to understand the relative positioning of SAP on Azure service providers across the U.K., as well as how their technical capabilities match with the needs of enterprises seeking success with a cloud transition for SAP.

**Finance, HR and HCM leaders** should read this report to understand the positioning of providers that will influence the implementation of the software they interact with on a regular basis as a critical part of their jobs.

**Sourcing, procurement and vendor management professionals** should read this report to understand the relative positioning of SAP on Azure service providers in the U.K., as well as understand the broader trends in the services ecosystem that may influence decisions about partner selection.




SAP migrations are notoriously complex, with many dependencies and risk factors. To combat these challenges, providers are increasingly focussing on **accelerators** and **automation tools** that can ease the transition.

*Mark Purdy*

## Definition

This quadrant evaluates service providers with capabilities related to adopting, managing, and using Microsoft's dedicated SAP on Azure suite of cloud solutions. The services typically provided by these companies include architecture consulting, an analysis of requirements for the application landscape. Also included are technical design with support for configuration, deployment, escalation management, change and fault management, support, optimization and reporting. It is required for providers evaluated in this category both to help their clients to migrate SAP workloads to Azure and to optimise, design and develop new processes and business flows. This must be provided as a part of platform management and through a combination of the provider's own services, SAP services and Microsoft Azure services. Service providers in this category require both Microsoft and SAP certifications. Also, they need to have active and productive partnerships with technology vendors and be well versed with how the relevant underlying technology offerings are evolving. Consequently, they should be able to articulate how product and platform changes would impact enterprises using this solution – from technical architecture considerations to business impacts.

## Eligibility Criteria

1. **Scope** and **depth** of **service portfolio** regarding migration of SAP workloads to SAP on Azure; SAP application and services implementation customisation, provisioning, and support
2. Number and location of employees who provide SAP on Azure services
3. Ability and willingness to support **hybrid cloud** and hybrid provider environments
4. Strength of the provider's **partnerships with SAP and Microsoft**, measured by the number and category of relevant certifications, duration of relationship, and evidence of strategic cooperation between the provider and Microsoft around SAP on Azure
5. Support for multiple pricing models, including **pay-as-you-go**
6. Robustness of provider's process for implementation, including the use of **agile** and **DevOps** methodologies, as well as relevant automation for service delivery and quality.

## Observations

SAP on Azure is one of the most complex and risky areas of the Microsoft ecosystem, typically requiring significant experience and skills in both the SAP and Azure platforms. Generally, only very large providers have the depth of skills and experience to navigate the complexity of SAP on Azure. Within this quadrant we see an increasing focus on tools and frameworks to ease deployment of SAP instances — for example, one-click provisioning — as well as the rise of consumption-based usage models and pricing. Providers also emphasize their use of advisory services and frameworks to help "right-size" SAP deployments, avoiding unnecessary costs from over-provisioning while ensuring critical business functions are not jeopardized from under-provisioning. Security and backup and disaster recovery services also form a core part of the managed services offered by most providers.

The following providers have achieved leader or rising star positions in this quadrant for the U.K.:

**Accenture** has decades of experience of working on both Microsoft and SAP projects, and it offers a full suite of implementation and managed services for SAP on Azure. It has migrated and managed large SAP systems for some of the largest and most complex global enterprises.

**Cognizant** has a Partner Managed Cloud joint offering with SAP. It offers an SAP managed cloud platform with elements such as consumption-based pricing, one-click SAP provisioning, metering, and monitoring. It also provides solutions specific to industries such as manufacturing and life sciences.

### DXC Technology

**DXC Technology** has decades of SAP and Microsoft experience and a sizable client footprint for its SAP on Azure services in the U.K. It provides a range of services, including a platform as a service for SAP offering, based on full-stack service agreements.

### IBM

**IBM** has over four decades of SAP experience and an alliance with Microsoft going back 30 years. It offers a cost benefits estimator tool to help clients achieve returns on investment from moving SAP applications to Azure.

### Tata Consultancy Services

**Tata Consultancy Services** has a significant client base for its SAP on Azure offerings in the U.K. and a large and experienced pool of SAP on Azure professionals in the region. It has a comprehensive end-to-end offering for SAP on Azure, and it has taken on projects for major U.K.-based clients.

**Wipro** has a significant market share in the U.K. for its SAP on Azure offerings and a sizable base of related specialists. Its broad spectrum of services for SAP on Azure stands out because of a raft of security features. Its partnership with Secude Halocore provides an additional layer of protection for its proprietary offerings when extracting confidential information from SAP systems.

FUJITSU

**Fujitsu** a Rising Star in this year's report, was named SAP Partner of the Year for Global Technology by Microsoft in 2021. It has a longstanding relationship with both Microsoft and SAP, and it offers an array of services such as low-cost data archiving, disaster recovery and data analytics.

# Dynamics 365 Services

## Who Should Read This

This report is relevant to enterprises across industries in the U.K. for evaluating Microsoft Dynamics 365 partners.

In this quadrant, ISG highlights the current market positioning of providers of Dynamics 365 services in the U.K. and how they address key enterprise challenges in the region.

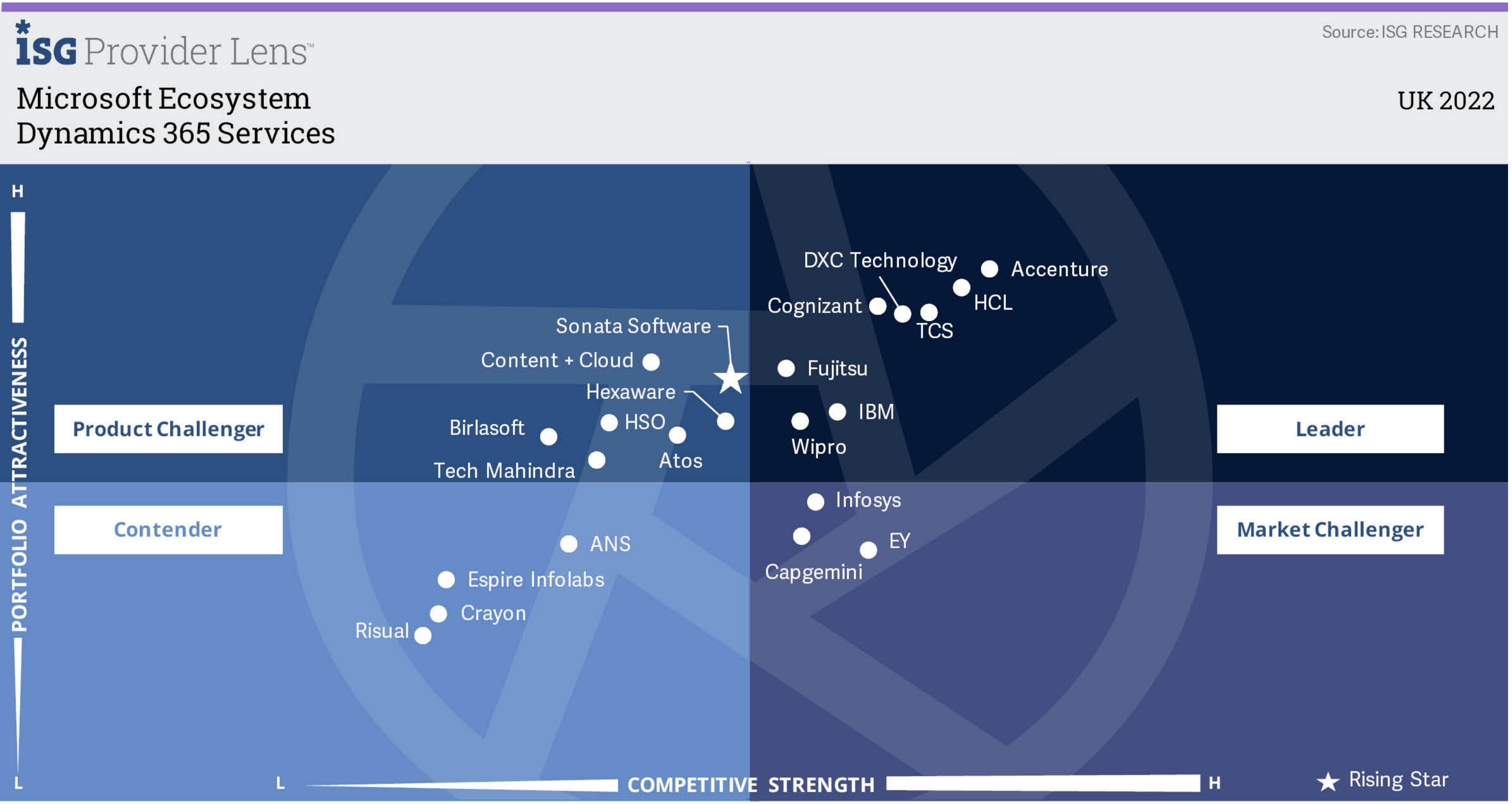
New-age enterprises across the world, including in the U.K., have accelerated the adoption of Microsoft Dynamics 365 to transform their enterprises by enhancing business processes. Enterprises in the U.K. are focusing on reducing their overall spend on sales activities, increasing operational efficiency and providing better customer experience. Moving to Dynamics 365 will help these enterprises achieve their business goals and reimagine customer experience by taking an omnichannel approach. In terms of customer relationship management (CRM), enterprises in the U.K. are looking for seamless unified digital experience for customers, partners and employees.

Several enterprises still have multiple enterprise resource planning (ERP) systems and are, therefore, focusing on the consolidation of operations and on cloud transformation. Concurrently, they wish to enable a holistic view of pipeline, planning and forecasting for sales and are looking for migration from Salesforce to Dynamics 365. For marketing, they are emphasizing end-to-end marketing modules and single unified marketing systems in an organization and enhancing ROI. Apart from implementation, enterprises in the region are looking for service providers that who can help them in managing, maintaining, and optimizing Dynamics 365 applications.

**CIOs and senior IT leaders** should read this report to understand how service providers can help with the adoption of Microsoft solutions, which, in turn, would help them understand ERP- and CRM-related solution advancements and how they integrate with other business systems.

**CMOs** should read this report to understand how service providers can help with the adoption of Microsoft solutions. Marketing and sales leaders leverage the CRM functions of Dynamics 365 to directly impact the way their teams work.

**COOs** should read this report to understand how service providers can help with the adoption of Microsoft technology.




This quadrant evaluates service providers that assist enterprises with the customisation, integration, and operation of the Dynamics 365 platform. Dynamics providers are increasingly branching into **industry solutions**, for example, in **healthcare, retail, financial services** and **utilities**.

*Mark Purdy*

## Definition

This quadrant evaluates service providers that assist enterprises with the selection, integration, customisation and operation of Microsoft's cloud-based Dynamics 365 enterprise resource planning (ERP) and customer relationship management (CRM) software. These services focus on the digitalisation of business processes using ERP and CRM software. In this context, service providers and system integrators should support user companies in the analysis of processes that have not been digitally mapped and the IT implementation of these processes via solutions from Dynamics 365. In addition, this study considers topics such as data integration with and transfer from legacy systems. Furthermore, it examines the way providers handle software lifecycle and user support. It also covers areas such as escalation handling, change management, optimisation and reporting.

Providers included in this quadrant also demonstrate a strong understanding of the way their services and the Dynamics 365 solution impact enterprise clients' business.

### Eligibility Criteria

1. **Scope** and **depth** of the provider's service portfolio regarding the implementation, customisation, provisioning and support of Microsoft Dynamics 365, with special consideration for industry specific services and capabilities
2. Number and location of employees that provide Dynamics 365 services
3. Ability to understand the client's **workloads** related to the transformation of **ERP** or **CRM**
4. Strength of the provider's partnership with Microsoft, measured by the number and category of relevant **certifications**, duration of relationship, and evidence of strategic cooperation
5. Support of **digital transformation** processes in user companies as a part of Dynamics 365 adoption
6. Variety and maturity of **pricing and payment** models that match the needs of enterprises adopting and using Dynamics 365.
7. Robustness of provider's process for implementation, including use of **agile** and **DevOps** methodologies, as well as relevant automation for service delivery and quality

## Observations

As the Dynamics 365 space within the U.K. continues to mature, we are beginning to see significant differentiation in the offerings of the many providers in the market. One notable development is the emergence of industry solutions, on both the CRM and the ERP sides, as providers seek to tailor their Dynamics solutions to the distinct needs of different sectors and industries. Current industry solutions include those targeting sectors as diverse as banking, legal services, retail, manufacturing, utilities, healthcare and government and public agencies. Some providers offer accelerators to ease deployment, or education and training workshops to help clients get the most out of their Dynamics 365 deployments. We also see an increasing use of AI and next-generation technologies in tandem with Dynamics deployments. In terms of deployment models, providers are also making greater use of both consumption-based and gainshare models, which should increase the appeal of Dynamics solutions to enterprises both small and large.

The following providers achieved leader or rising star positions for this quadrant in the U.K.:

accenture

**Accenture** (Avanade) won three Microsoft Partner of the Year awards in 2021. In October, it announced its intention to acquire Quantiq, a U.K.-based applications system integrator, which should help to boost Avanade's capabilities in enterprise resource planning (ERP) in particular.

Cognizant

**Cognizant** offers a range of customer experience (CX) transformation services using Dynamics 365, including digital marketing and sales and operation. These incorporate a range of next-generation technologies such as AI and machine learning, conversational AI, the IoT and augmented reality.

DXC Technology

**DXC Technology** offers a full spectrum of services across the Dynamics 365 platform, it and has more than 5,000 clients globally across this space. It also provides a range of industry specific solutions for banking, manufacturing, retail, smart government, land development and volume home builders.

FUJITSU

**Fujitsu** has multiple point solutions on the Dynamics 365 platform, for example, financial management solutions for municipalities and its eCourt Case Management system. It has delivered Dynamics solutions for a broad range of U.K.-based clients, including public agencies, major banks and retailers.

HCL

**HCL** offers services for Dynamics 365 through PowerObjects, a leading systems integrator for business applications that it acquired in 2015. PowerObjects is notable for its education and support services, helping clients optimise their Dynamics 365 investments. It also offers many add-ons that build on the native capabilities of the Dynamics 365 platform, as well as a range of industry accelerators.

## IBM

**IBM** offers Dynamics Value Assessment, a customised series of workshops designed to help clients rethink and optimise their Dynamics 365 CRM platforms. The offering uses design thinking methodologies and is delivered by a team of experienced IBM professionals.

## Tata Consultancy Services

**Tata Consultancy Services** offers a wide range of industry specific solutions on the Dynamics 365 platform in the U.K., catering to the utilities, manufacturing and financial services industries. It has delivered Dynamics-365-based CRM and ERP projects for an array of companies that are household names in the U.K.

**Wipro** offers a comprehensive suite of services for Dynamics 365 in the U.K., including a range of industry and point solutions for banking, utilities, and healthcare. It offers a variety of flexible pricing models, with some outcome-based and gain-sharing elements.

## Sonata Software

**Sonata Software**, a Rising Star in this year's U.K. report, has worked with Microsoft on technical development around the Dynamics 365 platform. It also offers a variety of industry specific solutions built upon the platform and various accelerators for fast upgrading.

# Power Platform Services

## Who Should Read This

This report is relevant to enterprises across industries in the U.K. for evaluating providers of Microsoft Power Platform services.

In this quadrant, ISG highlights the current market positioning of Power Platform service providers in the U.K., and how they counter key enterprise challenges in the region.

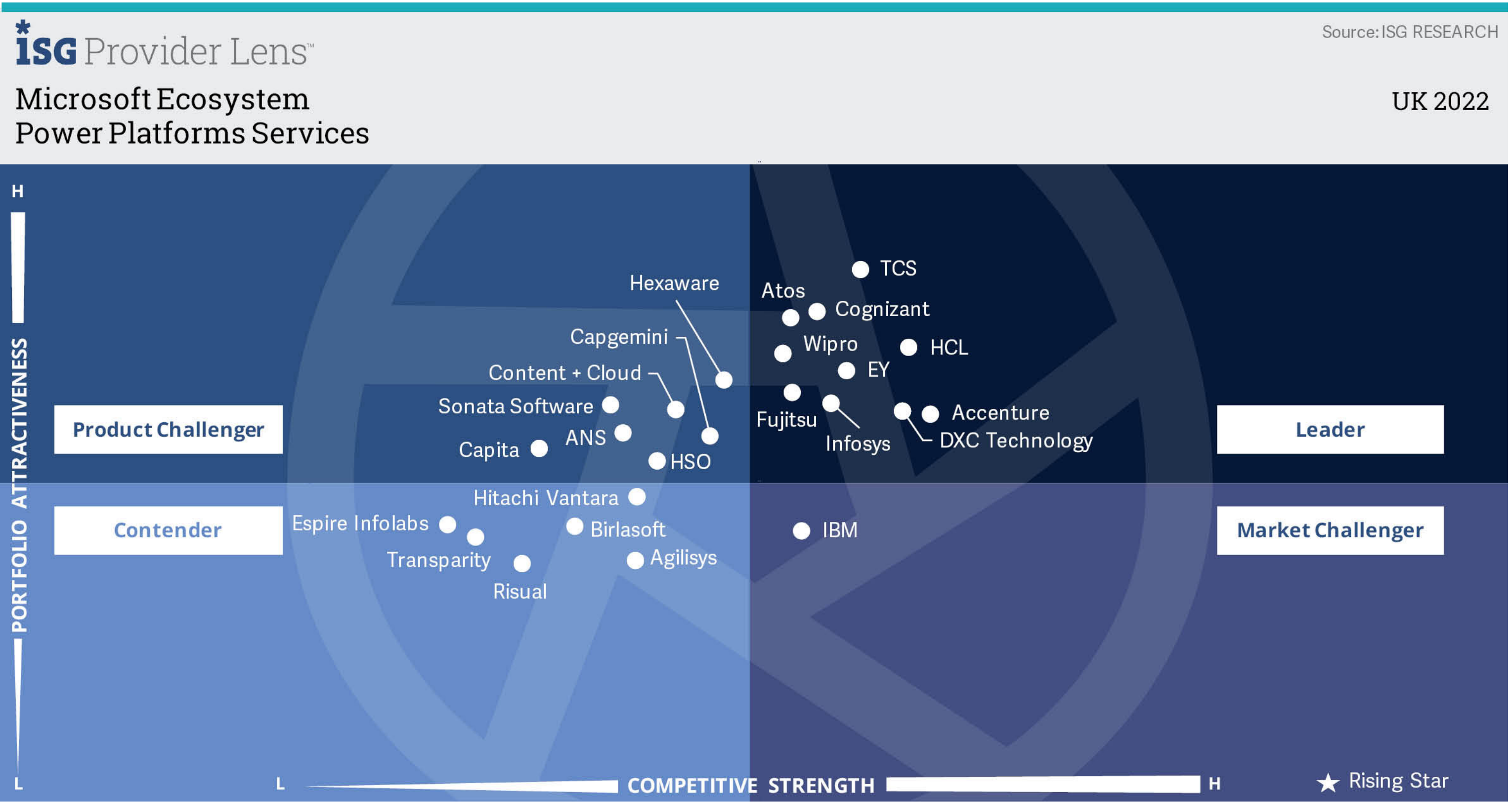
The global pandemic is pushing U.K. enterprises to implement the Microsoft Power Platform, and they are seeking service providers that can support them in their digital transformation journeys by helping them rethink future workforce management. To meet the evolving requirements triggered by the COVID-19 crisis, enterprises are focusing on service providers that, through an automation-driven approach, can help them achieve their modernization goals.

Enterprises in the U.K. are adopting Power Platform services for analyzing data, creating business applications, automating business processes and building virtual agents. They are focusing on modernizing their legacy applications and boosting business productivity by leveraging Power Apps and Power Automate, with their low-code AI and robotic process automation (RPA) capabilities. Consequently, they are looking for providers that can help accelerate their citizen developer programs and also provide effective governance, compliance and security guard-rails for these activities. Data-driven insights, conversational AI capabilities, including chatbots and virtual assistants, and integration with Azure are a few other critical parameters being considered by these enterprises while selecting service providers.

**IT and technology leaders** should read this report to better understand the relative strengths and weaknesses of service providers in the Microsoft ecosystem and also understand how providers are integrating the latest capabilities from Power Platform into their offerings.

**Sourcing, procurement and vendor management professionals** should read this report to understand the relative positioning of Power Platform service providers in the U,K., as well as to understand the broader trends in the services ecosystem that may influence decisions about partner selection.

**Workplace technology leaders** should read this report to understand how service providers can help with the adoption of Microsoft low-code/no-code and virtual assistant technologies. The report also helps them evaluate the ecosystem of potential partners for the effective implementation and integration of the Power Platform




Power Platform is helping to unleash the innovation potential of the **low-code revolution**, while also providing strong **governance, cost**, and **security** guardrails.

*Mark Purdy*

## Definition

This quadrant assesses providers that offer services towards an enterprise-wide implementation of the Microsoft Power Platform and offer support services and related advanced training. Enterprise clients use the services offered by the providers to create new and advanced software applications for digital transformation, obtain new insights on business operations and optimise business processes. The services offered by the providers here not only leverage the capabilities of the Power Platform, but also educate enterprises on the best practices for development. Providers in this space ace the integration with a variety of Microsoft business apps, for example, Office 365, Dynamics 365 and Azure, as well as advanced concepts such as DevOps, DataOps, or MLOps. The providers in this quadrant understand a client's objectives, demonstrate their data literacy and skills to provide the necessary guidance and take a holistic approach with an eye for details. .

### Eligibility Criteria

1. Services that support enterprise adoption of all Power Platform Solutions – **Power BI, Power Apps, Power Automate and Power Virtual Assistant**
2. Structured **offerings and tools** that enable easy adoption of Power Platform Solutions and streamline ongoing operation of the software
3. **Technical support** capabilities that assist enterprises with the adoption and management of platform solutions
4. Clear **business benefits** tied to use of platform solutions
5. Number and location of employees with relevant **certifications** for Power Platform use

## Observations

This is the first year that ISG has examined Power Platform as a distinct quadrant within the Microsoft ecosystem. The Power Platform market is in some ways the most nascent part of the current Microsoft ecosystem within the U.K. Despite the growing appeal of the low-code, citizen developer revolution, businesses are still treading cautiously given the potential governance, compliance and data risks associated with citizen development. Providers are therefore emphasizing two, mutually reinforcing, core offerings: first, their ability to give momentum to low-code activities through various accelerators, factory models and Centers of Excellence; second, their ability to bring effective governance, security and compliance capabilities to low-code activities on Power Platform. We also see some early signs of market differentiation emerging, with some providers offering industry-inflected Power Platform solutions, for example in life sciences, manufacturing, healthcare and finance. As mentioned above, the low-code revolution is in many ways still in its infancy, and we are likely to see significant further evolution in Power Platform services over the next several years.

The following providers are leaders or rising star for this quadrant:

### accenture

**Accenture** (Avanade) has a global advisory practice for Power Platform, with a depth of talent in analytics and automation, and a strong focus on governance tools and safeguards for citizen developer initiatives.

### Atos

**Atos** provides end-to-end services for the Power Platform, with a special focus on Power BI and data visualisation services. It also offers a governance platform solution, with accelerators and tools to provide effective governance for citizen developer activities.

### Cognizant

**Cognizant** has considerable expertise/experience in implementing client solutions using the Power Platform. It also offers a set of accelerators to help organisations speed up their citizen developer/low-code initiatives in a safe and effective manner.

### DXC Technology

**DXC Technology** is helping customers establish their centres of excellence for low-code activities, and it is offering an array of data visualisation and analytics tools using the Power Platform.

### EY

**EY** has been recognised by Microsoft as its Global Power Apps and Power Automate Partner of the Year for 2021. Its PowerApps Center of Excellence is widely lauded for innovative solutions such as grant accelerators launched during the pandemic.

### FUJITSU

**Fujitsu** offers a holistic centre of excellence to help clients speed up their low-code application development on the Power Platform. Its Fusion teams bring multidisciplinary expertise to citizen developer initiatives.

HCL

**HCL** has a significant base of Power Platform professionals in the U.K. It offers education and training to help clients co-develop apps and also a Power Platform development factory.

Infosys

**Infosys** has a large client base for its Power Platform services in the U.K., offering a wide spectrum of services with a particular focus on strong security and governance.

Tata Consultancy Services

**Tata Consultancy Services** has a dedicated Power Platform practice, with a comprehensive range of services and solution accelerators.

wipro

**Wipro** offers a series of carefully curated industry solutions on the Power Platform, encompassing banking and insurance, manufacturing, high tech, and energy and utilities.

Leader

"With powerful governance tools, Atos is a Leader in Power Platform in the U.K."

*Mark Purdy*

# Atos

## Overview

Atos is a public listed company, headquartered in Paris, providing digital solutions, products and consultancy services across 71 countries. Its Global Microsoft practice provides enterprise level services across Microsoft's entire portfolio of products and services. A strategic partner with Microsoft for over 20 years, Atos is an Azure Expert MSP, with Gold Competencies in data analytics and data platform. A significant portion of its Power Platform business comes from the U.K.

## Strengths

**Power BI:** While Atos provides end-to-end services for the Power Platform, it has a particular focus on services for Power BI. Under the umbrella of data visualisation, it works with its clients on three major aspects of Power BI: strategic consulting (including technical roadmap development); dashboard design and development, with a strong focus on intuitive, user-friendly designs; and migration factory, with a variety of proprietary accelerators to speed the transition of existing reporting tools to Power BI.

**Power Governance:** While citizen developer initiatives bring many benefits, Atos recognises that they can also present major governance and administration challenges for organisations. An important differentiator, in this context, is the Atos Power Governance Platform solution, a set of accelerators and tools for effective governance of citizen development on the Power Platform, enabling few-click information retrieval, overviews of licence usage, trends and alerts, compliance information, notification of non-required apps and reporting for management purposes.

## Caution

Given the relative newness of the low-code revolution and its unfamiliarity among many enterprises, Atos should showcase its solutions more prominently to the U.K. audience.

# Appendix

The ISG Provider Lens 2022 – Microsoft Ecosystem Partners research study analyzes the relevant software vendors/ service providers in the U.K. market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

**Lead Author:**
Mark Purdy

**Editors:**
Ipshita Sengupta, Grant Gross

**Research Analysts:**
Sonam Chawla

**Data Analyst:**
Sarida Khatun, Pooja Rani Nayak

**Quality & Consistency Advisors:**
Anthony Drake

**Project Manager:**
Smita Subhash

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 2022, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

All revenue references are in U.S. dollars ($US) unless noted.

The study was divided into the following steps:

1. Definition of Microsoft Ecosystem Partners market
2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & use cases
4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)
5. Use of Star of Excellence CX-Data
6. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
7. Use of the following key evaluation criteria:
   * Strategy & vision
   * Tech Innovation
   * Brand awareness and presence in the market
   * Sales and partner landscape
   * Breadth and depth of portfolio of services offered
   * CX and Recommendation

*Lead Author*

Mark Purdy
**Principal Analyst**

Mark Purdy is a Principal Analyst at ISG Provider Lens™ and brings over 25 years of experience working on economics and technology research in business and government. Mark has a focus on next-generation technologies, especially artificial intelligence and intelligent automation, digital twins, digital olfaction, machine learning, virtual reality, and edge computing. He is the author of several ISG Provider Lens™ studies, including the 2021 Container Solutions and Services study for Europe, and the 2021 Intelligent Automation studies for the UK and the Nordics. He has published widely in tier-1 media and business publications such as Harvard Business Review and Sloan Management Review. He speaks on economics and technology issues at conferences, client workshops and seminars around the world.

*Enterprise Content and Global Overview Analyst*

Sonam Chawla
**Senior Research Analyst**

Sonam Chawla is a senior analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on Future of Work - Services and Solutions. Her area of expertise is Conversational AI and Digital Workplace. During her tenure, she has supported research authors and authored enterprise context and the global summary report with market trends and insights.

*IPL Product Owner*

## Jan Erik Aase

**Partner and Global Head – ISG Provider Lens™**

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor. Now as a research director, principal analyst and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

## ISG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally. For more information about ISG Provider Lens research, please visit this webpage.

## ISG Research™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research delivers guidance that helps businesses accelerate growth and create more value.

For more information about ISG Research subscriptions, please email contact@isg-one.com, call +1.203.454.3900, or visit https://research.isg-one.com/

## ISG

ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 800 clients, including more than 75 of the 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.

MARCH 2022

REPORT: MICROSOFT ECOSYSTEM PARTNERS