ISG Provider Lens™

Microsoft Ecosystem Partners

Managed Services for Azure

A research report comparing provider strengths, challenges and competitive differentiators

QUADRANT REPORT | MARCH 2022 | AUSTRALIA

Table of Contents

Report Author: Craig Baty

Australia's Microsoft ecosystem continues to gain complexity and value.

Market Overview

The ecosystem of Microsoft-certified service providers **continues to gain both complexity and value in Australia**, as the Microsoft product set continues to evolve rapidly across Microsoft 365 services and modern workplace, managed services for Azure, SAP on Azure and Dynamic 365.

The **Australian government** and the private business sector are **ramping up cloud implementations**. The **competition between the local providers** and their larger global rivals is intense. This trend is expected to increase significantly over the next five years, further intensifying local competition.

Over the next few years, Australian MSPs will need to **invest heavily in AI-related capabilities** and training to retain high levels of Microsoft Azure certifications and partnerships.

There is now a **greater focus on app-driven modernisation of the cloud**. It is taking the centre stage amongst Australian Microsoft Azure implementations, as organisations embark on the next wave of cloud. This is posing a **challenge to cloud service providers to re-align** their offerings.

Many **Australian customers have already attained mature cloud** adoption status due to increased use of cloud-based technologies in the region. Thus, many Australian companies are now positioned to **migrate more complex applications such as SAP** to the public cloud. However,

Providers based in Australia are challenging larger global rivals.

there is still a **lack of cloud certified resources and expertise in Australia** in certain technologies such as cyber security, IoT and AI at the customer end, as client demand continues to rise. Although it is still in the early stages, Australian clients will increasingly focus **on re-aligning legacy applications to leverage data, insights, machine learning and AI**. The growing proliferation of digital touchpoints and the expansion of the enterprise into consumer segments such as a wearable will provide Australian MSPs with strong opportunities over the next few years.

Quadrant-specific market attributes

Managed Services for Azure

There are many **challenges associated with the traditional cloud managed services model**. The market is becoming highly competitive as global providers are using high levels of automation to reduce margins and capture market share, thereby requiring constant investment to remain competitive.

COVID-19 has resulted in several challenges, particularly regarding the rapid scaling of certain Azure projects, due to the growing trend for remote working. It has also accelerated the need for Australian customers to become more agile and reduce costs, which is driving a greater adoption of some cloud applications. This, in turn, is leading to an increased **migration of workloads to public clouds**.

Although Microsoft Azure entered the cloud space three years after AWS, Microsoft can leverage its brand name and **strong collaboration with almost 800 Australian partners** to continue to hold a large share of the market. Google, the other major competitor in this segment, has also made significant progress in signing up large enterprises.

Microsoft 365 Services

New virtual and virtual/physical hybrid teams and processes need agile technology deployments to function. **Modern Workplace 365 involves the combination of the Microsoft 365 tools**, together with enterprise-wide applications and services, to support the new normal.

Following the reshaping of Australian businesses because of COVID-19, many **Australian companies now have hybrid workplace experiences**, with their workforces partially spread across office and home. Thus, collaboration solutions are needed to bridge the experience gap between the two environments.

Australia's new and probably permanent **virtual and virtual/physical hybrid teams and processes need agile technology deployments** to function, and Modern Workplace 365 addresses these requirements by combining the Microsoft 365 tools, together with enterprise-wide applications and services, to support the new mid-COVID-19 normal.

SAP on Azure

The SAP on Azure market is highly complex, with providers requiring specialist skills. **Australian customers are demanding strong knowledge and certifications from their cloud partners**, especially in the SAP on Azure segment, due to its complex requirements.

COVID-19 and ransomware attacks have **accelerated cloud adoption amongst some Australian** organisations. Many are now willing to migrate their business-critical proprietary systems to cloud, providing **added opportunities for Azure providers based in Australia**.

The **SAP on Azure services market in Australia continues to grow**, as more customers in the region look to migrate from their on-premises server environment to the cloud. Many Australian companies **have already migrated low-to-medium complexity applications** to the cloud and are now positioned to **migrate more complex applications such as SAP** to the public cloud.

One of the greatest challenges over the next 18 months reglated to SAP Azure implementations is the **reluctance amongst Australian organisations to migrate** high-impact critical business applications such as SAP **from on-premises to the cloud**. Therefore, Australian cloud providers need to continue to educate the market on how migrations of large complex workloads such as SAP on Azure cloud can be done with relative ease, simplicity and low risk.

Microsoft's Dynamics 365

This platform continues to evolve at a rapid pace. **The Australian market has recently seen** the introduction of new products and **significant shifts to existing applications**, as the platform, as a whole, continues to evolve.

The **key providers** in the Dynamic 365 landscape **in Australia are global**. However, **many local providers** in the region are now emerging, and some are **gaining global recognition**.

MSPs are seeing a growing trend towards an **amalgamation of technology across ERP, CRM, Dataverse and digital services** on the periphery of the Dynamics 365 product set, as it evolves to become more modular and seamlessly connected.

The customer experience **(CX) is a primary driver for Dynamics 365 initiatives in Australia**, as smart businesses seek to offer customers a variety of ways to connect (omnichannel CX) to **capture customer data at every touchpoint and leverage that** data using AI and machine learning to increasingly personalise CX. Dynamics 365 service providers in Australia are now integrating technologies such as AI-powered chatbots and robotic process automation to continually enhance CX.

Power Platforms

As organisations embark on the next wave of the cloud, there is now a greater **focus on app-driven modernisation in the cloud** to take centre stage amongst Australian Microsoft implementations. This is posing a **challenge to cloud service providers to align** their offerings and build necessary capabilities to address market demand. This requires an amalgamation of internal proprietary tools as well the **integration of fit-for-purpose tools to address the related legacy issues**.

Over the next two years, a range of **new value-added services** are expected to enter the Power Platforms (and Dynamics 365) market in areas such as cloud migration, micro-verticalised Dynamics 365 solutions, customer analytics and insights offerings and the PowerApps factory.

The addition of the **power platform and customer insights requires staff to have new and different skillsets beyond traditional Dynamics 365 offerings**. The market is seeing increasing opportunities around some traditional applications modules, which are evolving with new technologies such as IoT and remote assist around field service, project operations, Dynamics 365 marketing and omnichannel offerings in customer service.

MSPs in Australia are now working on **innovating and developing custom solutions** that will offer agile and flexible systems. This will empower companies to optimise resources with IoT integration and result in zero downtime in the back-office space.

Australia still lacks cloud-certified resources and expertise in certain technologies.

Provider Positioning

	Managed Services for Azure	Microsoft 365 Services	SAP on AZURE Services	Dynamics 365 Services	Power Platform Services
AC3	Leader	Not In	Not In	Not In	Not In
Accenture / Avanade	Leader	Leader	Leader	Leader	Leader
Atos	Contender	Contender	Contender	Not In	Not In
Barhead Solutions	Not In	Not In	Not In	Leader	Leader
Capgemini	Product Challenger	Product Challenger	Contender	Product Challenger	Product Challenger
Cognizant	Product Challenger	Product Challenger	Contender	Contender	Contender
Data#3	Product Challenger	Product Challenger	Not In	Not In	Not In
Datacom	Product Challenger	Product Challenger	Not In	Product Challenger	Product Challenger
Dell	Not In	Not In	Product Challenger	Not In	Not In
Dicker Data	Product Challenger	Not In	Not In	Not In	Not In
DXC Technology	Leader	Leader	Leader	Leader	Leader

Provider Positioning

Page 2 of 4

	Managed Services for Azure	Microsoft 365 Services	SAP on AZURE Services	Dynamics 365 Services	Power Platform Services
Empired	Leader	Product Challenger	Not In	Leader	Product Challenger
Engage Squared	Not In	Not In	Not In	Not In	Product Challenger
EY	Not In	Not In	Not In	Contender	Contender
FiveP Australia	Not In	Contender	Not In	Not In	Not In
Fujitsu	Leader	Leader	Product Challenger	Product Challenger	Product Challenger
Fusion5	Not In	Not In	Not In	Contender	Contender
Generation-E	Not In	Contender	Not In	Not In	Not In
HCL	Rising Star ★	Leader	Leader	Leader	Rising Star ★
Hexaware	Leader	Leader	Not In	Product Challenger	Contender
Hitachi Vantara	Contender	Not In	Not In	Contender	Not In
IBM	Leader	Leader	Product Challenger	Leader	Leader

Provider Positioning

	Managed Services for Azure	Microsoft 365 Services	SAP on AZURE Services	Dynamics 365 Services	Power Platform Services
Infosys	Product Challenger	Rising Star ★	Rising Star ★	Leader	Product Challenger
Insight	Market Challenger	Not In	Not In	Not In	Not In
LAB3	Product Challenger	Not In	Not In	Not In	Not In
Logicalis	Leader	Leader	Contender	Not In	Not In
Macquarie Cloud Services	Product Challenger	Not In	Not In	Not In	Not In
Mindtree	Contender	Product Challenger	Market Challenger	Product Challenger	Contender
NTT DATA	Market Challenger	Market Challenger	Contender	Market Challenger	Market Challenger
OOBE	Not In	Contender	Not In	Not In	Not In
Publicis Sapient	Product Challenger	Contender	Not In	Contender	Contender
PwC	Contender	Not In	Not In	Market Challenger	Market Challenger
Rackspace Technology	Contender	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
Rhipe	Not In	Not In	Product Challenger	Not In	Not In
SoftwareONE	Contender	Contender	Product Challenger	Contender	Not In
Sonata Software	Not In	Not In	Not In	Product Challenger	Not In
TCS	Leader	Leader	Leader	Leader	Leader
Tech Mahindra	Product Challenger	Product Challenger	Leader	Product Challenger	Contender
Telstra	Leader	Leader	Rising Star ★	Not In	Leader
Unisys	Leader	Leader	Not In	Not In	Not In
Velrada	Not In	Not In	Not In	Leader	Leader
Veritec	Contender	Not In	Product Challenger	Product Challenger	Not In
Wipro	Leader	Leader	Leader	Leader	Leader

This study focuses on what ISG perceives as most critical in 2022 for Microsoft Ecosystem Partners.

- 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: the 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.

The ISG Provider Lens™ quadrant study offers the following to IT decision-makers:

- Transparency in the strengths and weaknesses of providers/service providers.
- Differentiated positioning of service providers in relevant areas.

Our studies thus provide potential customers with an essential decision-making basis for positioning and go-to-market considerations.

ISG advisors and enterprise customers also use information from these reports to evaluate their current and potential service provider relationships.

Scope of the Report

In this ISG Provider Lens™ quadrant study, ISG includes the following five quadrants: Managed Services for Azure, Microsoft 365 Services, SAP on Azure Services, 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 of enterprise customers differ from those of other customers, 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 Challenger, Market Challenger, and Contender), and the providers are positioned accordingly.

Each ISG Provider Lens quadrant may include a service provider(s) that ISG believes has strong potential to move into the Leader quadrant. This type of provider is 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 of all sizes across industries in Australia for evaluating providers of managed services supporting Microsoft Azure.

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

The COVID-19 pandemic has accelerated the need for Australian enterprises to become more agile and reduce costs. Concurrently, it has been driving momentum for the adoption of cloud applications.

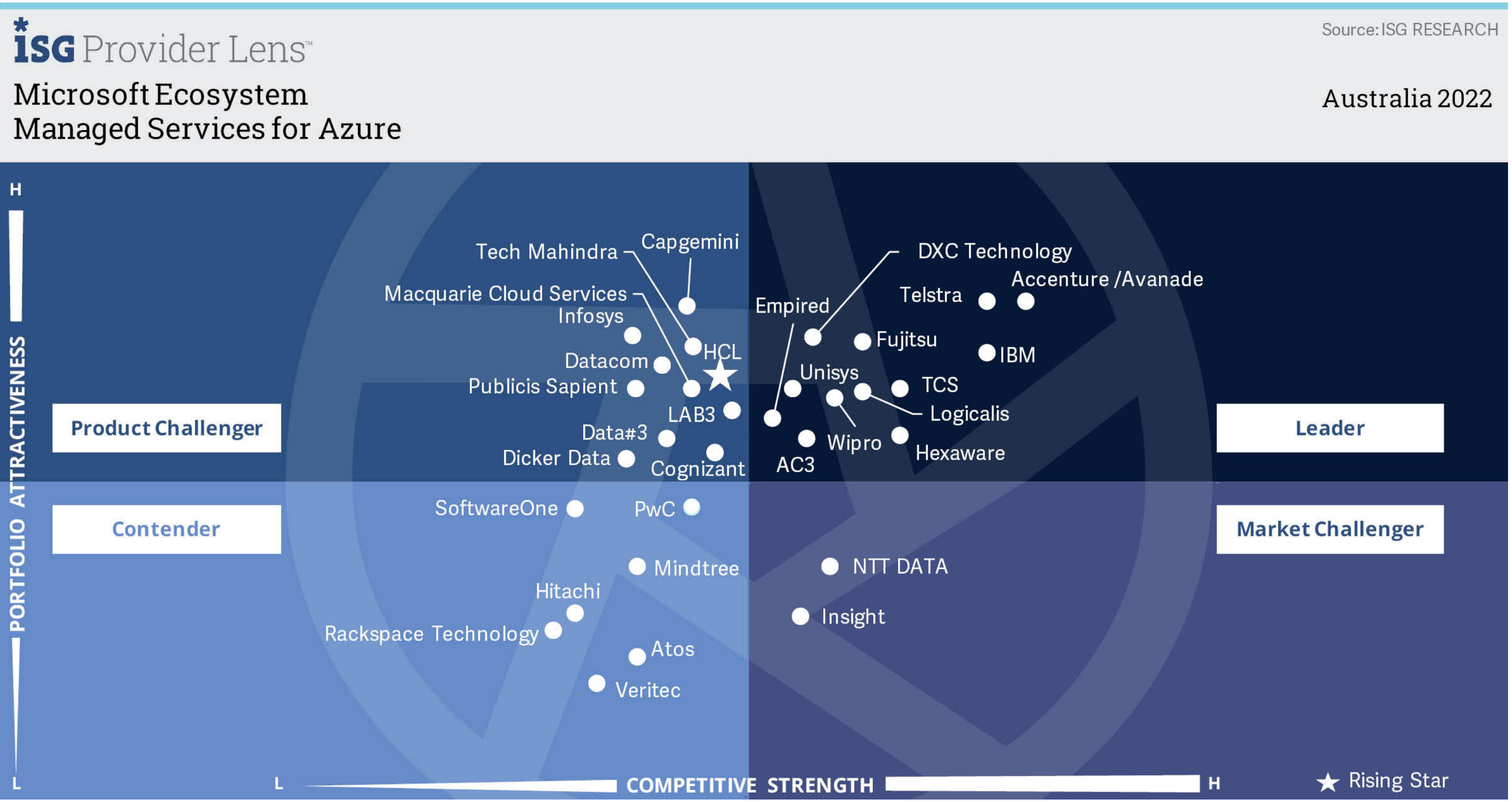
Enterprises continue to look for cloud managed service providers that can tailor Azure capabilities to their organizations' needs.

The benefits of the cloud, in terms of flexibility and agility to upscale, are encouraging midsize Australian firms to quickly move to the cloud to reduce spending on on-premises datacenters.

Another prevalent trend among Australian enterprises is the exploration and adoption of IoT and data analytics into their business operations.

IT and technology leaders should read this report to understand the relative positioning and capabilities of providers that will help them effectively harness services from Microsoft cloud. The report will highlight providers' technical capabilities in the context of the rest of the market.

Sourcing and procurement professionals should read this report to understand the provider ecosystem of managed services for Microsoft Azure in Australia and learn how providers can be compared to one another in the crowded Microsoft services ecosystem.



This quadrant assesses managed public cloud service providers that offer professional and managed services to **augment Azure's built-in capabilities**, including IaaS and PaaS. Service providers are increasingly **using specially developed cloud management platforms and tools.**

Craig Baty

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 maximise 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 utilisation and costs, including independent management.

The provided services typically include:

- Professional services for the management and monitoring of CPU, memory, databases, operating systems as independent or microservices or virtual machine or container services
- Update 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, as well as **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

Thirty-two companies have qualified for this quadrant, with 12 being identified as Leaders and one a Rising Star.

AC3

AC3 is a privately owned managed service provider based in Australia, specializing in cloud solutions. It provides a complete range of Azure services, spanning from initial strategy and planning and migration to ongoing support and monitoring.

accenture

Accenture/Avanade has access to 98,000 dedicated professionals with more than 60,000 Microsoft certifications globally and 700-plus Microsoft specialists in Australia.

DXC Technology

DXC Technology offers a complete range of services, including consulting, advisory, transformation, integration and operational management. It has a highly differentiated Managed Service for Azure offering and an advanced, end-to-end security practice.

Empired

Empired is a managed service provider based in Australia. It has been a long-standing and valued partner of Microsoft in managed services for Azure.

Fujitsu

Fujitsu is the eighth largest IT services provider globally. Fujitsu Australia and New Zealand generates over $1 billion annually in revenues. It was the first Azure Expert MSP to achieve Azure Virtual Desktop and SAP on Azure Advanced specialisations.

HCL

HCL Technologies is an Indian multinational IT services and consulting technology company. It has had a presence in Australia for more than 20 years. It is a Microsoft Azure Expert MSP.

HEXAWARE

Hexaware is a next-generation global provider of IT, BPO and consulting services. It is as an Expert MSP Partner and has advanced specialisation in Azure virtual desktop, low-code application development and modernisation of web applications.

IBM

IBM is a major global IT hardware, software and services provider with a large presence in the modern workplace market. The company has evolved its business focus in the past four years, with services that address data, AI, cloud, analytics and cyber security. In Australia, IBM has a large managed services for Azure business.

Logicalis

Logicalis is a leading managed services provider in Australia. It has offices in New South Wales, Victoria and Queensland. The company has more than 300 employees with customer base of over 400. Logicalis targets mid-market to enterprise-level organisations for Azure implementations in the region.

TCS

TCS is one of the world's leading global IT services, consulting and business solutions company, headquartered in India. It offers a comprehensive range of consulting services for Azure and a high level of Microsoft accreditation for Azure.

Telstra

Telstra is Australia's largest telecommunications provider and has a fast-growing presence across Asia, particularly in Singapore and Malaysia. Its managed Azure service is centred on a cloud management platform with highly scalable and automated elements.

Unisys

Unisys has a diverse global client base across the government, financial services and commercial markets, in more than 40 countries. It has 600 employees in Australia. Unisys is a Microsoft Azure Expert MSP partner and was the Azure Innovation Partner of the Year in 2017.

wipro

Wipro is a leading global IT, consulting and business process services provider, headquartered in Bangalore, India. In Australia, the company provides end-to-end managed services support for all the IaaS and PaaS services of Azure.

AC3

Leader

"AC3 is a Microsoft Azure Gold Partner and Tier 1 cloud services provider (CSP) Partner. It is also a Silver Application Development Partner."

Craig Baty

Overview

Founded in 1999, AC3 is a privately owned managed service provider based in Australia, specialising in cloud solutions. The company has around 300 FTEs and 80 contractors. It has a customer base of more than 1,000. AC3 provides a complete range of Azure services, spanning from initial strategy and planning and migration to ongoing support and monitoring, along with optimisation and security services. It acquired cloud services provider Bulletproof in 2018, dramatically expanding its business. This acquisition also included New Zealand-based Cloud House.

Strengths

Comprehensive range of services for Azure: AC3 provides a complete range of Azure services, from initial strategy and planning and migration to ongoing support and monitoring, along with cost optimisation and security services. Its support services for Microsoft Azure offer a modular approach. As part of the Qualified Multitenant Host (QMTH) program, Microsoft authorises AC3 to host clients' Windows virtual machines via a Microsoft cloud agreement subscription or enterprise agreements on dedicated or multitenant hardware.

Deep expertise and strong heritage in security: AC3 has a long legacy of providing technology services that comply with exacting Australian public services security standards. This is because it was originally part of New South Wales Government's Department of Finance, Services and Innovation. Security remains a key pillar of AC3's offerings.

Extensive multicloud management services: In addition to solutions to manage hybrid private and public cloud environments, AC3 offers multicloud management services leveraging public cloud and Amazon Web Services (AWS) expertise gained after its acquisition of Bulletproof. It has more than 14,000 virtual machines under management, servicing more than 50 percent of NSW government agencies and 700-plus commercial customers.

Caution

The managed services for Azure market in Australia is becoming increasingly competitive. This is driven by the continuous growth of local providers, entry of global providers and increased investment. Although AC3 is growing significantly, intense competition can hinder its rapid growth in the future.

Appendix

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

Lead Author:
Craig Baty, Phil Harpur

Editors:
Sajina B, Grant Gross

Research Analysts:
Angie Kho (APAC)

Data Analyst:
Sarida Khatun, Pooja Rani Nayak

Quality & Consistency Advisors:
Jason McAuliffe
Deepraj Emmanuel

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 January 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

Author

Craig Baty
Distinguished Lead Analyst

Craig has extensive research and thought leadership experience across the Asia Pacific and Japan ICT markets. Craig is principal of DataDriven, an Asia Pacific-based research and advisory firm that is an ISG Research partner. Craig has over 30 years of executive and board-level experience in the industry, including as group vice president and head of Gartner Research AP/J, CEO Gartner Japan, global vice president Frost & Sullivan, executive general manager for marketing and CTO Fujitsu ANZ, general manager for marketing, strategy and alliances at BT Syntegra, and more recently as vice president for global strategy and vice president of digital services in Fujitsu Tokyo headquarters. As a well-known ICT commentator and analyst, Craig has written over 200 research pieces, presented at over 1,500 events globally and is regularly quoted in regional media. Craig is actively involved in the ICT community as board member of the Australian Information Industry Association (AIIA). He is currently pursuing a doctor of business administration (DBA) on national culture impact on IT strategy/investment (Japan compared to Australia).

Co-Author

Phil Harpur
Principal Analyst

Phil Harpur is an Australian-based technology analyst and consultant with over 25 years of experience across telecommunications, cloud, data centres and digital media. His expertise spans over 35 countries across Asia. He also works as an analyst/writer in the financial services industry with a focus on the technology sector.

Phil is currently part of the DataDriven team, which is the Asia Pacific research partner for ISG, and he has contributed to the creation of nine ISG Provider Lens reports. Prior experience includes Gartner, Frost & Sullivan and BuddeComm.

He has been quoted in multiple global publications and appeared on business TV programs including Bloomberg, CNBC, Fox Business and ABC. He has also presented at numerous local and international conferences. Phil has a bachelor of science degree, with majors in computing and statistics from Macquarie University, and he holds a graduate certificate in applied finance and investment from the Securities Institute of Australia.

Analyst

Angie Kho
Senior Research Analyst

Angie Kho is a regional support analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on Microsoft Ecosystem for the Singapore and Malaysia markets. Her areas of expertise lie in IT services management and enterprise resource planning services. Angie develops content from an enterprise perspective and author the global summary report. Along with this, she supports the lead analysts in the research process and ad-hoc research assignments.

IPL Product Owner

Jan Erik Aase
Partner and Principal Analyst

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.

ISG Provider Lens™

MARCH, 2022

REPORT: MICROSOFT ECOSYSTEM PARTNERS