ISG Provider Lens™

Microsoft Cloud Ecosystem

Power Platform Services

A research report comparing provider strengths, challenges and competitive differentiators

QUADRANT REPORT | **MARCH 2023** | **SINGAPORE & MALAYSIA**

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The demand for Microsoft cloud services in Singapore and Malaysia continues to grow rapidly

The ecosystem of Microsoft-certified service providers continues to evolve in Asia and globally, as the Microsoft product set continues to advance rapidly across Microsoft 365, Modern Workplace, managed services for Azure, SAP on Azure, Dynamic 365 and Power Platform. Enterprises are accelerating their digital transformation investment for faster, measurable results. Large IT consulting practices are shifting their focus from IT-centric to customer-centric approaches and placing a stronger emphasis on end-user experience to optimise business outcomes and customer journeys. Data-driven industry insights are helping them personalise end-user experiences across Singapore and Malaysia.

The business sectors in Singapore and Malaysia are accelerating their level of cloud implementations. Enterprises are looking to

further leverage the potential of Microsoft Security capabilities within the Microsoft 365 suite of services. Local enterprises are also looking to better understand how to deliver improved levels of employee experience. There is also an increased inclination towards the use of Microsoft Viva among enterprises looking to understand how they can utilise the modules within the platform to help improve employee experiences. Enterprises currently focus on Viva Insights, Connections, Topics and Learning.

The Microsoft ecosystem is helping enterprises empower their employees to work from anywhere and enabling connectedness in the new hybrid working model. The ongoing trend of remote working in Singapore and Malaysia and advanced requirements for enterprises to collaborate internally and with clients are driving the use of Microsoft platform capabilities, such as external collaboration with Teams and Viva.

The global cloud market is becoming increasingly competitive as global MSPs are using high levels of automation to squeeze margins. Thus, further investment is required to remain competitive. Competition from locally based providers across Singapore and Malaysia

Singaporean and Malaysian Microsoft cloud services market experienced strong growth in 2022.

is also increasing, with many beginning to challenge their larger rivals. This trend is expected to increase significantly over the next five years, further intensifying local competition. Although AI has found its way into a range of IT support services, it is still in its infancy with regard to office collaboration tools. AI will become increasingly embedded into Teams meetings, assisting in information searches and supporting employees with common HR and IT tasks.

Asian enterprises are currently looking at new, non-intrusive ways to engage with their employees. These include cognitive virtual assistants to keep them updated with developments at work or at home and to take care of all routine tasks so that they can focus on critical work.

With more employees that have now returned to the office environment, there is likely to be an increase in the number of conference rooms and building services that utilise IoT and wearables. Enterprises are also looking for office productivity enhancement tools that can help with scheduling and related aspects.

Singaporean and Malaysian enterprises are also looking for cloud providers that offer a higher level of managed services, such as DevOps, containerisation, and application-level SLAs. However, such managed services do not lend themselves easily to scaling and automation, which poses an extra challenge to the providers of managed services for Azure.

Data security is also a growing issue as the remote workforce expands. Many enterprises have moved to a work-from-home model without looking closely enough at this issue. There is a growing opportunity for security services to expand further outside of the office and into the home office. This includes balancing the user experience while keeping the work data secure at all endpoints.

The SAP on Azure market is highly specialised, with providers requiring specialist skills. Asian customers are demanding strong knowledge and certifications from their cloud partners, especially in the SAP on Azure segment. Although Microsoft Azure is three years younger than AWS in the cloud space, Microsoft is able to leverage its brand name and strong partnership with SAP.

As enterprises embark on the next wave of cloud, there is now a greater focus on the app-driven modernisation of cloud to take centre stage amongst Asian Microsoft Azure implementations. This is posing a challenge to cloud service providers to align their offerings with the changes and build the necessary capabilities to address market demand. It requires an amalgamation of internal IP and the integration of fit-for-purpose tools to address related legacy issues.

There are also an increasing number of challenges to the traditional cloud managed services model. The market is becoming highly competitive as global providers are using high levels of automation to squeeze margins and capture market share. Thus, enterprises require constant investment to remain competitive in the market. MSPs must migrate and manage a growing array of applications, including non-Microsoft software, and make them integrate seamlessly into both Microsoft Azure and other cloud environments. They also need to enable core business transformation and provide measurable business improvement for clients, along with acting as both a traditional value-added reseller and a systems integrator. MSPs must also be adaptable and agile.

Asian enterprises are under increasing pressure to achieve more with fewer resources. They are, therefore, looking at implementing applications such as Microsoft Azure to be more productive and agile. They also want to pick and choose which parts of their environment they want to be managed over cloud. The expansion opportunities for managed cloud service providers in Asia over the next two years are the rising requirement to address the growing proliferation of digital touch points and the growth of segments such as wearables. This will see a reduction in the number of traditional server-based solutions in favour of cloud-to-edge applications.

Microsoft 365 services involve the design and application of processes to support personalised employee experience, workforce productivity, collaboration, and innovation. They comprise traditional Microsoft products such as Office, Excel, PowerPoint, and SharePoint and newer collaboration tools such as Teams, OneDrive, Power Automate, Power

BI, Enterprise Mobility + Security, and the Azure cloud for data storage and backup.

Many consulting firms are now seeing huge demand for security implementation services for Microsoft 365. This trend provides a significant opportunity for services and Microsoft 365 E5 adoption, with its enhanced security features. There is an increasing interest in clients looking to maximise the use of their E5 licensing for advanced threat protection to displace legacy voice systems and migrate to Teams Phone. Clients also want to utilise all the enhanced security features within an E5 license.

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

There is a growing focus on people experience and deployments of unified employee experience platforms, such as Viva, for both knowledge and frontline workers. Clients are moving away from customised implementations as they are fragile and expensive to be

implemented and maintained. With the starter templates and blueprints available from Microsoft, consulting firms are able to implement complex solutions in a fraction of the time and cost it usually needs and can move clients onto Microsoft 365 much more quickly than before.

The Modern Workplace segment has also started growing because COVID-19 has shown business leaders first-hand, both in Singapore and Malaysia and globally, that their companies can run virtually and in offices. Asian enterprises are beginning to move beyond just enabling their remote workforce and to embrace the hybrid work model as a critical piece of a longer-term strategy to drive reduced costs and increased productivity. For many enterprises, this means adopting a continuous improvement model that supports remote lifecycle services. They have seen how adaptable their teams and technology can be and will continue to seek innovations. Asian enterprises are also more aware of the importance of employee experience and how Modern Workplace is a primary enabler of employee satisfaction.

The SAP on Azure market is highly competitive, with providers requiring specialised skills and knowledge to deliver high-quality services. Asian enterprises are demanding strong knowledge and certifications from their cloud partners, especially in the SAP on Azure segment, considering its high-complexity requirements.

COVID-19 and ransomware attacks have resulted in the acceleration of cloud adoption amongst some enterprises in Singapore and Malaysia. Many are now willing to migrate their business-critical proprietary systems to cloud, which ensures added opportunities for Asia-based Azure providers. However, some Singaporean and Malaysian enterprises find it risky to migrate high-impact, critical business applications like SAP from the on-premises deployment to cloud, which poses a challenge to the providers of managed services for Azure.

Some Asian enterprises lack the required level of understanding of and experience with Azure.

Therefore, Asian cloud providers must educate the market on how SAP migrations can be done with ease, simplicity, and minimal risk.

Furthermore, there still remains a lack of Microsoft Azure–certified resources and expertise in certain technologies, such as cybersecurity, IoT, and AI, at the customer end as demand continues to rise.

SAP has aggressively moved to embrace cloud, driving the SAP on Azure market both in Singapore and Malaysia and globally. There has been a restructuring of much of its core business model, partnerships, development, and support, as other large-scale enterprise business management software providers, such as Oracle and IBM, have followed a similar strategy. The rate of SAP on Azure implementations has recently accelerated as SAP has globally announced the end-of-life for legacy applications, on-premises development, and support.

Microsoft's Dynamics 365 platform continues to evolve at a very rapid pace. The market has recently seen the introduction of new products and very significant shifts to existing applications, as the platform as a whole continues to evolve. MSPs are seeing a trend of the amalgamation of technologies 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.

CX is a primary driver for Dynamics 365 initiatives as smart businesses seek to offer customers a variety of ways to connect (Omnichannel CX), capture customer data at every touchpoint, and leverage that data using AI and ML to increasingly personalise CX. Dynamics 365 service providers in Australia, Singapore, and Malaysia are now integrating technologies like AI-powered chatbots and RPA to continually enhance CX.

There is increasing interest in using AI to augment human productivity. In the Microsoft space, the use of intelligent, conversational AI to augment human abilities in various tasks is predicted to grow strongly over the next five years. There is likely to be intense competition for highly skilled resources that are currently available, as the demand for Microsoft Dynamics 365 services is not currently being matched with enough training of staff, both in Asia and globally. This demand for Dynamics 365 resources puts pressure on both retention and hiring. MSPs offering these services in

Singapore and Malaysia must acquire new skills and technologies to remain on top of all the changes and continue investing in the Dynamics 365 segment as they keep up with the associated challenges in resource recruiting, retention, and training.

Dynamics 365 service providers have built IP from many prior engagements, have created reusable templates and solutions for specific horizontal and vertical industry processes, and offer preconfigured solutions that can accelerate the market implementation of their clients' new products and services.

> There is stiff competition in Singapore and Malaysia for highly skilled resources to meet the increased demand for Microsoft Dynamics 365 and Power Platform services. The existing skilled workforce is not enough for the current demand in these areas.

Provider Positioning

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	Managed Services for Azure	Microsoft 365 Services	SAP on Azure Services	Dynamics 365 Services	Power Platform Services
Accenture & Avanade	Leader	Leader	Leader	Leader	Leader
Atos	Contender	Product Challenger	Contender	Not In	Not In
Avepoint	Not In	Product Challenger	Not In	Not In	Not In
Capgemini	Contender	Rising Star ★	Contender	Rising Star ★	Contender
Cognizant	Product Challenger	Contender	Product Challenger	Product Challenger	Contender
Customer Capital Consulting	Not In	Not In	Not In	Leader	Leader
DXC Technology	Leader	Leader	Leader	Leader	Leader
Enfrasys	Product Challenger	Product Challenger	Not In	Not In	Product Challenger
Fujitsu	Rising Star ★	Not In	Rising Star ★	Product Challenger	Contender
HCLTech	Product Challenger	Leader	Leader	Leader	Rising Star ★

Provider Positioning

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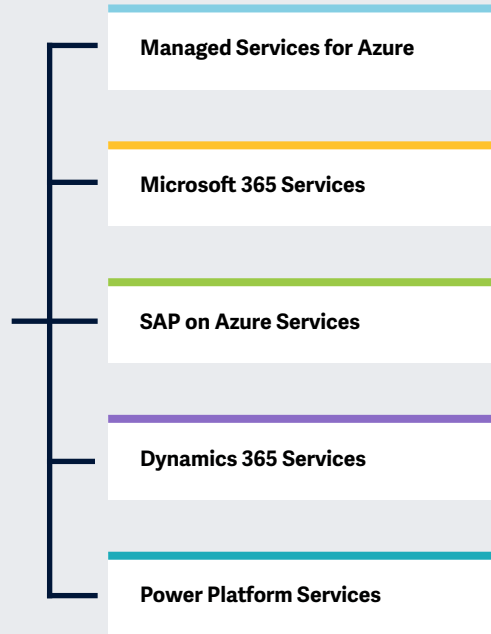|	Managed Services for Azure	Microsoft 365 Services	SAP on Azure Services	Dynamics 365 Services	Power Platform Services
Hitachi Vantara	Not In	Not In	Not In	Product Challenger	Not In
IBM	Market Challenger	Market Challenger	Market Challenger	Market Challenger	Market Challenger
Infosys	Product Challenger	Not In	Product Challenger	Leader	Product Challenger
Kyndryl	Leader	Leader	Leader	Leader	Leader
Logicalis	Product Challenger	Contender	Not In	Not In	Not In
LTIMindtree	Contender	Contender	Market Challenger	Contender	Product Challenger
NCS	Leader	Leader	Leader	Leader	Leader
NTT DATA	Market Challenger	Market Challenger	Market Challenger	Market Challenger	Market Challenger
Publicis Sapient	Product Challenger	Contender	Not In	Contender	Contender
PwC	Not In	Not In	Not In	Leader	Leader

Provider Positioning

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	Managed Services for Azure	Microsoft 365 Services	SAP on Azure Services	Dynamics 365 Services	Power Platform Services
Rackspace Technology	Contender	Not In	Contender	Not In	Not In
Softline	Leader	Leader	Not In	Not In	Not In
SoftwareONE	Contender	Contender	Not In	Contender	Not In
Sonata Software	Not In	Not In	Not In	Market Challenger	Product Challenger
TCS	Leader	Leader	Leader	Leader	Contender
Tech Mahindra	Product Challenger	Product Challenger	Contender	Contender	Leader
Telstra	Product Challenger	Product Challenger	Contender	Not In	Not In
Wipro	Not In	Contender	Contender	Not In	Product Challenger

This study focusses on what ISG perceives as most critical in 2023 for **Microsoft Cloud Ecosystem**.

Simplified Illustration Source: ISG 2023

Managed Services for Azure

Microsoft 365 Services

SAP on Azure Services

Dynamics 365 Services

Power Platform Services

Definition

Microsoft is one of the most established technology providers in the world. It has a network of thousands of partners, which augments its capabilities to aid enterprises in adopting its technologies. This network has been through a series of shifts in the past five years as Microsoft changed 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 & 11 and Office 365; and the Dynamics 365 suite of business applications. Partners are now evaluated on their ability to drive the use of Microsoft cloud services that comprise these core product lines. To succeed, service providers must offer enterprises a robust set of services that are complemented by forward-

thinking capabilities and backed by a strong relationship with Microsoft. Providers should demonstrate a keen awareness of future developments in the Microsoft clouds and show an ability to drive innovation and client business opportunities using the Microsoft suite of products and services.

ISG's analysis will focus on how providers in Australia, Brazil, Germany, Singapore and Malaysia, 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 delivering services for Microsoft products in each of these regions, 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 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 markets

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 ICT 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, and the spectrum of IT providers operating in the local market is sufficiently wide, 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 $20 million and $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 $1 billion, with activities worldwide and globally distributed decision-making structures.

This segmentation **was not used in the report on the Singaporean and Malaysian market** due to a lack of scale in the region.

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product & 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 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.

★ **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.

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.

Power Platform Services

Power Platform Services

Who Should Read This Section

This quadrant report is relevant to both large and midsize enterprises in Malaysia and Singapore that are evaluating the providers of Power Platform services. This report is centred around the current market positioning of these providers and how they address the key challenges faced by enterprises in this region.

The Power Platform services market in this region remains robust. Both public and private sectors continue to adopt Power Platform services to improve their data governance, user productivity, and decision-making capabilities.

Driven by the growth of cloud adoption and digital workforce in the region in the past two years, enterprises were inundated with a huge volume of data generated from multiple data sources. As a result, they were unable to have end-to-end visibility into their organisational and IoT data. Power Platform services address such concerns with its intelligent AI data dashboard and next-generation analytical capabilities.

Power Platform integrators continue to enhance their reusable solution templates and industry-specific offerings to accelerate the implementation of new products and services by clients.

Technology professionals should read this report to understand the strengths and weaknesses of providers in the Microsoft ecosystem and how they integrate the latest Power Platform capabilities into their offerings.

Workplace technology professionals should read this report to understand how providers support the adoption of Microsoft low-code/no-code and Virtual Assistant technologies and to evaluate Power Platform service providers.
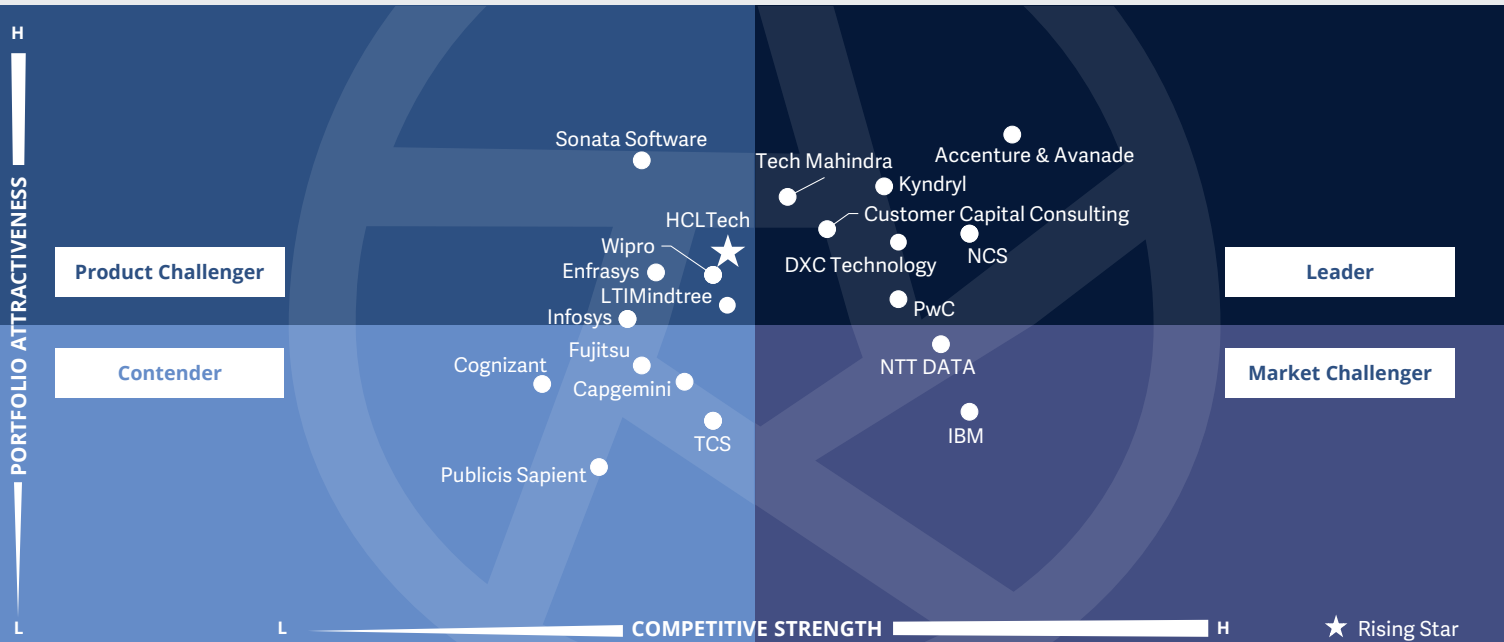
Procurement professionals should read this report to understand the provider ecosystem for Microsoft Power Platform services and gain knowledge on how providers are compared to one another.

ISG Provider Lens™

Microsoft Cloud Ecosystem
Power Platform Services

Source: ISG RESEARCH

Singapore & Malaysia 2023

PORTFOLIO ATTRACTIVENESS (H / L)

COMPETITIVE STRENGTH (L / H)

Product Challenger

Contender

Leader

Market Challenger

★ Rising Star

Sonata Software
Tech Mahindra
Accenture & Avanade
Kyndryl
HCLTech
Customer Capital Consulting
Wipro
NCS
Enfrasys
DXC Technology
LTIMindtree
Infosys
PwC
Fujitsu
Cognizant
NTT DATA
Capgemini
TCS
IBM
Publicis Sapient

This quadrant assesses providers that offer **services for** the enterprise-wide implementation of **Microsoft Power Platform** and related components. The **market for low-code/no-code services is firming** up rapidly, and service providers **are meeting the need**.

Craig Baty

Power Platform Services

Definition

This quadrant assesses providers that offer services for the enterprise-wide implementation of Microsoft Power Platform, support services, and related advanced training. Enterprise clients utilise the services offered by providers to create new and sophisticated software applications for digital transformation, obtain new insights on business operations, and optimise business processes in a sophisticated manner. The services offered by these providers not only leverage the capabilities of Power Platform but also educate enterprises on the best practices for apps and solutions development. Providers in this space ace the integration with a variety of Microsoft apps and other business apps, for example, Office 365, Dynamics 365, and Azure, as well as advanced concepts such as DevOps, DataOps, or MLOps.

The trending concept of citizen development shows a huge demand for service and support to govern and embed apps created by users using low-code and no-code development tools within and/or on Power Platform. Third-party tools' integration or migration is also important.

Furthermore, Power Platform's analytics, process management, IT management, and process automation capabilities should be supported by the providers evaluated in this quadrant.

The providers in this quadrant understand a client's objectives and use their data literacy and skills to provide the necessary guidance. With an eye for detail, these providers also take a holistic approach to driving client business performance.

Eligibility Criteria

1. Services that support enterprises' **adoption** of all Power Platform solutions — **Power BI, Power Apps, Power Automate, and Power Virtual Assistant**

2. Structured **offerings and IP** that enable easy adoption of Power Platform solutions and streamline the 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 the use of platform solutions

Observations

Some significant changes took place in the market in 2022, and these are reflected in the quadrant. Of particular note, Kyndryl is now fully spun off from IBM and appears in a similar, but slightly lower, position as IBM compared to last year; IBM has been moved to a Market Challenger as a result. HCLTech remains the Rising Star. PwC is a new entrant to the Leaders quadrant this year, reflecting its improved service offerings. Tech Mahindra was not evaluated last year but entered the quadrant as a Leader this year.

From the 175 companies assessed for this study, 20 have qualified for this quadrant, with seven being Leaders and one a Rising Star.

accenture

Accenture & Avanade are leading providers of innovative digital and cloud services, business solutions, and design-led experiences in the Microsoft ecosystem. Their global advisory practice co-creates and orchestrates practical strategies that drive faster outcomes with Power Platform services.

Customer Capital Consulting

Customer Capital Consulting is an Asian systems integration and consulting company specialising in CRM. It is a Microsoft Gold Partner and has a strong partnership with Microsoft, with a commitment to developing further innovation across a range of applications.

DXC Technology

DXC Technology provides a full range of services, including consulting, advisory, transformation, integration, and operational management, in Singapore and Malaysia. It utilises strong compliance and security procedures and advanced onboarding procedures.

Kyndryl

Kyndryl is the new name for IBM's managed infrastructure services business, which spun off as a separate company in 2021. It claims to be the world's largest IT infrastructure services provider. Kyndryl offers innovative citizen development offerings and industry-leading sustainability solutions for Power Platform.

NCS

NCS is a leading technology services provider operating across Asia-Pacific, mainly covering Singapore, Australia, Hong Kong, China, and India. It has a growing customer base across a wide range of industries and is growing strongly in the big data and AI spaces.

pwc

PwC is a global IT services firm with a strong and growing presence in Singapore and Malaysia. It also has a growing team of experts in both Power Apps and Power BI in Singapore and Malaysia.

TECH mahindra

Tech Mahindra focusses on leveraging next-generation technologies, including 5G, blockchain, cybersecurity, and AI, and enabling end-to-end digital transformation. It has a fast-expanding client base in Singapore and Malaysia.

HCLTech

HCLTech (Rising Star) is an Indian multinational IT services and consulting technology company with delivery centres in Singapore, Malaysia (Kuala Lumpur and Penang), the Philippines, and Vietnam. It provides managed security services through its Cybersecurity Fusion Centres spread across the globe.

Leader

"PwC is investing in industry solutions and accelerators built on Microsoft platforms and Industry Clouds, enabling faster time to market."

Craig Baty

PwC

Overview

PwC is a network of firms in 152 countries (688 cities) with nearly 328,000 people who are committed to delivering quality in assurance, advisory and tax services and has a strong and growing presence in Singapore and Malaysia. In FY22, the company generated $50.3 billion in revenue, with assurance as its largest segment. PwC's relationship with Microsoft spans over 20 years. Microsoft is PwC's 3rd largest global alliance. It delivers over 500 projects to Microsoft annually, and it is one of their most trusted and strategic advisors. PwC also has a growing team of experts in both Power Apps and Power BI in Singapore and Malaysia.

Strengths

Strong Microsoft services division: PwC has Microsoft certifications across Azure, Dynamics 365, Power Platform, Security, MyAnalytics, Microsoft 365, and applications and infrastructure. PwC is a leading digital business partner that brings together tier-1 business intelligence and systems integration capabilities in an integrated manner to establish value realisation for its clients at each stage of their digital transformation journey. Its core practice areas include Business Applications and Automation, Cyber and Integration, App Innovation and Migration Data, AI, and Platforms. Power Platform services are a fast-growing segment of its core practice.

Highly active in industries such as healthcare: PwC's High Performing Healthcare framework brings together leading practice KPIs to improve patient outcomes and the operational performance of healthcare services. The platform consists of a suite of customisable dashboards powered by Microsoft Platform.

A comprehensive range of new Microsoft assets and accelerators: PwC is investing in industry solutions and accelerators built on Microsoft platforms and Industry Clouds, enabling faster time to market and aligning with Microsoft's go-to-market strategies.

Caution

PwC has made significant progress in the Power Platform services market in Singapore and Malaysia. It was moved from a Market Challenger last year to a Leader this year. However, as in the Dynamics 365 services market, skill set acquisition continues to be a major challenge in this market also.

Appendix

Methodology & Team

The ISG Provider Lens™ 2023 – Microsoft Cloud Ecosystem report analyses the relevant service providers in the Singaporean & Malaysian market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

Lead Authors:
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The research and analysis presented in this report includes research from the ISG Provider Lens program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of February 2023, 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 Cloud Ecosystem market

2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics

3. Interactive discussions with service providers/vendors on capabilities & use cases

4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)

5. 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 & Editor Biographies

Author

Craig Baty
Distinguished Lead Analyst

Distinguished analyst and author Craig Baty has extensive research and thought leadership experience in the Asia Pacific and Japan ICT markets. Craig is Principal and Founder of DataDriven an Asia/Pacific based research and advisory firm. Craig has over 30 years of executive and board level experience in the ICT industry, including as a Group VP and Head of Gartner Research AP/J, CEO of Gartner Japan, Global VP Frost & Sullivan, and more recently as VP Global Strategy and VP Digital Services in Fujitsu Tokyo HQ. As a well know ICT commentator and analyst, Craig has written more than 200 research pieces, and presented at over 1500 events globally. He is also regularly quoted in regional media. Craig is actively involved in the ICT community as a board member of the Australian Information Industry Association (AIIA) and Immediate Vice Chair of the Australian Computer Society NSW (ACS).

Co-Author

Phil Harpur
Principal Analyst

Phil Harpur is an Australia-based technology analyst and consultant with over 25 years of experience across telecommunications, the 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 has contributed to the creation of tens of 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 programmes 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 holds a graduate certificate in applied finance and investment from the Securities Institute of Australia.

Author & Editor Biographies

Research Analyst

Angie Kho
Regional Support Analyst

Angie Kho is a regional support analyst at ISG and is responsible for supporting and contributing to Provider Lens™ studies for the APAC markets.

Angie is part of the DataDriven team, which is the Asia-Pacific research partner for ISG and has contributed to tens of IPL reports.

Her areas of expertise lie in IT services management and enterprise planning services. Angie develops content from an enterprise perspective and writes 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 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.

About Our Company & Research

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.

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