

SAP Ecosystem

A research report comparing provider strengths,
challenges and competitive differentiators

Customized report courtesy of:

T Systems

Executive Summary 03

Provider Positioning 06

Introduction

Definition 11

Scope of Report 13

Provider Classifications 14

Appendix

Methodology & Team 48

Author & Editor Biographies 49

About Our Company & Research 51

SAP S/4HANA System Transformation — Large Accounts 15 – 21

Who Should Read This 16

Quadrant 17

Definition & Eligibility Criteria 18

Observations 19

Provider Profile 21

SAP S/4HANA System Transformation — Midmarket 22 – 26

Who Should Read This 23

Quadrant 24

Definition & Eligibility Criteria 25

Observations 26

Managed Application Services for SAP ERP 27 – 33

Who Should Read This 28

Quadrant 29

Definition & Eligibility Criteria 30

Observations 31

Provider Profile 33

Managed Platform and Cloud Services for SAP ERP 34 – 40

Who Should Read This 35

Quadrant 36

Definition & Eligibility Criteria 37

Observations 38

Provider Profile 40

SAP Business Technology Platform Services 41 – 46

Who Should Read This 42

Quadrant 43

Definition & Eligibility Criteria 44

Observations 45

Provider Profile 46

Report Author: Rainer Suletzki

Making the transformation to S/4HANA a priority

The SAP HANA in-memory database and the applications based on it have now been well established in the enterprise software market for a few years and are continuously being updated by SAP.

For core ERP applications, S/4HANA migration is a top priority for SAP. The timeframe to achieve the migration is based on SAP's decision to end the standard maintenance of previous products at the end of 2027. Compared to its earlier decision, which ended support at the end of 2025, this decision represents a concession on the part of SAP because customers have hesitated to embrace the migration.

It should be mentioned here that the rapid expansion of the cloud-based infrastructure supporting SAP HANA has also significantly changed the migration conditions. Cloud migration is a key trend for SAP applications. The expansion of the presence by public cloud providers, the so-called hyperscalers, for HANA operations, which is being pushed, can ensure that in most pending projects, the option of a transition to a cloud-based operating model is being considered. In each case, it must be considered that the use of a public cloud requires a higher degree of standardization now than what was required in the past. The migration to such infrastructure has already made good progress in the area of development systems, test systems and sandboxes. However, many customers are reluctant to migrate production systems.

Cloud migration is a key trend for SAP applications



SAP is increasingly advertising the move to the software-as-a-service (SaaS) version of S/4HANA Cloud instead of the on-premises or private cloud version. Considering this step, the reluctance of many customers, especially in Germany, is even more pronounced than for the transition in general. The annual surveys published by the Deutsche SAP-Anwendergruppe e.V. (DSAG) among its member companies, which includes a large proportion of companies using SAP software, confirm this trend. In short, these surveys show that the willingness to move to S/4HANA in the coming years continues to grow, but the willingness to move to cloud-based versions is somewhat behind. The details can be found [here](#).

It should be noted that comparable figures from the corresponding user group in North America, the America SAP Users' Group (ASUG), indicate a

significantly higher readiness to move to cloud-based versions. In this context, SAP in 2021 launched an initiative with the RISE with SAP program (referred to as RISE in this report), to sustainably support the transformation to cloud-based infrastructures in the future. RISE offers a bundle of licenses and services for cloud transformation and subsequent cloud operations. SAP has partnerships with all hyperscalers; hence, there are no restrictions on which platform to choose. Several service providers have already qualified as SAP partners for RISE.

Since RISE was launched just last year, the experience is still incomplete. In addition, the composition of this package evolved during the year so that market estimates are also subject to further changes. The following aspects have emerged from discussions between ISG and service providers:

- RISE is sometimes seen as a complement to service providers' offerings. Some global system integrators, in particular, see a significant overlap with their own offerings and, thus, a potential competitive situation with SAP. In general, there is a tendency to combine RISE with their own offerings to strengthen their position as the primary contact for customers during a transformation.
- RISE is attracting more interest from midsize customers, especially those that are still using less complex SAP environments. Larger customers that generally have long-standing, extensive and detailed licensing agreements with SAP for many products have so far been very reluctant to use RISE.
- Hyperscalers see RISE as an additional opportunity to advance the use of their respective platforms for SAP installations. Partnerships with SAP clearly point in this direction.
- In its statements, SAP so far sees RISE as a great business success. In the market, both customers and service providers are taking a rather wait-and-see attitude, because they are not yet sure whether RISE will be a sustainable success. The next two years will certainly bring more clarity on this subject.

The following observation, which ISG was able to make in numerous interviews with customer companies on the one hand and suppliers on the other, seems to be another relevant aspect regarding the upcoming transformations to S/4HANA. In many cases, the expected complexity of the upcoming transformation, especially for large enterprises, leads to a noticeable



Executive Summary

uncertainty about the best possible transformation path. Also contributing to the uncertainty is the fact that SAP continues to rapidly develop the products around S/4HANA, meaning conditions are changing quickly.

As a result, preparatory strategies and program planning projects are still being extended in many companies to adequately address these uncertainties. Questions that need to be clarified include the following:

- Should we simply upgrade existing systems (brownfield transformation), or should the possibilities of HANA be better exploited through a complete overhaul of the system architecture and the resulting transformation through a new implementation (greenfield transformation)? SAP's focus here is the realization of a digital core with the implementation of S/4HANA. Furthermore, is there a suitable way

to migrate to a new system and thus achieve a re-engineering of selected processes without a completely new implementation (selective data transition)?

- Should the transition to a cloud-based infrastructure be an integral part of the move to S/4HANA? In many cases, the answer is yes, but that leads directly to the next question.
- Should you start with the application conversion or the migration to cloud infrastructure, or should the two steps be combined as part of a reimplementation?

Another consideration is the possibility offered by S/4HANA to replace ERP systems, which are often heavily modified nowadays, with a standard process-oriented implementation. An essential tool for this is the cloud-based SAP Business Technology Platform (BTP), the use of which, in many

cases, allows custom developments to happen outside the corresponding core system and thus maintain the standard. This strategy is generally described as "keep the core clean."

It is obvious that due to all the aspects mentioned above, the development of a system strategy and the formation of a business case require much more effort, and the subsequent implementation usually leads to more significant changes in the business processes of the companies involved.

For this issue, as well as for the more technical issues already discussed above, it is worth mentioning here the problem of the unavailability of human resources in the coming years. The rather moderate pace of change so far means that the number of parallel projects in different companies will increase significantly in view of the target date at the end of 2027. The unavailability of qualified personnel

to support these activities is already a limiting factor mentioned by many service providers. This is resulting in increased efforts to recruit additional staff. In many cases, there is also re-skilling, with staff being pulled from other areas and trained through appropriate qualification measures to participate in SAP transformations. SAP customers hope that these measures will enable the upcoming transformation programs to be carried out successfully and with virtually no disruption.

For core ERP applications, S/4HANA migration is a top priority for SAP.



Provider Positioning

Page 1 of 5

	SAP S/4HANA System Transformation – Large Accounts	SAP S/4HANA System Transformation – Midmarket	Managed Application Services for SAP ERP	Managed Platform and Cloud Services for SAP ERP	SAP Business Technology Platform Services
abat	Not In	Product Challenger	Product Challenger	Not In	Not In
Accenture	Leader	Ranked In Large Accounts	Leader	Leader	Leader
Adesso	Not In	Product Challenger	Contender	Not In	Not In
All For One Group	Not In	Leader	Leader	Leader	Leader
Arvato	Not In	Leader	Product Challenger	Product Challenger	Product Challenger
Atos	Leader	Ranked In Large Accounts	Leader	Leader	Leader
Axians	Contender	Not In	Not In	Not In	Not In
BearingPoint	Market Challenger	Ranked In Large Accounts	Not In	Not In	Contender
Birlasoft	Not In	Product Challenger	Product Challenger	Not In	Not In
BtC	Not In	Contender	Not In	Not In	Not In




Provider Positioning

Page 2 of 5

	SAP S/4HANA System Transformation – Large Accounts	SAP S/4HANA System Transformation – Midmarket	Managed Application Services for SAP ERP	Managed Platform and Cloud Services for SAP ERP	SAP Business Technology Platform Services
Camelot ITLab	Leader	Ranked In Large Accounts	Not In	Not In	Product Challenger
CANCOM	Not In	Not In	Not In	Leader	Not In
Capgemini	Leader	Ranked In Large Accounts	Leader	Leader	Leader
cbs	Not In	Product Challenger	Not In	Not In	Not In
CGI	Contender	Not In	Not In	Not In	Not In
Cognizant	Leader	Ranked In Large Accounts	Leader	Product Challenger	Product Challenger
DATAGROUP	Not In	Leader	Product Challenger	Product Challenger	Product Challenger
Deloitte Digital	Market Challenger	Ranked In Large Accounts	Not In	Not In	Not In
Devoteam	Not In	Leader	Product Challenger	Product Challenger	Product Challenger
DXC Technology	Contender	Ranked In Large Accounts	Product Challenger	Product Challenger	Product Challenger



 Provider Positioning

	SAP S/4HANA System Transformation – Large Accounts	SAP S/4HANA System Transformation – Midmarket	Managed Application Services for SAP ERP	Managed Platform and Cloud Services for SAP ERP	SAP Business Technology Platform Services
EPI-USE	Not In	Product Challenger	Not In	Not In	Contender
FIS	Not In	Product Challenger	Contender	Not In	Not In
Fujitsu	Not In	Leader	Product Challenger	Product Challenger	Contender
GISA	Not In	Contender	Not In	Not In	Not In
HCL	Rising Star ★	Ranked In Large Accounts	Rising Star ★	Product Challenger	Product Challenger
IBM	Not In	Not In	Not In	Market Challenger	Not In
Infosys	Leader	Ranked In Large Accounts	Leader	Product Challenger	Leader
Innovabee	Not In	Leader	Not In	Not In	Not In
KPS	Not In	Contender	Not In	Not In	Not In
metafinanz	Not In	Contender	Not In	Not In	Not In




Provider Positioning

Page 4 of 5

	SAP S/4HANA System Transformation – Large Accounts	SAP S/4HANA System Transformation – Midmarket	Managed Application Services for SAP ERP	Managed Platform and Cloud Services for SAP ERP	SAP Business Technology Platform Services
MHP	Product Challenger	Ranked In Large Accounts	Not In	Not In	Not In
Mindtree	Product Challenger	Ranked In Large Accounts	Not In	Contender	Product Challenger
Mphasis	Contender	Not In	Contender	Contender	Contender
msg	Not In	Product Challenger	Not In	Not In	Not In
Nagarro	Not In	Market Challenger	Market Challenger	Market Challenger	Contender
NTT DATA	Product Challenger	Ranked In Large Accounts	Leader	Leader	Market Challenger
PwC	Market Challenger	Ranked In Large Accounts	Not In	Not In	Not In
Syskoplan Reply	Not In	Contender	Not In	Contender	Contender
Scheer	Product Challenger	Ranked In Large Accounts	Product Challenger	Not In	Product Challenger
Sopra Steria	Contender	Ranked In Large Accounts	Contender	Not In	Not In



 Provider Positioning

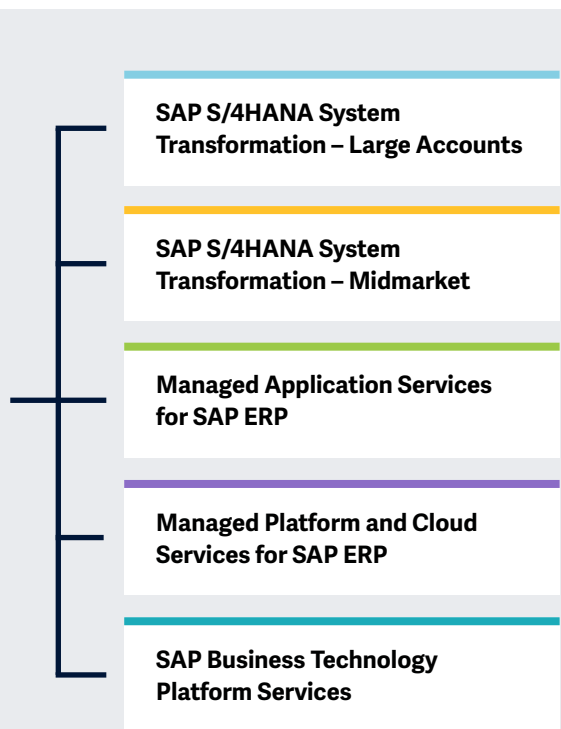
Page 5 of 5

	SAP S/4HANA System Transformation – Large Accounts	SAP S/4HANA System Transformation – Midmarket	Managed Application Services for SAP ERP	Managed Platform and Cloud Services for SAP ERP	SAP Business Technology Platform Services
Sycor	Not In	Contender	Not In	Not In	Not In
Syntax	Not In	Leader	Product Challenger	Product Challenger	Product Challenger
TCS	Leader	Ranked In Large Accounts	Leader	Product Challenger	Product Challenger
Tech Mahindra	Product Challenger	Ranked In Large Accounts	Product Challenger	Product Challenger	Product Challenger
T-Systems	Leader	Ranked In Large Accounts	Leader	Leader	Leader
Wipro	Rising Star ★	Ranked In Large Accounts	Leader	Leader	Leader



This study addresses the issues that ISG believes will be critical to the SAP-Ecosystem in 2022.

Simplified Illustration Source: ISG 2022



Definition

SAP has a strong partner network of 22,000 companies and a significant share of the IT market spend. The ISG Provider Lens™, SAP Ecosystem study will identify the best partners that deliver personalized and differentiated services to enterprise customers and achieve the best results.

Because SAP S/4HANA transformation projects require detailed planning and involvement on the business side, companies looking to embark on such projects need to refine their selection process and criteria to find the right partner that will deliver higher business value for a lower transformation cost. For customers that are new to SAP ERP or still hesitant to move to SAP S/4HANA, this study provides a detailed description of key trends and service providers in this area. For companies planning a system transformation, this study will help them

better understand the opportunities for a brownfield SAP S/4HANA transformation and also the associated accelerators for certain business functions. ISG has identified practical tools and frameworks for large-scale SAP transformations and new SAP S/4HANA (greenfield) implementations that are deployed in record time for mid-sized customers. The right partner can help customers and allay fears about the expiration of support for legacy SAP ERP software in 2027.

As SAP emphasizes the RISE with SAP program, the market is considering moving SAP workloads to the cloud. Many companies want to better understand the impact of moving their SAP workloads to a hybrid cloud, public or private, and which options are best for them. SAP has extended its cloud approach to the SAP Business Technology Platform (BTP), which can, in some circumstances, enable innovation.



Introduction

For customers that have adopted SAP S/4HANA, this study evaluates managed service providers that can help improve application performance, including stability, availability and security. In addition, service providers have recently integrated artificial intelligence (AI) and machine learning (ML) into application maintenance and operations to help predict incidents and automate troubleshooting, ticketing processes and deployment. The resulting increase in scale helps reduce support costs. This study identifies service providers that are effectively using new technologies to support SAP S/4HANA and HANA databases.



Scope of the Report

In this ISG Provider Lens™ Quadrant study, the following five quadrants are evaluated within the SAP ecosystem services:

- SAP S/4HANA System Transformation - Large Accounts
- SAP S/4HANA System Transformation - Midmarket
- Managed Application Services for SAP ERP
- Managed Platform Services and Cloud Services for SAP ERP
- SAP Business Technology Platform Services

The ISG Provider Lens™ study offers IT decision makers the following advantages:

- A transparent presentation of the strengths and weaknesses of relevant providers

- A differentiated positioning of providers by segment
- A view into different markets, including Brazil, France, Germany, the Nordic countries, the U.K. and the U.S.

ISG studies provide IT service providers and vendors with a critical decision base for positioning, relationship, and go-to-market considerations. ISG consultants and client companies use the information in these reports to evaluate their current and potential relationships with new vendors.

Classification of providers

Vendor positioning reflects the fit of the relevant IT vendors to a defined market segment (quadrant). Unless otherwise noted, the positioning applies to all company size classes and industries. If the IT service requirements of large companies and SMEs differ and the range

of IT providers active in the local market is sufficiently broad, a further differentiation of IT providers by service is made according to the target group for products and services. Either industry requirements or the number of employees as well as the corporate structures of the customers are considered, and the IT providers are placed based on their focus. As a result, a distinction is made between two customer groups, which are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues of \$20 million to \$999 million, headquartered in the country concerned and generally privately held.
- **Large Accounts:** Multinationals with more than 5,000 employees or revenues of more than \$1 billion, with global operations and decision-making structures spread around the world.

The ISG Provider Lens™ quadrants are based on an evaluation matrix and include four fields in which providers are ranked: Leader, Product Challenger, Market Challenger and Contender. Each quadrant in an ISG Provider Lens™ study may also contain a supplier that ISG believes has great potential to achieve a leadership position. Such providers may be classified as Rising Star.

Number of providers per quadrant:

ISG evaluates and positions the most important vendors based on the scope of the corresponding study; the number of vendors positioned in the quadrant is limited 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.

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.

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.

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.





SAP S/4HANA System Transformation – Large Accounts

Who Should Read This

This report is relevant to enterprises across industries in Germany for evaluating the providers of SAP S/4HANA consulting and implementation services for large system transformations. In this quadrant, ISG highlights the current market positioning of SAP S/4HANA consulting and implementation service providers for large clients in Germany based on the depth of their service offerings and market presence.

Challenging and dynamic work environments have increased the demand for cloud-based SAP solutions among some of the enterprise clients in Germany. Enterprises are choosing different cloud environments (public, private or hybrid) based on the criticality of their data and are seeking service providers that can help in implementing the suitable cloud model based on their requirements.

Furthermore, for large enterprises, S/4HANA implementations occur on a global scale, increasing the complexity of projects. Hence, these enterprises prefer service providers that have a skilled workforce, high integration capabilities and a global presence.



Marketing and sales professionals should read this report to understand the relative positioning and capabilities of service partners that can help them effectively harness SAP S/4HANA services for day-to-day analysis and dashboarding.



Technology professionals should read this report for a clear understanding of the strengths and weaknesses of service providers in the SAP S/4HANA ecosystem and to understand how they integrate the latest technologies and capabilities into their S/4HANA offerings to gain a competitive edge in the market.

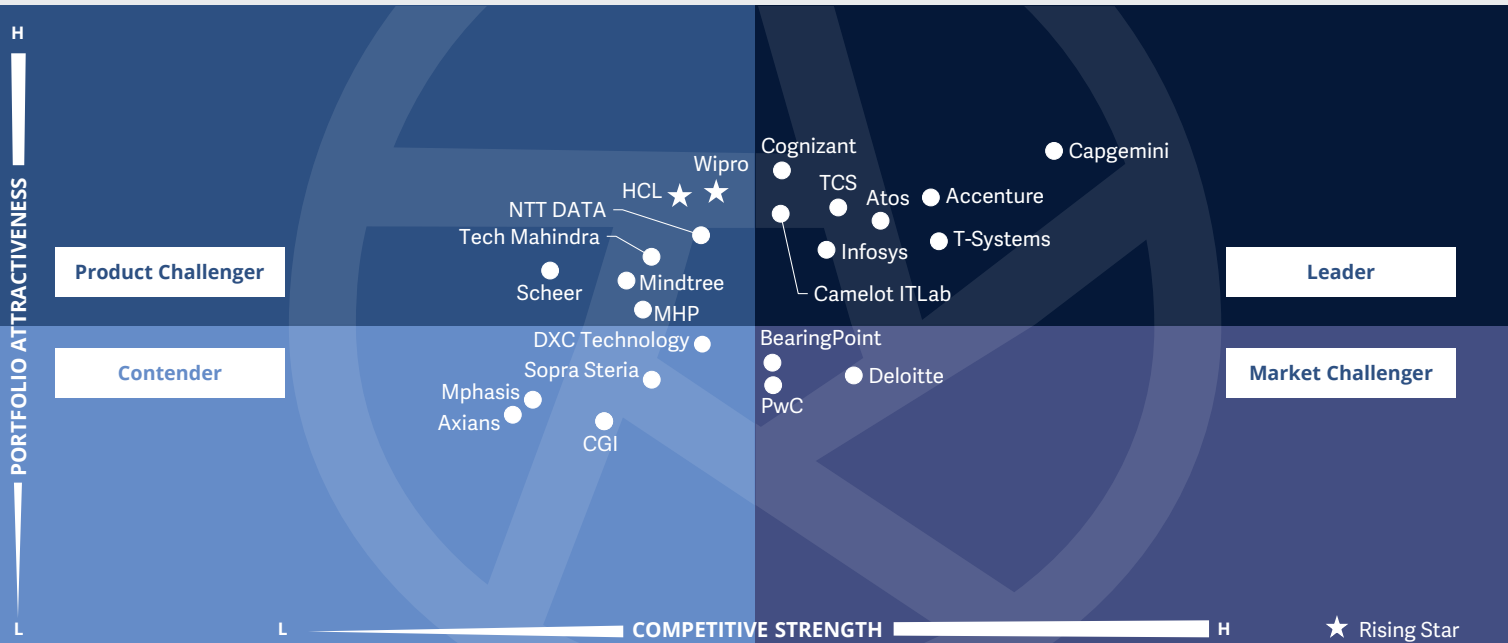


Operations professionals should read this report to understand the relative positioning of the partners that can help them effectively procure SAP S/4HANA services with respect to their business or industry and can ensure ROI.



SAP Ecosystem
SAP S/4HANA System Transformation – Large Accounts

Germany 2022



This quadrant evaluates consulting and systems integration service providers for **developing, deploying and testing enterprise applications** with SAP S/4HANA and SAP Business Suite with **SAP Fiori** as the user interface.

Rainer Suletzki



Definition

This quadrant evaluates consulting and systems integration service providers for developing, deploying and testing enterprise applications with SAP S/4HANA and SAP Business Suite with SAP Fiori as the user interface. The evaluation focuses on application planning, design, and modeling, considering the ability of the respective service provider to handle the high complexity and volume that characterizes large enterprise customers. Participating companies are expected to have frameworks, tools, and accelerators that support the requirements of large system transformations.

It should be noted that vendors in this quadrant often also provide services to middle market customers. However, they are generally not listed again in the corresponding quadrant, in order to achieve a clear differentiation of the vendor landscape.

Eligibility Criteria

1. The participating vendor's service portfolio must include SAP S/4HANA development, integration, and testing; the service provider can prove at least one implementation of S/4HANA or **SAP Business Suite** on HANA
2. Proof of S/4HANA consulting competence and implementation experience in **greenfield or brownfield** implementations
3. Use of tools and accelerators to reduce time to market
4. Provision of on-premises and cloud-based implementations
5. Cross-regional availability of **SAP-certified consultants** and experts to support cross-national and multi-lingual implementations
6. Optimal **onshore-offshore delivery** models to handle complexity and scale



SAP S/4HANA System Transformation - Large Accounts

Observations

This segment continues to be dominated by global system integrators. India-based vendors, in particular, have recently stepped up their efforts in terms of their onshore presence.

The following vendors were ranked as Leaders in this quadrant:

accenture

Accenture's industry expertise and broad portfolio qualify it as a leading partner for S/4HANA. The company has a powerful transformation framework and an extensive library of preconfigured solutions. It also has strong SAP System Landscape Optimization (SLO) expertise.

Atos

Atos is an extremely successful supplier for the transformation to S/4HANA. In addition to its comprehensive and clearly structured portfolio, Atos offers numerous preconfigured solutions. The RISE initiative is one of its strengths.

Camelot ITLab

Camelot ITLab offers expertise in supply chain optimization with S/4HANA. In addition to creating value in the business processes themselves, the company places a key focus on data management as a quality assurance measure. Camelot ITLab maintains a partnership with SAP specifically for innovative solutions.

Capgemini

Capgemini is a leading and fast-growing partner for the transformation to S/4HANA. Based on its comprehensive framework for agile transformation to S/4HANA, called iCaptive, digital core standardization is at the core of its portfolio. Numerous preconfigured accelerators highlight Capgemini's deep industry expertise.

cognizant

Cognizant, with significant investments in the SAP portfolio, is a leading provider in this quadrant. For the transformation to S/4HANA, Cognizant offers a comprehensive solution package under the name Smart Move, complemented by numerous industry-specific solutions. Cognizant has a long-standing partnership with SAP, particularly regarding RISE.

Infosys

Infosys is a competent partner for S/4HANA projects, with a considerable presence in Germany. Under the name Live Enterprise, Infosys' portfolio offers a comprehensive framework for transformation into cloud-based applications for S/4HANA. The company also focuses on innovative solutions.

TCS TATA CONSULTANCY SERVICES

TCS combines comprehensive services for S/4HANA transformation, with a global delivery model. The portfolio includes a comprehensive library of preconfigured industry solutions called TCS Crystallus™. In addition, the development of S/4HANA-based innovations is a key element of TCS' strategy.



T Systems

T-Systems is a provider for S/4HANA transformation in the German market. Its solution portfolio covers aspects from strategy definition to the implementation and operation of applications. The provider has experience relevant for companies in the upper Mittelstand companies, which are of particular importance in the German market. The following vendors were able to achieve the Rising Star status in this quadrant:

HCL

HCL's offering is distinguished by its technological and industry expertise for S/4HANA transformation. HCL offers a sophisticated model for S/4HANA transformation, coupled with a comprehensive library of industry-specific solutions. In addition, HCL places great emphasis on optimizing customers' business processes.



Wipro, with its extensive offering on S/4HANA, has the prospect of becoming a Leader in this quadrant. With eSymphony, Wipro offers a complete framework for all phases of the SAP application lifecycle. In addition, the company has recently invested significantly in the development of content competencies and personnel capabilities.





“T-Systems is a successful and innovative service provider for S/4HANA transformation in Germany.”

Rainer Suletzki

T-Systems

Overview

With its subsidiary T-Systems, which mainly focuses on large accounts, Deutsche Telekom is a major provider of SAP HANA-related services in the German market. In addition to extensive services for the infrastructure and operation of the platform, services are offered for the entire lifecycle of an application. Due to its size and extensive experience, the company can meet the complex needs of large, internationally operating companies.

Strengths

Global support for S/4HANA transformation: T-Systems’ solution portfolio covers all relevant aspects of the transformation to S/4HANA, from strategy definition to implementation to application operation. In addition to the technical aspects, the focus is on creating added value in business processes.

Sophisticated transformation options: In addition to the common brownfield and greenfield options, with SMARTField, T-Systems offers a transformation method that enables targeted system optimization without new build. A dedicated tool is available for this purpose.

Strong regional market position: As a specialized provider in the German-speaking region, T-Systems has an advantageous mix of customer proximity through local resources and cost efficiency using nearshore and offshore capacities. In addition, the company has a wealth of experience for upper-midmarket companies, which are of particular importance in the German market.

Caution

The optimization of the system environment from an application point of view should be considered to a greater extent by means of other offers concerning the general application architecture. This would allow T-Systems customers to better exploit the potential of the digital core advocated by SAP.

In the presentation of the portfolio, greater emphasis should be placed on application standardization, for example, by making better use of industry templates during the transformation.





SAP S/4HANA System Transformation - Midmarket

Who Should Read This

This report is relevant to midmarket enterprises across industries in Germany that are evaluating S/4HANA consulting and implementation services providers. ISG defines midmarket enterprises as the ones with less than 5,000 SAP users or a revenue of less than \$1 billion. In this quadrant, ISG highlights the current market positioning of SAP S/4HANA consulting and implementation service providers for midmarket clients in Germany based on the depth of their service offerings and market presence.

The German market comprises both large and midmarket enterprises, and midmarket enterprises have witnessed many of the same trends as large enterprises. However, German midmarket enterprises prefer providers with strong onshore and nearshore delivery capabilities and high integration

capabilities, as they have smaller project scales compared with large enterprises. Midmarket enterprises in the country are also seeking service providers with significant migration capabilities and the ability to offer ready-to-use templates or solutions for specific micro-segments.



Marketing and sales professionals

should read this report to understand the relative positioning and capabilities of service partners that can help them effectively harness SAP S/4HANA services for day-to-day analysis and dashboarding.



Procurement professionals

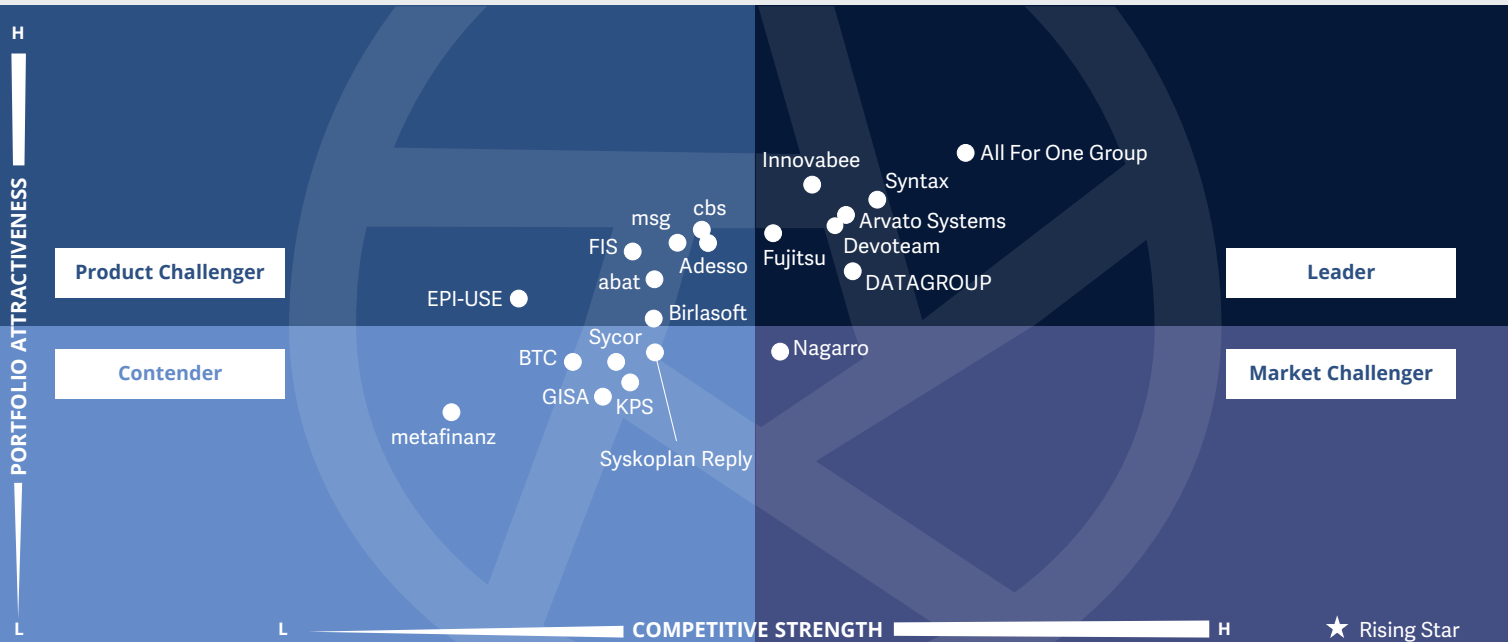
should read this report for a clear understanding of the S/4HANA market and the service provider landscape to identify or distinguish players based on their respective needs.



Technology professionals

should read this report for a clear understanding of the strengths and weaknesses of service providers in the SAP S/4HANA ecosystem and to understand how they integrate the latest technologies and capabilities into their S/4HANA offerings to gain a competitive edge in the market.





This quadrant evaluates service providers based on their ability to carry out SAP S/4HANA implementations for **midsize customers**, which typically have less complex needs compared to large enterprises because their projects are often less extensive.

Rainer Suletzki



Definition

This quadrant evaluates consulting and systems integration service providers based on their ability to offer rapid implementation of SAP S/4HANA deployments for midmarket customers (companies with fewer than 5,000 SAP users or less than \$1 billion in revenue). Compared to large enterprises, midsize customers do not have as complex requirements, and projects are not as extensive.

Participating service providers can implement SAP solutions using a variety of methods, including SAP's packaged solutions for small and medium-sized enterprises (SMEs). Templates for SAP S/4HANA should be used, including industry-specific templates, to reduce the transformation cycle while using standard processes. Multi-tenant implementations of SAP S/4HANA are also considered but are not a prerequisite for participation in

this quadrant assessment. SAP qualified partner packaged solution providers may also participate in this assessment, but this certification is not a prerequisite for inclusion in this quadrant.

It should be noted that vendors in this quadrant sometimes also provide services for so-called large accounts. However, they are generally not listed again in the corresponding quadrant, in order to achieve a clear differentiation of the vendor landscape.

Eligibility Criteria

1. Utilization of SAP accelerators and templates for **agile SAP S/4HANA implementations**
2. Consulting and implementation services offering for **medium-sized customers**
3. Availability of ready-to-use templates or solutions for specific microsegments
4. Availability of onshore or nearshore delivery options for local customers; offshore deliveries, while desirable, are not mandatory for this quadrant



Observations

Due to the generally limited complexity of transformation projects for midsize companies, it is particularly important for service providers in this segment to enable lightweight implementations with a high degree of standardization.

The following vendors were ranked as Leaders in this quadrant:

All For One Group

All For One Group, with Conversion/4, offers a convincing package for S/4HANA transformation as a managed service. The RISE initiative is skillfully combined with Conversion/4. In addition, All For One Group has several references for this managed service.

Arvato Systems

Arvato Systems' S/4HANA portfolio is convincing, especially regarding logistics functions. It has proven itself in practice and supports all relevant platforms (public and private cloud and on-premises). In addition, Arvato Systems has deep expertise in many business processes and uses this to provide competent advice and define strategies.

DATAGROUP

DATAGROUP has significant expertise in the transformation of midsize customers to S/4HANA. During implementation, DATAGROUP relies on rapid prototyping using a series of best practices and systematically ensures that standards are met wherever possible.

Devoteam

Devoteam is a proven provider for the transformation to S/4HANA, especially for SMBs. With its end-to-end portfolio, the company offers process, technology and implementation consulting from a single source and always keeps in mind the optimization of the entire system environment.

Fujitsu

Fujitsu offers a comprehensive portfolio for the transformation to S/4HANA, with its extensive experience. In addition to strong technical expertise, it has developed business process optimization skills over the past years. Fujitsu also has deep industry expertise, especially in manufacturing.

Innovabee

Innovabee consistently follows the approach of rapidly implementing preconfigured standard solutions without major modifications using agile methods. The company has a series of certifications from SAP and has recently become a leading partner for RISE.

Syntax

Syntax has a sophisticated approach model that skillfully combines classical approaches and agile methods. Based on many years of experience, the company offers deep expertise in designing relevant business processes within an S/4HANA transformation, with detailed solutions that are particularly compelling and practical for manufacturing-intensive companies.





Managed Application Services for SAP ERP

Who Should Read This

This report is relevant to enterprises across industries in Germany for evaluating managed application service providers for SAP ERP. In this quadrant, ISG highlights the current market positioning of the providers of managed application services for SAP ERP in Germany and shows how each provider addresses the key challenges faced in the country. These providers focus on helping enterprise clients effectively manage SAP ERP, which includes SAP S/4HANA, SAP Enterprise Central Component (ECC) and legacy R3.

Enterprises are relying on SAP managed application service partners to attain reliable SAP systems so that they can focus more on other core IT activities. Enterprises generally seek managed application services, including Level 2 and Level 3 application support, maintenance, incident resolution, security and user support.

In Germany, the need for automation to ensure better process efficiency and reduce costs is driving the market for SAP managed application services. Furthermore, many enterprises are undertaking migration initiatives to the latest SAP ERP version, as SAP will cease its support for legacy ERP by 2027. Hence, enterprises are also seeking providers that can support them in both managing and migrating their existing ERP.



Technology professionals should read this report for a clear understanding of the strengths and weaknesses of providers offering SAP ERP managed services and their competency in developing frameworks and tools to effectively manage their applications.

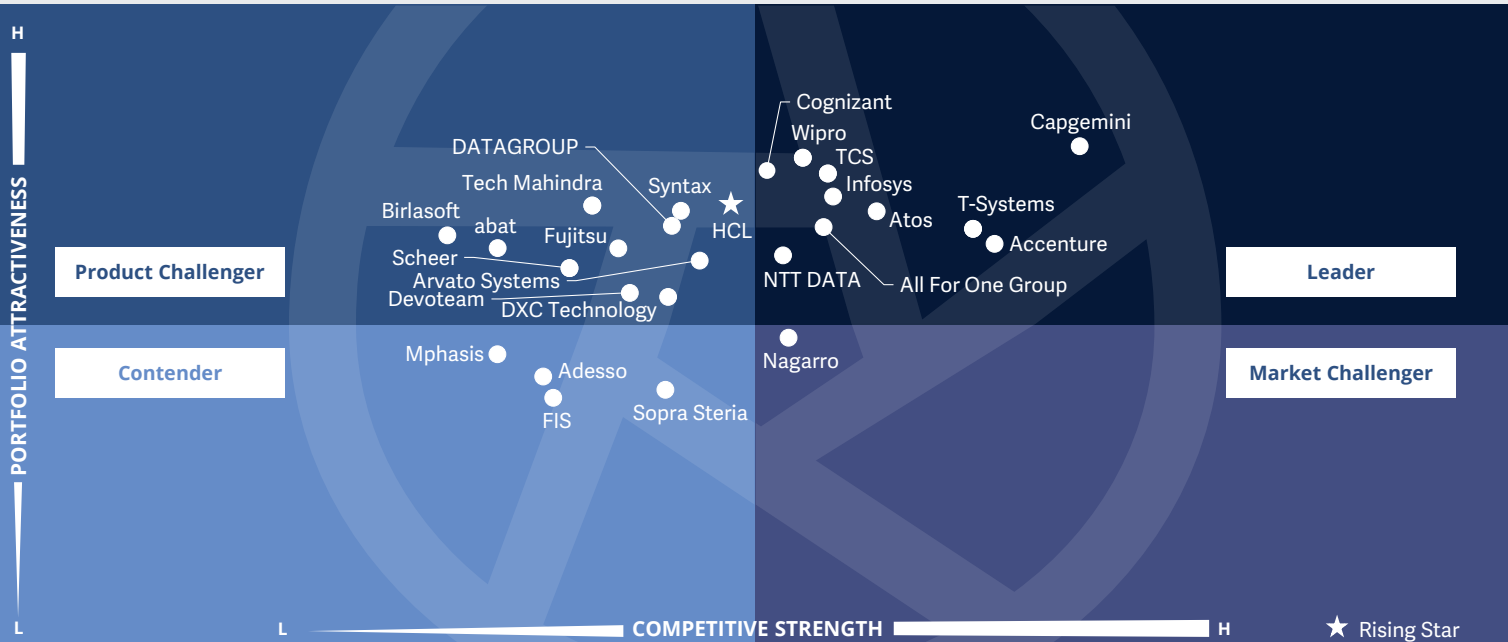


Procurement professionals should read this report for a clear understanding of the service provider ecosystem for SAP ERP managed services and how various providers can be compared with each other.



**SAP Ecosystem
Managed Application Services for SAP ERP**

Germany 2022



This quadrant evaluates providers' managed service performance, including **maintenance and support functions** that include application monitoring, remote support and centralized administration for SAP S/4HANA and older SAP business suites, such as ECC 6.0.

Rainer Suletzki



Managed Application Services for SAP ERP

Definition

This quadrant evaluates providers' managed service performance, including maintenance and support functions that include application monitoring, remote support, and centralized administration for SAP S/4HANA and older SAP business suites such as ECC 6.0.

Managed application services for incidents include troubleshooting, Tier 2 and Tier 3 application support, user support, ticket lifecycle management, incident resolution, problem management, root cause analysis, and an interface for SAP product support (after customer authorization). While vendors with center of excellence (CoE) certification are rated higher, this is not a prerequisite for inclusion in this quadrant.

Eligibility Criteria

1. Availability of offerings for **application optimization**, application support and testing
2. Services should include user management (adding and disabling user access), performance reporting, database services, security (access) monitoring and **license compliance**
3. Application extensions and changes on offerings, utilization of SAP Service Pack Stacks (SPS), and business effects forecast when required
4. Ability to stabilize applications and provide **SAP BASIS support**
5. Proven expertise in incident management and various ticket system tools, **SAP Solution Manager**, and other solutions for application documentation



Managed Application Services for SAP ERP

Observations

Providing reliable and, above all, cost-effective managed application services remains one of the key success criteria for vendors in this quadrant. In addition, in recent years, the importance of adding value through business process optimization, based on the knowledge gained from operating applications, has increased significantly.

The following vendors were ranked as Leaders in this quadrant:

accenture

Accenture, one of the world's largest providers of operational support for SAP systems, has a global delivery model that effectively combines offshore, nearshore and onshore components with high scalability. In this context, Accenture relies on the extensive use of automation to improve efficiency and ensure process quality.

All For One Group

All For One Group offers competent application services for SAP with a flexible contract. The continuous development of business processes through innovative functions is a central theme. It also focuses on the complete integration with Microsoft Office.

Atos

Atos offers powerful, cross-functional support for SAP ERP on all levels of the application. Comprehensive end-to-end monitoring via an in-house developed solution called Atos Bridge ensures performance and stability. In addition, Atos has a strong presence in the German market and benefits from its proximity to customers.

Capgemini

Capgemini's sophisticated application services for SAP ERP are convincing due to their high technological competence. With ADMNext, Capgemini has a functionally complete platform for supporting the operation of applications throughout the entire application lifecycle. Numerous delivery centers in relevant regions, including the German-speaking area, enable flexible and cost-effective delivery models.

cognizant

Cognizant has a comprehensive portfolio in the managed application services segment, with numerous tools that improve efficiency. Under the name Business Value Management (BVM), Cognizant offers a methodology for targeted improvement in the business processes it supports.

Infosys

Infosys provides technologically compelling and sophisticated managed application services for SAP ERP. Based on the framework used, Infosys often assumes end-to-end responsibility in its engagements, ensuring, in collaboration with the relevant customer, that an appropriate governance model is in place.

NTT DATA

NTT DATA offers a sophisticated portfolio of managed application services for HANA-based applications. The delivery model is based on globally distributed delivery centers, with a clear focus on Europe. In addition, NTT DATA places a key emphasis on data quality as a prerequisite for stable processes.



Managed Application Services for SAP ERP



TCS' offering for SAP application services is distinguished by a particularly high level of technological competence. The global delivery model combines an on-site presence for each project with significant cost optimization through exceptionally large offshore capacities. In addition, TCS can convincingly provide support for complete end-to-end processes.

T Systems

T-Systems offers SAP application services with a combination of competence and customer proximity. The portfolio covers important aspects for the operation of SAP ERP applications, such as the infrastructure, platform services and the application itself. With years of experience, T-Systems guarantees reliable system operation as part of an end-to-end responsibility.



Wipro's broad content competence enables it to provide end-to-end support for complete process chains. For the services provided, Wipro uses a series of flexible pricing models that include, in addition to usage-related components, components geared toward business success.

The following vendor was able to achieve the Rising Star status in this quadrant:



HCL, with the ASM 2.0 framework, offers efficiency-enhancing tools and comprehensive automation tools to ensure cost-effective support. HCL has recently significantly increased its investment in skills and capabilities in the European region, particularly in Germany.





"T-Systems offers SAP application services with a combination of competence and customer proximity."

Rainer Suletzki

T-Systems

Overview

With its subsidiary T-Systems, which mainly focuses on large accounts, Deutsche Telekom offers SAP HANA-related services in the German market. In addition to extensive services for the infrastructure and operation of the platform, it offers services for the entire lifecycle of an application. With its size and extensive experience, the company can meet the complex needs of large, internationally operating companies.

Strengths

A sophisticated portfolio with end-to-end competence: T-Systems' portfolio covers relevant aspects for the operation of SAP ERP applications, namely infrastructure, platform services and the application itself. With Ambition 4.0, T-Systems uses a powerful system for application management. With its many years of experience, T-Systems can guarantee reliable system operation as part of an end-to-end responsibility. This also includes special offers such as the near-zero downtime technology for updates and extensive security services.

High competence in key areas:

In addition to technical aspects, T-Systems has content competence for the operation of applications in a range of key sectors, including automotive, manufacturing and the public sector.

Contribution to value through continuous improvement in application management:

T-Systems places a particular emphasis on achieving business process improvements, in addition to IT-related efficiencies, through advances in application management.

Caution

The existing competence for various key areas should be further reflected in preconfigured solutions.

In the market, T-Systems is still primarily perceived as a provider of infrastructure and platforms based on it. Its focus on cloud migration further strengthens this perception. It should aim to better exhibit its competence regarding the application level.





Managed Platform and Cloud Services for SAP ERP

Who Should Read This

This report is relevant to enterprises across industries in Germany for evaluating managed platform and cloud service providers for SAP S/4HANA. In this quadrant, ISG highlights the current market positioning of managed platform and cloud service providers in Germany and shows how each company addresses the key challenges faced in the country. These providers focus on helping enterprise clients effectively migrate or maintain their applications on clouds or in their own data centers.

After the pandemic, enterprises are rapidly adopting the cloud-first approach. The expansion of cloud-based infrastructure and the rising presence of multiple hyperscalers are driving enterprises toward service providers that can manage hybrid deployments. Enterprises also want service providers with capabilities

to offer services such as security access, monitoring, system availability, interface performance, disaster recovery, backup, restoration, data compliance, and other infrastructure and cloud operations. While selecting service providers, enterprises also look for experience and any related industry certification.

Managed platform and cloud service providers can help enterprises in managing their day-to-day operations by optimizing infrastructure and maintaining and migrating SAP applications without errors or downtime. It will leave enterprises with more time and efforts to focus on other core business operations. Service providers' expertise in cost optimization and application code management, among other capabilities, will also benefit enterprises.



IT and infrastructure leaders should read this report to better understand the relative strengths and weaknesses of managed cloud service providers and to ascertain how their approaches to the market can impact enterprise cloud strategies.



Marketing, sales and field services leaders should read this report to understand the relative positioning and capabilities of partners that can help them procure managed cloud services. The report also highlights service providers' capabilities in maintaining or migrating data on data centers and clouds.

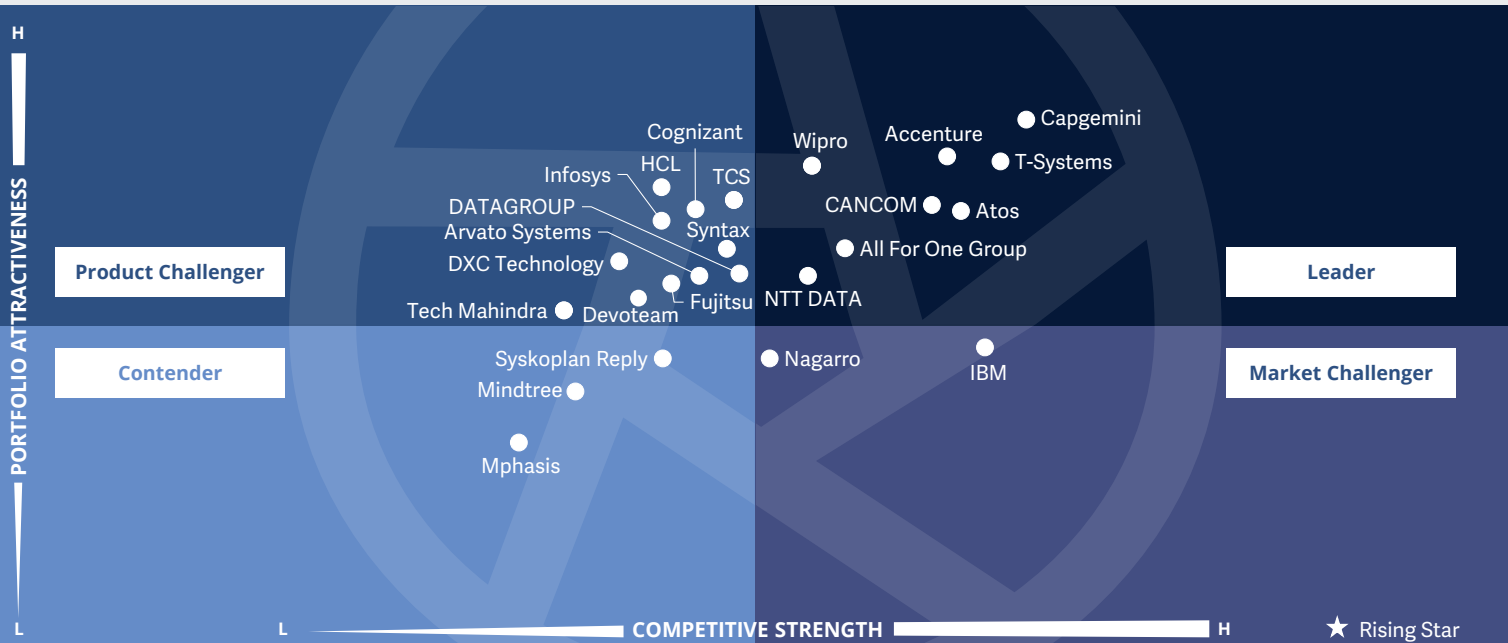


Sourcing and procurement professionals should read this report to have a better understanding of the current landscape of managed cloud service providers.



SAP Ecosystem
Managed Platform and Cloud Services for SAP ERP

Germany 2022



This quadrant evaluates service providers that address **hybrid cloud environment management**, security access, monitoring, system availability and interface performance, disaster recovery, backup, recovery, **data compliance**, and other infrastructure and cloud operations.

Rainer Suletzki



Managed Platform and Cloud Services for SAP ERP

Definition

This quadrant evaluates service providers that address hybrid cloud environment management, security access, monitoring, system availability and interface performance, disaster recovery, backup, recovery, data compliance, and other infrastructure and cloud operations. Initial technical barriers and customer resistance to moving ERP to the cloud are slowly disappearing, allowing these vendors to help their customers migrate from a private to a public cloud in exceptional cases.

This quadrant primarily includes vendors who can demonstrate expertise in maintaining a seamless SAP operation, which requires a deep understanding of SAP S/4HANA as well as the underlying in-memory database technology. Optimizing these types of applications also requires strong data volume management, application code management and cloud cost optimization services.

Eligibility Criteria

1. SAP deployment, management, and operation in the cloud, including, but not limited to hyper-scale public clouds such as **AWS, Azure, and Google**
2. Proven ability to assist customers with on-premises and hybrid cloud deployments of SAP systems and databases, at least at the infrastructure design level
3. Certification as a Platform or **Cloud Management Partner** with specialization in SAP S/4HANA
4. Certification for security, data protection and IT processes; minimum accreditations are **ISO27001** (security) and IT Infrastructure Library (ITIL) Incident Management
5. SAP-certified personnel for the support of **SAP technologies**



Observations

Recently, this segment has been dominated by the fast-growing offerings of public cloud providers (hyperscalers). Because the customer situation will continue, for the foreseeable future, to be characterized by deployment options used in parallel, including on-premises, the associated management of hybrid environments is, in particular, a central success factor for service providers.

The following vendors were ranked as Leaders in this quadrant:

accenture

Accenture's portfolio covers the often-complex needs of large enterprises for every workload environment. Accenture has extensive partnerships with hyperscalers and offers myNav, a cloud-based tool that allows customers to design and evaluate the best possible solution for different offerings during the selection process.

All For One Group

All For One Group offers platform management for SAP with a compelling service and pricing model. The management of cloud-based environments is supported by multiple tools and connectors, most of which were developed in-house. In addition, the company is addressing the increased compliance and security requirements in the SAP environment.

Atos

Atos can offer a comprehensive platform services consulting offering for SAP applications under the name Atos One Cloud. Based on the considerable experience already gained with the RISE offering, Atos can competently combine it with the managed cloud services to be provided.

CANCOM

CANCOM offers a sophisticated and varied portfolio for the operation of SAP HANA, which includes all relevant deployment options. In determining the strategy, CANCOM supports customers with their requirements for security and compliance with legal regulations at the highest level.

Capgemini

Capgemini offers comprehensive managed platform services for S/4HANA, with a high degree of automation. With Capgemini Cloud Platform, the company uses a comprehensive solution for managing complex, hybrid workloads, integrating public and private clouds.

NTT DATA

NTT DATA has a comprehensive and clearly structured portfolio for cloud transformation. Its convincing multi-cloud strategy with comprehensive coverage of hybrid scenarios considers customer situations appropriately.



Managed Platform and Cloud Services for SAP ERP

T Systems

T-Systems offers a comprehensive portfolio of managed platform services for HANA with high scalability. The entire range of managed cloud services for SAP HANA is covered, in addition to its own private cloud solutions, with offerings from hyperscalers. T-Systems offers a high-performance sovereign cloud solution for applications with high security requirements.



Wipro, with Cloud Studio, offers a portfolio that includes a unified platform that, in addition to its own FlexCloud, integrates the platforms of hyperscalers. The available platform services are grouped together in a clearly structured service catalog, which allows customers, via ServiceNow, to flexibly adapt their use to specific requirements.





“T-Systems offers a complete portfolio of managed platform services for HANA, with high scalability.”

Rainer Suletzki

T-Systems

Overview

With its subsidiary T-Systems, which mainly focuses on large accounts, Deutsche Telekom is a major provider of SAP HANA-related services in the German market. In addition to extensive services for the infrastructure and operation of the platform, it offers services for the entire lifecycle of an application. With its size and extensive experience, the company can meet the complex needs of large, internationally operating companies.

Strengths

Sovereign cloud for the highest security requirements: T-Systems offers a powerful sovereign cloud solution for applications with particularly high security requirements. This can be integrated into multi-hybrid-cloud management, like other applications.

Convincing customer integration in service management: Customers can, via their ServiceNow-based customer service portal, achieve full integration of their own processes with T-Systems’ service processes (configuration, incident and problem management, and change management).

A comprehensive multi-hybrid-cloud offering:

T-Systems’ portfolio offers a full range of managed cloud services for SAP HANA, in addition to those based on its own private cloud solutions, with offerings from various hyperscalers. For the management of various services, T-Systems uses a powerful managed hybrid cloud platform that allows the integration of existing on-premises applications.

Caution

T-Systems should make its varied portfolio easier to understand for customers, for example, by defining standardized, predefined packages for frequently encountered constellations. A better definition of corresponding service packages is recommended for consulting services for cloud transformations.





SAP Business Technology Platform Services

Who Should Read This

This report is relevant to enterprises across industries in Germany for evaluating service providers offering SAP Business Technology Platform (BTP). In this quadrant, ISG highlights the current market positioning of the providers of SAP BTP in Germany. The report explores their capabilities in designing, developing, modifying, integrating and supporting applications for enterprise systems and in delivering services for digital transformation using SAP BTP.

Enterprises are facing severe pressure of remaining relevant and agile in highly competitive markets. This is pushing enterprises toward digital transformation for processes and business operations as part of a digital-first approach or strategy. This leads to an increase in the adoption of new-generation digital technologies, such as blockchain, AI and machine learning.

Digital technologies are also witnessing huge growth potential in the SAP ecosystem space. However, enterprises in Germany are taking a cautious approach instead of promptly going for implementations. The integration of both SAP and non-SAP applications in a unified platform to achieve higher customer experience and process efficiency is one of the priorities for enterprises, and these new technologies can help. While integrating all these technologies in a package, service providers can help enterprises achieve agility and increase their business value.



Marketing, sales and field services leaders should read this report to understand the relative positioning and capabilities of service partners that can help implement SAP BTP effectively. The report highlights the advanced capabilities of service providers, including application development and the use of APIs and new methodologies.

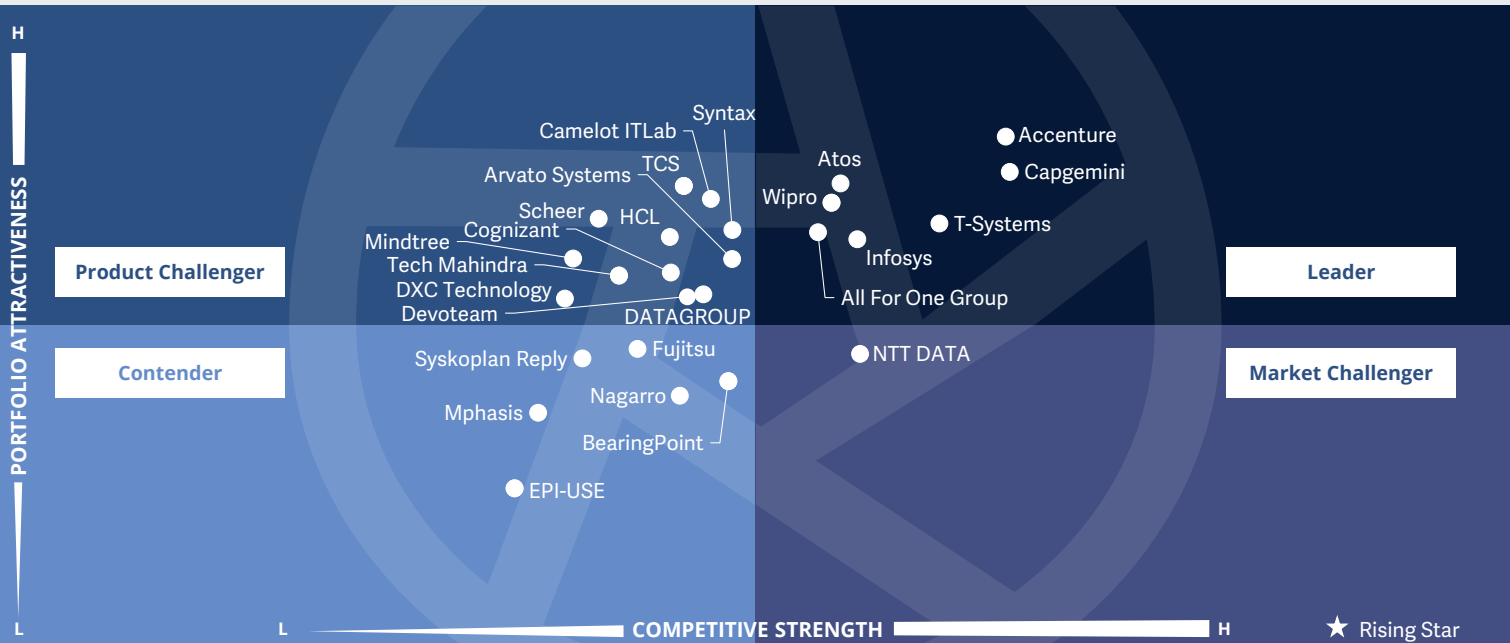


IT and technology leaders should read this report for a clear understanding of the strengths and weaknesses of service providers and to comprehend how they integrate the latest technologies and capabilities into their offerings to gain a competitive edge in the market.



SAP Ecosystem
SAP Business Technology Platform Services

Germany 2022



This quadrant assesses vendors' ability to design, develop, modify, integrate and support enterprise applications on **SAP BTP**, with expertise in cloud implementation.

Rainer Suletzki



Definition

This quadrant assesses vendors' ability to design, develop, modify, integrate, and support enterprise applications on SAP BTP, with expertise in cloud implementation. These vendors offer competency centers for co-innovation of smart technologies such as AI, machine learning and virtual reality. They also offer innovation workshops, design thinking, and other methods to drive innovation around SAP S/4HANA. Alternatively, use cases and frameworks have been developed to accelerate innovation or extend the functionality of SAP S/4HANA. These include out-of-the-box applications for fraud prevention and analytical dashboards presented to ISG in previous studies.

SAP BTP services include platform-as-a-service and application development for data integration, mobility-enabled services, analytics, and application development and deployment via multi-cloud platforms.

Eligibility Criteria

1. Consulting and implementation services for SAP BTP
2. Proven expertise in the cloud and simultaneous implementation of **SAP BTP**
3. Demonstrated **expertise** in artificial intelligence, machine learning, blockchain and IoT technologies
4. Proven support for BTP applications based on case studies
5. Appropriate SAP certifications for **SAP-certified applications**, as well as certified developers or partner-level certifications
6. Ideally, leading BTP services partners are expected to make case presentations at major events and have received awards from SAP, which helps them **gain customer recognition** and increase their brand awareness



Observations

SAP BTP is a central element of SAP's strategy. The key aspects are, on the one hand, maintaining the standard in the core ERP application by outsourcing custom developments and, on the other hand, using the BTP as a central integration platform for all types of applications. Successful suppliers offer services in both dimensions and thus help customers implement the strategy pursued by SAP profitably.

The following vendors were ranked as Leaders in this quadrant:

accenture

Accenture integrates the use of BTP into the basic procedure models for SAP implementations. The company has also started developing solutions for the smart enterprise concept at a very early stage and can, therefore, focus on many BTP-based solutions.

All For One Group

All For One Group's portfolio offers a range of feature-rich solutions using SAP BTP. The development and maintenance of components using BTP can be done in a manner similar to the services around the transformation of the core application under the pay-per-use model.

Atos

Atos has already been using BTP as a central integration platform in SAP-based environments for some time. In addition, a BTP development factory is available for custom development. Atos can also boast several co-innovation projects with SAP, for example, in the area of sustainability.

Capgemini

Capgemini systematically uses BTP for innovative solutions within the framework of the intelligent enterprise. Under the name Renewable Insights, Capgemini's portfolio offers a series of applications in the context of advanced analytics, based on the use of SAP BTP.

Infosys

Infosys has a series of specific S/4HANA extensions based on BTP, which are often certified by SAP. A strategic alliance has existed between Infosys and SAP for some time, which includes the joint development of innovative solutions.

T Systems

T-Systems consistently uses BTP as a central integration tool within SAP applications. For the development of mobile applications, T-Systems has, as an in-house mobile service provider, extensive expertise.



Wipro, in its customer projects, places great emphasis on standardizing the ERP core by using BTP. The company has numerous solutions developed using BTP and certified by SAP. In addition, its portfolio offers, with development as a service, a complete package for customized developments using a development factory.





“T-Systems has a high level of competence for BTP-based applications, including mobile applications.”

Rainer Suletzki

T-Systems

Overview

With its subsidiary T-Systems, which mainly focuses on large accounts, Deutsche Telekom provides SAP HANA-related services in the German market. In addition to extensive services for the infrastructure and operation of the platform, it offers services for the entire lifecycle of an application. With its size and extensive experience, the company can meet the complex needs of large, internationally operating companies.

Strengths

Many use cases: In recent years, T-Systems has developed a series of predefined solutions for certain sectors and in the field of analytics. For this purpose, there is also close cooperation with SAP. The best-known example of this cooperation is the EU-COVID digital certificate, whose central management platform was implemented based on SAP BTP. This solution is also proof of BTP’s suitability for applications with very high data volumes and wide availability for smartphone users.

Clear positioning of BTP: T-Systems consistently uses BTP as a central integration tool within SAP applications. This includes the connection of in-house developed solutions as well as the link to third-party solutions and the integration of SaaS solutions offered by SAP (Ariba, Concur, SuccessFactors, etc.).

High competence for BTP-based mobile applications: For the development of mobile applications, T-Systems has, as an in-house mobile service provider, extensive expertise.

Caution

Until now, T-Systems could only refer to a limited number of concrete customer examples for the use of BTP. It should broaden its experience and references.

The use of BTP to standardize core applications by transferring extensions outside the core (keeping the core clean) is now common in the market; therefore, T-Systems should consider this as a differentiating factor in its portfolio.





Appendix

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

Lead Author:

Rainer Suletzki

Editor:

Maria Müller-de Haen

Research Analyst:

Keanu Ghrab

Data Analysts:

Kankaiah Yasareni and Kiran B

Consultant Advisors:

Anna Medkouri, Yatin Dhruva, Alexandra Classen, Andreas Schubert and Thomas Wenzel

Project Manager:

Krishnanunni P

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 May 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 SAP 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

Lead Author



Rainer Suletzki
Senior IT Management Advisor

Rainer Suletzki brings more than 30 years of experience in various IT management functions within a global German Life Science corporation. His main areas of expertise comprise IT application management, IT architecture, data modelling as well as IT sourcing strategy and execution. Currently he acts as an independent

consultant in various projects at ISG with a focus upon application management for SAP, specifically for SAP HANA, and for Salesforce. This includes ISG Provider Lens Studies as well as various projects supporting companies in defining IT strategies and the corresponding sourcing decisions.

Enterprise Context and Global Overview Analyst



Keanu Ghrab
Research Analyst

Keanu Ghrab is a research analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on ADM Solutions and Services, Salesforce Ecosystem, ServiceNow Ecosystem, SAP Ecosystem and Future of Work (Workplace). He supports the lead analysts in the research process and authors the global summary report. Keanu also develops content from an enterprise perspective and collaborates with advisors and enterprise clients on ad-hoc research assignments as well. Keanu has helped

his current role since 2021. Prior to this role, he has worked in the BPO sphere of customer support, focusing on design and implementation of improved customer experience. Prior to that he gained professional experience whilst a student, through international jobs in Commodities Trade Management and IT Recruitment. His area of expertise lies across various technologies like IoT, Artificial Intelligence, VR/AR and blockchain and includes market, company, and competitive analysis.





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 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.



JULY 2022

REPORT: SAP ECOSYSTEM