ISG Provider Lens™

SAP Ecosystem

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

KELLTON TECH

QUADRANT REPORT | MAY 2023 | U.S.

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S/4HANA transformation is growing and has become a priority in a customer's SAP journey

SAP has a large client base in the U.S. and continues to dominate the market there. Compared to the 2021 ISG Provider Lens assessment, the SAP services market is now growing and expanding primarily due to the impact of cloud migration and the need for expertise to embrace a digital transformation journey. Global service providers lead the dynamic large account market, while midmarket enterprise clients remain inclined toward local players offering local and experienced staff resources. SAP applications that are often business-critical are migrating to cloud infrastructure.

Providers deliver services on public and private cloud-based transformations as per enterprise client demands and preferences. However, most enterprises prefer the private cloud over the public cloud for SAP applications. The expansion of the presence by public cloud providers, hyperscalers, can ensure that in most pending projects, the option of transitioning to a cloud-based operating model is being considered.

In this year's assessment, ISG observes that providers in the U.S. (and globally) remain highly focused on building specialized, intuitive and automated industry solutions for resilient value chains, data monetization, data-driven transformation and industry cloud innovations and solutions. They also aim to co-create a future digital platform for a highly interconnected enterprise led by SAP S/4HANA. **More than 500 use cases were assessed and analyzed. Most were aimed at improving operational efficiency and expanding the consulting-led approach for handling complex requirements in business model transformation and organizational change management (OCM). The analysis indicates increased interest in aligning the portfolio development strategy with the SAP product strategy.**

To differentiate themselves and secure more deals, service providers are focused on developing preconfigured industry processes and industry-specific solutions to accelerate

Improved operational efficiency continues to be the major focus area of providers and clients.

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the implementation process. **Most providers considered for this year's assessment are either developing in-house tools to deliver solutions across the SAP S/4HANA program life cycle in collaboration with SAP or leveraging the SAP platform.** They are also creating industry roadmaps to help clients overcome industry-specific challenges. Over the last 12 months, there has been continuous focus on integrating automation and AI into SAP transformation and managed services tools and accelerators. Those capabilities are the starting points of discussion to begin the transformation journey. In addition to end-to-end transformation journey roadmaps, consulting-focused tools and accelerators that have matured include transformation or cloud readiness assessment tools, peer benchmark tools and OCM tools.

A complete overhaul of the enterprise system architecture and the resulting transformation through a new implementation (the greenfield implementation method), remains the leading implementation approach, with more than 57 percent of overall SAP S/4HANA transformation projects delivered. Brownfield and hybrid implementation approaches are having robust growth, and providers are enhancing their capabilities to meet clients' cost-effective assessment and conversion objectives. **Clients favoring brownfield and hybrid implementation still follow the wait-and-watch strategy. They might utilize innovation in the future or address the reimplementation of specific modules or business units.**

After numerous briefings and discussions with providers and ISG advisors, **it has been noted that clients in the U.S. have started including strong consulting capabilities as one of the primary selection criteria.** Several consulting firms are expanding their footprints in the U.S. by strategically leveraging their advisory and finance transformation expertise and providing an experienced pool of consultants to win more SAP transformation clients. Many service providers have enhanced their IT consulting capabilities to offer advisory on operating model changes, business process improvement and standardization and harmonization of processes. Their consulting is supported by consulting-led tools and frameworks. Providers with expertise and experience in OCM have been rated higher for their service portfolios.

Sustainability continues to be a significant trend, receiving strong focus and investments from enterprise clients and providers. **Providers and enterprises have prioritized their investments in sustainability offerings and operations.** Besides providing a comprehensive set of sustainability offerings spanning from strategy to operations, providers have expanded their collaboration with SAP to invest heavily in creating specific sustainability solutions such as carbon footprint analytics, track-and-trace applications plus AI and IoT integrated solutions. These solutions enable sustainable business decisions to achieve organizational goals and ensure environmental compliance. Clients in the U.S. also expect service providers to help them improve their environmental, sustainability and governance Environmental, Social and Governance (ESG) target achievements. The SAP Sustainability Control Tower (an analytics dashboard) serves as their starting point.

There has been a significant rise in efforts among providers to build solid and longstanding partnerships with SAP and hyperscalers. Most providers have strategically enhanced their partnerships with SAP, offered go-to-market (GTM) in line with SAP's product strategy and collaborated on numerous fronts, including the RISE with SAP program for implementation. **These efforts aim to secure mega deals and position the providers among SAP's top three partners in terms of the volume of SAP-related services offered and the level of SAP license revenues influenced.** Providers have also extended their partnerships with hyperscalers (notably AWS, Azure and GCP) and work together with them to deliver SAP services for clients. Providers are also expanding their partnerships with third- parties such as SNP Group. Some of these partnerships have also resulted in co-innovation and strategic alliances.

Players such as Accenture, Capgemini and Infosys dominate the SAP ecosystem in the U.S. They continue to adopt innovation-focused approaches to enhancing the capabilities of their services. They have strong innovation roadmaps, well-planned vision and regional strategies and robust industry-specific and process-specific tools and accelerators to support and deliver complex SAP S/4HANA

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transformation, hybrid cloud management and application management projects for large and global clients. Other providers, such as Cognizant, LTIMindtree, HCLTech and TCS, are working towards challenging the top three players. Companies such as Atos, Birlasoft, Hexaware, Navisite and Tech Mahindra are improving their portfolio attractiveness and supporting greenfield and brownfield implementations. This year's significant development is the merger of LTI and Mindtree into a single entity. This newly formed entity, LTIMindtree, has unified its SAP services, which, in turn, has helped leverage its complementary capabilities and delivery services in the U.S.

Talent shortage continues to cloud the SAP market's growth; client projects require many trained employees with the necessary SAP certifications. The market is now undergoing a real talent war. To tackle the issue, many providers have implemented large-scale training and certification programs in the last nine to 12 months and have prioritized staff development in their overall growth strategy. **The presence of local S/4HANA-certified professionals acts as a differentiator for providers.** This also indicates their expertise in managing complexity, delivering services and maintaining client proximity. Local and tier 2 providers have taken a major hit as several global players are managing large projects, recruiting extensively and drying up the candidate market. Other significant challenges for clients include the average cost of implementation, long project implementation duration, data privacy, complexity and uncertainty about the best possible transformation path and unpredictable technology cycle coupled with economic uncertainty.

The ISG Star of Excellence (SOE)™ 2022 program found SAP service providers have drastically increased their customer-centric service offerings, and support them by flexible SLAs and a customer-friendly pricing model. Providers have outperformed in all six SoE categories and have received above-industry benchmark scores as opposed to last year's assessment, where providers received below-industry benchmark CX scores. The categories of adapting to changes, adopting effective cybersecurity measures and understanding clients' business and industry nuances received the highest CX scores.

To conclude, service providers are approaching the market by focusing on delivering a suite of SAP, managed and sustainability solutions, SAP S/4HANA and SAP Business Technology Platform (BTP), among other offerings. This trend is expected to continue with the increased adoption of cloud-based SAP solutions.

> To differentiate themselves and secure more deals, service providers are focused on developing preconfigured industry-specific solutions in collaboration with SAP, developing in-house tools to deliver solutions across the SAP S/4HANA program life cycle and leveraging the SAP platform.

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Provider Positioning

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	SAP S/4HANA System Transformation – Large Accounts	SAP S/4HANA System Transformation – Mid Market	Managed Application Services for SAP ERP	Managed Platform and Cloud Services for SAP ERP
Accenture	Leader	Not In	Leader	Leader
Applexus	Product Challenger	Product Challenger	Contender	Contender
Birlasoft	Not In	Leader	Product Challenger	Product Challenger
Capgemini	Leader	Not In	Leader	Leader
Clarkston Consulting	Not In	Contender	Not In	Not In
Cognizant	Leader	Not In	Leader	Leader
Delaware	Not In	Contender	Not In	Not In
Deloitte	Leader	Not In	Not In	Not In
DXC Technology	Product Challenger	Not In	Leader	Contender
EPI-USE	Not In	Product Challenger	Not In	Not In

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Provider Positioning

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	SAP S/4HANA System Transformation – Large Accounts	SAP S/4HANA System Transformation – Mid Market	Managed Application Services for SAP ERP	Managed Platform and Cloud Services for SAP ERP
Eviden (Atos)	Product Challenger	Leader	Rising Star ★	Product Challenger
EY	Market Challenger	Not In	Not In	Not In
Genpact	Market Challenger	Not In	Not In	Not In
Globant	Product Challenger	Product Challenger	Product Challenger	Not In
GyanSys	Not In	Market Challenger	Not In	Not In
HCLTech	Leader	Not In	Leader	Leader
Hexaware	Not In	Leader	Product Challenger	Product Challenger
Hitachi Vantara	Not In	Product Challenger	Product Challenger	Product Challenger
IBM	Leader	Not In	Leader	Not In
Infosys	Leader	Not In	Leader	Leader
Kellton	Contender	Product Challenger	Not In	Not In

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Provider Positioning

	SAP S/4HANA System Transformation – Large Accounts	SAP S/4HANA System Transformation – Mid Market	Managed Application Services for SAP ERP	Managed Platform and Cloud Services for SAP ERP
Kyndryl	Product Challenger	Not In	Product Challenger	Leader
LTIMindtree	Leader	Not In	Product Challenger	Product Challenger
Lumen	Product Challenger	Not In	Market Challenger	Product Challenger
Mindset Consulting	Not In	Contender	Not In	Not In
Mphasis	Contender	Product Challenger	Contender	Contender
Navisite	Not In	Leader	Product Challenger	Product Challenger
NTT DATA	Product Challenger	Leader	Product Challenger	Product Challenger
Numen	Contender	Not In	Not In	Not In
PwC	Product Challenger	Not In	Not In	Not In
Resolve Tech Solutions	Not In	Not In	Contender	Product Challenger
Softtek	Product Challenger	Rising Star ★	Product Challenger	Contender

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Provider Positioning

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	SAP S/4HANA System Transformation – Large Accounts	SAP S/4HANA System Transformation – Mid Market	Managed Application Services for SAP ERP	Managed Platform and Cloud Services for SAP ERP
Stefanini	Contender	Product Challenger	Product Challenger	Contender
Suneratech	Not In	Product Challenger	Contender	Not In
Syntax Systems	Not In	Not In	Not In	Product Challenger
TCS	Leader	Not In	Leader	Leader
Tech Mahindra	Rising Star ★	Product Challenger	Leader	Rising Star ★
T-Systems	Product Challenger	Ranked in Large Accounts	Product Challenger	Product Challenger
UST	Not In	Rising Star ★	Product Challenger	Contender
Wipro	Leader	Not In	Leader	Leader
Yash Technologies	Not In	Contender	Contender	Not In
Zensar	Not In	Product Challenger	Product Challenger	Not In

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This study focuses on **consulting and system integration** service providers for **SAP S/4HANA and SAP ERP.**

Simplified Illustration Source: ISG 2023

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

Definition

With thousands of SAP environments awaiting transition to S/4HANA before 2027, the transformation market is fiercely competitive for both SAP clients and SAP partners. This study identifies top SAP partners that offer tailored and differentiated services to enterprise clients.

SAP S/4HANA transformation projects require detailed planning and business participation. Clients often need to refine their selection criteria to find the right partner that delivers high business value at low costs for their transformation initiatives. For clients planning a system transformation, this study will help the reader to understand the possibilities for a brownfield SAP S/4HANA transformation and the accelerators specific for business functions. The right partner can support accelerating modernization goals and allay fears arising from the end of support for legacy SAP ERP, which is due in 2027.

SAP has sharpened its focus on migrating clients to the cloud. The RISE with SAP program has been in place for more than a year, offering client incentives to shorten their decision cycle. However, many enterprises are exploring the right opportunity in terms of cost, effort, timing and scope of transformation to the cloud.

SAP has expanded its cloud approach to BTP to offer clients more options to integrate with cloud-native applications. This is a part of a larger digital journey to integrate applications using the BTP platform and SAP applications.

This study also assesses managed service providers that can contribute to superior application performance, including higher stability, availability and security, through application services and cloud operations.

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Scope of the Report

In this ISG Provider Lens™ quadrant report, ISG covers the following four quadrants for services/solutions: SAP S/4HANA System Transformation – Large Accounts, SAP S/4HANA System Transformation – Midmarket, Managed Application Services for SAP ERP, and Managed Platform and Cloud Services for SAP ERP

- This ISG Provider Lens™ study offers IT decision-makers the following:
- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments (quadrants)
- Focus on the regional market

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

Provider Classifications

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

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between $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.

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

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

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Provider Classifications: Quadrant Key

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

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

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

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

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

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

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SAP S/4HANA System Transformation – Large Accounts

Who Should Read This Section

This report is relevant to enterprises across industries in the U.S. for evaluating SAP S/4HANA providers offering 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 in the U.S. based on the depth of their service offerings and market presence.

Enterprises are migrating to SAP S4/HANA to drive business value, speed, agility and cost reduction. SAP's deadline for SAP ECC maintenance is the other driver for this migration. Enterprises in the region are looking for enhanced customer experience, to eradicate technical debt and providers with a strong portfolio of tools and accelerators, industry-specific solutions and in-depth knowledge of regional compliance and regulatory requirements. More enterprises that underwent M&A are adopting greenfield implementation for improved operational efficiency and new business models.

Enterprises prefer service providers that create a roadmap with an accelerated approach and best practices for the S4/HANA transformation journey. They need partners with a continued focus on innovation through tools, accelerators and technologies such as AI, ML and automation for reduced effort and implementation timelines. The region's enterprises seek consultancy partners with comprehensive offerings and prior experience in transforming their existing and complex ERP systems to SAP S4/HANA. Furthermore, large accounts prefer service providers that can offer improvements and solutions within the SAP environment.

Marketing and sales professionals should read this report for insight on service partners' relative positioning and capabilities to effectively harness S/4HANA services.

Technology professionals should read this report to understand how service providers integrate the latest technologies into their S/4HANA offerings to gain a competitive edge in the market.

Line-of-business, industry and finance leaders should read this report to understand partners' relative positioning so they can effectively procure S/4HANA services and ensure ROI.

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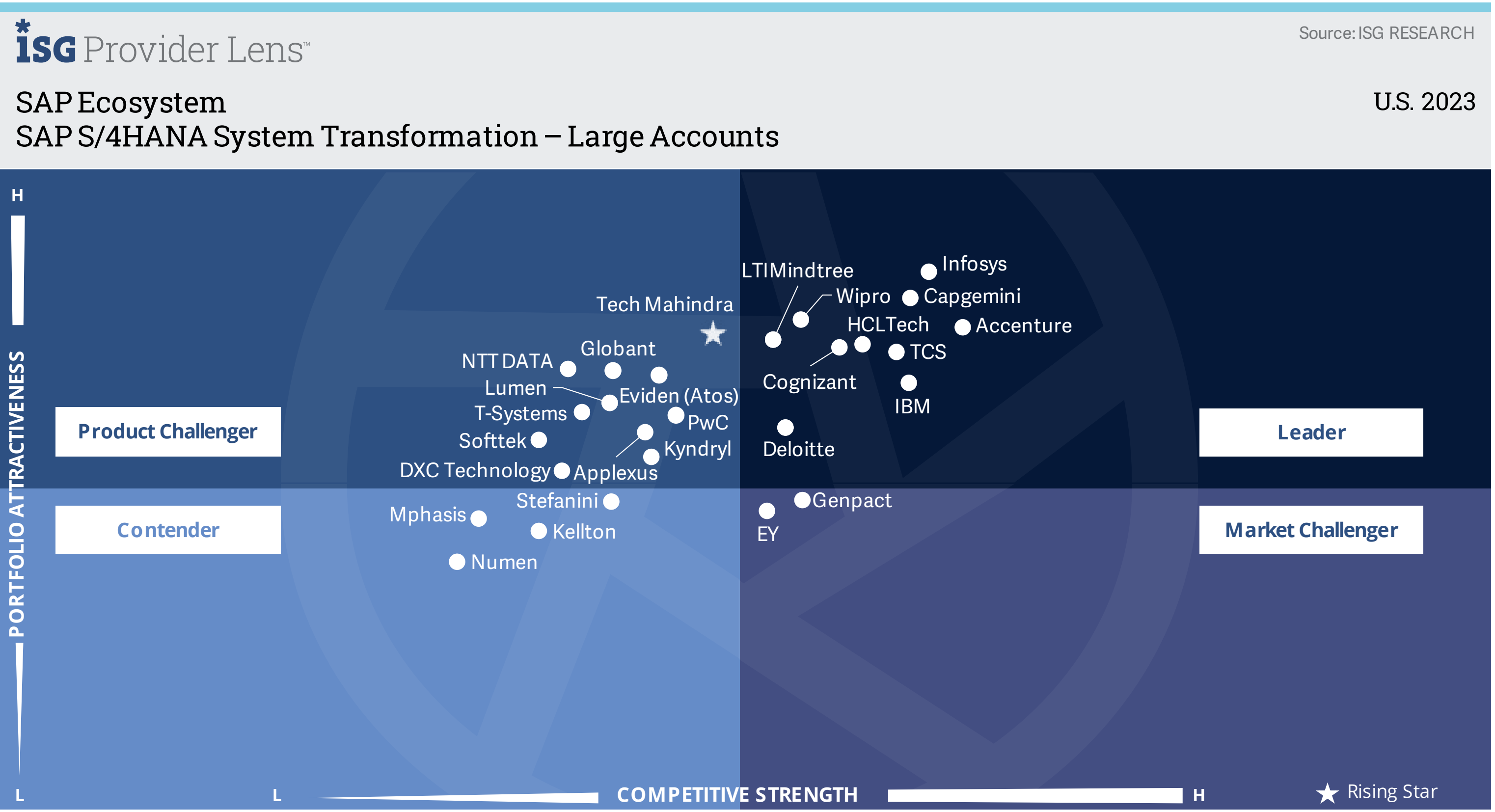

This quadrant assesses consulting and system integration capabilities of service providers that are developing, deploying and testing enterprise applications using **SAP S/4HANA**. This includes **certified partners** that support customers for SAP.

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Definition

This quadrant assesses consulting and system integration service providers, developing, deploying, and testing enterprise applications using SAP S/4HANA. Providers have partnerships with SAP for training their consultants on SAP's implementation methodology, product functionality, and configuration requirements. Certified partners can support customers in understanding and using SAP products.

Typical transformations include project planning, solution design, business process modeling, user training, product installation and configuration, testing and other services to enable clients/users to proficiently use SAP S/4HANA. These transformations could involve a new implementation, move existing ECC to S/4HANA or move workloads to the cloud. The providers also need to have the expertise to understand the client's business and technology landscape and leverage solutions to ensure delivery efficiency and operate the migrated solutions effectively. They also need to have an understanding of the RISE with SAP proposition and help clients to navigate the solution paradigm based on their IT landscape.

This quadrant considers service providers' ability to manage the complexity of large accounts that operate multiple SAP instances and require strict compliance and is characteristic of large enterprises with multinational operations and public company governance. The service providers are expected to offer frameworks, tools, and accelerators to support enterprise demand for fast and safe transformations.

Eligibility Criteria

1. Have all **SAP certifications** required to deploy SAP S/4HANA and support clients in using SAP products
2. Offer on-premises and **cloud-based implementations**
3. Offer cloud-based solutions for **S/4HANA migrations**
4. Have service portfolios that include SAP S/4HANA **development, integration and testing**, with at least one implementation of S/4HANA in the last 12 months
5. Have a track record of S/4HANA **advisory capabilities and implementation experience** in greenfield or brownfield deployments
6. Leverage **tools and accelerators** to deliver at reduced time to market
7. Have partnerships to **deploy RISE** with SAP, but this is not a condition for participation
8. Engage with **SAP-certified consultants** and practitioners across regions to support multi-country and multilanguage implementations
9. Ability to handle complexity and scale through optimal onshore-offshore delivery models. Concurrently, the provider should demonstrate local delivery **capacity in the local language**

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Observations

This segment continues to be dominated by global system integrators (GSIs). India-based vendors have recently stepped up their efforts to improve their onshore presence. As reported by service providers, in 2022, the average number of SAP S/4HANA certified consultants in the U.S. grew by 12 percent to nearly 2,000. The most FTEs for U.S. operations reported by a provider was 9,000. The total certified and experienced SAP S/4HANA consultants reported by providers in the U.S. was nearly 20,000, representing 48 percent of the total SAP professionals, up from 42 percent in 2021. The average client count stood near 150, with the most reported by a provider exceeding 350.

Compared to 2021 assessment, the number of transformation projects has increased, with several in progress. However, it is still difficult to calculate the ROI of migration to SAP S/4HANA, leaving many large enterprises struggling to choose the best solution to upgrade their legacy ERP systems. Most enterprises in the U.S. are aligning their SAP S/4HANA transformations with operational changes required for the entire business. There are more greenfield implementations than brownfield implementations in the U.S. Many enterprises are advancing their digital transformation journeys with increased greenfield implementations for SAP S/4HANA. Providers have reported an increased number of tools and accelerators to support greenfield implementation. They have increased their focus on digital core transformation consulting, bringing thought leadership, assisting clients with business cases, increasing the number of certified professionals, expanding their partnerships and providing RISE with SAP proposition to their clients.

From the 40 companies assessed for this study, 27 have qualified for this quadrant, with 10 being Leaders and one Rising Star.

accenture

Accenture's robust portfolio of tools and accelerators, industry experience and strong expertise in delivering large and complex transformation requirements make it a strong leader in the U.S. market.

Capgemini

Capgemini's strong growth in the U.S. market, coupled with a comprehensive transformation framework and deep industry expertise and numerous preconfigured accelerators, has resulted in strong leadership position.

cognizant

Cognizant has a strong go-to-market strategy and a focused vision for expansion in the U.S. This is complemented by a strong offering portfolio and robust frameworks. The company has a longstanding partnership with SAP and they work closely on RISE.

Deloitte.

Deloitte uses Agile technology implementation methodologies, preconfigured solutions and proprietary accelerators, together with the SAP® Activate innovation adoption framework.

HCLTech

HCLTech's offerings are differentiated by its technological and industry expertise in S/4HANA transformation. It offers a sophisticated model for S/4HANA transformation coupled with a comprehensive library of industry-specific solutions.

IBM

IBM offers a scalable platform called BREAKTHROUGH with IBM that consists of a solutions portfolio, consulting services and intelligent capabilities that help accelerate and amplify the journey to SAP S/4HANA Cloud.

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Infosys delivers SAP S/4HANA transformation through next-generation Live Enterprise. It has a large pool of skilled resources and a broad network of innovation hubs in the U.S.

LTIMindtree has scaled up its operations and offerings, establishing top-tier partnerships with SAP and hyperscalers. Its strategic focus on a large-scale practice makes it a strong player and a new leader in the U.S.

TCS offers various powerful industry solutions, a strong delivery model and comprehensive methods and tools to support S/4HANA transformation.

Tech Mahindra (Rising Star) has strategically integrated the capabilities of its past acquisitions and its tools and accelerators to offer SAP S/4HANA transformation services. It has more than 60 industry-specific cloud solutions built for SAP.

Wipro, with its extensive offerings on S/4HANA, is a Leader in this quadrant. With eSymphony, Wipro offers a complete framework for all phases of the SAP application lifecycle.

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SAP S/4HANA System Transformation – Midmarket

Who Should Read This Section

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

Midsize and smaller enterprises in the U.S. are mostly adopting the Rise with SAP offering for their S4/HANA transformation, implying an increase in greenfield implementations. Enterprises are facing challenges in operational costs, legacy systems and performance. They are looking for industry-focused solutions, minimal migration cost to achieve maximum business value, and want consulting partners that will help them outline their migration strategy and accelerate the migration process without premium costs. Midmarket enterprises with small-scale projects prefer providers with strong onshore and nearshore delivery capabilities and high integration capabilities.

Enterprises prefer service providers with industry expertise and the right pricing model. Tools and technologies based on new technologies such as AI, ML and automation that reduce costs and accelerate work are gaining traction among enterprises. Due to budget constraints, enterprises need partners with pre-built templates and fit-to-standard approaches. They prefer RISE with SAP and are seeking providers with a strong focus on S/4HANA cloud implementations.

Marketing and sales professionals should read this report for insight on service partners' relative positioning and capabilities to effectively harness S/4HANA services.

Technology professionals should read this report to understand how service providers integrate the latest technologies into their S/4HANA offerings to gain a competitive edge in the market.

Line-of-business, industry and finance leaders should read this report to understand the S/4HANA market and the service provider landscape to distinguish players based on their needs.

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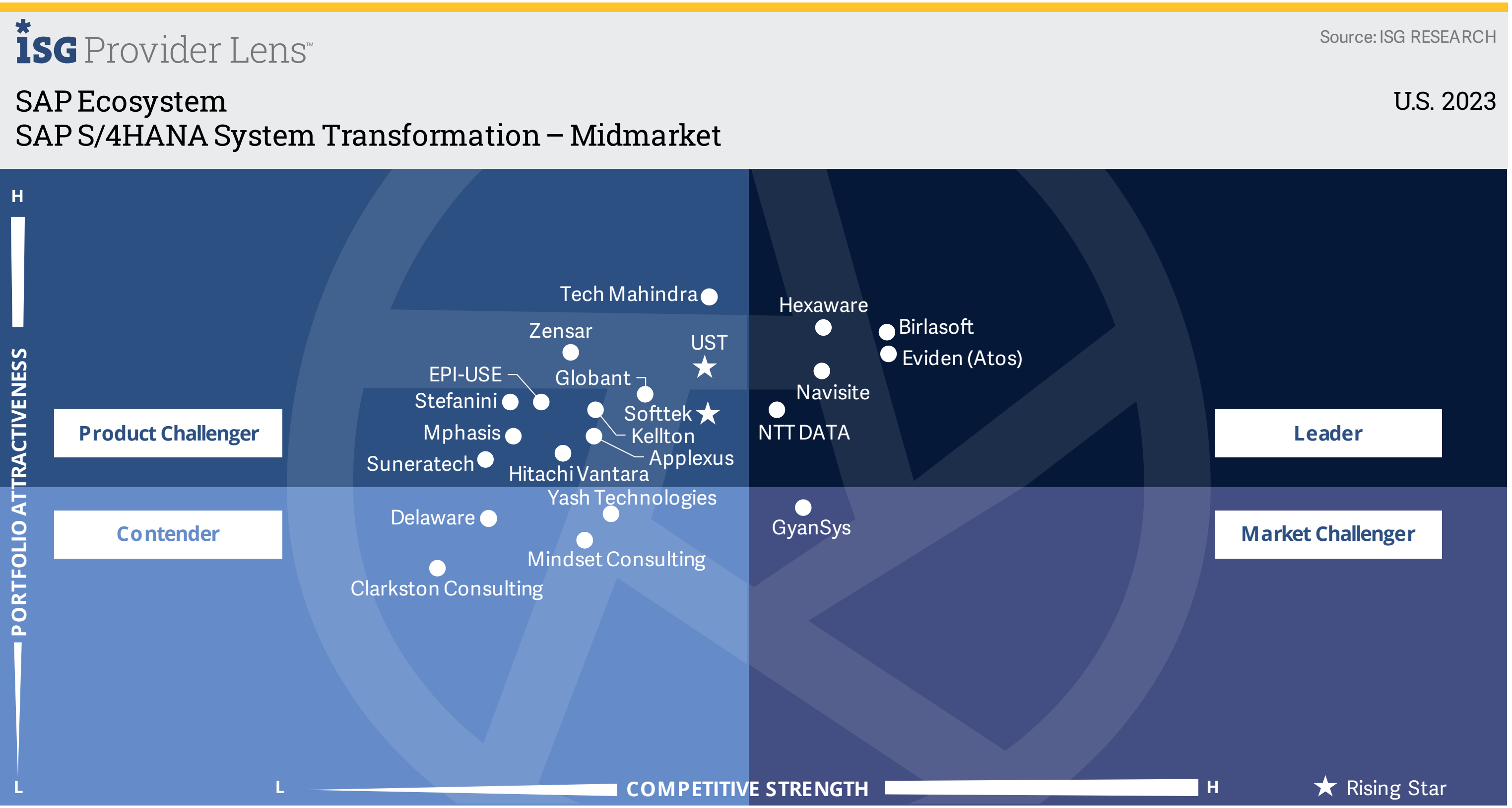

This quadrant assesses consulting and system integration capabilities of service providers, developing, deploying, and testing enterprise applications using **SAP S/4HANA for midmarket**. This includes **certified partners** who support customers for SAP.

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Definition

This quadrant assesses consulting and system integration service providers, offering a rapid turnaround for SAP S/4HANA implementations for clients in the midmarket. Midmarket clients have fewer complex requirements and smaller project scale compared with large enterprises. They operate within a country or region and require providers that can contribute for improved business operations.

The participating service providers should be able to deploy SAP solutions using multiple methodologies, including packaged solutions for small and midsized businesses (SMBs). They should use templates for SAP S/4HANA, including industry-specific templates, to reduce the transformation cycle while leveraging standard processes. Multitenant SAP S/4HANA implementations are included but not required for participating in this quadrant assessment. The providers should be able to deliver cloud transformations for clients in the midmarket segment and deliver services through RISE with SAP. They should also have the capability to help clients in strategizing transformation agendas, depending on business requirements and the complexity of their IT landscape.

This quadrant considers SAP partners that offer accelerators and can simplify SAP deployments for midsize enterprises. The providers typically achieve rapid time to market using solutions and accelerators specific to a client's business need. Providers of SAP-certified partner packaged solutions are preferred.

Eligibility Criteria

1. Have all **SAP certifications** required to deploy SAP S/4HANA and support clients in using SAP products
2. Service portfolio must include SAP S/4HANA **development, integration, and testing**, with at least one implementation of S/4HANA in the last 12 months
3. Have a track record of S/4HANA **advisory capabilities and implementation experience** in greenfield or brownfield deployments or cloud deployments
4. Ability to leverage SAP **accelerators and templates** for agile SAP S/4HANA implementations
5. Capability to deliver advisory and **implementation services** for midsize enterprise clients
6. Have **ready-to-use templates or solutions** for specific microsegments
7. Ability to offer **onshore or nearshore delivery** for local clients; offshore delivery is welcome but is not a condition for participation in this quadrant

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Observations

ISG observes significant traction in this market, with greenfield and brownfield implementation projects seeing the highest growth rates in the U.S. In 2022, the average number of SAP S/4HANA full-time equivalents for providers in this segment increased by more than 25 percent to reach 400. The most FTEs reported by a provider was 1,450 for U.S. operations. Their average number of clients stood near 35, with the highest reported by a provider exceeding 110. The total number of greenfield and brownfield SAP S/4HANA transformation services midmarket implementations has increased by more than 50 percent.

Automating standard processes, simplifying their IT portfolios, centralizing business functions and shared services, and redefining user experience were some of the major use cases on which providers assisted midmarket clients in the U.S. Midmarket clients have benefited the most from the RISE with SAP program. With the increase in cloud adoption, these enterprises could adopt SAP solutions and realize business benefits. These clients want SAP S/4HANA services to modernize their systems on the cloud and integrate cloud-native applications.

Most providers are investing in expanding their industry-specific capabilities and building tools that can specifically help midmarket clients adopt SAP S/4HANA applications. The ability to offer niche capabilities for industry and client requirements is the required differentiation to compete in this growing segment. Leaders in this quadrant have a dedicated vision and strategy for their clients and are highly focused on enhancing their greenfield and brownfield implementation capabilities.

From the 40 companies assessed for this study, 23 have qualified for this quadrant with five being Leaders and two Rising Star.

birlasoft

Birlasoft is well-positioned to meet the SAP S/4HANA requirements of midmarket clients in the U.S. It offers in-house solutions, a combination of proprietary tools, accelerators and an industry-led approach. It focuses on providing innovative solutions.

EVIDEN

Eviden (Atos) provides preconfigured SAP S/4HANA solutions enriched with additional processes and functionalities based on SAP best practices. Its robust service capabilities, consulting-led approach and portfolio of tools and accelerators make it a strong leader.

HEXAWARE

Hexaware leads with its ability to deliver on large-scale and complex projects, result-oriented proprietary tools and expertise in providing superior transition experience to clients in the U.S. It has one of the most loyal customer bases in the U.S. for SAP services.

NAVISITE

Navisite is a new Leader, demonstrating significant growth. It leads with a strategic focus on meeting the requirements of mid and upper-mid clients and offering SAP-qualified solutions aligned with SAP's go-to-market (GTM).

NTT DATA

NTT DATA offers a comprehensive portfolio for implementing SAP applications at all levels. It uses a reliable delivery model with a large pool of nearshore and onshore staff.

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Softtek

Softtek's (Rising Star) SAP S4/HANA portfolio includes business planning, digital transition strategies and cloud migration and implementation to support enterprises' current and future business needs. It continues to innovate its offerings to deliver seamless transformation.

UST (Rising Star) has a strong presence in the U.S. and is highly focused on innovations. It continues to invest in building S/4HANA migration tools and accelerators to speed S/4HANA migration.

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Kellton Tech Solutions Inc

Product Challenger

"Kellton Tech Solutions (Kellton) has seen great success with RISE With SAP and offers seasoned experts with strong SAP landscape understanding for selecting the best approach for SAP S/4HANA implementation with innovations to improve business performance."

Tarun Vaid

Overview

Kellton Tech Solutions Inc, headquartered in Hyderabad, India is an authorized partner for RISE With SAP S/4HANA Private Cloud, with RISE-certified experts and a consistent SAP PCoE (Partner Center of Expertise) certified partner. The company offers a complete suite of SAP S/4HANA migration and implementation services to modernize the customer's business core and accelerate their journey to an intelligent enterprise. It is focused on extending SAP Advisory Consulting to mid-market clients and is enhancing its implementation methodology by leveraging SAP Activate and SAP Best Practices.

Strengths

Expertise in RISE with SAP: Kellton engages with the customer to provide a strategic approach for their transformation and plan and perform the S/4HANA technical and application architecture design, licensing analysis, impact analysis, and cloud ALM for implementation and operations. Its SAP experts design and perform the data migration from source systems for greenfield implementation with relevant ETL tools. Subsequently, it offers new implementation or system conversion for RISE S/4HANA private cloud.

Strong expertise serving mid-market clients: Kellton implements Midmarket enterprises-focused SAP S/4HANA solutions by offering leading technical capabilities surrounding end-to-end SAP S/4HANA implementation services that can make SAP implementation journey smooth, quick and future-proof. It utilizes SAP tools to identify the business process scope and innovation potential and demonstrate important ready-to-run business processes with SAP Fiori Apps.

Varied benefits delivered: For an industrial products client, a U.S.-based manufacturer, Kellton delivered optimized processes for each product line through greenfield implementation, enabling superior agility and scalability, and flexibility through the cloud. It led to a 30 percent quarterly increase in revenue and production and 99 percent increase in on-time shipping.

Caution

Kellton must build industry-specific best practices, tools, accelerators and IPs for seamless delivery to thrive in this highly competitive service line. Furthermore, a more focused marketing initiative is required to establish a presence in the U.S.

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Managed Application Services for SAP ERP

Who Should Read This Section

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

Enterprises with large complex projects have experienced increased maintenance difficulties and business disruption risks in case of incidents. This, in turn, has increased the adoption of SAP ERP and managed application services outsourcing in the U.S. Enterprises need reduced manual and repetitive processes, operational savings and faster turnaround time. They generally seek managed application services, including level 2 and level 3 application support, maintenance, incident resolution, security and user support.

Enterprises prefer service providers focused on innovation, a strong partner ecosystems, SAP Partner Center of Expertise certification and technology-focused solutions. To reduce operational costs and enhance customer experience, they need service providers with capabilities driven by AI, ML, automation and RPA technologies

Enterprises seek consulting partners that provide end-to-end project management with comprehensive application managed services, tools and accelerators, and have competent delivery and transparent pricing models. These providers focus on helping enterprises manage SAP ERP, including SAP S/4HANA, ECC and legacy R3.

Technology professionals should read this report to understand the strengths and weaknesses of providers offering SAP ERP managed services and their competency in application management tools.

Procurement professionals should read this report to clearly understand the service provider ecosystem for SAP ERP managed services and compare various providers.

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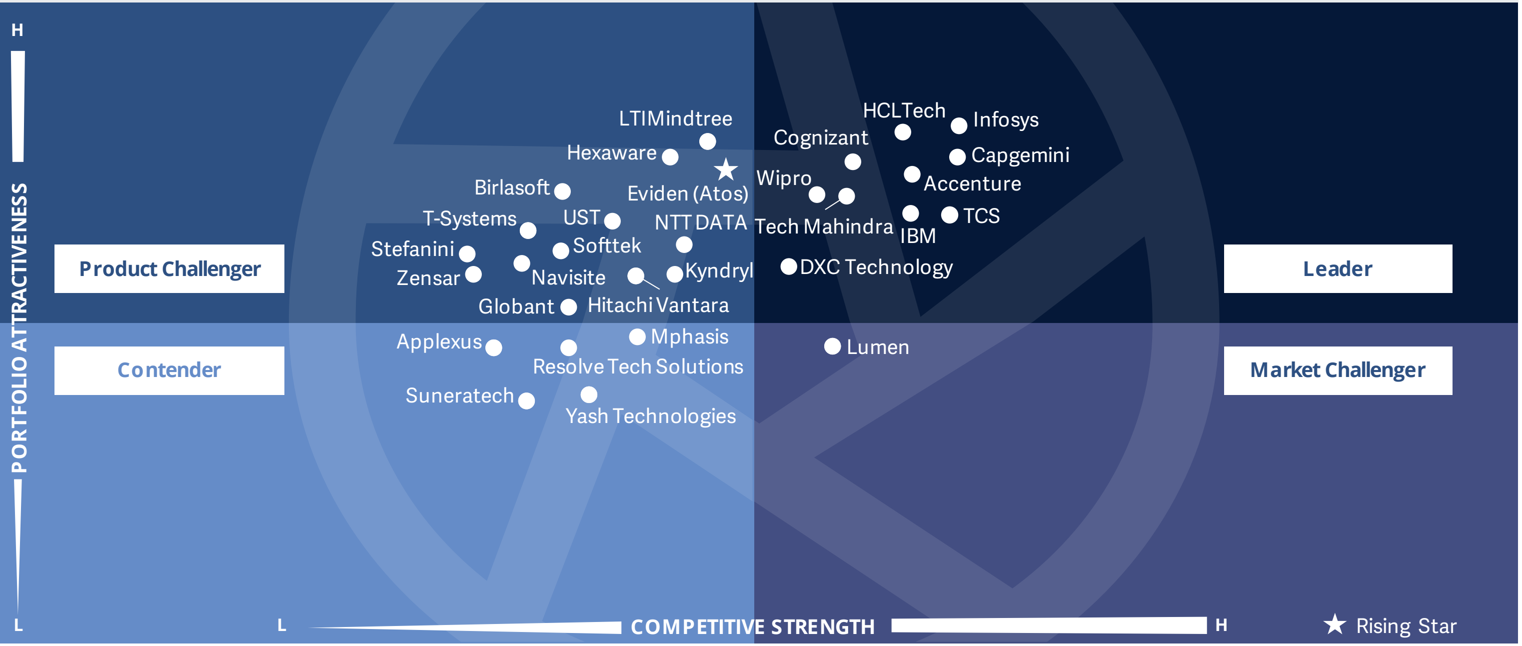
ISG Provider Lens™

Source: ISG RESEARCH

SAP Ecosystem
Managed Application Services for SAP ERP

U.S. 2023



This quadrant assesses service providers for their ability to offer **managed services, including enhancements,** maintenance, and support functions, **application monitoring, remote support** and **centralized management** for SAP ERP.

Tarun Vaid

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Definition

This quadrant assesses service providers for their ability to offer managed services, including enhancements, maintenance and support functions. The other parameters for assessing providers include application monitoring, remote support, and centralized management of applications for SAP S/4HANA and legacy SAP Business Suites such as ECC 6.0.

Managed application services for incidents encompass troubleshooting, level 2 and level 3 application support, user support, ticket lifecycle management, incident resolution, problem management, root-cause analysis and interface with SAP product support in accordance with client requirements. Providers that have the center of expertise certification are rated highly, but the certification is not a prerequisite for participating in this quadrant.

This assessment considers the maturity of providers' service delivery process and their ability to offer the automation of service request and IT-related processes, such as incident management, change request and release management, version control, application and changes documentation, configuration and SAP Solution Manager operation, root-cause analysis and problem elimination, quality improvement and testing. It also considers providers' ability to automate tasks and use AI and machine learning in the tools leveraged to deliver services for its clients. The quadrant also assesses providers' ability to handle complex solutions while delivering application managed services for SAP ERP.

Eligibility Criteria

1. Ability to offer application **optimization**, application **support**, and **testing** for SAP ERP solutions
2. Services should include **user management** (adding and disabling user access), user profile management, **performance** reports, **database** services, security (access), and license compliance
3. Ability to offer **enhancements and changes** pertaining to applications, apply SAP Service Pack Stacks (SPS) if required, and predict the business impact of such updates
4. Capability to stabilize applications and offer **SAP Basis** support
5. Expertise in incident management, variety of ticket system tools, **SAP Solution Manager**, and additional application documentation solutions

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Observations

The Managed Application Service quadrant was the most competitive, with as many as 30 providers making it to the quadrant. In 2022, the client bases reported by providers increased by more than 30 percent, and their average number of clients exceeded 125 in the U.S. The most clients reported by a provider was 310. The overall revenue reported by participating providers grew by 15 percent, and the number of certified and experienced FTEs increased by 25 percent. In the U.S., there have been increases in SAP ERP adoption and managed application services outsourcing or SAP ERP. Most enterprises seek the help of providers to manage their SAP ERP applications. Outsourcing application management for traditional SAP ERP applications and SAP S/4HANA has been a focus area for enterprises with large SAP landscapes.

Most service providers qualified in this quadrant have a SAP Partner Center of Expertise (SAP PCOE) certificate. In addition to functional competence, service providers in this quadrant are expected to have efficient delivery, transparent pricing models and clear service structures. Clients in the U.S. are pushing providers to use more automation to improve service predictability and demonstrate measurable results across their SAP application landscape. Providers continue to infuse AI, ML and automation capabilities to deliver agreed benefits. The services offered include an end-to-end spectrum of application-managed services covering operations, support and maintenance.

From the 40 companies assessed for this study, 27 have qualified for this quadrant with 10 being Leaders and one Rising Star

accenture

Accenture has long been providing managed applications services. The Accenture Liquid Application Management offering uses agile practices and quality engineering to streamline service delivery. The company can support all SAP products on a global scale.

Capgemini

Capgemini has the most SAP-certified practitioners, and its global platform enables it to share resources globally. It integrates several IT service management tools to offer full outsourcing capacity, including infrastructure management.

cognizant

Cognizant's broad base of SAP managed application services, host of proprietary tools and frameworks, cloud-ready digital intellectual property and bot-centric framework make it a promising provider of managed application services for SAP ERP.

DXC TECHNOLOGY

DXC Technology has several years of experience in reliable system operation and offers impressive methodological tools for efficiently provisioning managed application services.

HCLTech

HCLTech's Digital AMS 2.0 framework, proprietary tools and third-party solutions enable it to deliver its Digital AMS value proposition to clients. HCL has recently significantly increased its investment in skills and capabilities in the U.S.

IBM

IBM delivers strong managed services through flexible migration capabilities, security services, SLAs and multiple data centers. This makes it a suitable option for large enterprises that have high application managed service requirements for SAP ERP.

Infosys

Infosys leverages AI and automation capabilities across the entire lifecycle of managed application services. It has a reliable portfolio of methods and best practices and a platform for service management developed for SAP-based application operations.

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TCS' differentiators are its longstanding partnership with SAP, global delivery network, strong base of trained SAP consultants and proprietary tools and frameworks with an ability to scale.

Tech Mahindra leverages a global service platform with many automation tools and AI bots to improve SAP application quality and RPA for improved business performance. It offers a host of tools and accelerators that support SAP operations and maintenance functions.

Wipro offers powerful methods and tools for managed application services delivered through flexible pricing models. It invests heavily in strengthening its market position in the U.S.

Eviden (Atos) (Rising Star) offers the NxtGen SAP Service Transformation Framework, a robust framework for SAP managed application services. It provides support for end-to-end application maintenance, security administration, SAP Basis operations and KPI measurement.

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Managed Platform and Cloud Services for SAP ERP

Who Should Read This Section

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

The U.S. has seen tremendous growth in cloud adoption. However, enterprises are facing challenges related to cloud migration and management. This, in turn, has increased the outsourcing of managed platforms and cloud services. Enterprises are seeking consulting partners to help them achieve lower TCO and higher automation and business agility. Service providers that can help reduce costs while creating more business value are preferred. Higher complexities due to multiple cloud platforms also prompt enterprises to partner with service providers. The RISE with SAP services bundle program is also getting significant traction in the U.S.

Service providers that can help enterprises strategize cloud roadmap and bring AIOps and AI into operation are in high demand. They should have tools and accelerators supported by the latest technologies to automate and accelerate business processes. Enterprises are also evaluating providers that use strong partnerships with hyperscalers and other technology providers, including SAP, to deliver quality cloud services. Enterprise clients seek experienced service partners in their journeys toward RISE with SAP and/or private and public cloud hosting to gain maximum benefits from cloud investment.

IT and infrastructure leaders should read this report to understand the strengths and weaknesses of managed cloud service providers and discover how their approaches impact enterprise cloud strategy.

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

Marketing, sales and field services leaders should read this report for the relative positioning and capabilities of partners that can help them procure managed cloud services.

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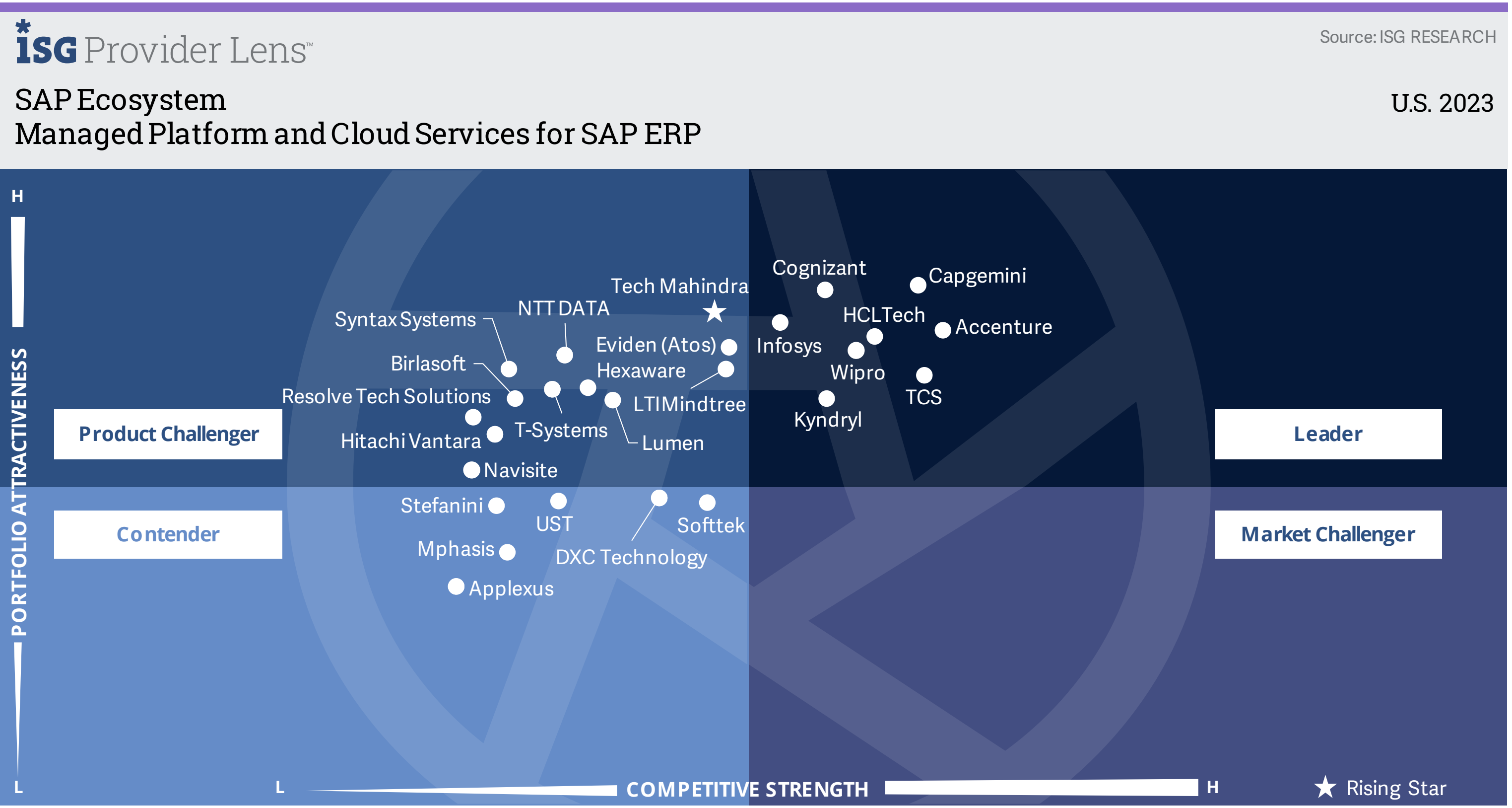

This quadrant assesses service providers that **manage hybrid cloud environments**, security access, infrastructure monitoring, system availability, **interface performance, disaster recovery, backup, restoration, data compliance and other infrastructure** and cloud operations.

Tarun Vaid

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Definition

This quadrant assesses service providers that manage hybrid cloud environments, security access, infrastructure monitoring, system availability, interface performance, disaster recovery, backup, restoration, data compliance, and other infrastructure and cloud operations.

The participating providers are capable of resolving and eliminating clients' initial technical barriers and resistance to moving enterprise resource planning to the cloud, supporting clients in planning and migrating from private cloud to public cloud infrastructures, or from on-premises to cloud infrastructures.

This quadrant evaluates providers that demonstrate expertise in maintaining smooth SAP operations that require deep knowledge about SAP S/4HANA and the underlying in-memory database technology. Strong capabilities to optimize this type of application also include data volume management, application code management and cloud cost optimization.

Typical service providers in this quadrant have both SAP and public cloud certifications to operate and configure secure SAP S/4HANA operation on-premises and in the cloud. At the same time, they have proven managed service expertise to handle on-premises operations if required by clients operating in hybrid environments. The leading providers in this quadrant should have advanced technologies to deliver on client infrastructure requirements along with the ability to deliver optimal services, thereby providing significant benefits to clients.

Eligibility Criteria

1. Ability to provide, manage and **operate SAP** in the cloud, including, but not limited to, hyperscalers such as AWS, Azure and Google
2. Capacity to **support clients in their on-premises and hybrid cloud** implementations of SAP systems and databases, providing infrastructure design support at a minimum
3. Have certified platform management or cloud partners with **SAP S/4HANA specialization**
4. Have certifications on security, data privacy and IT processes; **minimum accreditations** include ISO 27001 (security) and IT Infrastructure Library (ITIL) incident management
5. Have **SAP-certified and cloud-certified** staff to support SAP technologies

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Observations

ISG observes that this is one of the fastest-growing service lines due to several challenges associated with migration to S/4HANA Cloud, which, in turn, has increased the demand for SAP outsourcing experts. In response, managed cloud service players have been offering dedicated solutions that leverage the best of SAP and cloud technologies. Service providers have strategically built industry-specific cloud offerings to support digital transformation and manage cloud platforms. These industry-specific offerings are designed to meet every industry requirement for specific business needs.

Providers are expanding their partnerships with cloud providers, including SAP (via RISE with SAP), to deliver cloud services. Automation and AI capabilities and use cases became more prevalent in 2022 and continuing into 2023 compared to 2021 and are expected to attain higher significance in the coming years. Service providers have reported marginal to moderate revenue growth, indicating an increase in outsourcing activities in the U.S. for managed platforms and cloud services. The shifting trends from doing digital to being digital, increased cloud adoption and SAP's aggressive push for RISE are expected to further drive the demand for managed platform and cloud services through the end of 2024.

From the 35 companies assessed for this study, 25 have qualified for this quadrant with 8 being Leaders and one Rising Star

Accenture has close partnerships with SAP, AWS, Microsoft and Google to drive its cloud business. Its cloud-first approach is helping clients migrate their SAP applications, including SAP S/4HANA, to the cloud. It uses proven frameworks and methods for rapid migrations.

Capgemini's key differentiation is its highly integrated service management platform that handles large-scale operations. Capgemini Cloud Platform uses a comprehensive solution to manage complex and hybrid workloads and integrate public and private clouds.

Cognizant offers cloud advisory, assessment and a full-stack managed platform with orchestration and implementation capabilities. The company has a large pool of cloud experts and partners with leading cloud providers such as AWS, Azure, GCP and SUSE.

HCLTech provides cloud enablement and management services with 24/7 support. The company invests significantly in training and certifying its cloud architects. It leverages its AIOps framework to deliver managed cloud services.

Infosys has a broad spectrum of SAP and ADM offerings such as the Cobalt delivery platform. The company has global delivery expertise in AI-enabled application development and cloud migration.

Kyndryl offers rich SAP infrastructure and hosting to clients. It provides various options for SAP services, such as high-performance SLAs and extensive security through a global standard for delivery.

TCS' comprehensive services are built on open source and fortified with security and tools. The company is well-positioned to support enterprises with large-scale and complex support requirements for cloud operations.

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Wipro strongly focuses on driving efficiency through extensive automation and integrating multicloud environment management into the surrounding service management. Its framework comes with a single plug-and-play accelerator to address varied enterprise requirements.

Tech Mahindra's (Rising Star) mPAC 3.0 is a managed platform for adaptive cloud and delivers a unified management experience across multicloud and hybrid environments. It can also automate infrastructure deployment on cloud.

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Appendix

The ISG Provider Lens™ 2023 – SAP Ecosystem report analyzes the relevant software vendors/ service providers in the U.S. market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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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 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

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Lead Author

Tarun Vaid
Lead Analyst

Tarun has over 12 years of extensive research experience across the ICT domain, including report writing, drafting thought leadership, analyzing IT spending, consulting clients on latest trends and business use cases. Additionally, he has been responsible for delivering end-to-end research projects, working with internal stakeholders in delivering various consulting projects on digital transformation, supply chain transformation, understanding customer feedback and interviewing providers.

Enterprise Context and Global Summary Analyst

Vartika Rai
Research Analyst

Vartika Rai is a research analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on Analytics – Services and Platforms, and SAP Ecosystem. She supports the lead analysts in the research process and authors the global summary report. Vartika also develops content from an enterprise perspective and collaborates with advisors and enterprise clients on ad-hoc research assignments. Vartika started her current role in June 2022. Before this role, she worked on secondary research, competitive intelligence, market trends, and newsletter analysis.

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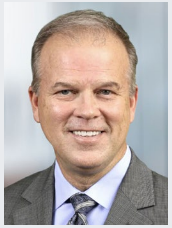
IPL Product Owner



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.

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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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Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,600 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.

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MAY, 2023

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