iSG Provider Lens™

SAP Ecosystem

Managed Platform and Cloud Services for SAP ERP

A research report comparing provider strengths, challenges and competitive differentiators

QUADRANT REPORT | **MAY 2023** | **U.S.**

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Executive Summary

Report Author: Tarun Vaid

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.

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

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.

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

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
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

Provider Positioning

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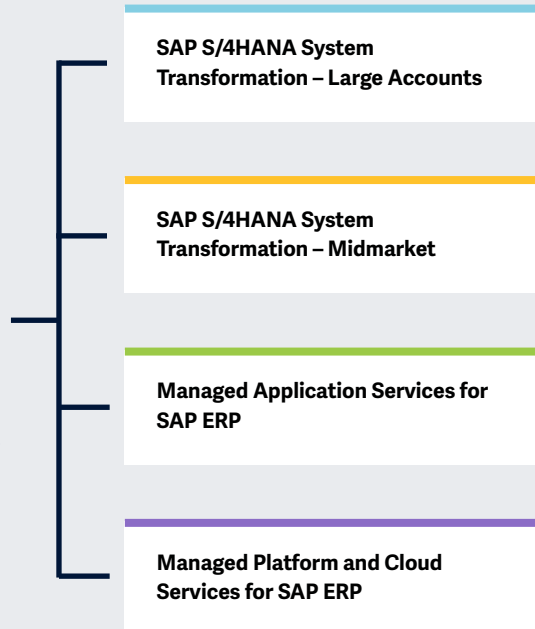|	SAP S/4HANA System Transformation – Large Accounts	SAP S/4HANA System Transformation – Mid Market	Managed Application Services for SAP ERP	Managed Platform and Cloud Services for SAP ERP
Kyndryl	Product Challenger	Not In	Product Challenger	Leader
LTIMindtree	Leader	Not In	Product Challenger	Product 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

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
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

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.

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).

Provider Classifications: Quadrant Key

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

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

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

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

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

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

Managed Platform and Cloud Services for SAP ERP

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.

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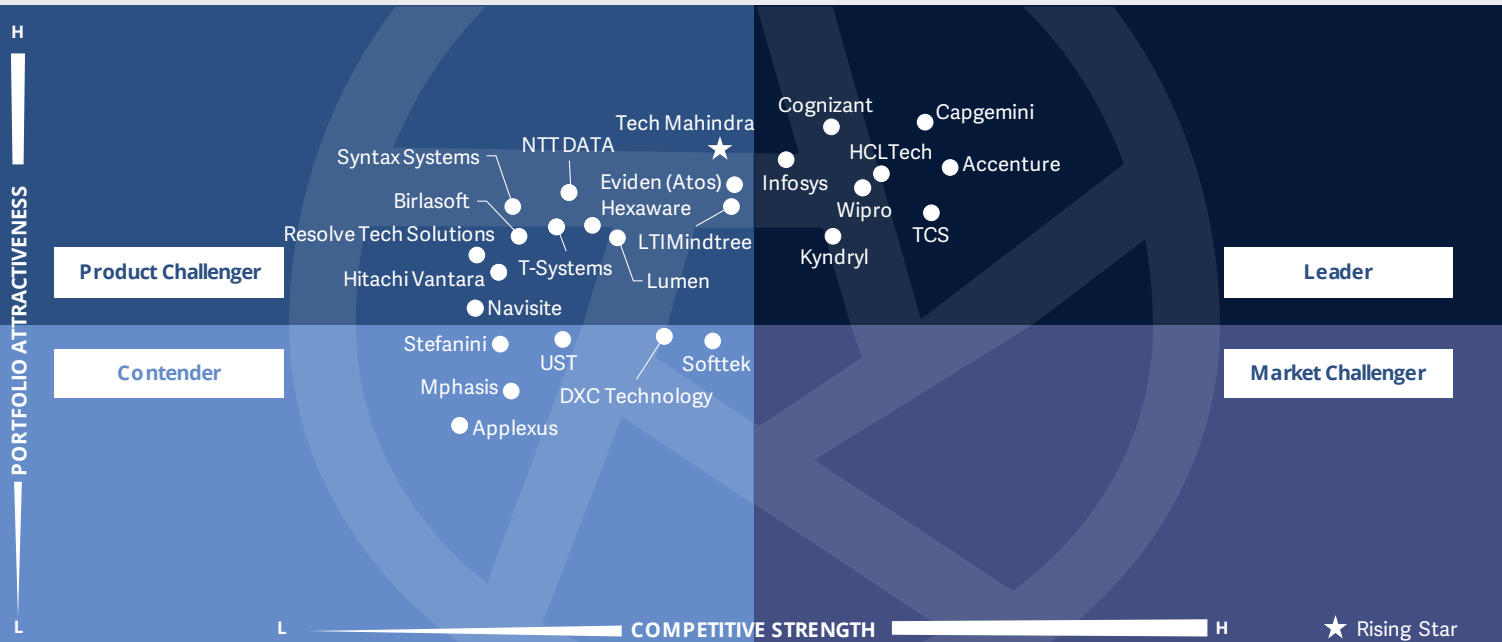
Sourcing and procurement professionals should read this report to better understand the current landscape of managed cloud service providers.

ISG Provider Lens™

SAP Ecosystem
Managed Platform and Cloud Services for SAP ERP

U.S. 2023

PORTFOLIO ATTRACTIVENESS (H → L)

COMPETITIVE STRENGTH (L → H)

Product Challenger

Contender

Leader

Market Challenger

★ Rising Star

Providers plotted:
- Tech Mahindra ★
- Syntax Systems
- NTT DATA
- Eviden (Atos)
- Birlasoft
- Hexaware
- Resolve Tech Solutions
- LTIMindtree
- Hitachi Vantara
- T-Systems
- Lumen
- Navisite
- Stefanini
- UST
- Softtek
- Mphasis
- DXC Technology
- Applexus
- Cognizant
- Capgemini
- HCLTech
- Accenture
- Infosys
- Wipro
- TCS
- Kyndryl

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

Managed Platform and Cloud Services for SAP ERP

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

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

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

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

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

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

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

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.

TATA CONSULTANCY SERVICES

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.

Managed Platform and Cloud Services for SAP ERP

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.

Kyndryl

Leader

"Kyndryl's expertise in infrastructure and security services and focus on having a robust partner network to co-innovate and make smooth cloud transitions for its clients makes them a leader in the U.S."

Tarun Vaid

Overview

Kyndryl is headquartered in New York, U.S., and operates in 63 countries. In FY21, the company generated $20 billion in revenue and had more than 90,000 employees worldwide. It focuses on seven industries: banking and financial markets; healthcare; manufacturing; retail; government; insurance; and communications and media. Kyndryl provides customers end-to-end SAP lifecycle services such as consulting, development, modernization, migration and management. Its managed apps platform provides AIOps, automation, security and transparency with a portal.

Strengths

Strong partnership: Kyndryl partners with leading service providers and hyperscalers to help clients in their cloud transformation journeys. It has strong and strategic partnerships with SAP and SAP-oriented hyperscalers such as Azure, AWS and GCP. It also leverages solutions developed with partners, such as SNP and Vnomics, to reduce downtime for large SAP system migrations.

Leveraging core strength: Kyndryl leverages its core strengths, data-driven insights and expertise through Kyndryl Bridge, an open integration platform, to deliver IT solutions. The platform combines the extensive domain expertise of technology consultants, delivery experts and alliance partners with knowledge of IT operations and IP to generate actionable insights. It helps customers consume and manage complex, heterogenous, multicloud and hybrid IT estates built on public, hybrid or private clouds.

End-to-end automation: Kyndryl provides end-to-end automation to help customers accelerate their cloud journey. It gives 50 percent faster production-ready SAP installations on the cloud, minimizing the risk associated with security and compliance and providing customer satisfaction. It has developed frameworks, tools and automation (for example, SAM-SAP Automation Manager) to offer superior services for complex SAP projects. The workflow engine generates every build and flow based on the SAMBOT definitions.

Caution

Kyndryl needs to focus on its marketing strategy to attract clients in the U.S. It should provide a detailed overview of its complex and ongoing and completed projects in the region and its capabilities on its web page.

Appendix

Methodology & Team

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

Author & Editor Biographies

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.

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.

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