isg Provider Lens

SAP Ecosystem

RISE with SAP Implementation Partners

A research report comparing provider strengths, challenges and competitive differentiators



QUADRANT REPORT | APRIL 2024 | GLOBAL

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The adoption of RISE is increasing among enterprises, along with their cloud journey

RISE with SAP:

In today's digital landscape, the utilization of cloud technology has become paramount for organizations seeking flexibility and agility in their operations to seamlessly align with evolving business requirements. Within this context, the RISE with SAP proposition stands out as a pioneering initiative, empowering enterprises to seamlessly integrate their ERP systems into their core cloud strategies. RISE with SAP represents more than just a cloud offering; it embodies a comprehensive suite of SAP products bundled together to deliver enhanced value. While SAP S/4HANA Cloud and SAP Business Technology Platform (BTP) are integral components of RISE, the proposition extends beyond these to encompass a spectrum of solutions. These include infrastructure offerings, alongside embedded tools such as the

SAP Readiness Check, Custom Code
Migration and SAP Enable Now, facilitating
smooth transitions to the cloud environment.
Moreover, RISE incorporates innovation
tools, such as SAP Build, and business
process transformation capabilities through
SAP Singavio. Notably, the premier version
of RISE introduces Joule, SAP's cuttingedge AI assistant, further augmenting the
suite's capabilities and underscoring SAP's
commitment to driving innovation and enabling
digital transformation for enterprises worldwide.

The RISE proposition covers infrastructure, applications, integration and support in a single contract depending on clients' requirements and their hyperscaler strategy. A simple commercial contract for RISE can include software, support, infrastructure management, technical managed services, governance, security and SLA. The offering is based on a full usage equivalent (FUE) metric that considers different types of employees and their types of usage. Additionally, industry and lines of business add-on packages can be licensed with metrics aligning with each solution's business value.

With the SAP application complexity, adopting cloud infrastructure is not a straightforward approach.

While SAP has built its custom offering for enterprises considering hyperscalers and the SAP Cloud, there has been ambiguity among enterprises in terms of the aspects that this contract covers with respect to their SAP landscape. Some enterprises have raised concerns about the cost estimation for long-term contracts and the flexibility this proposition provides for innovation. Despite these challenges, enterprises are adopting RISE with SAP to accelerate their digital transformation, considering factors such as cost, security, performance, ease of migration, automation, infrastructure, partner capabilities and SAP BTP integration capabilities. The RISE proposition is gaining traction in the upper midmarket segment and now in the large enterprise segment as well.

Enterprises are seeking help from their partners and service providers to navigate the areas where they are unclear and need handholding to decide on the technological priorities per the business requirements. The providers are building industry-specific propositions with their industry cloud offerings tailored to clients' needs to accelerate their cloud journey.

Service providers are strategically aligning themselves with SAP's overarching vision and the transformative potential of RISE with SAP, which serves as a catalyst for expediting the SAP S/4HANA migration journey for customers, particularly those embarking on significant technical migrations and large-scale business transformation endeavors. These providers play a pivotal role in assisting clients in navigating the complexities surrounding licensing models and intricate multicomponent environments, while concurrently streamlining governance structures, particularly in areas concerning cybersecurity, integration of multicloud, and management of scattered and diverse components and instances. Moreover, service providers offer comprehensive end-to-end solutions, encompassing consultancy, transformational initiatives, hosting and ongoing operations, all encapsulated within a single managed service contract. Emphasis is placed on driving cost savings early in the RISE with SAP journey, often leveraging partner managed cloud services to seamlessly integrate non-RISE with SAP components within the same commercial

framework, thereby maximizing efficiencies and optimizing resource utilization.

The percentage of clients adopting SAP S/4HANA cloud differs across service providers. For some, only 5-10 percent of their clients adopt SAP S/4HANA Cloud, while for some providers, most of their clients use SAP S/4HANA Cloud. In general, it is observed that there is a 70:30 ratio in terms of adoption of on-premises vs cloud version of SAP S/4HANA. The typical benefits realized for clients include reduced TCO, improved license ownership, optimized infrastructure use, minimized risk, enhanced security posture, simplified operations, and improved business outcomes; clients can also have a platform for innovation aligned with their business requirements. The typical timeline required to implement SAP S/4HANA cloud varies on an average of around 40-60 weeks. For instance, the SAP S/4HANA public cloud version takes around 40 weeks, while the SAP S/4HANA private cloud requires around 50-60 weeks, with an additional 4-8 weeks for infrastructure provisioning.

The RISE offering is gaining traction among enterprises. Service providers are capturing this opportunity to grow their SAP business. In certain regions, specifically around Europe, there is resistance to using the public cloud as a preferred infrastructure. Depending on the governance and compliance requirements of the industry for cloud infrastructure, the adoption of RISE with SAP proposition varies. The use of SAP BTP for the clean core approach and digital transformation is an holistic approach for enterprises that adopt RISE with SAP and for providers that help their clients in their cloud journey for SAP workloads.

SAP Business AI and BTP:

SAP Business Technology Platform (BTP) is considered a multi-purpose, multicloud platform that SAP has positioned as an enabler for integrating applications for the enterprise IT landscape. While the erstwhile BTP was specifically an integration platform that drove digitalization, the current BTP enables a clean core approach for SAP S/4HANA migration. Integrating AI with BTP and building ready-to-use business cases have also positioned BTP



as a lucrative approach for enterprise use cases using AI and BTP, for integrating applications in the enterprise IT landscape using cloud, to build tools and accelerators on BTP that help manage applications for clients and to use it as a platform that enables digital core and clean core approach for SAP S/4HANA transformation.

The utilization of SAP Business Al and BTP remains exploratory among diverse stakeholders within the SAP market. Enterprises have yet to fully grasp the advantages of combining BTP and Al. Typically, BTP deployment occurs alongside initiatives such as RISE or as part of the digital journey toward SAP S/4HANA transformation. particularly in greenfield transformation scenarios. Service providers have taken the lead in experimenting with SAP BTP, crafting numerous enterprise use cases to deploy applications for their clientele. Over the years, these providers have collaborated closely with SAP to develop applications on BTP, resulting in many apps featured on the SAP Store. Recognizing the immense potential

in this domain, SAP has designated BTP as a distinct business unit and appointed dedicated leadership roles to propel its growth. SAP positions BTP as the cornerstone for organizations seeking to dismantle departmental silos and embrace dynamic, cross-functional business processes aimed at delivering exceptional experiences to stakeholders. This strategic focus underscores SAP's commitment to leveraging BTP as a catalyst for organizational transformation and innovation.

Service providers are actively assisting their clients in harnessing the potential of AI and BTP either to develop novel cloud solutions or to extend the existing SAP offerings. These providers are investing significantly in integrating BTP-based solutions with GenAl capabilities. They are spearheading the development of a GenAl platform that offers a pragmatic and secure avenue for businesses to fully capitalize on the advantages of GenAl. The objective is to utilize this platform to create an array of BTP-focused automation use cases. Numerous use cases leveraging BTP have

emerged recently across various industries, including manufacturing, retail, energy and utilities. Service providers have curated over 100 business use cases through relentless motivation, empowered by cutting-edge technology and Al. These predefined solutions are readily available, sparing businesses the need to embark on implementations from scratch, provided their specific business requirements align with the functionalities offered, tailored by industry and line of business (LOB).

SAP BTP combined with Business AL represents a transformative paradigm shift in the correlation between work methodologies and desired outcomes across various facets, including organizational dynamics, software delivery and operational efficacy. This innovative approach offers many benefits, promising accelerated project delivery with potential reductions in delivery times by up to 33 percent. Organizations can expect an overall decrease in lead time through constant release cycles, swifter implementation of changes and minimized

downtimes, thereby enhancing operational agility. The platform also facilitates timesaving upgrades, a notable 25 to 30 percent reduction in upgrade duration, which scales with complexity. SAP BTP enables faster software deployment and easier adoption of both SAP software innovations and regulatory changes to software. The providers are offering new ways to address business needs while avoiding excess technical debt, preparing organizations to maximize strategic benefits and limit the transformation cost, SAP BTP has the potential to unlock business values. supporting the business in being more agile and able to adapt to external factors. The providers also aim to increase the productivity index through Al-powered developer tools.

With numerous use cases and as a pivot for the clean core approach of SAP S/4HANA transformation, adopting SAP BTP and AI is expected to increase multifold. The providers play an important role in educating their clients about the benefits of this segment and embedding it in their digital journey.



Cloud Economics and FinOps for SAP:

With the rise of digital transformation, the adoption of cloud has tremendously increased. This surge encompasses the development of applications on cloud, migration of existing applications to cloud environments and utilizing cloud as a definitive medium to execute digital initiatives. However, just cloud adoption does not guarantee a successful digital transformation. Achieving successful cloud adoption requires meticulous planning and the creation of an optimal technology architecture that positions cloud as a foundational infrastructure component. Another crucial driver for cloud adoption is cost optimization.

It is imperative that any application being transitioned to cloud undergoes rationalization or transformation to ensure optimal functionality in the cloud environment, while also justifying the cost of infrastructure. When it comes to SAP applications, due to their complexity, adopting cloud as the infrastructure is not a straightforward approach for enterprises. The expenditure and economic

considerations involved in migrating SAP applications to cloud can adversely impact business outcomes if not executed properly. Hence, the domain of cloud economics and FinOps has gained traction and become a significant area of interest for enterprises.

Cloud economics refers to the financial principles and factors associated with the use of cloud computing services. This includes understanding the costs, benefits and tradeoffs involved in migrating, operating and optimizing workloads on cloud. On the other hand, FinOps is a set of practices that helps businesses optimize their cloud investments by anticipating and controlling their cloud spending. It empowers enterprises to make informed decisions regarding resource allocation, identify cost-saving opportunities and ensure that cloud usage aligns with overarching business goals.

RISE with SAP has empowered businesses to embrace cloud solutions for their SAP applications, leading to the growing adoption of cloud services among enterprises. While the advantages of cloud are evident, there are

also associated costs involved in migrating workloads and managing cloud expenses for SAP operations. To reduce these costs, enterprises often collaborate with service providers to oversee cloud deployments and governance expenses. This report delves into the role of service providers that assist clients in navigating cloud economics and implementing FinOps strategies to optimize costs. These providers offer valuable insights into potential expenditures and opportunities for savings within enterprises' cloud environments hosting SAP workloads.

In FinOps for SAP, attention to detail is important across several key areas. Firstly, establishing cost visibility is foundational; organizations must employ cloud cost management tools and services to comprehensively track and comprehend the expenditure associated with running SAP systems on cloud. Next, cost allocation is imperative, given the intricate nature of SAP environments. Accurately assigning costs to various business units or departments facilitates chargeback and showback processes,

fostering awareness among stakeholders regarding the costs incurred. Furthermore, budgeting and forecasting play a pivotal role, enabling organizations to proactively plan and allocate resources for SAP on cloud, thus averting unexpected cost overruns.

The FinOps approach highlights cost optimization by identifying and capitalizing on cost-saving opportunities, such as rightsizing SAP instances, utilizing reserved instances for long-term savings or incorporating spot instances when feasible. Real-time cost monitoring and alerts are indispensable, as they allow for the swift identification and resolution of any cost anomalies or unexpected spikes. Tagging and metadata management are equally vital, ensuring accurate cost allocation and tracking by associating resources with specific projects or teams. Cloud vendor negotiations present opportunities for organizations to further optimize costs by leveraging the resource-intensive nature of SAP workloads to negotiate better pricing or discounts with their cloud service providers, with FinOps teams playing a pivotal role in these negotiations.

Regular cost reporting and accountability mechanisms sustain transparency and responsibility within an organization, ensuring that stakeholders are aware of their costs and accountable for managing them effectively. Lastly, the integration of automation and optimization tools tailored to SAP facilitates the automation of cost-saving measures and ensures the efficient operation of SAP instances, thereby maximizing cost efficiency in SAP cloud operations.

Cloud economics and FinOps follow the industry guidelines for optimizing cloud infrastructure. Enterprises mostly rely on the service providers to help them assess and manage SAP workloads on cloud. The cloud and SAP teams of these service providers collaborate to ensure optimal workload performance in the cloud environment. Providers positioned in this quadrant have the capabilities to assess the landscape, guide enterprises on their cloud journey and manage SAP workloads on cloud to achieve optimal operations. They also handle the complexities of SAP applications on cloud;

employ tools to monitor, assess and respond (Inform-Optimize-Operate stages of FinOps); invest in R&D; maintain robust governance processes; and continuously monitor KPIs.

In response to the specific requirements of niche enterprises, service providers are building propositions and frameworks tailored to the cloud economics and FinOps aspects of SAP landscapes. Providers are building predictive usage models to help clients define FinOps best practices, which are integrated into their global cloud strategy and embedded within application design guidelines for each target cloud environment. Some of these best practices are published by the FinOps Foundation, and providers liaise with global design authorities in this regard. Additionally, some providers are establishing FinOps-as-a-service offerings to facilitate the implementation of continuous cloud cost optimization services.

With the increasing adoption of RISE with SAP, it has become increasingly important for providers to focus on and develop capabilities in cloud economics and FinOps. Some of the

leading service providers have built platforms with the core principle of extensibility, ensuring unparalleled customization flexibility to meet the unique needs of each customer. These service providers have developed a comprehensive ecosystem comprising certified FinOps practitioners, a robust consulting practice specializing in the cost optimization process, and continuous enhancement of platform capabilities based on customer feedback and requirements. With seamless integration across multiple public clouds, including AWS, Azure and Google Cloud, this ecosystem offers unparalleled versatility. Whether opting for SaaS or on-premise solutions, clients benefit from the flexibility of deployment tailored to their preferences. Centralizing service management visibility helps clients view their applications in a single pane of glass, streamlining operations and enhancing efficiency. With the increasing adoption of cloud technology within the SAP environment and beyond, this segment is expected to gain significant traction in the coming years.

ISG observes the adoption ratio between the on-premises and cloud versions of SAP S/4HANA to be approximately 70:30. Typically, the timeline for bringing SAP S/4HANA to the market varies, averaging between 40 and 60 weeks. Specifically, the SAP S/4HANA public cloud version requires around 40 weeks, while the SAP S/4HANA private cloud version typically spans between 50 and 60 weeks. Additionally, infrastructure provisioning entails an additional 4-8 weeks on average.

Provider Positioning

Provider Positioning

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	RISE with SAP Implementation Partners	SAP Business AI and Business Technology Platform (BTP) Services	Cloud Economics and FinOps Services for SAP
Accenture	Market Challenger	Leader	Product Challenger
All for One Group	Not In	Not In	Contender
Birlasoft	Product Challenger	Contender	Product Challenger
Capgemini	Leader	Leader	Leader
Cognizant	Leader	Product Challenger	Leader
Deloitte	Leader	Not In	Not In
DXC Technology	Product Challenger	Product Challenger	Product Challenger
Eviden (an Atos Business)	Leader	Leader	Product Challenger
EY	Market Challenger	Not In	Not In
HCLTech	Leader	Leader	Leader

Provider Positioning

Provider Positioning

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	RISE with SAP Implementation Partners	SAP Business AI and Business Technology Platform (BTP) Services	Cloud Economics and FinOps Services for SAP
Hexaware	Product Challenger	Product Challenger	Not In
Hitachi Digital Services	Contender	Not In	Not In
IBM	Product Challenger	Market Challenger	Not In
Infosys	Leader	Leader	Product Challenger
KaarTech	Product Challenger	Product Challenger	Not In
Kellton Tech	Contender	Not In	Not In
Kyndryl	Leader	Product Challenger	Not In
LTIMindtree	Product Challenger	Rising Star ★	Not In
Mphasis	Contender	Contender	Not In
Navisite	Not In	Not In	Contender

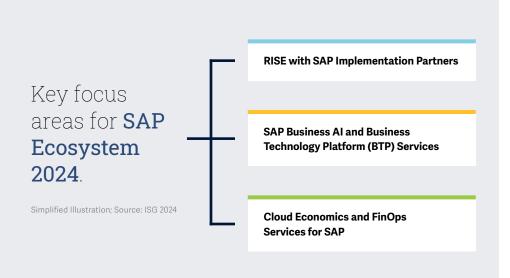
Provider Positioning

Provider Positioning

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	RISE with SAP Implementation Partners	SAP Business AI and Business Technology Platform (BTP) Services	Cloud Economics and FinOps Services for SAP
Protera Technologies	Contender	Not In	Contender
Public Cloud Group	Not In	Not In	Contender
PwC	Rising Star 🛨	Not In	Not In
Stefanini	Not In	Contender	Product Challenger
Syntax	Not In	Contender	Market Challenger
Tech Mahindra	Leader	Leader	Not In
T-Systems	Contender	Contender	Not In
UST	Product Challenger	Product Challenger	Rising Star ★
Wipro	Leader	Leader	Leader

Introduction



Definition

The ISG Provider Lens™ SAP Ecosystem 2024 offers the following to business and IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers.
- A differentiated positioning of providers by segments on their competitive strengths and portfolio attractiveness.
- Focus on different markets, including the U.S., U.K., Nordics, Brazil and Germany.

ISG studies serve as an important decisionmaking basis for positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their current vendor relationships and potential engagements.

Introduction

Scope of the Report

This ISG Provider Lens™ quadrant report covers one quadrant for services/solutions: RISE with SAP Implementation Partners, SAP Business AI and Business Technology Platform (BTP) Services, Cloud Economics and FinOps Services for SAP. This ISG Provider Lens™ study offers IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers/ software vendors
- A differentiated positioning of providers by segments (quadrants)
- · Focus on the regional market

Our study serves as the basis for important decision-making by covering providers' 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).



Introduction



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 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 reasons for this designation: company; the company does or solution as defined for each quadrant of a study; or the company for the study quadrant. Omission from the quadrant does not imply does not offer or plan to offer this service or solution.



Who Should Read This Section

This quadrant is relevant to enterprises across industries worldwide evaluating service providers that offer RISE with SAP services.

Enterprises look toward RISE with SAP for its holistic approach, integrating ERP systems seamlessly into cloud strategies. Offering a suite of SAP products beyond S/4HANA Cloud and BTP, RISE streamlines transitions with infrastructure offerings and innovative tools such as SAP Build. Enterprises benefit from single contracts tailored to their needs, covering software, support and infrastructure. Despite challenges, RISE addresses concerns about cost, security, innovation and flexibility, which drive its adoption.

Enterprises look for service providers that can assist with the complexities of SAP implementations, align SAP offerings with enterprise vision and optimize enterprise resource utilization to maximize efficiency in the RISE journey. Enterprises seek providers that have the capabilities to offer tailored solutions and strategic guidance throughout the cloud journey.

Providers should be able to offer enterprises with specialized SAP services, advise on SAP applications' cloud migration and build industry-specific propositions. Providers are expected to expedite SAP S/4HANA migration journeys to align with enterprises' SAP vision and assist them in navigating licensing complexities and multicomponent environments. They should also emphasize end-to-end solutions encompassing consultancy, transformation initiatives, hosting and ongoing operations under managed service contracts. This strategy should help enterprises with early cost savings in the RISE journey, leveraging partner-managed cloud services.



Marketing and sales professionals should read this report to gain insights into service providers' relative positioning and capabilities to effectively harness RISE with SAP services.

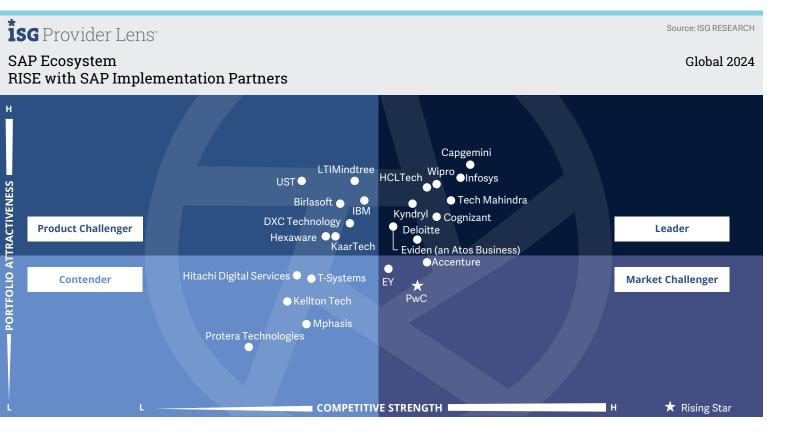


Chief information officers (CIOs) should read this report to understand providers' relative positioning regarding SLA and licensing capabilities to effectively procure services.



Technology professionals should read this report to understand how service providers can offer the benefits of RISE with SAP.





This quadrant assesses providers certified to offer RISE. with SAP services and SAP **S/4HANA** cloud transformation services. These service providers have proven case studies and certified expertise for RISE.

Akhila Harinarayan



Definition

RISE with SAP is an as-a-service proposition by SAP. RISE with SAP bundles software services such as S/4 HANA as core. Business Technology Platform (BTP), Business Process Intelligence (BPI) and Business Network (BN) as a subscription model. This quadrant assesses service providers who offer RISE contracts, including those who are RISEcertified and provide SAP S/4HANA cloud ERP services. These providers, typically SAP partners, also offer Application Management covering functional support. The providers in this quadrant can scope, select and implement the SAP S/4HANA cloud solution, including the multitenant version of S/4HANA Cloud and the private edition. The providers offer tools for various SAP S/4HANA cloud deployment options and configure and integrate SAP S/4HANA cloud with other applications. The providers also help in data migration and business process testing.

These providers have expertise across industries and understand the nuances involved in cloud migrations. The providers should be able to offer services to both large enterprises and midmarket clients and handle the complexities involved across the application landscape and firms with varied IT maturity.

Eligibility Criteria

- SAP RISE-certified and partnering with SAP
- **2.** Offering **RISE with SAP** contracts to clients across regions
- 3. Offering customized cloud services and proprietary intelligent tools delivered through an as-a-service model
- **4**. **SAP-certified employees** with expertise in cloud migrations
- 5. Extended partnerships across industry players who help deploy RISE with SAP and manage SAP applications

- 6. A track record of S/4HANA cloud advisory capabilities and deployment experience
- Service portfolios that include SAP S/4HANA cloud deployment and testing, with work done with at least one client in the last 12 months



Observations

SAP has developed a tailored offering for enterprises, navigating hyperscaler environments and the SAP Cloud. However, there remains ambiguity among businesses regarding the scope of this contract in relation to their specific SAP landscapes. Some enterprises have expressed concerns regarding cost savings in the long term and the extent of flexibility that can be leveraged by the RISE proposition to drive innovation. Despite these challenges, clients embarking on their digital transformation journey are considering the RISE proposition for their SAP workloads. These organizations evaluate various factors, including cost-effectiveness, security measures, performance optimization, migration ease, automation capabilities, infrastructure support, partner expertise and integration capabilities with SAP BTP. Notably, a significant portion of the upper midmarket segment is exploring the RISE proposition, with momentum building within the large enterprise segment as well.

Service providers are aligning closely with SAP's vision and the RISE with SAP initiative to accelerate customers' SAP S/4HANA migration journeys, particularly for those undertaking significant technical migrations and large-scale business transformations. These providers assist clients in overcoming challenges related to licensing models and complex multicomponent environments, while also simplifying governance, especially concerning cybersecurity, multicloud integration and diverse component management. They offer end-to-end services, spanning consultancy, transformation, hosting and operations within a single managed service contract.

From the 50 companies assessed for this study, 22 qualified for this quadrant, with 9 being Leaders and 1 Rising Star.

Capgemini

Capgemini provides comprehensive RISE with SAP offerings, which underpins its Digital Core, allowing enterprises to harness new digital technologies to evolve their business processes.

cognizant

Cognizant provides RISE with SAP offerings to enterprises across diverse industries. It is a key partner in SAP's Industry Cloud initiative and offers a range of SAP-based solutions, catering to clients' unique needs across industries.

Deloitte.

Deloitte and SAP have developed a joint reference architecture that streamlines the RISE with SAP journey by providing a comprehensive blueprint for core infrastructure, business processes, data-to-value, integration, extensibility and user experience.

EVIDEN

Eviden (an Atos Business) offers various cloud services specific to industries. These include CLM 2.0, an IoT solution for smart factories, and E-biscus, a tax and customs solution deployed on BTP for the public sector.

HCLTech

HCLTech, as a RISE with SAP partner, offers technical advisory, resale and implementation services. Leveraging the Elevate roadmap framework, HCLTech devises technical strategies for migrating enterprises to RISE with SAP

Infosys[®]

Infosys has around 5,700 cloud-certified resources globally to support clients' RISE with SAP transformation projects. Moreover, it maintains a robust partner ecosystem, collaborating closely with hyperscalers for joint assessments.

kyndryl

Kyndryl provides a comprehensive RISE with SAP program designed to assist enterprises in adopting, modernizing and migrating to SAP S/4HANA.



TECH mahindra

Tech Mahindra provides customized industry solutions to enterprises, supported by RISE with SAP, facilitating smooth transitions into intelligent enterprises.



Wipro tackles the dual challenges of cost and innovation that clients encounter by harnessing the full potential of RISE with SAP. It offers business process intelligence with its value discovery framework, embedded services and tools with a pre-configured industry template.



PwC (Rising Star) understands clients' pain points and challenges across their cloud journey and guides them in adopting RISE with SAP proposition, ensuring smooth cloud transformation and realizing business benefits.





"With strong deployment and automation capabilities, Kyndryl has deep expertise in managing SAP solutions on cloud platforms. It offers RISE with SAP offerings across the entire value spectrum and continues to strengthen its partnership with SAP."

Akhila Harinarayan

Kyndryl

Overview

Kyndryl is headquartered in New York, U.S. It has more than 85,000 employees across 90 offices in 66 countries. In FY23, the company generated \$17.0 billion in revenue, with Principal Markets as its largest segment. Kyndryl offers end-toend SAP services, including consulting, modernizing, migrating, securing and managing critical business applications and data. Kyndryl's team brings deep expertise gathered over multiple years of experience in modernizing, migrating and managing ERP workloads. It offers RISE with SAP services and serves both large and midsize clients.

Strengths

A comprehensive program for RISE with

SAP: Kyndryl provides a comprehensive RISE with SAP program designed to assist enterprises in adopting, modernizing and migrating to SAP S/4HANA. Positioned strategically, the company facilitates migrations and transformations, system and data integrations, data insights and analytics, and application development for SAP clientele.

Value-added services for cloud journey:

Kyndryl provides value-added services, which include cloud management for both SAP and non-SAP applications, industry and business accelerators, and deep functional experience with SAP assets and processes. Kyndryl offers SAP Journey to Cloud, a roadmap for providing landscape

consolidation and leveraging SAP Intelligent Enterprise capabilities and platforms. Kyndryl also helps enterprises optimize the SAP license cost, reduce operational costs and improve the sustainability of the IT estate.

Partnership with SAP: Kyndryl collaborates with SAP to help enterprises achieve technology-driven transformational change for their complex SAP landscape. Its partnership with SAP includes participation in the PartnerEdge Program. Kyndryl offers various services across categories, including BTP and S/4HANA Cloud Private Edition. It also works with SAP to improve its RISE with SAP proposition for prospective clients.

Caution

Kyndryl has robust managed cloud capabilities and collaborates with SAP for ongoing engagements. The company should better highlight its established cloud capabilities, tools and accelerators that enhance its RISE with SAP deployments and the ability to handle complex projects globally.



Star of Excellence

A program, designed by ISG, to collect client feedback about providers' success in demonstrating the highest standards of client service excellence and customer centricity.

Customer Experience (CX) Insights

Source: ISG Star of Excellence™ research program, Insights till January 2024

In the ISG Star of Excellence™ research on enterprise customer experience (CX), clients have given feedback about their experience with service providers for their **SAP Ecosystem** services.

Based on the direct feedback of enterprise clients, below are the key highlights:

Client Business Role

- Most satisfied Sales/Marketing
- ▼ Least satisfied
 Human Resources

Region

- ▲ Most satisfied

 Australia/New Zealand
- ▼ Least satisfied

Industry

- ▲ Most satisfied

 Consumer Packaged Goods
- ▼ Least satisfied
 Oil and Gas

Industry Average CX Score



CX Score: 100 most satisfied, 0 least satisfied Total responses (N) = [565]

Most Important CX Pillar

Business Continuity and Flexibility

Service Delivery Models	Avg % of Work Done	
Onsite	52%	
Nearshore	20.7%	
Offshore	27.2%	



Appendix

Methodology & Team

The ISG Provider Lens 2024 – SAP Ecosystem study analyzes the relevant software vendors/ service providers in the global 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 March 2024, 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
- Leverage ISG's internal databases
 advisor knowledge & experience
 (wherever applicable)
- 5. Use of Star of Excellence CX-Data

- 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

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Akhila Harinarayan is Senior Lead Analyst and the lead author for ISG Provider Lens studies with a focus on Digital Business Transformation and SAP Services. She has more than 12 years of experience across research and consulting including provider strategy, enterprise strategy, industry roadmaps, point-of-view papers, service provider assessment across regions. She has strong expertise on strategy and transformation, digital insights, thought leadership, benchmarking, market assessments and go-to-market strategies.

She has authored many thought leadership papers, digital insight studies, devised go-to-market strategies across products/industries/regions, built frameworks and maturity models across industries for both enterprises, vendors and service providers.



Enterprise Context and Global Overview Analyst

Maharshi Pandya Research Specialist

Maharshi Pandya is a Research Specialist at ISG and is responsible for supporting and co-authoring ISG Provider Lens™ studies on SAP HANA Ecosystem & Next-Gen ADM Solutions and Services. He supports the lead analysts in the research process and authors the global summary report. Maharshi also develops content from an enterprise perspective and collaborates with advisors and enterprise clients on ad-hoc research assignments. Before this role, he has been associated with several syndicated and custom market research firms, in which he has worked on both,

secondary and primary interaction-centric research projects around market sizing & forecasting, competitive benchmarking, pricing analysis vendor profiles and market share analysis for several industry verticals such as information and communication technology, media & information services, and automotive. His area of expertise includes analytics, application development and maintenance, and enterprise resource planning.

Author & Editor Biographies



Study Sponsor

Aman Munglani Director and Principal Analyst

Aman Munglani leads the ecosystems and custom research practice for ISG. He brings over twenty years of expertise in emerging technologies and industry trends. His career is marked by significant contributions in guiding top executives from Global 2000 companies, offering strategic advice on digital transformation, start-up partnerships, driving innovation, and shaping technology strategies.

In his tenure exceeding twelve years at Gartner, Aman focused on providing CIOs and IT executives across Asia Pacific and Europe with insights on the practical implementation and advancement of new technologies, the evolution of infrastructure, and detailed vendor assessments.



IPL Product Owner

Jan Erik Aase
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Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor.

Now as a research director, principal analyst and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

About Our Company & Research

†SG 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.

İSG Research

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Founded in 2006, and based in Stamford, Conn., ISG employs 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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