

An abstract collage of skyscraper facades, primarily in shades of blue and teal, arranged in a geometric, overlapping pattern on the left side of the cover. The buildings are viewed from low angles, emphasizing their height.

**\*ISG** Provider Lens™

2022

SAP Ecosystem – 2022

imagine your future®

ISG (Information Services Group) (NASDAQ: III) is a leading global technology research and advisory firm. A trusted business partner to more than 800 clients, including 75 of the top 100 enterprises in the world, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; technology strategy and operations design; change management; market intelligence and technology research and analysis. Founded in 2006 and based in Stamford, Connecticut, ISG employs more than 1,300 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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# Definition

SAP has a strong partner network of 22,000 companies and has a significant impact on the IT market in terms of IT spending share. The ISG Provider Lens™ SAP Ecosystem study will identify the top partners that offer tailored and differentiated enterprise client services and deliver the best results.

SAP S/4HANA transformation projects require detailed planning and business participation. Client companies undergoing these projects will be required to refine their selection process and criteria to find the right partner for providing higher business value at a lower cost of transformation. For clients that are new to SAP ERP or are hesitant to upgrade to SAP S/4HANA, this study will provide a detailed description of the top trends and service providers in this domain. For clients that are planning for a system transformation, this study will help them understand the possibilities for brownfield SAP S/4HANA transformation and related accelerators specific for business functions. ISG has identified viable tools and frameworks for large SAP transformations and greenfield SAP S/4HANA implementations that are delivered in record time for midmarket clients. The right partner can support clients and allay fears arising from the end of support for legacy SAP ERP, which is due in 2027.

With SAP focusing on the RISE with SAP program, there has been consideration in the market for moving SAP workloads to the cloud. Many enterprises are exploring the right opportunity and possibility to understand the impact of moving their SAP workloads to a hybrid, public or private cloud. SAP has expanded its cloud approach to SAP Business Technology Platform (BTP). This can help to deliver innovation benefits through SAP BTP.

For clients that have adopted SAP S/4HANA, this study assesses managed service providers that can contribute to superior application performance, including higher stability, availability and security. In addition, service providers have recently incorporated AI and machine learning (ML) into application maintenance and operations to predict incidents and automate troubleshooting, ticketing processes and provisioning. This allows for increased scale, which can lower support costs. This study will identify service providers that effectively apply new technologies to support SAP S/4HANA and HANA databases.

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

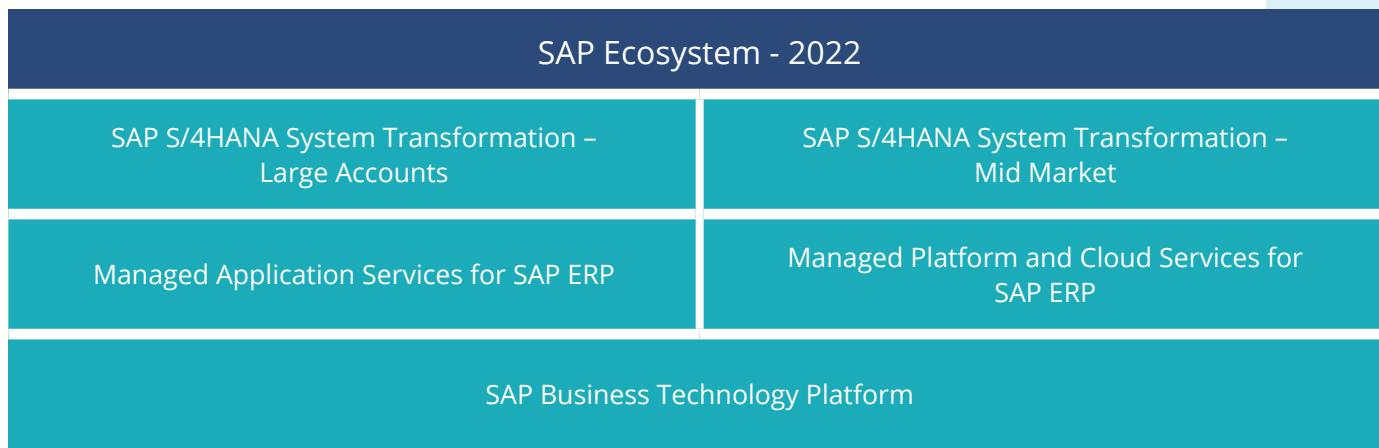
- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments
- A perspective on different markets, including Brazil, France, Germany, the Nordics, the U.K. and the U.S.

For IT providers and vendors, ISG studies serve as an important decision-making basis for positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients use information from these reports to evaluate their current vendor relationships and identify potential new engagements.

# Quadrants Research

This ISG Provider Lens™ quadrant study assesses service providers across the following five quadrants within SAP Ecosystem Services:

Simplified illustration



Source: ISG 2022

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

ISG assesses consulting and system integration service providers for developing, deploying and testing enterprise applications using SAP S/4HANA and SAP Business Suite with SAP Fiori as the user interface. The evaluation includes applications planning, designing and modeling, and considers the service provider's ability to manage the complexity and scale that are common characteristics of large enterprise clients. The participating companies are expected to have frameworks, tools and accelerators to support the needs of large system transformations.

### **Eligibility criteria:**

- Participant's service portfolio must include SAP S/4HANA development, integration and testing, with at least one implementation of S/4HANA or SAP Business Suite on HANA
- Demonstrate S/4HANA advisory capabilities and implementation experience in greenfield or brownfield deployments
- Leverage tools and accelerators to deliver at reduced time to market
- Provision to offer on-premises and cloud-based implementations
- Availability of SAP-certified consultants and practitioners across regions to support multi-country and multilanguage implementations
- Ability to handle complexity and scale through optimal onshore-offshore delivery models

## SAP S/4HANA System Transformation – Midmarket

This quadrant assesses the ability of consulting and system integration service providers to offer a rapid turnaround for SAP S/4HANA implementations for clients in the midmarket (companies with less than 5,000 SAP users or revenues of less than \$1 billion). Midmarket clients have fewer complex requirements and smaller project scale when compared with large enterprises.

The participating service providers can deploy SAP solutions using multiple methodologies, including SAP's packaged solutions for small and midsize businesses (SMBs). It 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. Providers of SAP-qualified partner packaged solutions are appreciated, but that certification is not required for inclusion in this quadrant.

### **Eligibility criteria:**

- Ability to leverage SAP accelerators and templates for agile SAP S/4HANA implementations
- Capability to deliver advisory and implementation services for midsize enterprise clients
- Availability of ready-to-use templates or solutions for specific microsegments
- Ability to offer onshore or nearshore delivery for local clients; offshore delivery is welcome but not restrictive for participation in this quadrant

## Managed Application Services for SAP ERP

This quadrant assesses a service provider's capability to offer managed services, including maintenance and support functions that comprise 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 include 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 (upon client authorization). Providers that have the center of expertise certification are rated more highly, but the certification is not a prerequisite for participating in this quadrant.

### Eligibility criteria:

- Ability to offer application optimization, application support and testing
- Services should include user management (adding and disabling user access), user profile management, performance reports, database services, security (access) and license compliance.
- 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
- Capability to stabilize applications and offer SAP Basis support
- Demonstrate expertise in incident management, variety of ticket system tools, SAP Solution Manager and additional application documentation solutions



## Managed Platform and Cloud Services for SAP ERP

This quadrant assesses service providers that manage hybrid cloud environments, security access, monitoring, system availability, interface performance, disaster recovery, backup, restoration, data compliance and other infrastructure and cloud operations. The initial technical barriers and client resistance to moving ERP to the cloud are slowly disappearing, enabling these providers to support clients in migrating from a private cloud to a public cloud in exceptional cases.

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

### Eligibility criteria:

- Ability to provision, manage and operate SAP in the cloud, including, but not limited to, hyperscale public clouds such as AWS, Azure and Google
- Demonstrate the capacity to support clients in their on-premises and hybrid cloud implementations of SAP systems and databases, providing infrastructure design support at a minimum
- Be a certified platform management or cloud partner with SAP S/4HANA specialization
- Certification on security, data privacy and IT processes; minimum accreditations include ISO 27001 (security) and IT Infrastructure Library (ITIL) incident management
- Have SAP-certified staff to support SAP technologies

## SAP Business Technology Platform (BTP) Services

This quadrant evaluates providers' capabilities to design, develop, change, integrate and support enterprise applications on SAP BTP with expertise on cloud deployments. These providers offer centers of excellence for co-innovation on intelligent technologies such as AI, machine learning and virtual reality. They provide innovation workshops, design thinking and other methods to drive innovation around SAP S/4HANA. Alternatively, the company may have developed use cases and frameworks to accelerate innovation or extend SAP S/4HANA functionality. These include ready-to-use applications for fraud prevention and analytics dashboards that were presented to ISG in previous studies.

SAP BTP services include platform-as-a-service and application development for data integration, mobile-enabled services, analytics and application development, and deployment across multicloud platforms.

### Eligibility criteria:

- Capability to deliver consulting and implementation services for SAP BTP
- Demonstrate expertise in cloud and implementing SAP BTP simultaneously
- Demonstrate expertise in AI, machine learning, blockchain and IoT technologies
- Demonstrate support for BTP applications with case studies
- Appropriate SAP certifications across SAP-certified applications, and certified engineers or partner-level certifications
- Leading BTP service partners ideally are expected to provide use case presentations through large events, earn SAP awards and gain client recognition

# Quadrants by Region

Quadrants	U.S.	U.K.	Nordics	Germany	Brazil	France
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	✓	✓	✓	✓	✓	✓
SAP Business Technology Platform (BTP) Services	✓	✓	✓	✓	✓	✓

\*Large Accounts and Midmarket quadrants are consolidated into a single SAP S/4HANA System Transformation quadrant in the Nordics and France.

# Archetype Report

In this report, ISG identifies and classifies the typical buyers within the SAP Ecosystem Services market. It comprises five major segments of buyers, which are as follows:

- **Transactional Users:** In this buying scenario, clients have SAP ERP Central Component (ECC) as an existing ERP solution and are seeking services to manage this application. They are reluctant to move to a different ERP, primarily due to complexity, lack of available investment, inability to manage the complex SAP environments and absence of skillsets.
- **Technical Transitioners and Cloud Adopters:** In this buying scenario, clients intend to implement SAP S/4HANA and have SAP ECC as their existing ERP offering. They want to implement SAP S/4HANA through Suites on HANA (SoH) or conversions (brownfield implementations) for both on-premises and cloud or implement SAP S/4HANA Cloud (as a service). They aim for stability in their business processes and IT application landscape.
- **Landscape Transformers:** In this buying scenario, clients want to realize the benefits of SAP S/4HANA and are ready to invest in an integrated ERP system as soon as possible. The enterprise leadership is prepared for an organizational process change and wants to work toward a new ERP system to realize the benefits of responsive applications and a rich user interface.
- **Digital Futurists:** In this buying scenario, clients want to bring in digital transformation using SAP S/4HANA and emerging technologies such as machine learning, AI and blockchain. They intend to move from the existing application architecture and leverage the power of these emerging technologies to provide value to their customers.

# Schedule

The research phase falls in the period between **February and May 2021**, during which the survey, evaluation, analysis and validation will take place. The results will be presented to the media in **August 2022**.

Milestones	Beginning	End
Launch	February 22, 2022	
Survey Phase	February 22, 2022	March 22, 2022
Sneak preview	June 2022	
Press release	August 2022	

Please click [this link](#) to view/download the ISG Provider Lens™ 2022 research agenda:

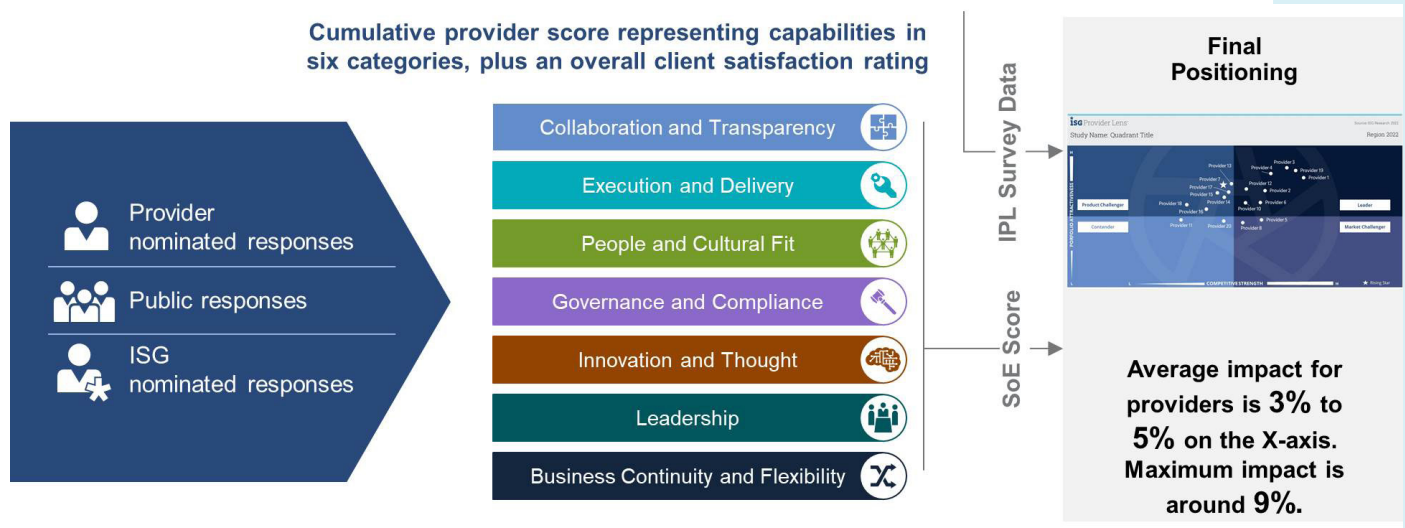
## Access to Online Portal

You can view/download the questionnaire from [here](#) using the credentials you have already created or refer to instructions provided in the invitation email to generate a new password. We look forward to your participation!

# ISG Star of Excellence™ – Call for nominations

The Star of Excellence is an independent recognition of excellent service delivery based on the concept of “Voice of the Customer.” The Star of Excellence is a program, designed by ISG, to collect client feedback about service providers’ success in demonstrating the highest standards of client service excellence and customer centricity.

The global survey is all about services that are associated with IPL studies. In consequence, all ISG Analysts will be continuously provided with information on the customer experience of all relevant service providers. This information comes on top of existing first-hand advisor feedback that IPL leverages in context of its practitioner-led consulting approach.



Providers are invited to [nominate](#) their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

It is our vision that the Star of Excellence will be recognized as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments.

To ensure your selected clients complete the feedback for your nominated engagement please use the Client nomination section on the Star of Excellence [website](#).

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply. Here is the email address: [Star@isg-one.com](mailto:Star@isg-one.com).

## Research Production Disclaimer:

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing work identified by the clients. This data is collected as part of the ISG FutureSource™ process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not to produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of the information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by lead analysts.

# Partial list of companies being invited for the survey

**Are you in the list or do you see your company as relevant provider that is missing in the list?** Then feel free to contact us to ensure your active participation in the research phase.

Bearing Point	GyanSys	Seidor
Bilot	HCL	Softtek
Birlasoft	Hexaware	Sonda
Camelot ITLab	IBM	Sopra Steria
CANCOM	Infosys	Stefanini
Capgemini	KMD	Suneratech
Centiq	KPMG	Syntax
CGI	LTi	Synvance
Claranet	Lumen	Syskoplan
Clarkston Consulting	Megawork	TCS
CODiLOG	Meta	TeamWork
Cognizant	Mindtree	Tech Mahindra
DATAGROUP	Minsait (Indra)	TietoEVERY
Delaware	Mphasis	TIVIT
Deloitte	Navisite	T-Systems
Devoteam	Neomore Consulting	TVH Consulting
DXC	Neoris	UST
Enfo Group	NNIT	VISEO
EPI-USE	NTT DATA	Wipro
essence IT	oXya	Yash Technologies
EY	PASàPAS	Zensar
Fujitsu	PWC	

# Your Contact for this study



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Research Analyst



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## Do you need any further information?

If you have any questions, please do not hesitate to contact us at [ISG.ProviderLens@isg-one.com](mailto:ISG.ProviderLens@isg-one.com).