ISG Provider Lens™

SAP Ecosystem

SAP S/4HANA System Transformation

A research report comparing SAP service providers

Customized report courtesy of:

Capgemini

QUADRANT REPORT | JULY 2022 | FRANCE

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Report Author: Richard Peynot

Global players lead the dynamic large account market, while midmarket enterprises value local niche players.

The times when French companies fully managed their own SAP applications are fading away, giving way to a proliferation of service contracts with managed service providers (MSPs). MSPs provide the expertise, resources and the ability to manage SAP applications. Even if a large number of companies wish to keep their ECC version for a few more years, the move to S4/HANA and migration to the cloud are becoming increasingly common.

The SAP services market is growing and expanding, primarily due to the impact of cloud migration and the need for expertise.

- **Greater acceptance of the cloud**. Since the COVID-19 pandemic, use of the cloud has been growing rapidly. CIOs — who faced difficulties to ensure the availability and security of their information systems when the crisis was at its peak — have finally acknowledged the capabilities of cloud service providers. SAP applications, which are often business-critical, are therefore migrating to the cloud infrastructure. The trend largely favors private clouds, but hybrid clouds are also finding increasing acceptance.
- **The resilience of business**, and therefore of its information systems, requires robust, secure and durable architectures that are also scalable. Therefore, companies are looking

Investments in SAP are helping to **accelerate** digital transformation.

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for reliable service providers with the expertise to lead their digital transformation projects, application maintenance and operations, with a high level of both protection and agility.

- **The increasing complexity and capabilities of SAP solutions** often overwhelm a company's internal teams. SAP S/4HANA, BTP and RISE with SAP provide sophisticated tools; therefore, customers are looking for providers that can support them in the optimal use of these solutions.

The market is characterized by the differences in large and midsize accounts and in global leaders and local players.

- **The gap between large accounts and midsize accounts is significant**. Large accounts with complex, large SAP systems and with out-of-sync updates and multiple interfaces are transforming these landscapes to more homogeneous, modern solutions, and are ready for cloud hosting. Contrarily, the midmarket is further behind, using ECC6, with no cloud culture and apprehensive about major changes.

- **Global leaders and local players have different approaches**. The major MSPs (U.S-, India- and Europe-based Leaders) have built development and migration frameworks (migration factories), tooling and automation, and ready-to-use vertical-specific solutions. In these factors, they have overtaken the small, local or Europe-focused MSPs; the latter recognize that they do not have the same resources, and therefore, focus on customer proximity and customer loyalty.

- **The gap between offerings and effective deployment**. It is legitimate to ask about the capacity of Indian companies established in France, with their limited resources, to effectively and fully implement these tools and frameworks. Clients expect a local presence for their transformation projects and regular interaction. Some India-based MSPs have understood this and are recruiting accordingly for French service centers.

- **French midsize enterprises prefer local pure play providers**. These players may be more expensive, and their methods and tools more limited, but proximity, ease of interaction and absence of language barriers are the key determinants for decision-making for midsize enterprises.

- **The managed application services market is complex**. Most customers require providers to support all their applications and rarely sign up for only SAP asset support. Also, companies looking to outsource support and migrate operations to the cloud primarily seek a single provider for both types of services.

- **Capgemini and Accenture dominate the overall market** across all SAP businesses. The India-based challengers are aiming for the third place in the market in France. They are too quick to overlook the role of Atos, but are showing ambitions that will be interesting to follow in the next two years.

Customers are hard to convince about the most modern solutions.

- **Customers are wary of the BTP technical platform, and even more of RISE with SAP**. They perceive them as a risk of being too closely tied to SAP. It will likely take two more years for these innovations to take off.

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- **Customers need to be convinced about accelerators and automation tools**. Customers perceive them as complex and theoretical, and are thereby wary of promises that they believe cannot be easily and completely fulfilled.

Recruitment difficulties are clouding this booming market.

- Client projects require large numbers of trained employees with the required SAP certifications. The market is now undergoing a real talent war. For a while, the pure players in France attracted the best technical profiles. But, at present, these players are noting that the Leaders are managing large projects, recruiting extensively and "drying up" the employment market.

Suppliers and companies place great importance on sustainable offerings and operations.

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Provider Positioning

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	SAP S/4HANA System Transformation	Managed Application Services for SAP ERP	Managed Platform and Cloud Services for SAP	SAP Business Technology Platform
Accenture	Leader	Leader	Leader	Leader
Atos	Leader	Leader	Leader	Leader
Augusta Reeves	Contender	Not In	Not In	Not In
Capgemini	Leader	Leader	Leader	Leader
CGI	Product Challenger	Product Challenger	Not In	Not In
CODiLOG	Contender	Market Challenger	Not In	Not In
Cognizant	Product Challenger	Product Challenger	Not In	Not In
Delaware	Product Challenger	Not In	Not In	Not In
Deloitte	Product Challenger	Not In	Not In	Not In
DXC Technology	Leader	Leader	Contender	Product Challenger

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Provider Positioning

	SAP S/4HANA System Transformation	Managed Application Services for SAP ERP	Managed Platform and Cloud Services for SAP	SAP Business Technology Platform
EY	Product Challenger	Not In	Not In	Not In
IBM	Product Challenger	Leader	Not In	Product Challenger
Kyndryl	Not In	Not In	Contender	Not In
Inetum	Product Challenger	Contender	Not In	Contender
Infosys	Product Challenger	Product Challenger	Product Challenger	Product Challenger
NTT DATA	Product Challenger	Product Challenger	Contender	Not In
Orange Business Services	Not In	Not In	Contender	Not In
oXya	Not In	Not In	Leader	Not In
PASàPAS	Contender	Rising Star ★	Market Challenger	Not In
PwC	Product Challenger	Not In	Not In	Not In

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Provider Positioning

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	SAP S/4HANA System Transformation	Managed Application Services for SAP ERP	Managed Platform and Cloud Services for SAP	SAP Business Technology Platform
Sopra Steria	Product Challenger	Market Challenger	Contender	Market Challenger
Synvance	Contender	Not In	Not In	Not In
TCS	Leader	Leader	Contender	Product Challenger
TeamWork	Contender	Not In	Not In	Not In
Tech Mahindra	Product Challenger	Product Challenger	Product Challenger	Product Challenger
T-systems	Rising Star ★	Not In	Leader	Rising Star ★
TVH Consulting	Contender	Contender	Not In	Not In
VISEO	Contender	Not In	Not In	Not In
Wipro	Product Challenger	Product Challenger	Product Challenger	Rising Star ★

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This study reflects ISG's view of the **major trends** in the **SAP ecosystem** in France in 2022

SAP S/4HANA System Transformation

Managed Application Services for SAP ERP

Managed Platform and Cloud Services for SAP

SAP Business Technology Platform

Simplified Illustration Source: ISG 2022

Definition

SAP continues to be a major player in the business software market. Its ecosystem includes approximately 390,000 customers worldwide and more than 7,500 partners (technology partners and resellers). Among the successive evolutions of the SAP ERP, SAP S/4HANA is undoubtedly the largest, both in the size of the technological leap and the number of installed assets to migrate.

This study identifies the SAP partners that offer the best SAP support, migration, maintenance, and SAP asset management services. The study qualifies service providers based on a wide range of criteria including their experience and credentials, resources and skill level, tools and methods, service centers, and their level of partnership with SAP.

The study is also an opportunity to measure the market with regard to migration to S4/HANA, cloud solutions, and the level of adoption of BTP technology.

SAP S/4HANA transformation projects require a preliminary study and detailed planning, as well as the involvement of companies to work alongside service providers , however expert they may be. Enterprise customers embarking on these projects must refine their selection criteria to find the right partner to deliver greater digital transformation value at lower cost. For customers new to SAP ERP or that are hesitant to move to SAP S/4HANA, this study provides a detailed description of key trends and service providers in this area. For customers planning an SAP ERP transformation, this study will help them understand the opportunities and benefits of moving to SAP S/4HANA. The managed services providers (MSPs) best qualified

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for this type of project can help customers and allay their fears caused by the end of support for legacy SAP ERPs, scheduled for 2027.

For customers that have already adopted SAP S/4HANA, this study evaluates service providers that can improve application performance, including increased stability, availability, and security. Service providers are integrating AI and machine learning for application maintenance and operations to predict events and automate troubleshooting, ticketing processes, and provisioning. This widens the range of possibilities and can reduce support costs.

SAP is now promoting its RISE with SAP solution and its BTP technology platform. These are emerging markets that most customers still don't fully trust. The study evaluates MSPs that have already implemented BTP and have accumulated expertise.

In the meantime, many companies are exploring the opportunity and feasibility of understanding the impact of moving their SAP applications to a hybrid cloud, public or private. SAP has extended its approach to the cloud to SAP Business Technology Platform (BTP), which can lead to innovation benefits.

The studies conducted by ISG provide information on the relative positioning of IT service providers and software vendors.

ISG advisors and enterprise clients use information from these reports to evaluate their vendor relationships and identify potential new engagements.

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Scope of the Report

This study considers the top service providers certified by SAP to support clients in ERP and HANA products. These service providers are qualified in a number of quadrants defining service providers in the SAP HANA ecosystem.

The SAP S/4HANA Systems Transformation quadrant evaluates service providers in consulting and systems integration to develop, deploy, and test enterprise applications using SAP S/4HANA and SAP Business Suite, as well as to design and drive large transformation projects (ERP to HANA, HANA to S4/HANA and then S4/HANA cloud). Participating companies are expected to have the models, tools, and accelerators necessary to meet the needs of large system transformations.

The Managed Application Services for SAP ERP quadrant evaluates a service provider's ability to offer maintenance and support services including monitoring, remote support, and centralized application management for SAP S/4HANA and legacy SAP Business Suites applications such as ECC 6.0.

The Managed Cloud Services for SAP HANA quadrant evaluates service providers that manage hybrid cloud environments, security, monitoring, system availability, performance, disaster recovery, backup, recovery, data compliance, and other infrastructure and cloud operations. Initial technical barriers and customer resistance to migrating ERP to the cloud are gradually disappearing, allowing these vendors to support customers in their migration to a private cloud, and sometimes to a public cloud.

The SAP Business Technology Platform quadrant evaluates vendors' capabilities to design, develop, modify, integrate, and support business applications on the SAP Business Technology Platform (BTP). These vendors offer labs to allow customers to experiment with these emerging technologies. They offer innovation workshops and methods to stimulate innovation (such as design thinking) around SAP S/4HANA.

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.

Provider Classifications

The provider position reflects its suitability for a defined market segment (quadrant). Without further additions, the position always applies to all company size classes and industries. If the requirements of companies for IT services differ and the range of IT providers operating in the local market is sufficiently broad, further differentiation is made according to the target group of 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:

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- **Mid-market:** Companies with 100 - 4,999 employees or with revenues between $20 million and $999 million, headquartered in the country concerned. They are usually private companies.
- **Large Accounts:** Multinational companies with 5,000 or more employees or revenue above $1 billion, with activities worldwide and globally distributed decision-making structures.

In the case of the SAP Ecosystem study on France, we have not differentiated between mid-market and large accounts, because there are too few significant players, unlike that seen in other countries.

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 quadrant may include one or more service providers that ISG believes have strong potential to move into the Leader quadrant, and these providers may be classified as Rising Stars.

Number of providers in each quadrant: ISG evaluates and positions the most relevant providers and limits the number to 25 per quadrant, with some exceptions.

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Provider Classifications: Quadrant Key

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

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

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

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

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

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

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SAP S/4HANA System Transformation

Who Should Read This

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

In France, S4/HANA transformation is gaining traction as enterprises are looking forward to making their business processes more agile. They are seeking service providers with a local presence and a proven track record in S4/HANA transformation. They also want providers that have readily available tools/ accelerators and skilled resources.

In the complex environment with multiple deployment models, enterprises are looking for service providers that can be partners. Service providers with a proven track record and related business cases, with onshore delivery capabilities, are more likely to succeed in France. Having partnerships with SAP and SAP-certified resources will be an added advantage for service providers.

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

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

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

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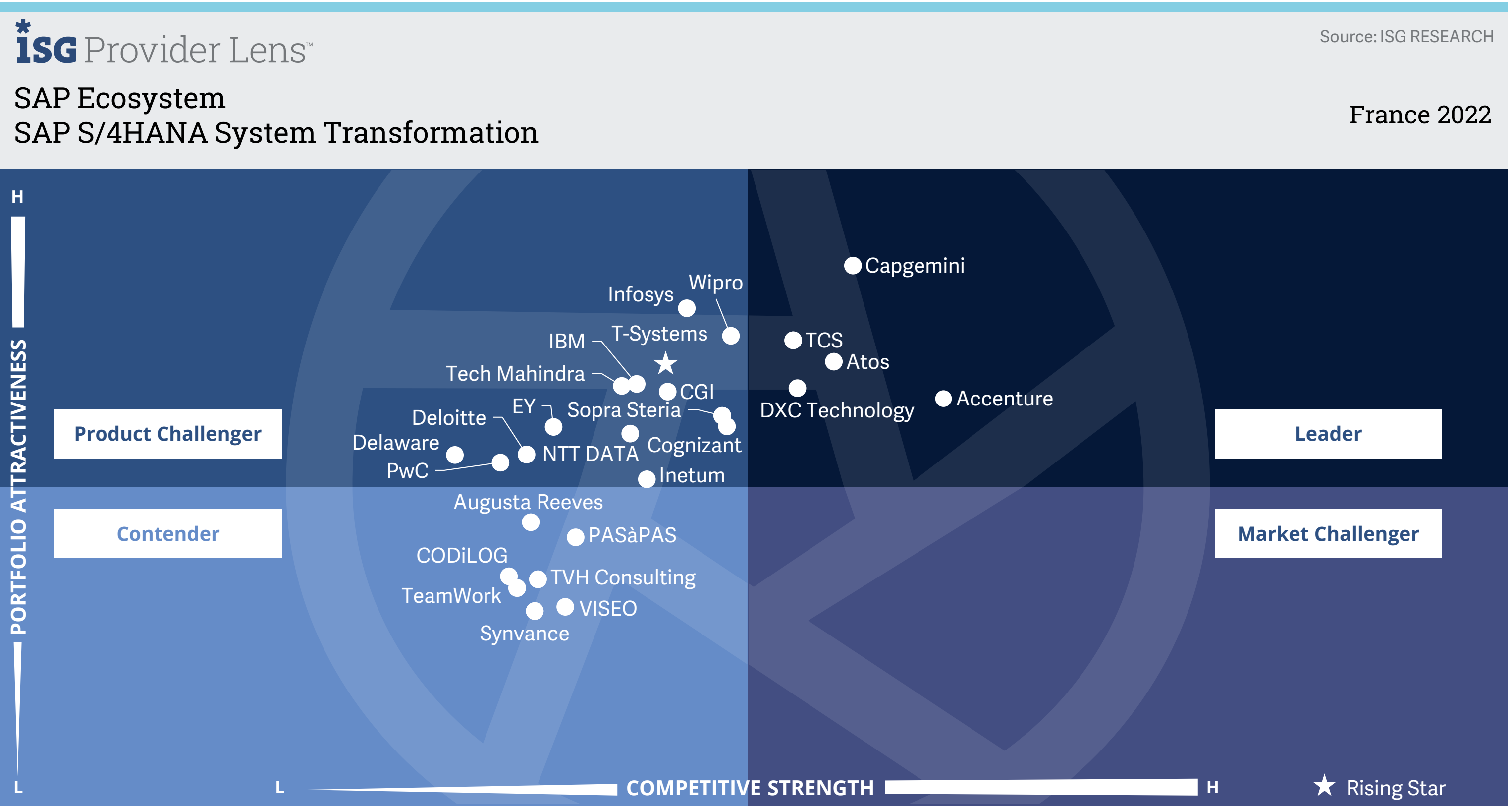

Even if SAP maintains old ERP versions after 2027, **migration to S4/HANA and the cloud is unavoidable. Global leaders** have developed tools and expertise for **large transformations**, with **niche players** addressing the needs of the **midmarket**.

Richard Peynot

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Definition

ISG assesses consulting and system integration service providers for developing, deploying, and testing enterprise applications using SAP S/4HANA and SAP Business Suite. The assessment covers the planning, design, and modeling of applications. It also considers the ability of the service provider to manage both the complexity and the size of the projects. Participating companies are expected to have a framework, tools and accelerators to address transformation needs, whether for large systems (large accounts) or smaller projects (mid-market).

Eligibility Criteria

1. 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
2. Demonstrate S/4HANA **consulting capabilities and implementation experience in so-called "greenfield" (new project) or "brownfield" (transformation of existing SAP assets) deployments**
3. Ability to **leverage SAP accelerators and templates** for agile SAP S/4HANA implementations
4. Provision to **offer both on-premises and cloud-based implementations**
5. Availability of **SAP-certified consultants and practitioners across regions** to support multi-country and multilanguage implementations
6. Ability to **manage project complexity and size** through optimal onshore-offshore models

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Observations

Despite SAP's announcement that it will stop maintaining its Business Suite 7/ERP ECC 6.0 solution in 2025 (an extension now announced to 2027), many French companies still wish to retain their old versions. Others have understood the value of the S/4HANA solution and realize that waiting until the 2027 deadline would involve several risks. Many transformation projects are underway in France, although the ROI of a migration to S/4HANA remains difficult to calculate.

When choosing a service provider for an SAP transformation project, customers ask themselves the following question: "Since S/4HANA tends to standardize processes, how will our specific customization needs be considered?" Clients are looking for service providers that can help them meet these challenges. This quadrant includes providers that had acquired expertise in S4/HANA, and developed related migration methods and tools.

Leaders have been identified by the size of their portfolios as well as their large number of employees. This should not obscure the capabilities of small players that have adapted well to the needs of the midmarket, and therefore to projects of small size and low complexity. The Rising Star identified is a world leader, but is still modest and growing in France.

Global leaders such as Infosys, CGI, Cognizant and Wipro are unable to compete here because of their low local revenues and limited workforces. Moreover, their local teams rarely implement the range of their global tooling, automation and frameworks.

Highly specialized French niche players such as Pasàpas, Codilog, Viseo and Sopra-Steria primarily serve the midmarket with contract sizes not as big as the multinationals. Although they are well suited to this target audience, their tooling is not as advanced as the world leaders.

Of the 27 providers assessed for this study, 26 have qualified for this quadrant, with five being Leaders and one a Rising Star

accenture

Accenture has extensive resources and offshore capabilities and offers robust transformations that include advanced SAP and cloud solutions. Clients benefit from out-of-the-box applications that integrate with SAP S/4HANA, including predictive analytics, real-time dashboards, data lakes and other solutions. Accenture is well positioned for large multinational projects.

Atos

Atos has long been an SAP partner with a strong presence in the manufacturing industry. Atos combines Industry 4.0, IoT and data analytics to modernize the ERP platforms of its clients, introducing innovation to transform business performance. Atos can support customers on large projects. The double competence application management-platform management is an asset, suitable for large and complex projects.

Capgemini

Capgemini has a robust SAP delivery team, with more SAP certifications than most of its competitors. It has invested in tools and models, improving its competitiveness. One of the largest SAP transformation providers in France, it supplements its capacity with offshore delivery centers. Its competence in both application managements and platform management is an asset, suitable for large and complex projects.

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DXC Technology

DXC Technology combines SAP and cloud experts from CSC and HPE, after the merger of both companies in 2019, making it one of the most relevant global SAP partners. It benefits from the expertise of global teams. In France, DXC Technology is focused on applications. It offers a comprehensive set of tools for large-scale transformations and has experience in France.

TATA CONSULTANCY SERVICES

Tata Consultancy Services (TCS) is one of the largest IT service organizations in the world. It is an India-based company and well established in France, following the acquisition of local companies. It serves more than 80 of the largest 100 France-based enterprises. Recent portfolio enhancements and leading partnerships with SAP, as well as leading hyperscalers make it a suitable partner for large SAP S/4HANA migrations to the cloud.

T-Systems

T-Systems, a Rising Star and a long-time SAP partner, has the tools and methods required for SAP transformation. The local team in France is small but has good experience. T-Systems is actively seeking large accounts and customers in the upper midmarket that have been slow to migrate to S4/HANA, making it a potential Leader in the coming years.

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Capgemini

Leader

"Capgemini is a leading IT services company based in France and supporting SAP transformations in both the public and private sectors."

Richard Peynot

Overview

Capgemini is an SAP Platinum Partner. The company is one of the world leaders in digital services, with 325,000 employees in 50 countries; revenues of €18 billion in 2021, including approximately €3.4 billion in France; and growth of over 14 percent in 2021. Capgemini pursues its global growth strategy, with the largest acquisition being Altran (56,000 employees) in 2019.

Strengths

Global capacity to support large enterprises: Strategy and transformation consulting accounts for about 7 percent of Capgemini's total revenue. The Capgemini Cloud Platform (CCP) is at the core of its cloud offerings. Capgemini uses a set of services and accelerators to migrate, operate and innovate in the cloud. It is recognized as one of the largest and most experienced SAP integration providers, with 20,000 SAP practitioners and 1,300 clients worldwide. Altran's contribution is significant in this area.

Frameworks and tools to integrate IT solutions and services: Capgemini has developed extensive tools and methods to automate and secure migrations to the cloud. Its dual experience in application management and infrastructure management provides it with the skills to transformation complex information systems, integrating not only SAP but also other products.

Caution

Capgemini focuses on full outsourcing deals, where it can leverage its integrated IT service management toolset. The company may not be interested transactional, project-based SAP S/4HANA transformations that do not involve multi-year managed service deals.

Capgemini focuses mainly on large accounts.

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Appendix

The ISG Provider Lens™ 2022 – SAP Ecosystem analyzes the relevant software vendors/service providers in France, 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 May 2022, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

All revenue references are in U.S. dollars ($US) unless noted.

The study was divided into the following steps:

1. Definition of SAP Ecosystem market
2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & use cases
4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)
5. Use of Star of Excellence CX-Data
6. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
7. Use of the following key evaluation criteria:
   * Strategy & vision
   * Tech Innovation
   * Brand awareness and presence in the market
   * Sales and partner landscape
   * Breadth and depth of portfolio of services offered
   * CX and Recommendation

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Lead Author

Richard Peynot
Senior Analyst

Richard Peynot brings 40 years of experience spanning development, large projects management, technology and business intelligence, IT market research and IT sourcing consulting. He founded the consulting firm ACSEITIS in 2008. Since then, he advises companies on sourcing strategy, RFI/RFP, service provider selection, negotiation and contracting, contract audit and restructuring.

On behalf of ISG he conducts studies within the framework of ISG Provider Lens™. Richard Peynot holds graduate degrees in computer sciences, marketing, general management and business intelligence.

Enterprise Context and Global Overview Analyst

Keanu Ghrab
Research Analyst

Keanu Ghrab is a research analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on ADM Solutions and Services, Salesforce Ecosystem, ServiceNow Ecosystem, SAP Ecosystem and Future of Work (Workplace). He supports the lead analysts in the research process and authors the global summary report. Keanu also develops content from an enterprise perspective and collaborates with advisors and enterprise clients on ad-hoc research assignments as well. Keanu has helmed his current role since 2021. Prior to this role, he has worked in the BPO sphere of customer support, focusing on design and implementation of improved customer experience. Prior to that he gained professional experience whilst a student, through international jobs in Commodities Trade Management and IT Recruitment. His area of expertise lies across various technologies like IoT, Artificial Intelligence, VR/AR and blockchain and includes market, company, and competitive analysis.

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IPL Product Owner

Jan Erik Aase
Partner and Global Head – ISG Provider Lens™

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor. Now as a research director, principal analyst and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

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About Our Company & Research

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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ISG

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JULY 2022

REPORT: SAP ECOSYSTEM

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