

SAP Ecosystem

A research report comparing provider strengths,
challenges and competitive differentiators

Customized report courtesy of:



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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 cutting-edge 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



Executive Summary

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 AI and BTP remains exploratory among diverse stakeholders within the SAP market. Enterprises have yet to fully grasp the advantages of combining BTP and AI. 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 GenAI capabilities. They are spearheading the development of a GenAI platform that offers a pragmatic and secure avenue for businesses to fully capitalize on the advantages of GenAI. 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 AI. 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 AI 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 time-saving 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 AI-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 trade-offs 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.



Executive Summary

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

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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

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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

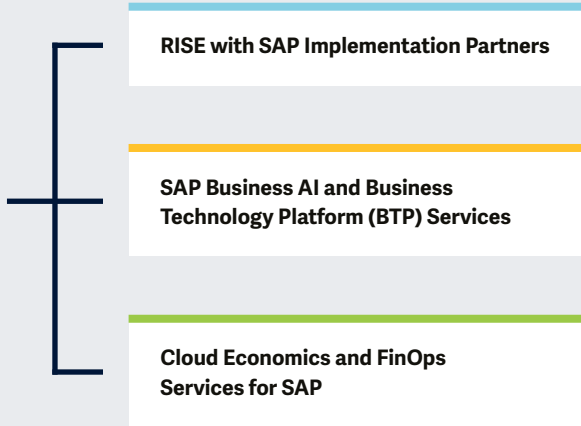
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| | RISE with SAP Implementation Partners | SAP Business AI and Business Technology Platform (BTP) Services | Cloud Economics and FinOps Services for SAP |
|----------------------|---------------------------------------|---|---|
| Protera Technologies | 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 |



Key focus areas for SAP Ecosystem 2024.

Simplified Illustration; Source: ISG 2024



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.



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).





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.

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.

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.

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.





RISE with SAP Implementation Partners

RISE with SAP Implementation Partners

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.



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

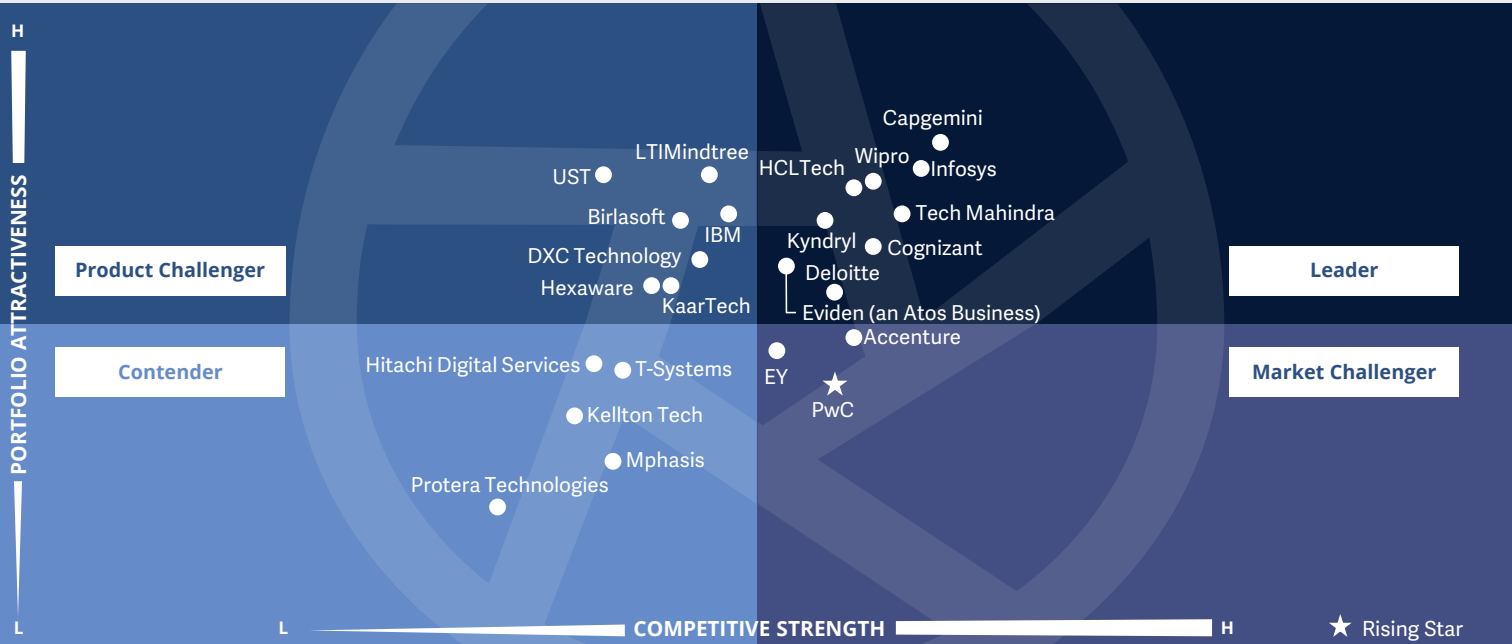


Chief information officers (CIOs) should read this report to understand providers' relative positioning regarding SLA and licensing capabilities to effectively procure services.



SAP Ecosystem
RISE with SAP Implementation Partners

Global 2024



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



RISE with SAP Implementation Partners

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 RISE-certified 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

1. **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**
7. Service portfolios that include SAP S/4HANA cloud **deployment and testing**, with work done with at least one client in the last 12 months



RISE with SAP Implementation Partners

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



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 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.



RISE with SAP Implementation Partners



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.





“Cognizant provides end-to-end support by leveraging its LEAP framework for RISE with SAP, continually enhancing its RISE capabilities to support enterprises in their transformation journey and help them achieve tangible business outcomes.”

Akhila Harinarayan

Cognizant

Overview

Cognizant is headquartered in New Jersey, U.S. It has more than 347,700 employees across 147 offices in 50 countries. In FY23, the company generated \$19.4 billion in revenue, with Financial Services as its largest segment. Cognizant takes a holistic approach to S/4HANA transformation and offers industry best practices and cloud-enabled solutions to accelerate enterprises' transformation journey. It has partnered with SAP Signavio to co-develop BPI offerings and transform clients' business processes, delivering maximum value.

Strengths

RISE with SAP: Cognizant's LEAP framework, fueled by the Cognizant® Intelligent Enterprise Platform (CIEP), facilitates technology modernization focused on delivering value, reimagining business processes and enhancing CX. This framework unfolds in four stages: learning about possibilities, enabling transformation, accelerating the journey, and performing and transforming, each designed to guide businesses through their transformation journey effectively.

Focus on multiple industries:

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 the

unique needs of clients across industries. These include LifeCare for the life sciences, MfgXpress for discrete manufacturing and ChemXpress for the chemical industry.

Delivering business outcomes: Cognizant has deep expertise in executing the technical migration of SAP landscapes from on-premises to the cloud with RISE with SAP. This has enabled enterprises to realize benefits, including optimized infrastructure, improved scalability and security, and cost savings in infrastructure expenditures. For one of the clients, Cognizant has delivered an end-to-end, best-practice-validated environment within five and a half months, adhering to regulations and compliance.

Caution

Cognizant should provide flexibility to its potential customers with an outcome-based pricing model to win more deals, as its competitors have shown a significant share of engagements for this pricing model.





SAP Business AI and Business Technology Platform (BTP) Services

SAP Business AI and Business Technology Platform (BTP) Services

Who Should Read This Section

This quadrant is relevant to enterprises across industries worldwide evaluating service providers that offer SAP Business AI and Business Technology Platform (BTP) services.

In the rapidly evolving business landscape, enterprises worldwide are increasingly turning to service providers for guidance in unlocking the full potential of SAP Business AI and BTP services. These enterprises recognize the need for innovative cloud solutions and the seamless integration of BTP-based solutions with generative AI (GenAI) capabilities to stay ahead in their respective industries. Service providers play a crucial role in developing these solutions and educating enterprises on the large number of benefits they offer. From accelerating project delivery to minimizing technical debt, these solutions promise increased productivity and agility while maximizing strategic advantages.

Enterprises are eager to invest in BTP-based solutions, knowing they can rely on service providers to tailor them to their specific business use cases across diverse sectors. As the digital transformation journey becomes increasingly complex, enterprises seek partners who can navigate them through the integration of SAP BTP and Business AI, ensuring enhanced agility and productivity every step of the way.



Research and innovation professionals

should read this report to understand the providers' capability to innovate with the help of new technologies such as AI and ML, and SAP BTP capabilities.



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



Line of business (LOB) and industry leaders

should read this report to understand service providers' relative positioning to effectively procure S/4HANA services and ensure ROI.

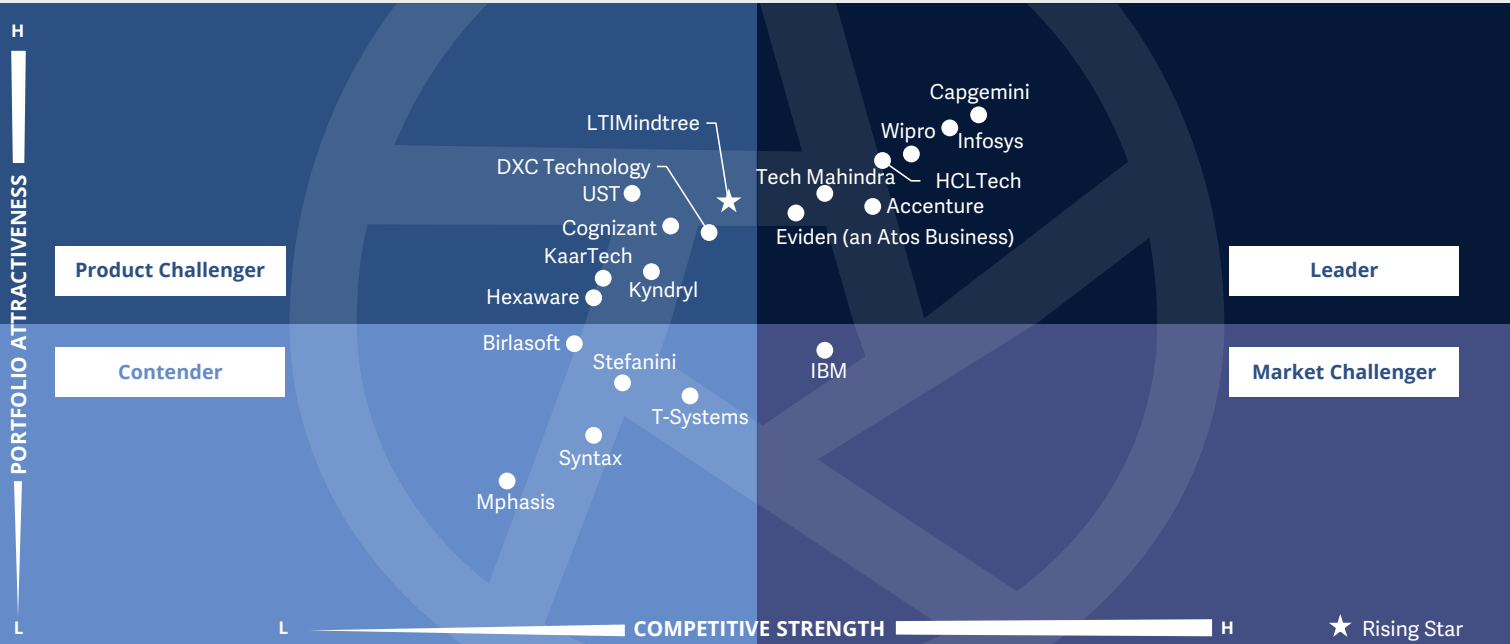


Product and strategy professionals should read this report to understand the benefits and capabilities introduced by the providers offering Business AI and BTP services.



SAP Ecosystem
SAP Business AI and Business Technology Platform (BTP) Services

Global 2024



This quadrant assesses service providers who have capabilities to strategize, develop and integrate SAP BTP solutions with SAP Business AI to deliver digital core applications for their global clients.

Akhila Harinarayan



SAP Business AI and Business Technology Platform (BTP) Services

Definition

SAP Business AI helps enterprises use AI advancements to deliver business impact. It is built into SAP applications, helps improve business-critical processes and has 15 Business AI capabilities, some of which are powered by GenAI. Some SAP Business AI use cases include strengthening HCM, improving supply chain resilience, increasing efficiency and compliance in procurement, reducing risks and controlling finance costs. SAP BTP enables SAP and partner applications to leverage the GenAI capabilities provided by SAP. GenAI capabilities in SAP BTP help simplify administrative tasks and improve the developer experience, integrations, process automation, analytics and planning activities.

This quadrant assesses service providers who offer these capabilities for their clients. These service providers have the capabilities to strategize, develop and integrate SAP BTP solutions with SAP Business AI to deliver digital core applications for their clients.

They have built ready-to-deploy solutions and have developed expertise across industries on the nuances involved in deploying SAP BTP with Business AI. The providers are assessed based on their portfolio readiness, CoEs and client benefits. The firms in this quadrant would have typically developed expertise and trained personnel specifically for SAP BTP. These providers offer their experience and expertise to build applications faster using a reference architecture aligned to industry portfolios.

Eligibility Criteria

1. Capability to deliver **consulting and implementation** services for SAP BTP with SAP Business AI
2. **Demonstrating expertise** in strategy, deployment and implementation of SAP BTP and Business AI
3. Highlighting **use cases and ready-to-deploy solutions** using SAP Business AI
4. Providing engineers with **SAP certifications** or partner-level certifications across SAP applications
5. Leading BTP service partners are ideally expected to provide use **case presentations through large events**, earn SAP awards and gain client recognition



SAP Business AI and Business Technology Platform (BTP) Services

Observations

SAP's Business Technology Platform (BTP) has evolved into a versatile, multicloud solution heralded by SAP as a vital tool for seamlessly integrating applications within the enterprise IT landscape. While its predecessor primarily focused on driving digitalization through integration, the current iteration of BTP takes on a broader role, facilitating a clean core approach toward SAP S/4HANA migration. Moreover, the integration of AI capabilities into BTP, alongside the development of prebuilt, ready-to-use business cases, has solidified BTP's position as an attractive option for various purposes: firstly, for addressing enterprise-level challenges through the amalgamation of AI and BTP functionalities; secondly, as a platform supporting both digital core and clean core strategies for SAP S/4HANA transformation initiatives; thirdly, for seamlessly integrating applications within the enterprise IT ecosystem using cloud infrastructure; and finally, for the creation of tools and accelerators on BTP aimed at enhancing application management

for clients. This multi-faceted approach underscores BTP's relevance and appeal in today's rapidly evolving digital landscape.

Using SAP Business AI and BTP is at an exploratory stage among various stakeholders in the SAP market. Enterprises are not entirely privy to the advantages of using BTP and AI. In most cases, the use of BTP is embedded with the use of RISE or through the digital journey of SAP S/4HANA transformation (or the greenfield transformation). The providers have been at the forefront of experimenting with SAP BTP and have built multiple enterprise use cases to deliver these applications to their clients.

From the 50 companies assessed for this study, 20 qualified for this quadrant, with 7 being Leaders and 1 Rising Star.

accenture

Accenture and SAP work together to integrate GenAI into core business processes, enhancing SAP technology investments and accelerating time to value with SAP S/4HANA® Cloud.

Capgemini

Capgemini helps enterprises emphasize agility, innovation and scalability through a cloud-native approach. With a focus on SAP BTP, the provider facilitates S/4HANA transformations and clean core principles, enabling clients to adapt quickly to changing business requirements.

EVIDEN

Eviden (an Atos Business) introduces GenAI solutions for business automation, leveraging Azure APIs and collaborating with SAP for co-innovation. Eviden's suite accelerates processes across various domains, from inventory optimization to automated test script generation.

HCLTech

HCLTech's strategy integrates SAP BTP and Business AI into transformation and support services. The firm's new business focuses on value-driven transformations, leveraging SAP technologies such as RISE with SAP.

Infosys

Infosys offers a wide range of services, including SAP Standard Scenario Services for quick AI adoption, MLOps setup, custom scenario development, BTP platform consulting, clean core and line of business (LOB) extensions, and integration services.

TECH mahindra

Tech Mahindra has developed more than 60 solutions and specializes in digital transformation, BTP implementations and solutions for intelligent technologies. It invests in emerging platforms such as SAP Data Sphere and GenAI, driving innovation in enterprise solutions.



SAP Business AI and Business Technology Platform (BTP) Services



Wipro's SAP Business AI and BTP offerings provide comprehensive services tailored to leverage the capabilities of SAP BTP. Its engagement modes encompass consulting, innovative PoC and end-to-end build services.



LTIMindtree's (Rising Star) proficiency in GenAI and SAP BTP enables it to develop and offer solutions for the SAP ecosystem. The company addresses diverse industry challenges by integrating GenAI capabilities and utilizing SAP BTP, enhancing UX and driving sustainable value creation.





Cloud Economics and FinOps Services for SAP

Cloud Economics and FinOps Services for SAP

Who Should Read This Section

This quadrant is relevant to enterprises across industries worldwide evaluating service providers that offer cloud economics and FinOps services for SAP.

Enterprises face challenges in optimizing cloud costs and managing SAP workloads effectively. As digital transformation drives increased cloud adoption, enterprises seek meticulous planning to ensure optimal technology architecture for cloud infrastructure. Cost optimization is imperative, particularly for SAP applications due to their complexity. Cloud economics and FinOps practices have gained traction in addressing these challenges. These practices focus on understanding costs, allocating resources efficiently and optimizing spending. Service providers play a crucial role in assisting enterprises with

assessment, guidance and optimization tools tailored to SAP environments. The providers also offer predictive models, best practices and FinOps-as-a-Service solutions to enterprises, enabling continuous cost optimization.

These providers offer platform flexibility, multicloud integration and centralized service management visibility, which help enterprises to streamline operations and enhance efficiency. With their expertise and tailored solutions, service providers aid enterprises in navigating the complexities of cloud economics and FinOps, ensuring successful cloud adoption and cost-effective SAP operations.



Marketing and sales professionals should read this report to gain insights into service providers' relative positioning and capabilities to effectively harness cloud economics and FinOps services.



Technology professionals should read this report to understand how service providers can help integrate FinOps services into the SAP landscape to gain a competitive edge in the market.



Procurement and finance leaders should read this report to understand providers' relative positioning to effectively procure cloud economics and FinOps services and ensure ROI.

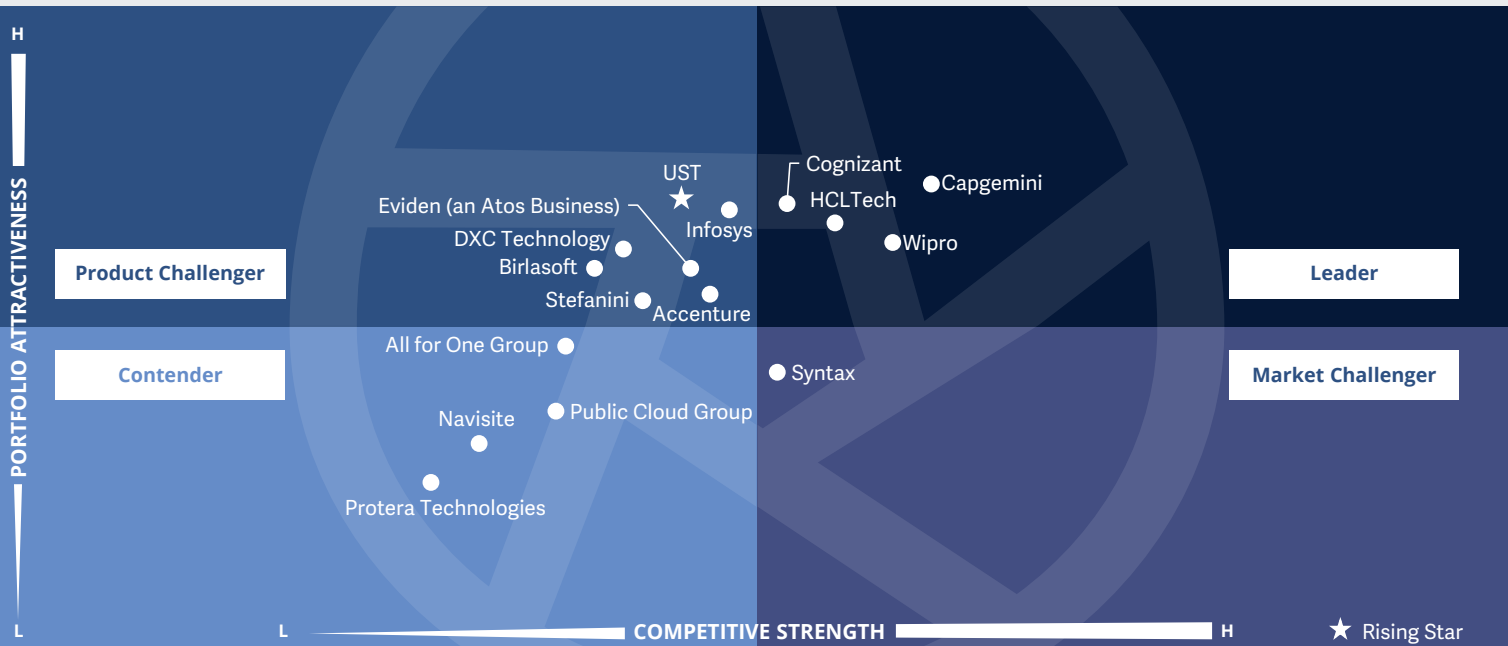


Product managers should read this report to identify the related service providers and understand how they offer cloud economics and FinOps services, which can bring down both CapEx and OpEx.



SAP Ecosystem
Cloud Economics and FinOps Services for SAP

Global 2024



The providers in this quadrant also **assist businesses in identifying challenges and opportunities** across their transformation journey and offer approaches to **maximize their SAP investments within cloud environments.**

Akhila Harinarayan



Cloud Economics and FinOps Services for SAP

Definition

Cloud-based transformations have increased adoption within the SAP ecosystem. RISE with SAP has enabled enterprises to adopt cloud for SAP applications, and an increasing number of firms are opting for cloud services. With the benefits the cloud brings, there is also an aspect of costs involved in moving workloads to the cloud and managing cloud costs for the SAP workloads. To optimize the cost, enterprises partner with service providers to manage cloud deployments and governance costs. This quadrant focuses on service providers who help clients with cloud economics and implement FinOps strategies for cost optimizations. These providers offer insights on potential spending and savings for the enterprise's cloud environments hosting SAP workloads. The providers help enterprises assess the cost implications of moving SAP workloads on hyperscalers and offer tools to optimize and manage cloud costs throughout the application lifecycle. These providers leverage automation and AI to recommend optimal approaches for cost management.

The providers in this quadrant also assist businesses in identifying challenges and opportunities across their transformation journey and offer approaches to maximize their SAP investments within cloud environments. These providers can guide their clients in financial decisions for planning, deploying and running SAP workloads on cloud. These providers offer processes, tools and best practices that enhance the client organization's capacity to comprehend cloud costs and make trade-offs. The providers help clients to anticipate, control, monitor and optimize the costs associated with a cloud-based solution reactively and proactively.

Eligibility Criteria

1. Offer **cloud economics** for migrations of SAP workloads to the cloud
2. Offer FinOps **framework, strategy and implementation roadmap** within the client's organization, including information, optimization and operation for SAP
3. Demonstrating **optimization expertise** in addition to FinOps reporting
4. FinOps services regulated by cost-saving targets centered on budget control SLAs
5. Guide enterprises on **approaches to be considered** in cost management for cloud migrations
6. **FinOps-certified FTEs** in at least three hyperscalers among the popular ones such as AWS, Microsoft Azure and Google Cloud
7. **Proven case studies** in reducing costs of operations in the cloud, especially in the consumption of cloud resources



Cloud Economics and FinOps Services for SAP

Observations

Cloud economics and FinOps adhere to industry guidelines for optimizing cloud infrastructure. Enterprises often rely on service providers to assess and manage SAP workloads on cloud. These providers collaborate across teams to ensure workload optimization, leveraging expertise in SAP applications, cloud monitoring tools and robust governance processes. To meet enterprise needs, service providers are developing tailored propositions and frameworks specific to cloud economics and FinOps for SAP landscapes. They offer predictive usage models, embed FinOps best practices in global cloud strategies and application designs, and provide FinOps as a Service for continuous cost optimization. With the increasing adoption of RISE with SAP, providers are enhancing capabilities in cloud economics and FinOps, offering extensible platforms, certified FinOps practitioners and seamless multicloud integration. Their ecosystem ensures deployment flexibility, centralized service management

visibility and efficient operations. As cloud adoption in SAP environments grows, this segment is poised for significant expansion.

From the 50 companies assessed for this study, 16 qualified for this quadrant, with four being Leaders and one a Rising Star.



Capgemini's SAP BTP FinOps solution helps companies manage and optimize their SAP BTP costs. It combines Capgemini's cloud transformation and cost management expertise with industry best practices and advanced tools to deliver cost visibility and analysis.



Cognizant employs SAP BTP FinOps to empower client organizations with proactive anticipation, control, monitoring and optimization of cloud service costs, particularly in managing RISE migration.

HCLTech

HCLTech's FinOps framework enhances cloud financial management through a range of technical strategies. These include providing real-time visibility into account expenditures through advanced dashboards and implementing showback and chargeback mechanisms.



Wipro offers FinOps for cloud cost management, conducts cloud assessments for resource optimization, and offers automated scaling and power scheduling to adjust resources and reduce costs.

U - S T

UST (Rising Star) optimizes cloud expenditure by regularly rightsizing instances to match actual needs and utilizing reserved instances for stable workloads. It employs monitoring tools to track resource utilization and performance.





“Cognizant harnesses SAP BTP FinOps to enable client organizations to proactively anticipate, control, monitor and optimize the costs associated with cloud-based services.”

Akhila Harinarayan

Cognizant

Overview

Cognizant is headquartered in New Jersey, U.S. It has more than 347,700 employees across 147 offices in 50 countries. In FY23 the company generated \$19.4 billion in revenue, with Financial Services as its largest segment. Cognizant’s cloud economics and FinOps services are integrated into its proprietary Cognizant Cloud Assessment and Transformation (cCAT) framework, offered as managed platform as a service (MPaaS). These services collectively contribute to an overarching operating model for cost management on cloud.

Strengths

RISE and cloud FinOps: In managing RISE migration, Cognizant employs SAP BTP FinOps to empower client organizations with proactive anticipation, control, monitoring and optimization of cloud service costs. This approach includes providing daily reporting and dashboard overviews of operating costs for SAP BTP global accounts, directories and sub-accounts. To facilitate centralized analysis, reporting and license auditing, Cognizant utilizes APIs from SAP to collect, store and present usage data for services and applications across all cloud deployment regions. This methodology aligns with adopting SAP’s clean core strategy within a cloud environment.


Framework for migration and cost

optimization: The cCAT framework facilitates a structured cloud migration tailored to clients’ specific business needs. This framework integrates processes, tools, best practices and cultural adaptation to enhance an organization’s ability to understand and manage cloud expenses effectively. By enabling businesses to anticipate, control, monitor, and proactively or reactively optimize cloud costs, cCAT fosters a culture of cost awareness and financial responsibility. This strategic approach not only enhances financial accountability but also significantly increases business agility within a cloud environment.

Caution

Cognizant has strong capabilities and models to deliver cloud economics and FinOps services for SAP to clients. However, the company should consider showcasing its successful case studies to a larger audience to enhance mindshare and visibility.





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.



Appendix

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
4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)
5. Use of Star of Excellence CX-Data
6. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
7. Use of the following key evaluation criteria:
 - * Strategy & vision
 - * Tech Innovation
 - * Brand awareness and presence in the market
 - * Sales and partner landscape
 - * Breadth and depth of portfolio of services offered
 - * CX and Recommendation



Author & Editor Biographies



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Senior Lead Analyst

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.



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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.





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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
Partner and Global Head – ISG Provider Lens™

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

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



iSG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens™ research, please visit this [webpage](#).

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iSG

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For more information, visit isg-one.com.





APRIL, 2024

REPORT: SAP ECOSYSTEM