

**\*ISG** Provider Lens™

# SAP HANA Ecosystem Services

France 2021

Quadrant  
Report



A research report  
comparing provider  
strengths, challenges  
and competitive  
differentiators

Customized report courtesy of:

**Infosys**®

September 2021

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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 2021, 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.

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## EXECUTIVE SUMMARY

The market in France is known for its preference for SAP customizations, which makes any plans for migration to SAP S/4HANA complex, sometimes taking years to complete. Companies in France have the distinction of developing SAP customizations rather than adapting to SAP to processes, adding complexity to their migration plans to embrace SAP S/4HANA. Unaware of the fact that automation tools can accelerate the conversion process, clients fear that transformations could take years.

Despite this challenge, migration and transformation projects are continuing as planned. By using SAP partners with higher accreditation, clients can discover tooling and frameworks that simplify SAP S/4HANA adoption and reduce the cost and time required for an upgrade or new implementation. Although the macroeconomic implications of the COVID-19 pandemic slowed down SAP S/4HANA projects in 2020, the pandemic has also acted as a catalyst for enterprises. It has been a strong argument in favor of digital transformation, SAP migrations to S/4HANA and the development of digital services.

In 2020, SAP reported a revenue of €12 billion from EMEA, which was 44 percent of its global revenue — SAP France generated €1 billion, with more than 1,400 employees. The SAP Business Technology Platform (SAP BTP) solution, offered as Software as a Service (SaaS), is yet to gain maturity in France, where it is primarily aimed at midsize companies. Large companies have not explored the potential benefits of SAP BTP.

A typical system integrator (SI) or ETI in France has a small team when compared to the ones in Germany, working on projects with 10-30 consultants. It is common for these SAP expert firms to also partner with other ERP vendors. The primary focus for SAP are midsize

to large companies in France (with more than 1,000 employees), as below this aforementioned size, SAP has to compete with local ERP vendors that offer more competitive licensing and implementation costs.

In France, the cost of a SAP implementation can go over several million euros. Acknowledging that IT-related costs for the same would comprise 1-5 percent of turnover, these SAP solutions are primarily adopted by companies that have proportionally high revenues. Hence, the SAP market in France is small. Companies opting for SAP solutions have tailored these as closely as possible to their business needs, achieving a customization of 50-80 percent of the standard functions. The migrations from legacy ERPs to SAP S/4HANA are complex, particularly for most customers that have Oracle ERP. There is a whole ecosystem of applications around SAP, grafted around SAP classic modules such as Financial Accounting (FI), Controlling (CO), Material Management (MM), Sales & Distribution (SD), Human Resources (HR) and Business Warehousing (BW) reporting.

The digital transformation of business functions such as order taking, online catalog and delivery system are common and more about B2C functions than B2B. SAP S/4HANA works better for B2B functions rather than client-facing applications. The companies in France are cautious when making decisions about such projects and observe competitors and identify pitfalls before embarking. A major factor for an SAP migration is the availability of support for uninterrupted services. Although SAP has extended the deadline for support for ECC, Business Suite powered by SAP HANA and other offerings until 2027, apprehension on its availability could act as a constraint for adoption. Correspondingly,

these companies are looking at other options, including solutions that are not fully integrated by interfacing external applications to their ERP systems. SAP BTP facilitates the connection of external applications through application programming interfaces (APIs). However, SAP licensing policies at cloud level remain ambiguous, and companies are not going headlong into migrating SAP projects to the cloud. Therefore, in France, SAP is looking for other sales areas and is increasingly depending on its partners to offer cloud solutions. These SAP licensing policies are obstacles to the integration of SAP and new SAP technologies that service partners with industry vertical specialization can resolve.

At present, many large companies are opting for modular and flexible offerings and a subscription model to digitalize business processes or functions, as alternatives to SAP. Furthermore, SAP's licensing model, which has a direct impact on customer revenue growth, is an important parameter to be considered before a migration. New offerings and vendors are emerging, offering easy connectivity to SAP in the form of modular applications.

Among France-based companies, change is accepted as long as it is not too disruptive and has been customized to an organization's processes. This becomes a challenge in the case of SAP ERP implementations such as SAP S/4HANA. This transition and adoption become even more difficult if there is resistance among employees in adapting to this change. Any SAP migration requires strong change management initiatives to deal with the changes occurring in business processes. Furthermore, challenge arises from the fact that an SAP migration to S/4HANA involves significant costs, related to operations and maintenance, and does not guarantee ROI from the SAP product itself. Clients are advised to consider the benefits obtained from modular apps, easier integration and reduced cost of operations when running in the cloud, to build their business case for better return on investment.

At the same time, migrations to S/4HANA are driven by the availability of support services. However, given the uncertainty of licensing policy changes, and the corresponding increase in overall costs, providers cannot commit to any definitive ROI associated with these migrations. Players taking the lead in the market know how to respond to demand, when it arises, and have a good grasp of customer requirements, managing to convince them to digitalize or migrate.

In view of the current market challenges, the current providers of SAP, and their partners, must deal with variables as dictated by customers, with a clear long-term vision. More so as most France-based customers have faced the complications associated with successive SAP ERP implementations and migrations and are waiting to get a clear and complete understanding of a migration to SAP S/4 HANA, weighing their alternatives before embarking on these projects. This explains the time required for decision-making before any migration initiative.

This report assessed 53 SAP Platinum and Gold partners that have operations in France, of which 36 are certified and authorized to integrate or support S/4HANA. These 36 service providers collectively employ approximately 12,000 SAP experts in the country, in addition to many practitioners offshore (not counting non-SAP experts working in support and sales in these companies). The annual revenue of these service providers is in the range of €2 million to €400 million.

Ten companies have not met the quadrant inclusion criteria. This report assesses 26 service providers in four quadrants.

# Introduction

Simplified illustration

SAP HANA Ecosystem Services - 2021	
SAP S/4 HANA System Transformation	Managed Application Services for SAP ERP
Managed Cloud Services for SAP HANA	SAP Business Technology Platform and Intelligent Technologies

Source: ISG 2021

## Definition

With more than 21,000 partner companies, SAP has a significant impact on the IT market in terms of both innovation and global IT spending share. This study identifies the top SAP partner companies that offer differentiated enterprise client services and deliver the best results from their clients' SAP S/4HANA investments.

SAP S/4HANA offers superior performance by using in-memory technology. As transformation projects require detailed planning and business participation, clients should refine their selection process and criteria to find the right partner for providing higher business value at a lower cost of transformation.

## Definition (cont.)

For clients that are new to SAP ERP or are hesitant to upgrade to SAP S/4HANA, this study references case studies and success stories. ISG has identified viable tools and frameworks for large SAP transformations and greenfield SAP S/4HANA implementations that are delivered in record time for midmarket clients. The right partner can support clients and allay fears arising from the end of support for legacy SAP ERP, which is due in 2027.

With the introduction of the SAP Cloud Platform (SCP), it has become evident that the major benefits of adopting SAP S/4HANA are its backbone of innovation, offered through SAP Cloud Platform (SCP), as well as the novel ways of leveraging application programming interfaces (APIs) and microservices. In this context, SAP partners have demonstrated innovation by using artificial intelligence (AI), analytics, Internet of Things (IoT), mobile apps, robotic process automation (RPA) and blockchain to disrupt markets and transform businesses.

For clients that have adopted SAP S/4HANA, this study assesses managed service providers that can contribute to superior application performance, including higher stability, availability and security. In addition, recently, AI and machine learning (ML) have been incorporated into application maintenance and operations to

predict incidents and automate troubleshooting, ticketing processes and provisioning. This allows for increased scale, which can lower support costs. This study identifies service providers that effectively apply new technologies to support SAP S/4HANA and HANA databases.

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

- Transparency on providers' relevant strengths and weaknesses
- A differentiated positioning of providers by segments
- Focus on different geographic markets. This study focuses on France

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

## Definition (cont.)

### 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 were qualified in five quadrants of the SAP HANA Ecosystem Services:

The **SAP S/4HANA System Transformation – Large Accounts quadrant** assesses consulting and system integration service providers for developing, deploying and testing enterprise applications using SAP S/4HANA and SAP Business Suite, with SAP Fiori as the user interface. The participating companies are expected to have the frameworks, tools and accelerators to support the needs of large system transformations.

The **SAP S/4HANA System Transformation – Midmarket quadrant** assesses consulting and system integration service providers on the ability to offer a rapid turnaround for SAP S/4HANA implementations for clients in the midmarket (companies with less than 5,000 SAP users or revenue of less than \$1 billion).

The **Managed Application Services for SAP ERP quadrant** assesses a service provider's capability to offer managed services, including maintenance and support functions that comprise monitoring, remote support and centralized management of applications for SAP S/4HANA and legacy SAP Business Suites such as ECC 6.0.

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

The **SAP Business Technology Platform and Intelligent Technologies** assesses the capabilities of providers in the design, development, change, integration and support of enterprise applications on SAP Business Technology Platform (BTP). These providers offer lab facilities for client experimentation with emerging technologies. They provide innovation workshops, design thinking and other methods to drive innovation around SAP S/4HANA.

## 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 US\$20 million and US\$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 US\$1 billion, with activities worldwide and globally distributed decision-making structures.

## Provider Classifications

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly.

### Leader

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.

### Product Challenger

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.

### Market Challenger

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.

### Contender

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 both products and services and a sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

## Provider Classifications (cont.)

Each ISG Provider Lens™ quadrant may include a service provider(s) which ISG believes has 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).

### Rising Star

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

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.

## SAP HANA Ecosystem Services - Quadrant Provider Listing 1 of 3

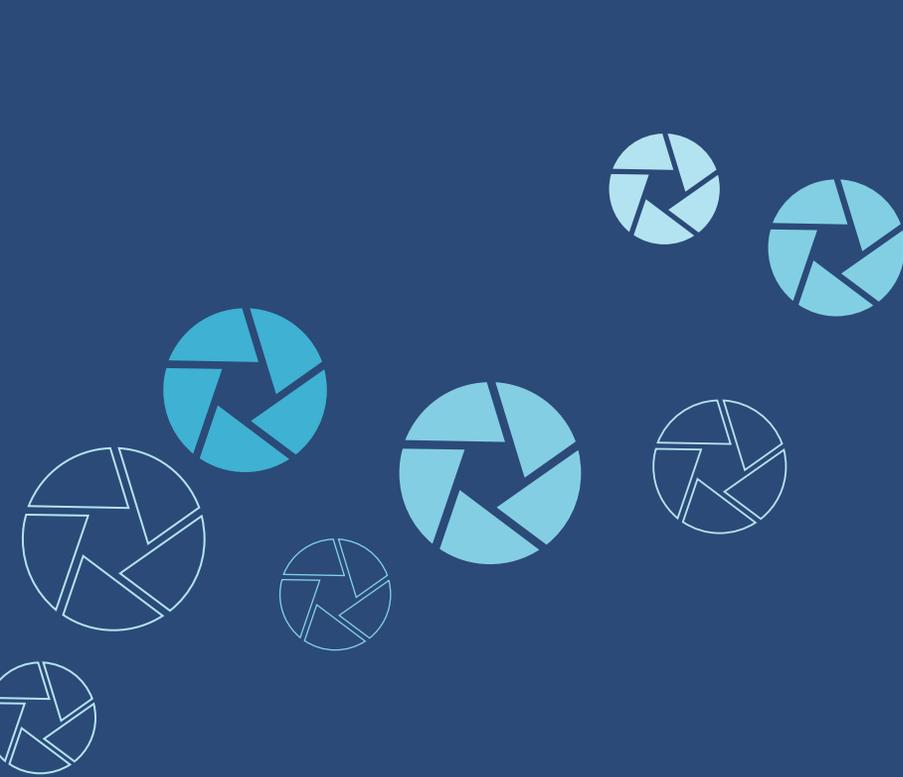
	SAP S/4 HANA System Transformation	Managed Application Services for SAP ERP	SAP Business Technology Platform and Intelligent Technologies	Managed Cloud Services for SAP HANA
Accenture	● Leader	● Leader	● Leader	● Leader
Atos	● Leader	● Leader	● Leader	● Leader
Augusta Reeves	● Contender	● Not In	● Not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

## SAP HANA Ecosystem Services - Quadrant Provider Listing 2 of 3

	SAP S/4 HANA System Transformation	Managed Application Services for SAP ERP	SAP Business Technology Platform and Intelligent Technologies	Managed Cloud Services for SAP HANA
EY	● Product Challenger	● Product Challenger	● Not In	● Not In
HCL	● Product Challenger	● Product Challenger	● Product Challenger	● Product Challenger
IBM	● Product Challenger	● Leader	● Contender	● Not In
IBM (Kyndryl)	● Not In	● Not In	● Not In	● Product Challenger
Infosys	● Leader	● Leader	● Leader	● Product Challenger
Linke	● Not In	● Not In	● Not In	● Contender
NTT DATA	● Product Challenger	● Product Challenger	● Not In	● Contender
Orange Business Services	● Not In	● Not In	● Not In	● Product Challenger
oXya	● Not In	● Contender	● Not In	● Leader
PASàPAS	● Contender	● Contender	● Not In	● Contender

## SAP HANA Ecosystem Services - Quadrant Provider Listing 3 of 3

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



# SAP HANA Ecosystem Services Quadrants

## ENTERPRISE CONTEXT

### SAP S/4HANA System Transformation

This report is relevant to enterprises across industries in France, for evaluating providers of SAP S/4HANA system transformation.

In this quadrant report, ISG highlights the current market positioning of providers of SAP S/4 HANA system transformation services in France, based on the depth of their service offering and market presence.

S/4HANA transformation across industries has been influenced by the pandemic, with most enterprises focusing on developing automation-led processes. To address enterprise needs, service providers are incorporating automation in their offerings to help enterprises in several complex transformations. DevOps and continuous integration/continuous delivery (CI/CD) processes have reduced the risk of S/4HANA transformation and accelerated deployment among enterprise clients.

The adoption of S/4 HANA is lower in France when compared with other regions because of factors such as integrity challenges with existing applications, high cost and talent and skills gaps. However, enterprises have started adopting S/4HANA in the cloud due to the lockdown constraints associated with the COVID-19 pandemic. Therefore, enterprise clients are seeking providers that can help implement cloud-based SAP solutions, including S/4HANA.

Who should read the report:

**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.

**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/capabilities into their offerings to gain a competitive edge in the market.

**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/4 HANA services with respect to their business/industry and ensure return on investment.

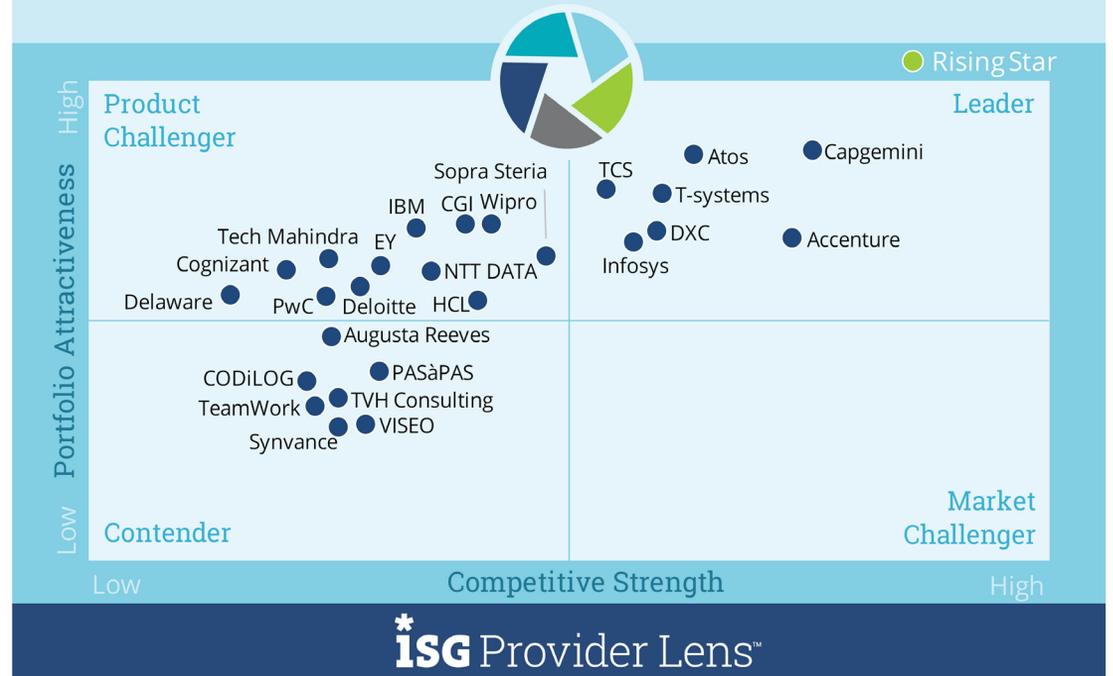
## SAP S/4HANA SYSTEM TRANSFORMATION

### Definition

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

SAP HANA Ecosystem Services  
SAP S/4HANA System Transformation

2021  
France



Source: ISG Research 2021

## SAP S/4HANA SYSTEM TRANSFORMATION

### Eligibility Criteria

- Participant's service portfolio to include development, integration and testing of SAP S/4HANA with at least one implementation of S/4HANA or SAP Business Suite on HANA
- Demonstrate advisory capabilities and implementation experience on greenfield or brownfield S/4HANA
- Provision to offer on-premises and cloud-based implementations
- Availability of SAP-certified consultants and practitioners across regions to support multi-country and multi-language implementations
- Ability to handle complexity and scale through optimal onshore-offshore delivery models
- Must have Gold or Platinum level partnership in France

### Observations

An SAP S/4HANA migration increases efficiency, however, with no clear indication of savings. Migrating to SAP cloud or another provider also makes the customer captive. Some of the questions that remain are: what is the commitment of service providers toward customers and their businesses? And, how do these solutions contribute to a customer's business, since specific needs are not taken as much into consideration with the need to adhere to standards? Customization is a part of company's identity. But the need for standardization reduces this value addition given by the company. Leading service providers are the ones that partner with clients to understand their concerns and build solutions that add value and outweigh the cost of upgrade projects.

## SAP S/4HANA SYSTEM TRANSFORMATION

### Observations (cont.)

In this quadrant, consulting and system integration service providers are evaluated for the development, deployment and testing of enterprise applications with SAP S/4HANA and SAP Business Suite or assessed on how the SAP Fiori library improves user experience in a mobile interface. The focus of this quadrant is on globally operating providers that can comprehensively cover the complex system landscapes and support major customers in transformation and global rollouts.

Twenty six companies were assessed for this quadrant, seven were named Leaders.

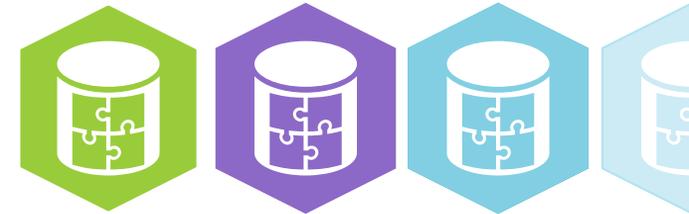
- **Accenture** proposes robust transformations that include advanced SAP and cloud solutions. Clients benefit from ready-to-use applications that integrate with SAP S/4HANA, including predictive analytics, real-time business dashboards, data lakes and other solutions.

- **Atos** has long been an SAP partner with a strong presence in the manufacturing industries. It combines Industry 4.0, IoT and data analytics to modernize the ERP platform of its clients, introducing innovation to transform business performance.
- **Capgemini** has a robust SAP delivery team, with more SAP certifications than most of its competitors. It has been investing in tools and frameworks, elevating its competitiveness. The company is one of the largest in France and supplements its capacity with offshore delivery centers.
- **DXC Technology** is an U.S.-based company. It combined SAP and cloud experts from CSC and HPE, after the merger of both companies in 2019, making it one of the most relevant SAP partners in the world. With robust operations in France, DXC offers a comprehensive toolset for large transformations.
- **Infosys** has a top partnership with SAP and is keen to pursue new transformation projects. The company has many delivery centers around the globe, enabling it to accommodate every type of SAP deal, covering many languages in all continents, making it ideal for global SAP rollouts.

## SAP S/4HANA SYSTEM TRANSFORMATION

### Observations (cont.)

- **Tata Consultancy Services (TCS)** is one of the largest IT service organizations in the world. It serves more than 80 of the largest 100 France-based enterprises. Recent portfolio improvements and top partnerships with SAP and major hyperscalers make it ideal for large SAP S/4HANA migrations to the cloud.
- **T-Systems** leverages its large operations in Germany to deliver high quality services throughout Europe. It has delivery centers in Brazil and India to supplement its transformation capacity. It is a SAP Strategic Partner, with priority access to SAP launches and innovations.



# INFOSYS

## Overview

Infosys employs more than 249,000 professionals in 46 countries and generates \$13.1 billion in revenue in 2020. It has established its footprint in France with a Digital Center of Excellence in Marseille, which is a part of a global network of centers servicing clients' digital requirements. Its focus is to provide existing and new clients with a range of offerings in the areas of design and user experience, AI and big data and analytics, while expanding its footprint in the shipping and logistics industry. In France, Infosys has offices in Paris and Toulouse.

## Strengths

**Comprehensive portfolio:** Infosys offers a full spectrum of S/4HANA offerings, including Infosys Cobalt, a key component in migrating clients to the cloud while applying AI. The company now offers hybrid SAP and an SAP co-innovation industry cloud and medallion initiative, with automation and accelerators on cloud, including program management, change management, data migration, testing, validation and training.

**Mature framework for greenfield projects:** Infosys wants to standardize processes and accelerate implementation with a common template that can be rolled out to multiple geographies. It starts with Infosys Catalyst, a preconfigured solution, and designs an S/4HANA-based solution architecture as a scalable platform to fulfill the need for digital transformation with a quick adoption of intelligence. The company leverages an S/4HANA center of excellence, SAP knowledge and artifacts repository for designing solutions.

**Automation for brownfield project:** Infosys applies Suite on HANA (SoH) migrations to move a client's legacy applications onto the S/4HANA database. It also converts ECC systems to S/4HANA, using its Safe Passage Methodology. After go-live, Infosys undertakes application maintenance services, complementing its portfolio.

## Caution

Infosys has a midsize SAP organization in France that shares nearshore and offshore capacity. Clients should not expect to have a large team on-premises and need to adapt to Infosys' way of distributing work to dispersed teams to extract the best value.



## 2021 ISG Provider Lens™ Leader

Infosys explores design thinking workshops to accelerate innovation, while delivering robust SAP S/4HANA transformations.

## ENTERPRISE CONTEXT

### Managed Application Services for SAP ERP

This report is relevant to enterprises across industries in France for evaluating providers of managed application services for SAP ERP.

In this quadrant report, ISG highlights the current market positioning of providers of managed application services for SAP ERP in France, and how each provider addresses the key challenges faced in the country. These providers focus on helping enterprises effectively manage SAP ERP, which includes SAP S/4HANA, SAP Enterprise Central Component (ECC) and legacy R3.

Enterprises in France are increasingly adopting automation in managed application services and are seeking service providers that can provide these solutions by considering their digital maturity and business objectives.

Many enterprises are undertaking migration initiatives to move to the latest SAP ERP version, as SAP will cease support services for its legacy ECC ERP by 2027. Hence, enterprises should look for providers that can not only support their existing ERP system but also help migrate it.

Who should read the report:

**IT and technology leaders** should read this report for a clear understanding of the strengths and weaknesses of providers offering SAP ERP managed services, and their competency in developing frameworks and tools to effectively manage their applications.

**Sourcing and procurement managers** should read this report for a clear understanding of the service provider ecosystem for SAP ERP managed services in France and how various providers can be compared with each other.

## MANAGED APPLICATION SERVICES FOR SAP ERP

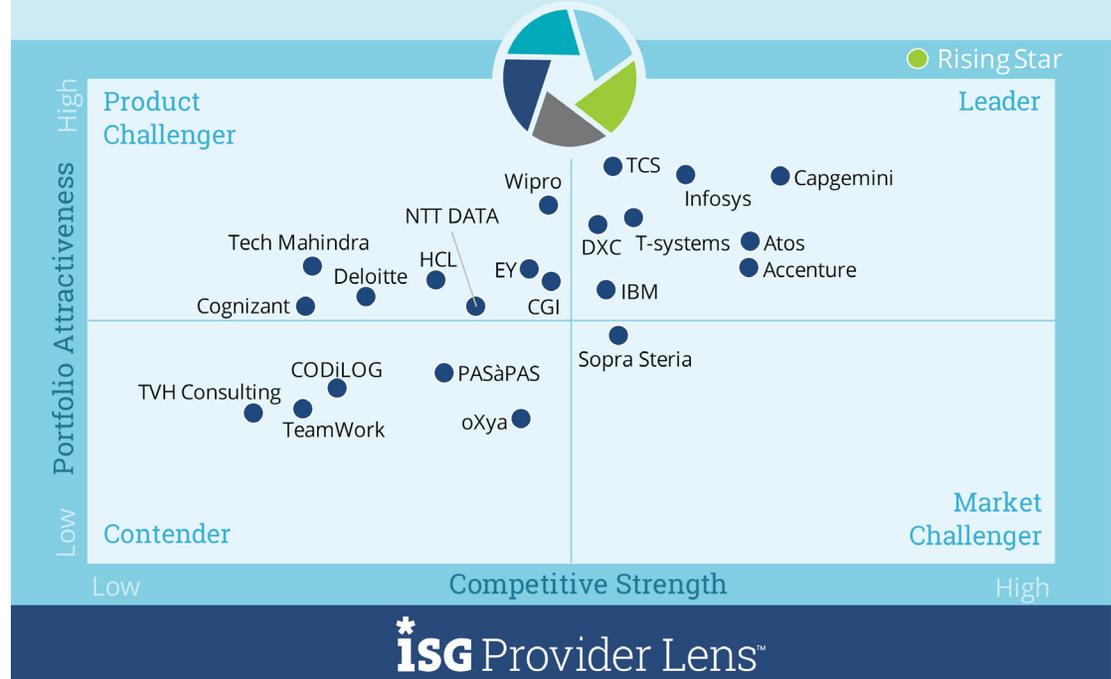
### Definition

This quadrant assesses a service provider's capability to offer managed services, including maintenance and support functions that comprise monitoring, remote support and centralized management of applications for SAP S/4HANA and legacy SAP Business Suites such as ECC 6.0.

Managed application services for incidents include troubleshooting, Level 2 and Level 3 application support, user support, ticket lifecycle management, incident resolution, problem management, root-cause analysis and interface with SAP product support (upon client authorization). Service requests typically include user management (adding and changing user profiles and disabling user access), performance reports, database services, security (access) monitoring and license compliance. Providers that have center of excellence (CoE) certification are better evaluated, but this is not a prerequisite for participating in this quadrant.

SAP HANA Ecosystem Services  
Managed Application Services for SAP ERP

2021  
France



Source: ISG Research 2021

## MANAGED APPLICATION SERVICES FOR SAP ERP

### Eligibility Criteria

- Ability of service provider to offer application optimization, support and testing
- Ability to offer enhancements and changes pertaining to applications, apply SAP Service Pack Stacks (SPS) if required and predict the business impact of such updates
- Capability to stabilize applications and offer SAP BASIS support
- Demonstrate expertise in incident management, a variety of ticket system tools, SAP Solution Manager and additional application documentation solutions
- Must have Gold or Platinum level partnership in France

### Observations

The Managed Application Service market is the most competitive in the SAP ecosystem. It is sometimes called application managed services (AMS), application maintenance services (another reference to AMS), application support services and sustained application services. A key observation in the last two years is the increased use of automation to track events, application incidents and service requests, thus moving the market toward managed services and away from maintenance, which has become an exception (maintenance refers to bug fixing).

With quality programs and automation tools in place, service providers gradually eliminate application bugs to spend more time on application improvements such as deployment of new functionalities, improved security, new application dashboards and analytics, among other improvements to augment SAP business value. Along with the RISE with SAP transformation services offer from SAP arises the question of possible competition of SAP with partners that operate SAP for their clients, on-premises or in the cloud. The RISE with SAP offer is to migrate the client ERP instance to the cloud, to be operated by SAP, creating an unclear responsibility around certain functions of application support and operations.

## MANAGED APPLICATION SERVICES FOR SAP ERP

### Observations (cont.)

SAP promotes the greenfield approach that allows it to operate in an environment as close as possible to the SAP standard, which reduces, or even eliminates, a good part of the activities of managed applications services, to the detriment of its partners that currently offer these services.

This quadrant evaluates the managed services providers and the services they offer, including their maintenance and support capabilities that include monitoring, remote support and centralized management of applications for SAP S/4HANA and legacy SAP business suites such as ECC 6.0. In addition to functional competence, a key focus of the providers in this quadrant is on efficient delivery models, clear service structures and transparent pricing models.

Twenty two companies were qualified for this quadrant, with eight named as Leaders.

- **Accenture** has long been providing managed applications services. The Accenture Liquid Application Management offering uses agile practices and quality engineering to streamline service delivery. Accenture can support all SAP products at a global scale.
- **Atos** has a robust SAP practice and many clients in Europe. The company has a comprehensive service platform that leverages automation and integrates SAP application managed services with data center and public cloud services, offering a full-stack solution for demanding SAP clients.
- **Capgemini** has the largest number of SAP-certified practitioners, and its global platform enables it to share resources globally. Efficient services balance local and offshore resources. Capgemini integrates several IT service management tools to offer full outsourcing capacity.
- **DXC Technology** leverages a global organization based on a common service platform and the “follow-the-sun” model that enables it to ensure 24/7 service availability. Its optimized services provide seamless client experience with consistent quality.

## MANAGED APPLICATION SERVICES FOR SAP ERP

### Observations (cont.)

- **IBM** has a large application management service organization, under its Global Business Services (GBS) division. SAP is a core competency within GBS. IBM offers SAP support, user support, application maintenance services and infrastructure services in its comprehensive SAP portfolio.
- **Infosys** runs on a global service platform with a lean organization, which positions it as one of the most competitive SAP service partners globally. The company's lean approach also facilitates problem resolution, providing local leadership autonomy to respond to specific client requests.
- **Tata Consultancy Services (TCS)** is the largest India-based global IT services company. It leverages robust automation to offer efficient services. It has a mature delivery organization that focuses on reducing the number of application incidents and on streamlining operations.
- **T-Systems** leverages its strategic partnership with SAP to design sophisticated services. The company has redesigned its service platform around cloud, providing it more speed and flexibility. It has a small set up in France that it compensates with delivery centers in Germany, India and Brazil.

# INFOSYS

## Overview

Infosys employs more than 249,000 professionals in 46 countries and generated \$13.1 billion in revenue in 2020. It has established its footprint in France with a Digital Center of Excellence in Marseille, which is a part of a global network of centers servicing clients' digital requirements. Its focus is to provide existing and new clients with a range of offerings in the areas of design and user experience, AI, and big data and analytics, while expanding its footprint in the shipping and logistics industry. In France, Infosys has offices in Paris and Toulouse.

## Strengths

**Global capacity:** Infosys has implemented industry specific and process CoEs. The company collaborates with SAP in 15 industry verticals, investing up to 3.2 percent of its annual revenue in R&D. A global, shared platform enables Infosys to provide world-class services to clients.

**AI-assisted automation:** Infosys harnesses conversational AI to offer a digital assistant, supporting self-service and self-help, and predictive analytics to speed up incident monitoring and resolution. Its Live Enterprise Application Management Platform (LEAP) is an integrated suite of Infosys IP and reusable solutions such as AssistEDGE and Infosys Enterprise Assistant IEA. It also offers the ValuePLUS framework, which covers root cause analysis, problem analytics, automation and AI-based operations (AIOps). Infosys's core philosophy is zero touch and a reliable and autonomous service delivery to ensure disruption-free operations with an elevated user experience.

**Engaging relationships:** The Infosys Service Delivery Operating Framework ensures optimal service quality, reduced costs and total cost of ownership (TCO), end-to-end accountability and greater business satisfaction. Partnerships include Azure, Google MSP, AWS (as premium consulting partner) and IBM.

## Caution

Infosys has the potential to increase its presence in the managed application services space in France. The company leverages global delivery centers, but an increased local presence could attract more clients in this specific market.



## 2021 ISG Provider Lens™ Leader

Infosys leverages a global organization to offer attractive deals in Europe. Clients can get quality services from its robust application services platform.

## ENTERPRISE CONTEXT

### Managed Cloud Services for SAP HANA

This report is relevant to enterprises across industries in France for evaluating providers of managed cloud services for SAP HANA.

In this quadrant report, ISG highlights the current market positioning of providers of managed cloud services in France, and how each provider addresses the key challenges faced in the region. These providers focus on helping enterprises effectively migrate or maintain the applications in the cloud or in their own data centers.

In France, enterprises are focused on moving their SAP systems to the cloud mainly due to the challenges that arose from the lockdown constraints associated with the COVID-19 pandemic. They also seek service providers that can manage offshore services effectively for developing their SAP roadmaps.

Enterprises in France have now started to take the cloud-first approach for existing and new applications owing to the challenging and changing work environments resulting from the COVID-19 pandemic.

Managed cloud service providers can help these enterprises unburden the responsibility of day-to-day operations by keeping their IT infrastructure updated to optimally run, maintain and migrate SAP applications, without errors or downtime. Enterprises can also benefit from a managed cloud service provider's expertise in volume management, application code management and cloud cost optimization.

Enterprises that are procuring managed cloud services should consider a service provider's capabilities in operating in the cloud and its credentials and level of certifications.

Who should read the report:

**IT and infrastructure leaders** should read this report to better understand the relative strengths and weaknesses of managed cloud service providers to ascertain how their approaches to the market can impact enterprise cloud strategies.

**Marketing, sales and field services leaders** should read this report to understand the relative positioning and capabilities of partners that can help them procure managed cloud services. The report also highlights the capabilities of service providers in maintaining or migrating data in data centers and the cloud.

**Sourcing and procurement professionals** should read this report to have a better understanding of the current landscape of managed cloud service providers.

## MANAGED CLOUD SERVICES FOR SAP HANA

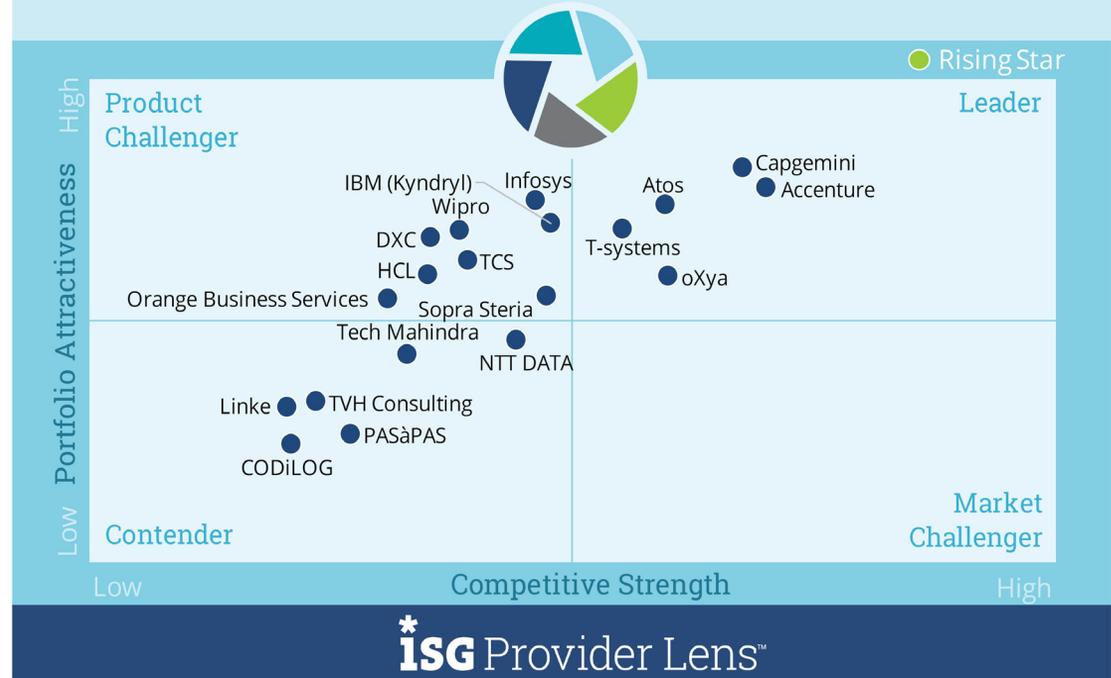
### Definition

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

This quadrant includes providers that demonstrate expertise in maintaining smooth SAP S/4HANA operations, which requires deep knowledge about the underlying in-memory database technology. Furthermore, strong capabilities to optimize this type of application include data volume management, application code management and cloud cost optimization. However, the provider should retain the capacity to support SAP HANA and legacy SAP ERP versions for clients that have old instances running simultaneously with SAP S/4HANA.

SAP HANA Ecosystem Services  
Managed Cloud Services for SAP HANA

2021  
France



Source: ISG Research 2021

## MANAGED CLOUD SERVICES FOR SAP HANA

### Eligibility Criteria

- Ability of service provider to provision, manage and operate SAP in the cloud, including, but not limited to, hyperscale public clouds with players such as AWS, Azure and Google
- Demonstrate the capacity to support clients in their hybrid cloud implementations of SAP systems and databases, providing infrastructure design support at a minimum
- Offer Tier III data center choices to host SAP S/4HANA or be a certified cloud partner with SAP S/4HANA specialization
- Certified on data center security, data privacy and IT processes; minimum accreditations include ISO27001 (security) and IT Infrastructure Library (ITIL) incident management
- Have SAP-certified staff to support HANA and other SAP technologies

### Observations

Service providers in this market are focused on operating SAP applications for their clients. Traditional participants are outsourcing companies that offered data center facilities to host SAP workloads. With the increasing use of the public cloud, most of the data center outsourcing providers have repositioned their offerings around managed cloud services.

Cloud services with the RISE with SAP transformation service were developed with SAP's partner, Delaware. This company becomes a competitor to SAP's other initial partners that have already developed their own cloud solution for SAP ERP and SAP S/4 HANA, which may explain the low number of SAP to S/4 HANA migrations in France.

Many companies run SAP systems on-premises, demanding service providers that can help with the migration of their ERP to the cloud. Options include lift-and-shift, when the workload is shifted to the cloud without changes to applications, databases and related software. The lift-and-shift option enables clients to migrate fast. However, leading service providers in this market can use automation tools to convert applications to a new database or upgrade ERP to SAP S/4HANA at once, thus replacing the lift-and-shift option with the involvement of little time and effort.

## MANAGED CLOUD SERVICES FOR SAP HANA

### Observations (cont.)

SAP ERP operations in the cloud differ from on-premises operation on several aspects. There are more tools available to back-up data and applications, using low-cost cloud storage that can reside in different cloud regions. Cloud tools enable system image copies that reduce disaster recovery costs. Automation improves operations, including archiving. A new set of tools make SAP in the cloud more secure and resilient. Automation and cloud expertise differentiate the service providers in this market.

This quadrant evaluates service providers that offer management of hybrid cloud environments, security access, monitoring, system availability and interface performance, disaster recovery, backup, recovery data compliance, and other requirements of infrastructure and cloud operations.

Nineteen service providers have been included in this quadrant and five were named Leaders.

- **Accenture** is liaising with SAP, AWS, Microsoft and Google to drive its cloud business. The company is gradually migrating its SAP customers to the cloud. It leverages an automated operations platform and a large offshore business to support SAP workloads in the cloud.
- **Atos** provides clients with options for hosting SAP solutions. It has data centers, high-performance servers for on-premises operations and partnerships with AWS, Microsoft and Google to enable SAP in the cloud. Atos operates SAP in any hybrid cloud configuration, using a robust automated platform.
- **Capgemini** has top accreditations from SAP, AWS, Microsoft and Google, enabling clients to choose the best location for SAP. The company's key differentiation is a robust, highly integrated service management platform that handles large-scale, local or multi-country operations.
- **oXya** is an agile managed services provider, with full focus on operating SAP in any kind of configuration. It offers clients the option to host their SAP in its data centers or in the cloud. Backed by the Hitachi Group, its parent organization, the company is growing in France and the rest of the world.
- **T-Systems** leverages the infrastructure of its parent company, Deutsche Telekom, to offer SAP-certified hosting as well as managing SAP in the public cloud. It has global partnerships with SAP, AWS, Microsoft and Google. T-System is a longtime provider of SAP infrastructure services.

## ENTERPRISE CONTEXT

### SAP Business Technology Platform and Intelligent Technologies

This report is relevant to enterprises across industries in France for evaluating service providers offering SAP Business Technology Platform (BTP) and intelligent technologies.

In this quadrant report, ISG highlights the current market positioning of providers of SAP BTP and intelligent technologies in France. It covers their capabilities in designing, developing, modifying, integrating and supporting applications for enterprise systems, and in delivering services for digital transformation using SAP BTP and intelligent technologies.

As a part of their digital transformation, enterprises are looking to transform their processes and business operations and are progressing on their intelligent enterprise journeys. The use of high-end technologies such as analytics, AI and machine learning, for processing SAP data, has also increased among enterprises.

Enterprises also want to integrate their existing applications (both SAP and non-SAP) under one unified platform to enhance user experience and increase process efficiency with technologies such as AI and machine learning. Service providers can integrate the solutions into one and help enterprises achieve agility, business value, data to value, and extensibility of SAP and non-SAP applications.

Who should read the report:

**Marketing, sales and field services leaders** should read this report to understand the relative positioning and capabilities of service partners that can help implement SAP BTP effectively. The report also highlights the advanced capabilities of service providers, including application development and their use of application programming interfaces (APIs) and new methodologies.

**IT and technology leaders** should read this report for a clear understanding of the strengths and weaknesses of service providers and to comprehend how they integrate the latest technologies and capabilities into their offerings to gain a competitive edge in the market.

## SAP BUSINESS TECHNOLOGY PLATFORM AND INTELLIGENT TECHNOLOGIES

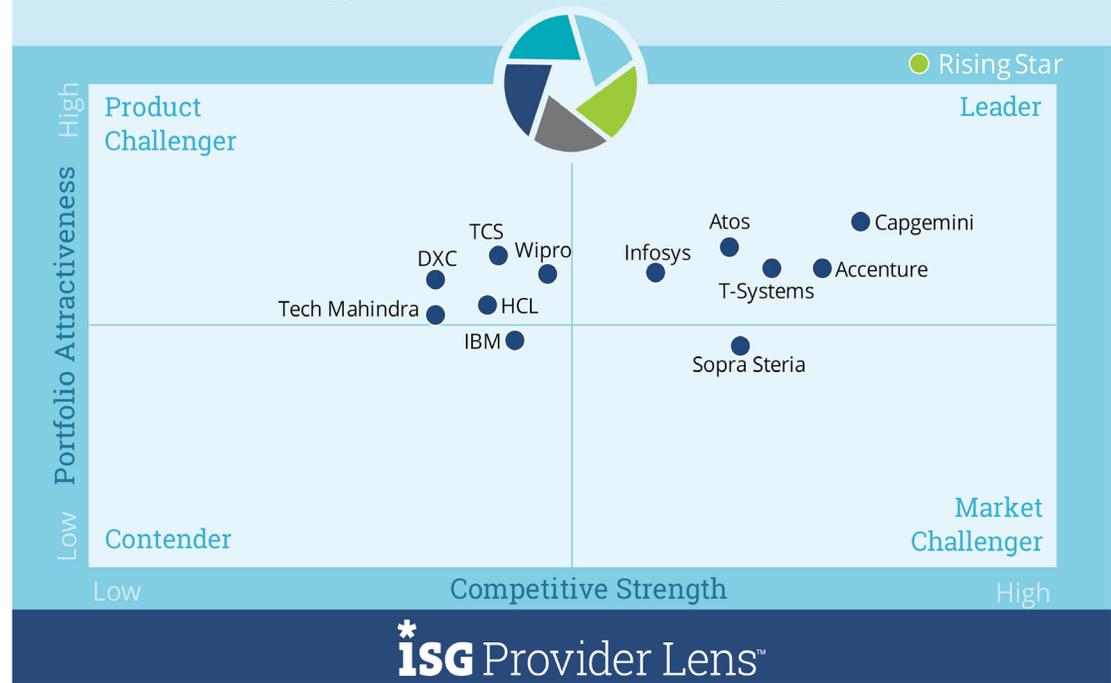
### Definition

This quadrant assesses the capabilities of providers in the design, development, change, integration and support of enterprise applications on the SAP Business Technology Platform (BTP). These providers offer lab facilities for client experimentation with emerging technologies. They provide innovation workshops, design thinking and other methods to drive innovation around SAP S/4HANA. Alternatively, the company may have developed use cases and frameworks to accelerate innovation or extend SAP S/4HANA functionality. These include ready-to-use apps for fraud prevention and analytics dashboards that were presented to ISG in previous studies.

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

SAP HANA Ecosystem Services  
SAP Business Technology Platform and Intelligent Technologies

2021  
France



Source: ISG Research 2021

## SAP BUSINESS TECHNOLOGY PLATFORM AND INTELLIGENT TECHNOLOGIES

### Eligibility Criteria

- Capability of service provider to deliver consulting and implementation services for BTP
- Expertise in AI, ML, blockchain and IoT technologies
- Demonstrate support of BTP applications with case studies
- Appropriate SAP certifications across SAP-certified applications, as well as certified engineers or partner-level certifications
- Leading BTP service partners ideally expected to provide case presentations through large events and SAP awards and gain client recognition
- Must have Gold or Platinum level partnership in France

### Observations

In this quadrant, the capabilities of providers in the design, development, modification, integration and support of enterprise applications based on the SAP BTP are assessed. These providers often run innovation labs, where new technologies can be developed, together with customers, to build new processes and business models. They also offer workshops, design thinking and other methods to drive innovation around SAP S/4HANA.

SAP has been changing product features and service models to adapt to market demands. SAP BTP is the replacement of SAP Leonardo and SAP Intelligent Enterprise. BTP offers an integration platform, with SAP S/4HANA microservices and APIs, enabling clients and system integrators to develop applications in any language, and using any interface, with SAP S/4HANA through BTP.

SAP BTP incorporates Function as a Service, thus offering a new capability to deliver complex business process through “recipes” that chain functions that perform a business process or business task . Function as a Service is serverless and can enable low code/no code development.

## SAP BUSINESS TECHNOLOGY PLATFORM AND INTELLIGENT TECHNOLOGIES

### Observations (cont.)

This market has seen significant changes from last year with service providers changing offerings and thereby market results. However, BTP is slowly maturing to consolidate as an integration platform. The leading service providers in this quadrant have deep understanding of the technology and envision new ways of delivering business value on BTP.

We have qualified 12 service providers in this quadrant and identified five Leaders:

- **Accenture** leverages its SAP Strategic Partner status to develop applications jointly. It had developed Leonardo applications for more than five years before pivoting to the development of the SAP Business Technology Platform. It has many Leonardo applications available for BTP.
- **Atos** has been investing in innovation on all fronts — from quantum computing to Google cloud partnership. Atos leverages R&D to include SAP Intelligent Technologies in its portfolio. It has differentiated strengths in data management and analytics.
- **Capgemini** has a clear vision for BTP deployments, where it uses a well-defined architecture to provide long-term benefits to enterprises. Capgemini's Renewable Enterprise concept envisions apps that connect to standard SAP S/4HANA, enabling application replacement without any business interruption.
- **Infosys** has a robust global practice around innovation, AI, machine learning and analytics, with a vast library of apps that integrate with BTP. The company focuses on the design thinking methodology to engage clients in transformational initiatives and in developing new apps to resolve specific needs of clients.
- **T-Systems** is evolving its longtime partnership with SAP to co-develop solutions and offer clients innovation around IoT, Industry 4.0, logistics and retail. It leverages the experience accumulated with the clients it supports in the manufacturing and automotive industries

# INFOSYS

## Overview

Infosys employs more than 249,000 professionals in 46 countries and generates \$13.1 billion in revenue in 2020. It has established its footprint in France with a Digital Center of Excellence in Marseille, which is a part of a global network of centers offering services to address the digital requirements of clients. Its focus is to provide existing and new clients with a range of offerings in the areas of design and user experience, AI and big data and analytics, while expanding its footprint in the shipping and logistics industry. Infosys also has offices in Paris and Toulouse.

## Strengths

**Blueprints for innovation and AI:** Infosys invests in design thinking, digital studios, industry leading S/4HANA solutions, Leonardo-based solutions and agile labs to define and rapidly prototype solutions. Its focus is on building industry stories around re-imagined business processes and pre-configured templates. The company has more than 80 use cases, incorporating the power of AI and machine learning.

**Design thinking for business improvement:** Infosys offers architecture consulting, governance, application development, extensions and implementation of pre-built solutions, data intelligence, machine learning, predictive analytics, Leonardo blockchain services and Leonardo IoT services to the retail, consumer packaged goods (CPG), logistics, manufacturing, energy and utilities, life sciences and financial services industries.

**Global industry expertise:** The company is a global leader in consulting and technology, and offers clients a range of solutions. Infosys works closely with clients to define and support their journey to becoming an intelligent enterprise, by helping to create and execute complex business and SAP ecosystem transformation. It leverages its innovation centers and design thinking workshops to help customers find opportunities for transformation.

## Caution

Infosys needs more reference cases in France to create brand awareness among a larger audience and to serve as references for new deals.



## 2021 ISG Provider Lens™ Leader

Infosys teams up with clients to develop intelligent solutions that integrate with SAP S/4HANA for improved business performance.



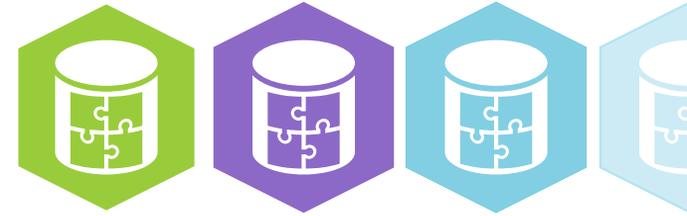
# Methodology

## METHODOLOGY

The research study “ISG Provider Lens™ 2021 SAP HANA Ecosystem Services, France” analyzes the relevant software vendors/service providers in the French market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

The study was divided into the following steps:

1. Definition of 2021 SAP HANA Ecosystem Services, French market
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities and use cases
4. Use of ISG’s internal databases and advisor knowledge and experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts and figures received from providers and other sources.
6. Use of the following key evaluation criteria:
  - Strategy & vision
  - Innovation
  - Brand awareness and presence in the market
  - Sales and partner landscape
  - Breadth and depth of portfolio of services offered
  - Technology advancements



# Authors and Editors



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### Distinguished Analyst

Distinguished analyst and author, Pedro brings extensive experience in research of the Americas and SEMEA (Southern Europe Middle East and Africa) markets. With more than 30 years of experience in sourcing, he has developed vendor assessments plus contract restructuring, services scope and IT benchmarking programs for diverse vertical markets in the Americas and Asia Pacific. Before joining ISG, Pedro was a partner of TGT Consult and managing vice president at Gartner Inc., responsible for the consulting business in APAC and Latin America.



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Aude's background includes 30 years of progressively responsible positions and roles in different business including IT services companies. She ensured Consulting, Audit, IT Project Management from RFP to their implementation to meet operational delivery (Outsourcing, Near /Best Shore). Aude contributed to achieve major international programs (above € 100M), leading to implementation of ERP solutions including SAP, shared services and ensuring associated organizational change, communication, transition and transformation as well.

# Authors and Editors



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# ISG Provider Lens™ | Quadrant Report September 2021

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