

SAP Ecosystem

Managed Platform and Cloud Services for SAP

A research report comparing SAP service providers

Customized report courtesy of:

oxya
A Hitachi Group Company

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

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

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

- **Greater acceptance of the cloud.**

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

- **The resilience of business,** and therefore of its information systems, requires robust, secure and durable architectures that are also scalable. Therefore, companies are looking

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



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

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

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

- **The gap between large accounts and midsize accounts is significant.** Large accounts with complex, large SAP systems and with out-of-sync updates and multiple interfaces are transforming these landscapes to more

homogeneous, modern solutions, and are ready for cloud hosting. Contrarily, the midmarket is further behind, using ECC6, with no cloud culture and apprehensive about major changes.

- **Global leaders and local players have different approaches.** The major MSPs (U.S-, India- and Europe-based Leaders) have built development and migration frameworks (migration factories), tooling and automation, and ready-to-use vertical-specific solutions. In these factors, they have overtaken the small, local or Europe-focused MSPs; the latter recognize that they do not have the same resources, and therefore, focus on customer proximity and customer loyalty.
- **The gap between offerings and effective deployment.** It is legitimate to ask about the capacity of Indian companies established in France, with their limited resources, to effectively

and fully implement these tools and frameworks. Clients expect a local presence for their transformation projects and regular interaction. Some India-based MSPs have understood this and are recruiting accordingly for French service centers.

- **French midsize enterprises prefer local pure play providers.** These players may be more expensive, and their methods and tools more limited, but proximity, ease of interaction and absence of language barriers are the key determinants for decision-making for midsize enterprises.
- **The managed application services market is complex.** Most customers require providers to support all their applications and rarely sign up for only SAP asset support. Also, companies looking to outsource support and

migrate operations to the cloud primarily seek a single provider for both types of services.

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

Customers are hard to convince about the most modern solutions.

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



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

Recruitment difficulties are clouding this booming market.

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

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



Provider Positioning

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



Provider Positioning

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



Provider Positioning

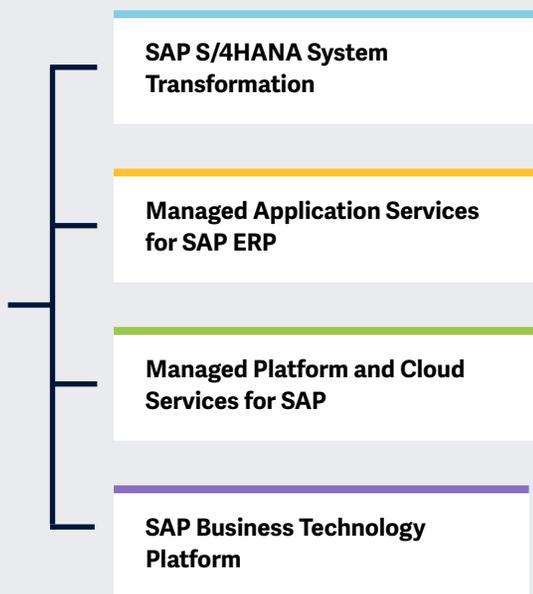
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	SAP S/4HANA System Transformation	Managed Application Services for SAP ERP	Managed Platform and Cloud Services for SAP	SAP Business Technology Platform
Sopra Steria	Product Challenger	Market Challenger	Contender	Market Challenger
Synvance	Contender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



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

Simplified Illustration Source: ISG 2022



Definition

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

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

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

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



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

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

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

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

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

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



Scope of the Report

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

The SAP S/4HANA Systems

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

The Managed Application Services for

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

The Managed Cloud Services for SAP

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

The SAP Business Technology Platform

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

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

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

Provider Classifications

The provider position reflects its suitability for a defined market segment (quadrant). Without further additions, the position always applies to all company size classes and industries. If the requirements of companies for IT services differ and the range of IT providers operating in the local market is sufficiently broad, further differentiation is made according to the target group of products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions IT providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:



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

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

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

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

Number of providers in each quadrant:

ISG evaluates and positions the most relevant providers and limits the number to 25 per quadrant, with some exceptions.



 **Provider Classifications: Quadrant Key**

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

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

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

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

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

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





Managed Platform and Cloud Services for SAP

Managed Platform and Cloud Services for SAP

Who Should Read This

This report is relevant to enterprises across industries in France for evaluating the providers of managed platform and cloud services for SAP ERP.

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

With the presence of multiple deployment models, such as hybrid cloud, private cloud, public cloud and on-premises deployments, there is an increase in the complexity of projects. To manage diverse platforms, enterprises in France are seeking the support of service providers that can offer security, business continuity

and disaster recovery, data privacy and data protection services. Enterprises are also focusing on ROI and innovative cost or pricing models while considering service providers.

To attract enterprises, service providers in France are showcasing proven business cases and successful past engagements. Investments in skill development to increase the number of certified professionals and industry partnerships will also create better opportunities for service providers in France. Capabilities to provide L1, L2, and L3 support will be an added advantage for service providers.



IT and infrastructure leaders should read this report to better understand the relative strengths and weaknesses of managed cloud service providers and 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 service providers' capabilities in maintaining or migrating data on data centers and clouds.



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





The level of **expertise required to manage S/4HANA and cloud infrastructures**, as well as security requirements, is **driving clients to outsource the management of their SAP infrastructures to specialists with extensive technical resources.**

Richard Peynot



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 slowly disappearing, enabling these providers to support clients in migrating to a private cloud and sometimes to a public cloud.

This quadrant evaluates providers that demonstrate expertise in maintaining smooth SAP operations, which requires in-depth knowledge of SAP S/4HANA, expertise in cloud technology, and cloud-cost optimization.

Eligibility Criteria

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



Managed Platform and Cloud Services for SAP

Observations

Infrastructure outsourcing as a concept has long been in existence, but with the challenges of migration to S/4HANA Cloud, some clients are now looking for SAP outsourcing experts. In response, players in this space are offering dedicated solutions that leverage the best of both SAP and cloud technologies. An increasing number of companies are choosing to have the same provider for both managed application and managed platform and cloud services.

SAP pushes companies toward its own comprehensive RISE with SAP solution, which is becoming a competitor to the offerings of other original SAP partners. They have already developed their own cloud solution for SAP ERP and SAP S/4HANA. Rise with SAP could shake up the market for S/4HANA cloud hosting and operations services, but at present the adoption of Rise for SAP remains limited in

France, as the high level of standardization required still scares clients that are used to customizing their ERPs.

This quadrant evaluates service providers that have data centers to host and operate SAP applications, and those that offer management of hybrid cloud environments, security access, monitoring, system availability and interface performance, disaster recovery, backup, recovery data compliance, as well as other requirements of infrastructure and cloud operations.

At the same time, players recognized as world leaders are found in France among the challengers. This is because their coverage in the region remains limited and their offerings that use considerable offshore resources does not meet the expectations of many France-based clients.

Of the 19 providers assessed for this study, 15 have qualified for this quadrant, with five being Leaders.

accenture

Accenture has close partnerships with SAP, AWS, Microsoft and Google to drive its cloud business. The company is gradually migrating its SAP customers to the cloud. It relies on an automated operations platform and has significant offshore activities.

Atos

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

Capgemini has top certifications 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

A Hitachi Group Company

oXya is a managed services provider focused on operating SAP in any kind of configuration. It offers customers the option of hosting their SAP ERP 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. It stands out for its technical expertise, agility and proximity to French clients.



Managed Platform and Cloud Services for SAP

T-Systems

T-Systems leverages the infrastructure of its parent company, Deutsche Telekom, as well as its global resources, 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-Systems is a long-time provider of SAP infrastructure services.





“oXya has long-standing experience in delivering SAP operations in the cloud.”

Richard Peynot

oXya

Overview

oXya was founded in 1998 in Paris and was acquired by the Hitachi Group in 2015. The company operates in the U.S., Canada, the U.K., France, Belgium, Spain, China and Japan through Hitachi. With more than 800 employees, it provides managed cloud services and SAP technical services to more than 400 clients. oXya specializes in migrating SAP customers to SAP S/4HANA.

Strengths

Technicality and originality of the operational model: oXya is characterized by the technical expertise of its employees and by its original model of cells of eight to 10 engineers, each managing a small pool of customers. As a cell grows, it splits to create a new cell to maintain the size and proximity that customers value.

Consistency and continuity: The company has been operating in France for many years and has a high customer retention rate — customer surveys show that 99 percent of its customers are satisfied. Its reputation allows it to attract and retain top talent.

Full-scope services: More than just moving workloads to the cloud, oXya guides clients to modernize the technologies they use to support business operations. The company offers transformations that include connectivity and cloud architecture. oXya helps with working on new opportunities for automation and on leveraging cloud resources for flexibility and agility.

Caution

oXya can improve the automation of its management tools and its public cloud certification levels to increase the attractiveness of its portfolio, and eventually compare itself to the market majors. In addition, higher levels of certification would put oXya closer to the hyperscalers, thus increasing its sales opportunities.

Oxya has long been focused on SAP, but now runs a variety of applications. In the case of extreme technological diversity, it is important to check their capacity to handle all products, especially older ones.





Appendix

The ISG Provider Lens™ 2022 – SAP Ecosystem analyzes the relevant software vendors/service providers in France, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this report includes research from the ISG Provider Lens program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of May 2022, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

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

The study was divided into the following steps:

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



Author & Editor Biographies

Lead Author



Richard Peynot
Senior Analyst

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

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

Enterprise Context and Global Overview Analyst



Keanu Ghrab
Research Analyst

Keanu Ghrab is a research analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on ADM Solutions and Services, Salesforce Ecosystem, ServiceNow Ecosystem, SAP Ecosystem and Future of Work (Workplace). He supports the lead analysts in the research process and authors the global summary report. Keanu also develops content from an enterprise perspective and collaborates with advisors and enterprise clients on ad-hoc research assignments as well. Keanu has helped

his current role since 2021. Prior to this role, he has worked in the BPO sphere of customer support, focusing on design and implementation of improved customer experience. Prior to that he gained professional experience whilst a student, through international jobs in Commodities Trade Management and IT Recruitment. His area of expertise lies across various technologies like IoT, Artificial Intelligence, VR/AR and blockchain and includes market, company, and competitive analysis.





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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