ISG Provider Lens™

SAP Ecosystem

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of: Atos

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SAP's transition to the cloud drives RISE with SAP and GROW with SAP, but not at the expected pace

As enterprises navigate their digital transformation journeys, several key trends are shaping the adoption and utilization of SAP solutions. Many businesses face difficulties constructing a robust business case for migrating from SAP ERP to SAP S/4HANA. Understanding the TCO for the initial years remains a significant hurdle, with organizations seeking more clarity and frameworks to evaluate potential returns and justify the transition investment effectively. While pressure exists to migrate to SAP S/4HANA, firms are taking a cautious approach globally to ensure business continuity and pace the timing of the migration to minimize impact.

The shift toward cloud-based solutions is also prominent. Enterprises embarking on their cloud journey consider RISE with SAP, which offers a holistic transformation approach, while rapidly growing subsidiaries and smaller firms lean toward GROW with SAP for a scalable, accelerated path to cloud adoption. Both approaches aim to streamline business operations and enhance agility.

Joule's integration into SAP S/4HANA Cloud Public and Private editions marks a significant advancement. However, enterprises express concerns regarding pricing structures and the complexity associated with implementation, necessitating clear communication from SAP to ensure seamless adoption.

With the increasing interest in cloud migrations, understanding cloud economics and implementing financial operations (FinOps) strategies becomes critical. Enterprises focus on optimizing cloud spending and ensuring cost efficiency while maximizing the value derived from cloud investments.

Furthermore, digital initiatives are increasingly built on the SAP Business Technology Platform (BTP), emphasizing maintaining a Clean Core to ensure minimal customization for easier

Cloud capabilities offered by service providers become more important **with RISE and GROW.**

upgrades and better system performance. Application integration via BTP supports broader digital strategies, enabling innovation and operational excellence.

These trends underscore SAP's evolving landscape and highlight the importance of strategic planning and informed decision-making for successful transformation outcomes.

RISE with SAP

RISE with SAP's adoption is growing, albeit slower than anticipated. While there is optimism about its future growth, it is not expected to surpass traditional on-premises deployments in the near term. Nevertheless, an increasing number of enterprises are gaining clarity on the RISE with SAP package's components, leading to more informed adoption decisions. For details, please refer to the 2024 edition of the SAP Ecosystem IPL study.

One key development is Joule's inclusion within the RISE with SAP offering, particularly for SAP S/4HANA integrations. However, this addition has received mixed reviews, with enterprises struggling to identify applicable use cases. This ambiguity underscores the need for enhanced communication and education to help businesses maximize the benefits of Joule's integration.

Service providers are pivotal in facilitating RISE with SAP's successful adoption. Understanding different industries' unique nuances, these providers develop tailored, industry-specific propositions to ensure quicker deployments and reduce time to market. Their cloud expertise is critical, as they assist clients in balancing workloads and managing cloud expenditures effectively, optimizing both performance and cost.

Transitioning to the cloud and adopting a new operational model introduces inherent risks, particularly regarding compliance and security, which are paramount in regulated industries. Service providers actively guide clients through these complexities, ensuring regulatory requirements are met and security protocols upheld. Post-rollout change management has emerged as a crucial focus area, ensuring that organizations are well-prepared to adapt to new processes and systems, which is essential for long-term success.

Partners' strong alignment regarding the solution's capabilities and advantages is a significant strength in the RISE with SAP ecosystem. Partners have targeted strategies, robust frameworks and advisory services to support organizations transitioning to modern, cloud-centric ERP solutions. Addressing client concerns about complexity, costs and potential operational disruptions remains vital. Effective communication and comprehensive support frameworks are essential for easing these concerns and driving broader adoption.

GROW with SAP

GROW with SAP's package includes SAP S/4HANA Public Cloud Edition, SAP BTP and SAP Build products. The package includes best practices guides, acceleration services, AI and automation services, and learning resources. It is available in base and premium versions. The base version contains core ERP and SAP BTP, while the premium version includes additional services such as enhanced analytics, business process automation and advanced integration services. The proposition emphasizes that this leaner version enables faster implementation and quicker ROI than traditional ERP projects. Simplified deployment models and preconfigured best practices are integral to accelerating adoption. The solution also supports business growth by equipping organizations with tools to optimize processes, enhance efficiency and enable data-driven decision-making.

GROW with SAP's adoption is witnessing significant momentum, particularly among smaller and lower midmarket firms and large enterprises' subsidiaries. The overall increase in cloud adoption drives this trend, positioning GROW with SAP as a strategic solution that enables the adoption of SAP best practices with minimal customizations. Industries such as manufacturing, energy and consumer packaged goods (CPG) are at the forefront of this adoption wave, leveraging GROW with SAP to enhance operational efficiency and agility.

Service providers play a pivotal role in GROW with SAP's success by emphasizing their unique strengths, such as industry-specific solutions, long-standing client partnerships and localized market expertise. Additionally, providers are utilizing prebuilt templates and accelerators designed to reduce deployment timelines and lower costs, enhancing GROW with SAP's appeal.

Service providers are encouraged to enhance customer engagement by integrating feedback loops throughout the transformation journey to drive greater success. This approach allows for continuous improvements and effectively addresses evolving client needs. Leveraging data analytics tools is another critical strategy, enabling providers to assess implementation effectiveness, track performance metrics and deliver more personalized CX based on informed decision-making.

Moreover, a strong emphasis on training is essential. Developing robust training programs during the initial implementation and post-implementation ensures client teams can effectively leverage new technologies. This approach fosters sustained adoption and maximizes the value derived from GROW with SAP.

SAP Business AI and BTP

SAP BTP is critical in enabling a Clean Core and integrating with broader IT landscapes to support digital initiatives. Service providers are actively building industry-specific solutions on BTP, ensuring that businesses can seamlessly integrate digital processes and drive innovation. The adoption of SAP Business AI, including Joule, is also gaining momentum, although pricing clarity remains a concern for enterprises. Service providers have an essential role in helping clients understand Joule's use cases and demonstrating its value within their operational frameworks.

Joule's use cases are diverse across industries. In the utility sector, it facilitates text categorization for service ticket classification, enhancing operational efficiency, and supports AI-assisted field service bots. In HR, natural language query-enabled cognitive search capabilities help improve intelligent employee interactions with HR systems. In sustainability initiatives, customer-centric solutions focus on carbon footprint management, leveraging LLMs for improved outcomes. Additionally, life sciences benefit from document translation services and smart assistive technologies that enhance service efficiency.

Enterprises leverage SAP Business AI and analytics to enhance business resilience by improving decision-making and insights. These technologies streamline processes, reduce manual errors and contribute to operational excellence. The acceleration of digital transformation and improved business agility further underscore their importance, enabling companies to achieve faster time to value.

For service providers, facilitating the adoption of these technologies involves more than implementation. It requires guiding clients through the complexities of pricing, use cases and integration strategies while ensuring effective utilization for maximum business impact. Service providers can be pivotal in advancing digital transformation journeys by enhancing clarity around solutions like Joule and delivering industry-specific innovations on BTP.

Cloud Economics and FinOps for SAP

With the increasing migration of SAP workloads to the cloud, cost optimization has emerged as a key priority. FinOps practices are becoming essential for controlling cloud spending and maximizing ROI. Strategies such as optimizing resource utilization, leveraging cloud provider discounts and identifying and eliminating wasteful spending become crucial here. For SAP BTP, there is an increasing focus on specialized FinOps strategies to address its unique cost models. This step requires implementing tools and processes for effective expense monitoring and management, ensuring transparency and control over financial outlays.

Cloud economics is gaining attention as organizations seek to measure the cost of individual business transactions or processes within the cloud. This granular approach provides insights into cloud-based SAP applications' profitability and cost structures. Automation and AI play a crucial role in enhancing FinOps efficiency. Automated tools facilitate real-time cost monitoring, reporting and optimization, while AI and ML analyze spending patterns to identify potential cost-saving opportunities.

Integrated FinOps strategies are critical for managing deployments involving SAP BTP and hyperscaler services such as AWS, Azure and Google Cloud. Governance policies further enhance control by defining clear resource provisioning, usage and cost management guidelines. A cultural shift promoting cost awareness and accountability across organizations is also required. Educating employees about cloud costs and empowering them to make cost-effective decisions is essential for sustainable financial management.

Service providers are instrumental in supporting firms with tailored strategies that ensure operational efficiency and financial clarity. Their diverse approaches help clients navigate financial complexities during cloud migrations, ranging from structured to agile methodologies. The collaborative efforts of multiple stakeholders ensure smooth transitions, emphasizing cost optimization, transparency and risk mitigation. Ultimately, robust FinOps practices and governance frameworks are critical for maximizing value from SAP cloud investments.

The adoption of GROW with SAP is gaining strong momentum, particularly among smaller and lower midmarket companies and subsidiaries of larger enterprises seeking agile and scalable solutions. Industries such as manufacturing, energy and CPG are leading this adoption wave. This growth is driven by the need for streamlined operations, enhanced data management and accelerated digital transformation.

Scope of the Report

This ISG Provider Lens™ quadrant report covers the following four quadrants for services: RISE with SAP Implementation Partners, SAP Business AI and Business Technology Platform (BTP) Services, Cloud Economics and FinOps Services for SAP and GROW with SAP Implementation Partners (Midsize providers).

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

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments (quadrants)
- Focus on the regional market

Our study serves as the basis for important decision-making by covering providers' positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing vendor relationships and potential engagements.

Provider Classifications

The provider position reflects the suitability of providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the service requirements from enterprise customers differ and the spectrum of providers operating in the local market is sufficiently wide, a further differentiation of the 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 providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between $20 million and $999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above $1 billion, with activities worldwide and globally distributed decision-making structures.

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

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 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.

SAP Business AI and Business Technology Platform (BTP) Services

Who Should Read This Section

This report is valuable for service providers offering SAP Business AI and Business Technology Platform (BTP) services globally to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence. These providers are assessed on portfolio readiness, CoEs and client benefits.

Research and innovation professionals

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

Technology professionals

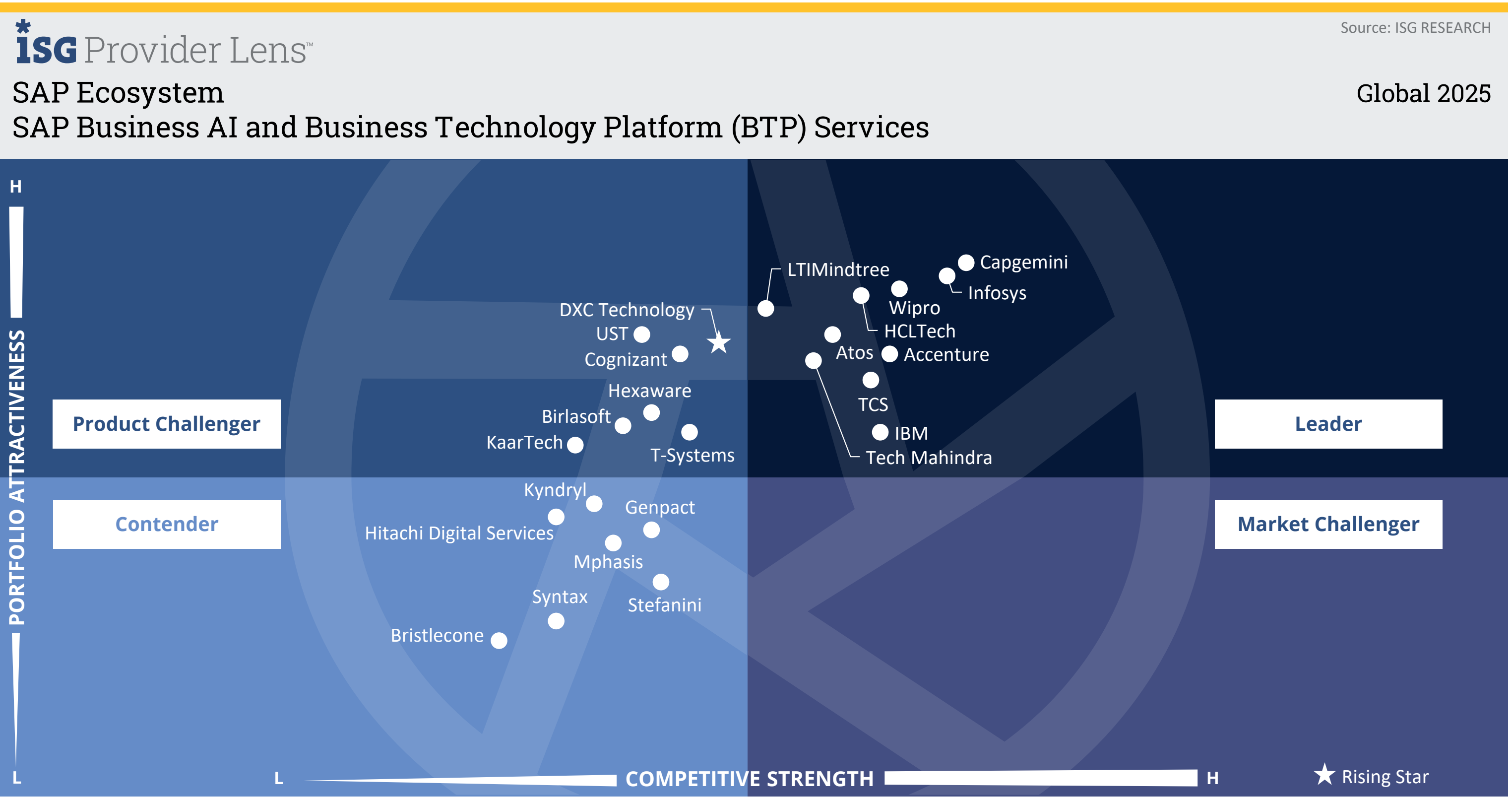
Should read this report to understand how service providers integrate modern technologies into their offerings to gain a competitive edge in the market.

Line-of-business (LOB) and industry leaders

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

Product and strategy professionals

Should read this report to understand the benefits and capabilities introduced by the providers offering Business AI and BTP services.



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

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Definition

SAP Business AI enables enterprises to harness AI for impactful business outcomes. Integrated into SAP applications, it enhances processes with AI capabilities, some powered by generative AI (GenAI). Its use cases include strengthening HCM, improving supply chain resilience, increasing procurement efficiency and compliance and minimizing financial risks and costs. SAP Business AI allows SAP and partner applications to use GenAI to simplify administrative tasks and enhance developer experience, integrations, process automation, analytics and planning.

The quadrant evaluates providers that strategize, develop and integrate SAP BTP with Business AI, delivering digital core applications for clients. These providers have ready-to-deploy solutions and robust industry expertise. They are assessed on portfolio readiness, CoEs and client benefits. They also typically have personnel specialized and trained in SAP BTP, accelerating application development with industry-specific reference architectures.

Eligibility Criteria

1. Capability to deliver **consulting and implementation** services for SAP BTP with SAP Business AI
2. **Expertise** in strategy, deployment and implementation of SAP BTP and Business AI
3. **Use cases and ready-to-deploy solutions** using SAP Business AI
4. Engineers with **SAP certifications** or partner-level certifications across SAP applications
5. Use **case presentations through large events**, earn SAP awards and gain client recognition

Observations

SAP BTP is pivotal for service providers to enable a Clean Core and integrate broader IT landscapes to support digital initiatives. Service providers are developing industry-specific solutions on BTP, allowing businesses to integrate digital processes seamlessly and drive innovation. The growing adoption of SAP Business AI, including Joule, presents significant opportunities, though pricing clarity and beneficial use cases remain a concern for enterprises. Service providers are essential in helping clients understand Joule's diverse use cases and demonstrating its value within operational frameworks.

Enterprises leverage SAP Business AI and analytics to strengthen resilience by enhancing decision-making and insights. These technologies streamline processes, reduce manual errors and contribute to operational excellence, accelerating digital transformation and improving agility for faster time to value.

For service providers, facilitating adoption involves more than implementation. It requires guiding clients through pricing complexities, use case applications and integration strategies while ensuring effective utilization for maximum business impact. Service providers can drive meaningful advancements in digital transformation journeys by enhancing clarity around solutions, such as Joule, and delivering industry-specific innovations on BTP.

From the 90 companies assessed for this study, 24 qualified for this quadrant, with 10 being Leaders and 1 Rising Star.

Accenture leverages SAP BTP to drive advancements across various industries and business functions while complementing its SAP industry cloud solutions. These tools empower clients to enhance their capabilities and integrate intelligent technologies.

Atos assists customers in leveraging GenAI capabilities to automate routine manual and support tasks by identifying pain points and analyzing optimal GenAI solutions compatible with SAP BTP and S/4HANA.

Capgemini offers a robust suite of GenAI solutions to empower clients across four key areas: developing tailored AI strategies, providing custom enterprise solutions enhancing CX through finely tuned models and optimizing operational efficiencies.

HCLTech takes a comprehensive approach to utilizing GenAI to enhance SAP application management by employing GenAI models, advanced algorithms and ML.

IBM's Intelligent Delivery Suite for SAP Applications, available on IBM's Consulting Advantage, integrates GenAI capabilities to optimize tasks throughout the entire SAP project delivery lifecycle.

Infosys has developed multiple industry cloud solutions that utilize Business AI and BTP services to transform clients' business processes. It provides consulting and governance services focused on GenAI.

LTIMindtree's Innovation Studio for SAP BTP empowers enterprises to accelerate their transformation journeys through the RISE with SAP solutions and SAP BTP.

TCS has introduced a cloud-based intelligent subscription solution powered by SAP BTP to help the media and publishing industry transition to subscription-based order-to-cash digital and physical content processes.

Tech Mahindra's SAP BTP Development Assessment Framework integrates multiple frameworks, technologies, methodologies and best practices to evaluate and plan extensions and developments on SAP BTP effectively.

Wipro adopts a consulting-led approach to help customers devise a strategic plan for leveraging SAP BTP and AI, aiming to establish a long-term Clean Core that is ready for future innovations.

DXC Technology (Rising Star) offers comprehensive consulting and implementation services, leveraging industry expertise and proprietary frameworks, such as DXC PathWay, to support clients throughout all stages of their SAP Business AI and BTP transformation.

Atos

Leader

"Atos leverages a human-centric design philosophy, innovative industry solutions and robust automation capabilities on SAP BTP to deliver tailored Business AI services that enhance operational efficiency and drive customer satisfaction."

Akhila Harinarayan

Overview

Atos Group) is headquartered in Bezons, France. It has more than 78,000 employees in 68 countries. In FY24, the company generated €9.58 billion in revenue, with Digital Services as its largest segment. Atos offers BTP conversion accelerators to assist clients in maintaining a Clean Core while integrating modern tools and technologies, enabling streamlined workflows and innovative developments. The company leverages its customer-centric delivery model to provide world-class service in a cost-effective way.

Strengths

Industry solutions: Atos provides innovative industry solutions on SAP BTP, including CLM 2.0 for closed-loop manufacturing, E-Biscuss for tax and customs, and ALTEA, a smart trading solution that offers a comprehensive view of trading activities. The company also offers solutions such as Waterpack 2.0 that enhance the full water cycle from meter to cash, while Work2Success addresses data migration challenges from Workday using BTP as middleware.

Human-centric design: Atos's human-centric design and build philosophy emphasizes balancing the needs of people, processes and technology within its customer engagement framework. The company utilizes agile methodologies and RPA technology for process optimization while encouraging cross-functional collaboration by fostering a personalized and customer-centric culture. Leveraging SAP BTP Business AI tools, the approach focuses on data-driven insights and automation and ensures seamless omnichannel engagement to enhance CX.

GenAI capabilities: Atos assists customers in leveraging GenAI capabilities to automate routine manual and support tasks by identifying pain points and analyzing optimal GenAI solutions compatible with SAP BTP and S/4HANA. Its offerings, including Inventory Enabler, Optimization, KnowledgeGenie and BTP Hub, utilize Microsoft Azure Gen API capabilities to provide comprehensive support.

Caution

Atos has industry-specific solutions built on SAP BTP. However, to further enhance its position and gain more market share, the company should increase the number of certified employees for SAP Business AI and BTP services.

Appendix

The ISG Provider Lens 2025 – SAP Ecosystem study analyzes the relevant software vendors/ service providers in the global market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this study will include data from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. ISG recognizes the time lapse and possible market developments between research and publishing, in terms of mergers and acquisitions, and acknowledges that those changes will not reflect in the reports for this study.

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

Lead Author

Akhila Harinarayan
Manager and Principal Analyst

Akhila Harinarayan is Senior Lead Analyst and the lead author for ISG Provider Lens studies with a focus on Digital Business Transformation and SAP Services. She has more than 12 years of experience across research and consulting including provider strategy, enterprise strategy, industry roadmaps, point-of-view papers, service provider assessment across regions. She has strong expertise on strategy and transformation, digital insights, thought leadership, benchmarking, market assessments and go-to-market strategies.

She has authored many thought leadership papers, digital insight studies, devised go-to-market strategies across products/ industries/regions, built frameworks and maturity models across industries for both enterprises, vendors and service providers.

Research Analyst

Vartika Rai
Senior Research Analyst

Vartika Rai is a senior research analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on Analytics – Services and Platforms, and SAP Ecosystem. She supports the lead analysts in the research process and authors the global summary report. Vartika also develops content from an enterprise perspective and collaborates with advisors and enterprise clients on ad-hoc research assignments.

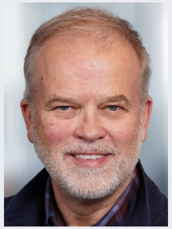
Vartika started her current role in June 2022. Before this role, she worked on secondary research, competitive intelligence, market trends, and newsletter analysis.

Study Sponsor

Aman Munglani
Director: Hyperscalers, Digital Innovator Series and Custom Research

Aman Munglani leads the ecosystems and custom research practice for ISG. He brings over twenty years of expertise in emerging technologies and industry trends. His career is marked by significant contributions in guiding top executives from Global 2000 companies, offering strategic advice on digital transformation, start-up partnerships, driving innovation, and shaping technology strategies. In his tenure exceeding twelve years at Gartner, Aman focused on providing CIOs and IT executives across Asia Pacific and Europe with insights on the practical implementation and advancement of new technologies, the evolution of infrastructure, and detailed vendor assessments.

IPL Product Owner



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

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

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

ISG Provider Lens™

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

For more information about ISG Provider Lens™ research, please visit this webpage.

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ISG

ISG (Nasdaq: III) is a global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth.

The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.

For more information, visit isg-one.com.

ISG Provider Lens™

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