PAC RADAR

SAP Services I Germany & Switzerland I 2019

SAP C/4HANA-related Services in Germany & Switzerland 2019

SITSI I Vendor Analysis I PAC RADAR

– Positioning of Infosys –

Lead analysts:

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PAC Germany, February 2019

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RADAR IT SUPPLIER ASSESSMENT FROM PAC

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OBJECTIVE OF THIS REPORT

The purpose of the PAC RADAR from the market research and strategic consultancy PAC (teknowlogy Group) is to provide a holistic evaluation and visual positioning of leading IT providers within a defined service segment on a local market. Using predefined criteria, the providers' revenue volumes and development and market share are assessed and compared alongside their performance and specific competences in the relevant market segment.

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INTRODUCTION

Germany and Switzerland belong to the most mature markets for SAP. Many medium-sized and large companies in these two countries use SAP solutions. Typically, organizations manage a substantial proportion of their core processes with SAP software. This also means that these companies are very experienced in using and operating SAP applications. Moreover, they typically evaluate every new product innovation coming from the German software manufacturer.

Although SAP is dominating the market for core business applications in Germany and Switzerland, this does not mean that the market for SAP solutions and related services is stagnant. This is because companies keep investing in the improvement of existing solutions. They need to deliver new functions to fulfill the demand from the business, improve the usability of applications and reduce the complexity of their SAP landscapes.

New solutions drive the SAP services market

Another driver for the SAP-related market are new solutions. SAP’s next-generation ERP suite SAP S/4HANA is one example. An increasing number of companies have started ERP migrations or are at least planning such an undertaking. Other areas of investment activities are analytics, human capital management (SuccessFactors) and digital customer experience (SAP C/4HANA, a new suite of solutions for CRM, e-commerce and marketing, which comprises products such as SAP Hybris, SAP Cloud for Customer and others).

Data-driven applications extend core ERP

The expanding portfolio and the widespread use of cloud-based technology results in additional integration demand as well as new development platforms. Companies want to be able to develop and deploy new data-driven applications that process data coming from various sources including connected devices or machines. This is why we also see an increasing interest in the SAP Cloud Platform (SCP) and SAP’s toolset for data-driven applications, SAP Leonardo. The latter comprises features such as machine learning, Internet of Things and big data analytics.

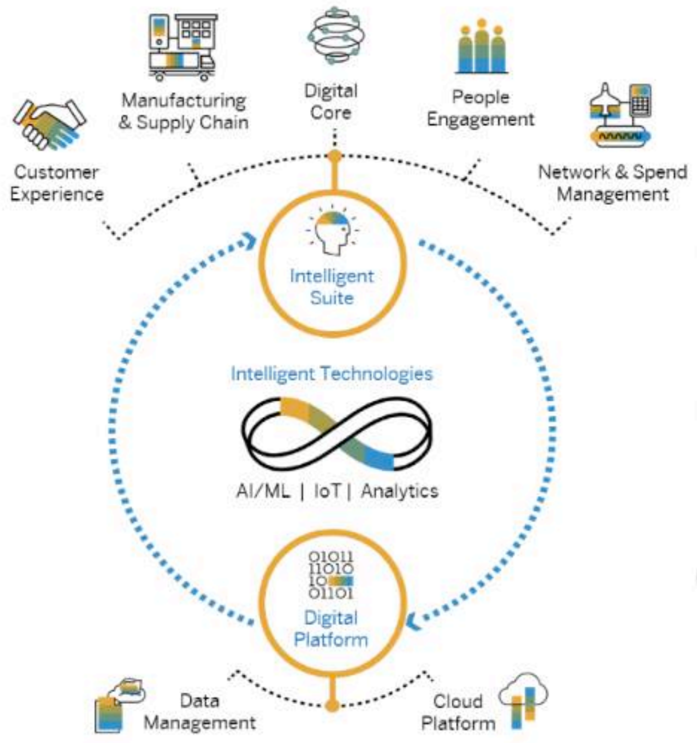
We at PAC expect that companies will invest in services for the development, deployment and integration of such data-driven applications. This includes application products or SAP add-ons developed and sold by SAP partners.

Cloud computing is becoming commonplace

All the new SAP solutions and platforms are cloud-based or offer at least the option to be used in the cloud. Cloud computing is becoming relevant for core ERP as well. PAC expects that more and more companies will use public cloud environments, such as Microsoft Azure or Amazon Web Services, to operate their SAP ECC or SAP S/4HANA solutions.

IT services for a broader SAP portfolio

Due to the broader SAP portfolio, service providers need to expand their competencies across more than one product. And it requires much more consulting work in terms of SAP roadmap and architecture strategy. Platform capabilities to implement and integrate cloud solutions with on-premises applications are going to become highly relevant, too.



Source: SAP

Alongside this, SAP continues to pursue a wide-ranging cloud strategy within which increasing numbers of SAP solutions are being provided in the cloud, as a result of which SAP has started to modify its own solutions portfolio. SAP has also been involved in a number of takeovers that have enabled it to extend its cloud portfolio.

Constant growth at different speeds

We define SAP C&SI services as services that IT service providers deliver on their customer's behalf in order to implement SAP software, expand or improve existing solutions, and to provide companies with consultancy on SAP topics.

The demand for new solution approaches from SAP is also generating an increased demand for SAP-related consultancy and systems integration services. SAP customers require external support from SAP partners especially in terms of the definition and implementation of their S/4HANA roadmap. The same applies to new SAP applications such as SAP C/4HANA, SAP Ariba and SAP SuccessFactors. As implementation projects comprise both legacy migration and new deployments, companies need strategic support for a transformation of solution landscapes and a transformation of the related business processes.

Services for legacy applications remain relevant

That said, the "more traditional" (non-HANA-related) SAP services are still relevant. The overwhelming majority of SAP customers are moving towards the "new SAP world" in an incremental manner, meaning that the demand for services relating to the existing SAP systems, and in particular SAP ERP, remains high. Modifications to existing systems are also required to manage the transition to the new world. Consequently, SAP partners remain involved in tasks connected to the core ERP system. At the same time, demand for services related to SAP HANA is increasing strongly as the first SAP customers have already started with the implementation of the S/4HANA roadmap.

PAC estimates current expenditure by German SAP customers on SAP C&SI (consulting and systems integration) services to be more than €4.3 billion. In Switzerland, this volume amounts to almost €1 billion. By 2022, we anticipate an average growth of around 6 percent annually in both countries – a high growth rate in these two mature IT markets.

And also operations services for SAP solutions remain in high demand, even though the expected growth rates are lower than in the C&SI market.

Expenditures for SAP application management were €1.8 billion in Germany and €375 million in Switzerland in 2018, and are expected to grow by 1.4% on average in Germany and by more than 2% in Switzerland in the coming years. Thus, SAP-related services stand for more than 50% of the overall application management spending in Germany, and for about 40% in Switzerland.

The hosting of SAP solutions through external services providers is a market with a very long history, but has nevertheless been massively developing in the last years. The first big transformation of SAP hosting concepts was characterized by the "cloudification" of traditional hosting delivery and pricing, resulting in hosted private cloud concepts with standardized architectures, pay-per-use components, etc., but still widely dedicated to each client. The second big transformation has started only recently in the considered countries, but is also about to massively change the hosting concept: public cloud-based SAP hosting. While it has already become common for most hosting providers to include public cloud platforms for selected tasks like testing, more and more SAP customers consider hosting models that are widely or fully based on public cloud platforms.

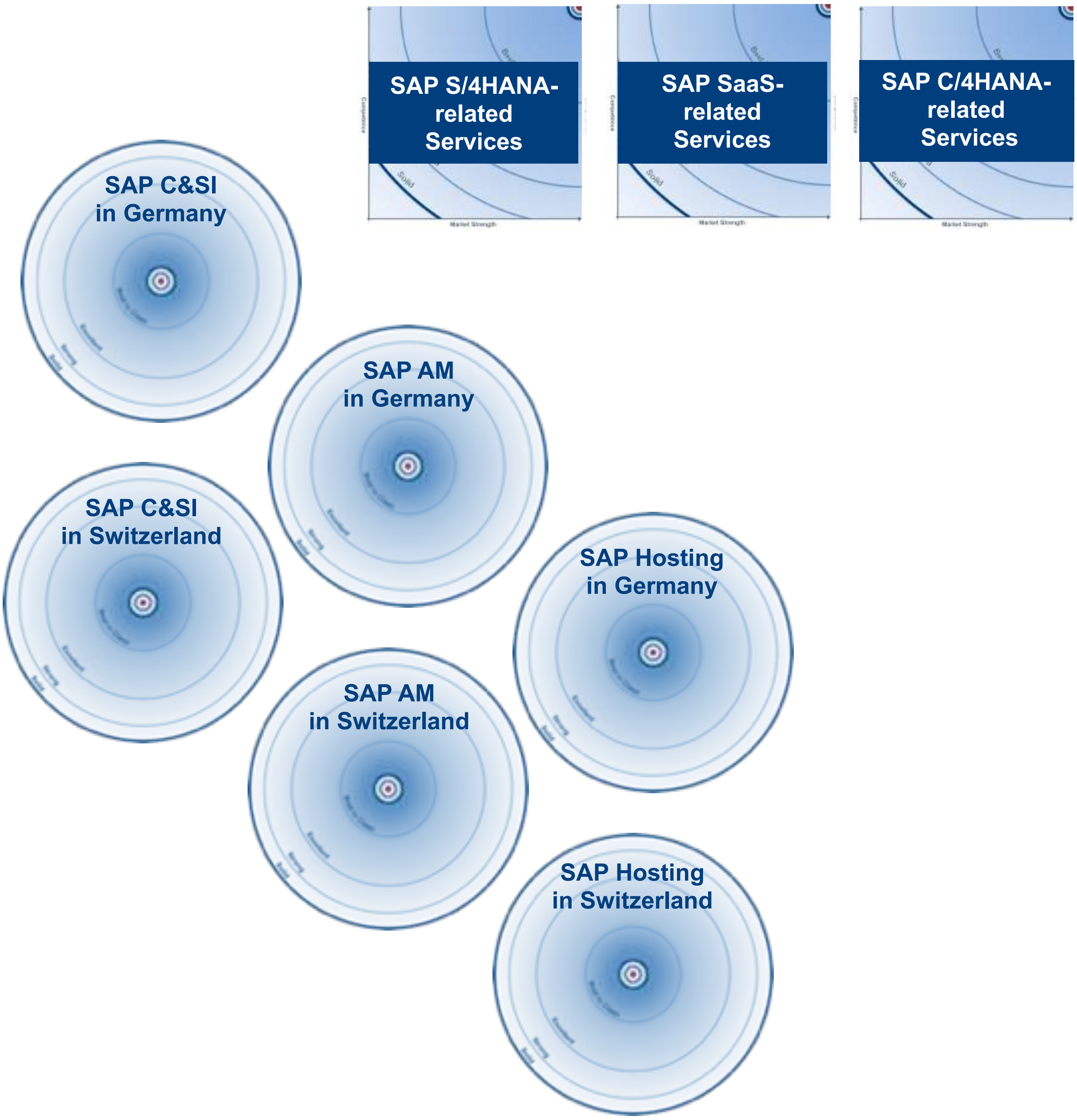
At the same time, the increasing automation of SAP operations delivery and services processes became the next big efficiency lever in addition to nearshoring and offshoring – which will nevertheless remain of high importance. Overall, German companies spend about €2 billion on SAP hosting services, Swiss companies almost €250 million.

Growth driven by new topics

While the market volume for SAP-related services for existing SAP landscapes (e.g. SAP ECC, SAP Business Suite) is bigger if compared with the market for new applications (SAP S/4HANA, SAP C/4HANA, etc.), the much higher growth rates come from the new products.

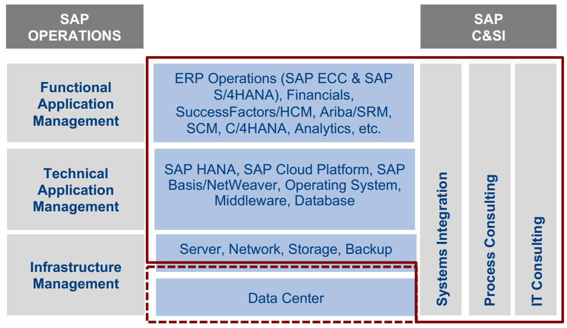
SCOPE & DEFINITION

PAC evaluated the **providers of SAP-related services in Germany and in Switzerland** in different PAC RADAR analyses, each of which emphasizes a different service type but also overlaps with the other service types. Depending on their focus, the providers will be positioned either in all or in selected PAC RADAR analyses.



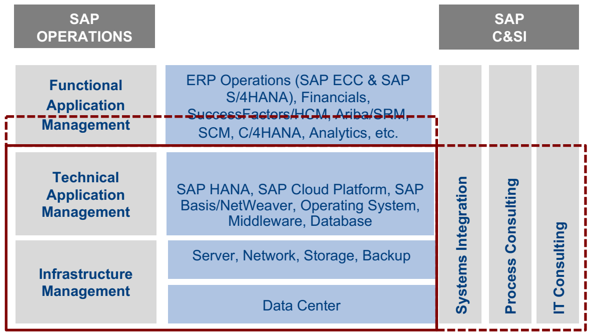
PAC RADAR SAP Consulting & System Integration 2019

SAP C&SI includes **SAP-related IT consulting services** (planning, specification and design of SAP systems or the SAP-related part of systems), **IT-related process consulting** within the framework of SAP-related projects (which beside purely IT-related services such as the audit of SAP system environments, technological/ architectural design, and the selection of technologies and solutions around SAP also includes business process reengineering (BPR) and change management around SAP projects), as well as **SAP systems integration** (SAP-related software development, implementation services around SAP, integration of SAP solutions in the infrastructure, and SAP-related infrastructure services).



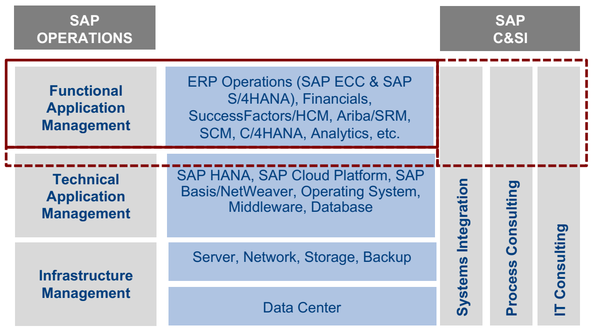
PAC RADAR SAP Hosting 2019

SAP hosting refers to the **operation and management of an SAP application** from a technical perspective, including the operation and management of the hardware infrastructure (server, memory, network) and technical application management (including the management of the SAP basis/NetWeaver, databases, operating systems, and middleware), on the provider's premises (possibly including partnerships with co-location providers) or on public cloud infrastructure. This PAC RADAR covers both cloud-based and "traditional" hosting models.



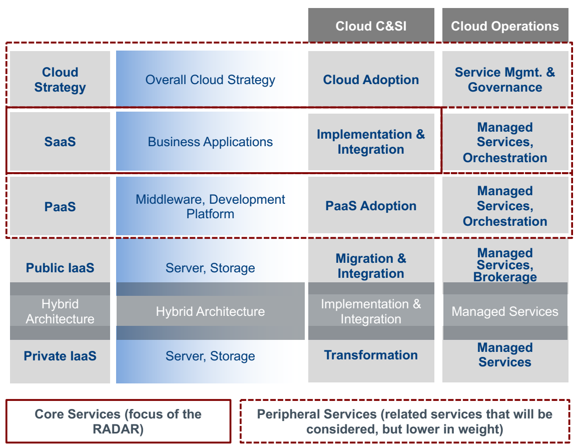
PAC RADAR SAP Application Management 2019

SAP application management (AM) refers to the **maintenance and enhancement of existing SAP applications** under a long-term (multi-year) contract with a commitment to fulfilling pre-defined service level agreements (SLAs). This PAC RADAR covers both stand-alone application management and embedded application management (e.g. as part of complete or business process outsourcing).



PAC RADAR SAP SaaS-related Services 2019

SAP SaaS implementation and integration, as considered in this PAC RADAR analysis, includes **SAP software-as-a-service (SaaS)-related IT consulting services** (feasibility study, planning, specification, and design), **IT-related process consulting** as part of a SaaS-related project (audit of system infrastructures, selecting technologies and solutions, business process reengineering, [BPR] and change management), and **SaaS implementation and integration** (implementation services and data migration, integration of the SaaS solution in the existing software infrastructure and in other SaaS solutions where applicable, testing, training, etc.).



PAC RADAR EVALUATION METHOD

The PAC RADAR evaluation method

PAC used more than 150 predefined criteria to assess and compare the providers within given service segments.
The assessment is based on the report-card score within the peer group of the positioned providers.
This is based on:

- The provider's detailed self-disclosure about resources, distribution, delivery, portfolio, contract drafting, pricing, customer structure, references, investments, partnerships, certifications, etc.;
- An assessment of the provider by reference customers (to be obtained by the provider);
- The analysis of existing PAC databases;
- Secondary research;
- Dedicated face-to-face interviews as relevant.

The provider data is verified by PAC and any omissions are rectified based on estimates.
If the provider does not participate, the assessment is performed using the proven PAC methodology, in particular based on:

- Information obtained from face-to-face interviews with the provider's representatives, analyst briefings, etc.;
- An assessment of company presentations, company reports, etc.;
- An assessment of PAC databases;
- An assessment of earlier PAC RADARs in which the provider participated;

If no customer assessments are submitted, or fewer than the required number
Any missing customer assessments are scored as "satisfied", i.e. they do not negatively affect the score. This produces an average score for criteria based on customer assessments.

Reissue of published RADARs
The assessments in the PAC RADAR represent an assessment of the providers within the given peer group in the year in which the respective PAC RADAR was published.
The evaluations may not be directly comparable with those of the previous version due to subsequent content modifications. In particular, they do not depict a development of individual providers over time.
Methodological and/or organizational modifications may be made due to changing market conditions and trends and can include:

- Different peer group in the focus of the analysis;
- Modification of individual criteria within clusters and sub-clusters;
- Increased or altered expectations by user companies;
- Adjustment of the weighting of individual criteria.

Selection of providers

Providers are selected and invited according to the following criteria:

- Size of revenues in the segment to be analyzed in the specified region;
- “Relevance”: Even providers that do not belong to the top-selling providers in the segment to be analyzed are considered, if PAC classifies them as relevant for potential customers, for instance due to an innovative offering, strong growth, or a focus on a specific customer group (e.g. SMB).

Further criteria include the strategic relevance of the service offerings in the portfolio as a whole, breadth and depth of the portfolio, and a broad customer base in the market segment of the target customer group.

The provider landscape scrutinized for this edition of the PAC RADAR is very heterogeneous. The considered providers each employ between several dozen and several tens of thousands SAP consultants worldwide. Some providers address smaller customers in particular, while others focus on large international corporations. Some widely rely on local resources while others can rely on extensive global delivery resources.

However, factors such as the pure scale or the internationality of a provider are given just a low weighting in this overall assessment as their relevance is ultimately dependent on the individual customer and their requirements. Accordingly, each RADAR customer will be given a different custom overall assessment weighted in accordance with their own specific criteria.

There is no differentiation as to whether the providers are customers of PAC – neither in the selection of the providers to be positioned, nor in the actual evaluation.

Some few providers with significant SAP services revenue were not considered in this RADAR analysis:

- Providers that are strongly focused on one single industry sector, and are thus only relevant for a limited clientele (e.g., MHP in Germany).
- Providers whose positioning is not sufficiently transparent to the general public as well as to the analyst community, and who were not willing to participate in the RADAR process (e.g., Deloitte).
- Moreover, the question may arise why SAP is not listed in this assessment. Naturally, SAP is one of the most relevant and largest providers of SAP-related services in Germany and Switzerland. However, in the PAC RADAR, PAC deliberately does not consider the manufacturer’s service units as they cannot be compared with the peer group, which is why SAP itself has not been assessed in this PAC RADAR analysis.

These providers will be considered, in addition to the providers positioned in the RADAR, in custom-specific provider selection engagements where relevant to the customer.

Considered providers by service segment and geography

SAP C&SI in Germany	SAP C&SI in Switzerland	SAP AM in Germany	SAP AM in Switzerland	SAP Hosting in Germany
• Accenture • All for One Steeb • Atos • BTC • BearingPoint • Capgemini • CGI • Cognizant • Datagroup • DXC Technology • Fujitsu • IBM • Infosys • itelligence (part of NTT Data) • T-Systems • TCS • Wipro	• Accenture • BearingPoint • BTC • Capgemini • Cognizant • DXC Technology • Fujitsu • IBM • Infosys • itelligence (part of NTT Data) • Swisscom • T-Systems • TCS • Wipro	• Accenture • All for One Steeb • Atos • BTC • Capgemini • CGI • Cognizant • Datagroup • DXC Technology • Fujitsu • IBM • Infosys • itelligence (part of NTT Data) • T-Systems • TCS • Wipro	• Accenture • BTC • Capgemini • Cognizant • DXC Technology • Fujitsu • IBM • Infosys • itelligence (part of NTT Data) • Swisscom • T-Systems • TCS • Wipro	• Accenture • All for One Steeb • Atos • BTC • Cognizant • Datagroup • DXC Technology • Freudenberg IT • Fujitsu • IBM • Infosys • itelligence (part of NTT Data) • QSC • T-Systems • TCS

SAP Hosting in Switzerland	S/4HANA-related Services in Germany & Switzerland	C/4HANA-related Services in Germany & Switzerland	SAP SaaS-related Services in Germany & Switzerland
• Accenture • BTC • Cognizant • DXC Technology • Fujitsu • IBM • Infosys • itelligence (part of NTT Data) • Swisscom • T-Systems • TCS	• Accenture • All for One Steeb • Atos • BearingPoint • BTC • Capgemini • CGI • Cognizant • Datagroup • DXC Technology • Fujitsu • IBM • Infosys • itelligence (part of NTT Data) • T-Systems • TCS • Wipro	• Accenture • All for One Steeb • Atos • BearingPoint • BTC • Capgemini • CGI • Cognizant • Datagroup • DXC Technology • Fujitsu • IBM • Infosys • itelligence (part of NTT Data) • T-Systems • TCS • Wipro	• Accenture • All for One Steeb • Atos • BTC • BearingPoint • Capgemini • CGI • Cognizant • DXC Technology • Fujitsu • IBM • Infosys • itelligence (part of NTT Data) • T-Systems • TCS • Wipro

Evaluation criteria (most relevant)

General criteria

<table>
<tr><th></th><th colspan="2">General criteria
(considered to varying extents for several of the considered services segments)</th></tr>
<tr><td rowspan="2">Cluster “Competence”</td><td colspan="2">• Portfolio: future development of SAP C&SI service value chain (e.g. in terms of cloud and SaaS support)
• Portfolio: business transformation services
• Project experience – SAP S/4HANA
• SAP focus – share of SAP topics in internal training budgets
• SAP services-related R&D commitment and investments
• Portfolio: cloud migration services
• Portfolio: coverage of C&SI service value chain
• Portfolio: migration of existing SAP systems (SAP ECC, SAP BW) to SAP HANA
• Project experience – SAP Hybris & Cloud for Customer (now SAP C/4HANA)
• Regional resource strength for SAP Cloud for Customer (now part of SAP Sales Cloud)
• Regional resource strength for SAP Hybris (now SAP Marketing Cloud & SAP Commerce Cloud)
• Regional SAP SaaS C&SI project experience
• Balance of global delivery network (off-/nearshore resources relevant to Germany/Switzerland)
• Regional resource strength for S/4HANA
• Project-relevant certifications (a.o. service quality, security)
• Regional strength & competence for SAP Cloud Platform & HANA-based innovation
• Functional mix of SAP services consultants (process consulting, implementation, development, architecture)
• Share of new implementations with recently completed projects
• Portfolio: custom solution development and support
• Share of certified consultants in SAP services consultants
• Share of extensions and integration with recently completed projects
• Portfolio: coverage of SAP Cloud portfolio (hosting & reselling)
• Regional resource strength for SAP CRM
• Anchoring of SAP services within the organization
• Global delivery capability
• Importance of SAP services within total regional IT services (percentage of sales)
• Reference customer evaluation: Evaluation of quality of service provision – across SAP services
• Regional resource strength for SAP CRM
• Strength in SAP-based industry-specific offerings
• Strength of global delivery network
• Resource strength SAP services – worldwide
• Resource strength for SAP SaaS solutions – worldwide
• Share of functional upgrades and optimization with recently completed projects
• Share of solution migration with recently completed projects
• Share of technical upgrades and optimization with recently completed projects
• Breadth of SAP services portfolio – combined offerings from SAP C&SI, AM and/or hosting
• Coverage of different pricing models (SAP C&SI)
• Partnership with public cloud providers – coverage of major platforms
• Experience level and mix of SAP services consultants – worldwide
• SAP-related public cloud competence worldwide – across platforms
• SAP-related public cloud competence – AWS
• SAP-related public cloud competence – Microsoft Azure
• SAP-related public cloud competence – SAP Cloud
• SAP-related public cloud competence – Google</td></tr>
<tr><td>• Coverage of different industries – related to the number of SAP consultants – Germany
• Experience level and mix of SAP services consultants – in Germany
• Resource strength SAP services – Germany
• SAP project experience – number of recently completed projects in Germany
• Depth of know-how in specific industries – related to the number of SAP consultants – Germany</td><td>• Coverage of different industries – related to the number of SAP consultants – Switzerland
• Experience level and mix of SAP services consultants – in Switzerland
• Resource strength SAP services – Switzerland
• SAP project experience – number of recently completed projects in Switzerland
• Depth of know-how in specific industries – related to the number of SAP consultants – Switzerland
• Coverage of local Swiss project languages (German, French, Italian)</td></tr>
</table>

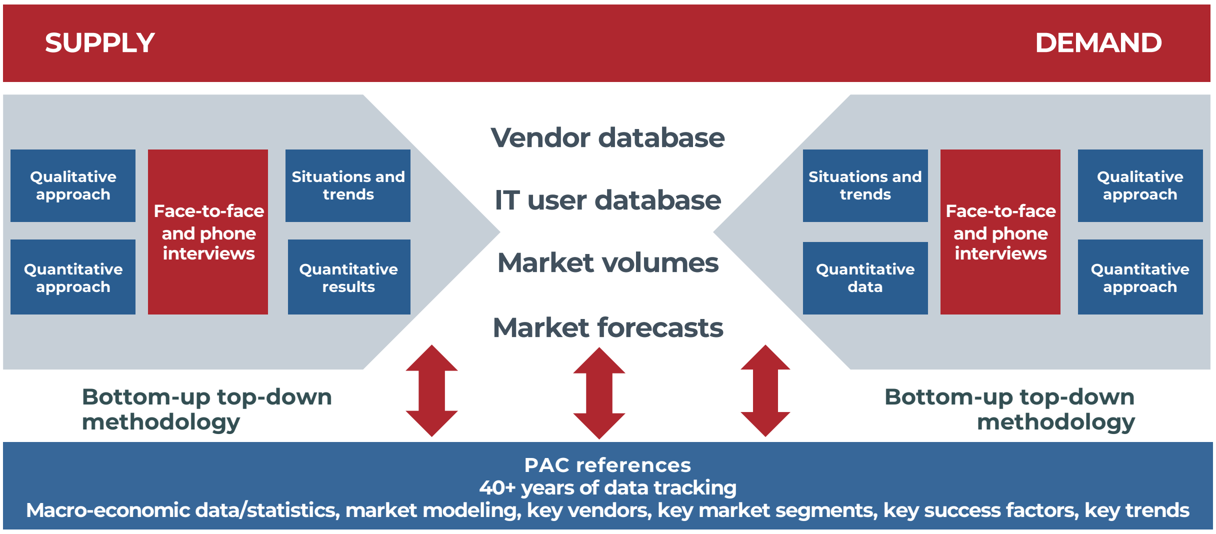
<table>
<tr><th></th><th colspan="2">General criteria
(considered to varying extents for several of the considered services segments)</th></tr>
<tr><td rowspan="2">Cluster “Relative market strength”</td><td colspan="2">• Industry focus of SAP services sales and pre-sales organization
• Corporate transparency
• Provider stability in terms of business model, customer mix, size etc.
• Reference customer evaluation: Evaluation of account management – across SAP services
• Reference customer evaluation: Evaluation of quotation phase – across SAP services
• Employee turnover in SAP services</td></tr>
<tr><td>• Recognition by the competition: C&SI for SAP SaaS solutions – Germany
• Recognition by the competition: C&SI for S/4HANA – Germany
• Recognition by the competition: Innovation with SAP Cloud Platform, SAP Leonardo and SAP HANA – Germany
• Local sales & pre-sales resources for SAP services – Germany</td><td>• Recognition by the competition: C&SI for SAP SaaS solutions – Switzerland
• Recognition by the competition: C&SI for S/4HANA – Switzerland
• Recognition by the competition: Innovation with SAP Cloud Platform, SAP Leonardo and SAP HANA – Switzerland
• Local sales & pre-sales resources for SAP services – Switzerland</td></tr>
</table>

SAP C/4HANA Services in Germany & Switzerland

	SAP C/4HANA-related Services in Germany / Switzerland Criteria with higher weighting
Cluster “Competence”	• Portfolio: future development of SAP C&SI service value chain (e.g. in terms of cloud and SaaS support) • Project experience – SAP Hybris & Cloud for Customer (now SAP C/4HANA) • Regional resource strength for SAP Cloud for Customer (now part of SAP Sales Cloud) • Regional resource strength for SAP Hybris (now SAP Marketing Cloud & SAP Commerce Cloud) • Portfolio: business transformation services • Portfolio: cloud migration services • Portfolio: migration of existing SAP systems (SAP ECC, SAP BW) to SAP HANA • Regional resource strength for SAP CRM • SAP focus – share of SAP topics in internal training budgets • SAP services-related R&D commitment and investments • Functional mix of SAP services consultants (process consulting, implementation, development, architecture) • Portfolio: coverage of C&SI service value chain • Portfolio: development of add-ons to SAP SaaS solutions • Project-relevant certifications (a.o. service quality, security) • Regional resource strength for SAP CRM • Regional SAP SaaS C&SI project experience • Regional strength & competence for SAP Cloud Platform & HANA-based innovation • Resource strength for SAP SaaS solutions – Germany • Resource strength for SAP SaaS solutions – Switzerland • Share of certified consultants in SAP services consultants • Share of new implementations with recently completed projects
Cluster “Relative market strength”	• Recognition by the competition: C&SI for SAP SaaS solutions – Germany • Recognition by the competition: C&SI for SAP SaaS solutions – Switzerland • Focus on the German market • Focus on the Swiss market

General PAC research method

The following overview describes PAC's research method for market analysis and key differentiation features.



Description of the PAC methodology

Local research and face-to-face communication are two core elements of PAC's methodology. In our market studies, we can draw on more than 40 years of experience in Europe.

Positioning within the PAC RADAR

From the resulting overall score, each provider receives their characteristic positioning within a ring of the PAC RADAR. Here, the following applies: The closer a provider is to the center, the closer they are to meeting customers' requirements.

The "customer requirements" at the center represent a cross-section of the market; the position of the provider represents the completeness with which the provider's offerings and competence correspond with the requirements of all potential customers; i.e. purely local clients, international key accounts and SMEs alike.

The providers are positioned within ring 1 (innermost ring) to ring 4 (outermost ring), based on the total grade they achieved. The total grade is the average score of the two main clusters ("competence" & "market strength").

The rings of the PAC RADAR can be classified by the following attributes:

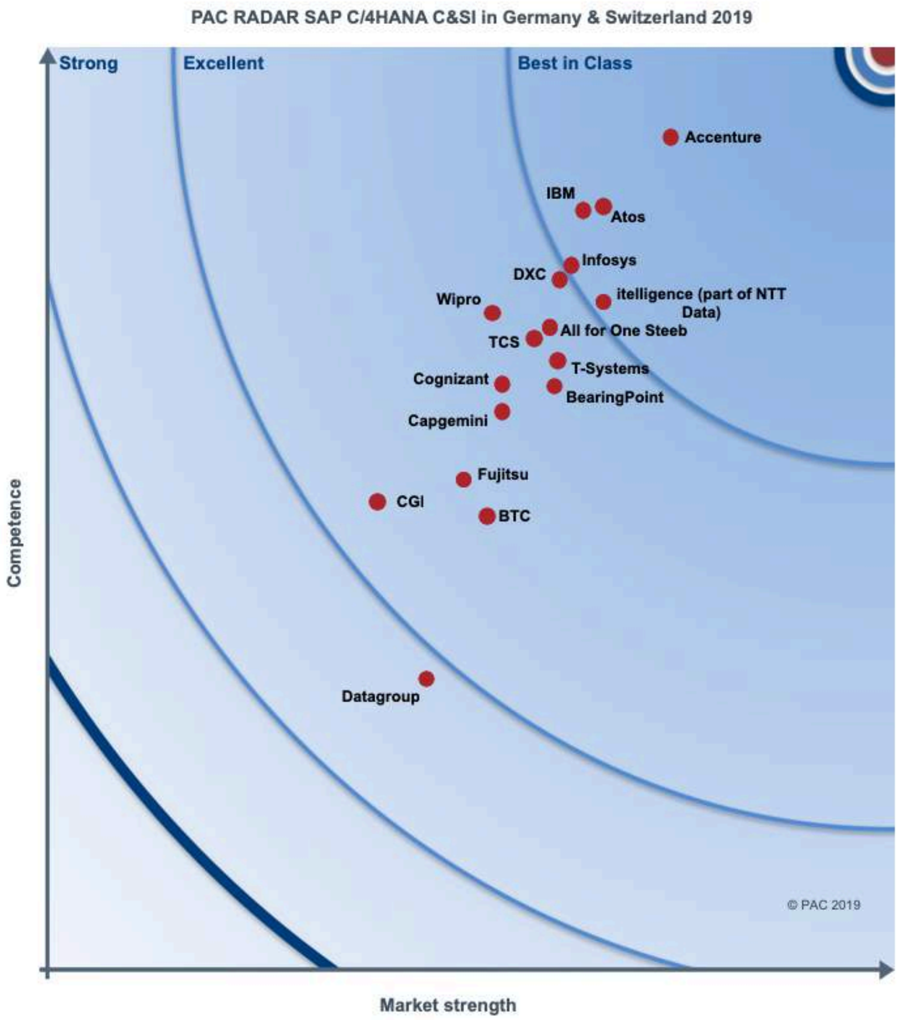
Ring 1: "Best in Class" (total grade between 1 and 1.99)

Ring 2: "Excellent" (total grade between 2 and 2.99)

Ring 3: "Strong" (total grade between 3 and 3.99)

Ring 4: "Solid" (total grade between 4 and 4.99)

PAC RADAR "SAP C/4HANA-RELATED SERVICES IN GERMANY & SWITZERLAND 2019"



PAC RADAR SAP C/4HANA-related Services in Germany & Switzerland 2019

REVIEW OF TOP-SEEDED PROVIDER INFOSYS

Infosys

PAC RADAR SAP C/4HANA-related Services in Germany & Switzerland 2019 **Best in Class**

C/4HANA-related C&SI in Germany & Switzerland		
Cluster	**Average**	**Infosys**
1. Relative market strength	**2.5**	**2.4**
2. Competence	**2.2**	**1.9**
Total score	**2.3**	**1.96**

Criteria rated as significantly ABOVE AVERAGE*

- Resource strength for SAP SaaS solutions – Switzerland
- Balance of global delivery network (off-/nearshore resources relevant to Germany/Switzerland)
- Strength of global delivery network
- Resource strength for SAP SaaS solutions – worldwide
- Resource strength SAP services – Switzerland
- Focus on / experience with large SAP AM projects
- AM for SAP SaaS applications
- SAP project experience – number of recently completed projects in Switzerland
- Focus on / experience with large SAP C&SI projects
- Regional resource strength for SAP CRM
- SAP services-related R&D commitment and investments

Criteria rated as significantly UNDER AVERAGE*

- SAP C&SI: focus on medium-sized to small accounts
- Share of certified consultants in SAP services consultants

*One or more grades above or below the average rating

ABOUT TEKNOWLOGY GROUP

teknowlogy Group is the leading independent European research and consulting firm in the fields of digital transformation, software, and IT services. It brings together the expertise of three research and advisory firms, each with a strong history and local presence in the fragmented markets of Europe: Ardour Consulting Group, CXP and PAC (Pierre Audoin Consultants).

We are a content-based company with strong consulting DNA. We are the preferred partner for European user companies to define IT strategy, govern teams and projects, and de-risk technology choices that drive successful business transformation.

We have a second-to-none understanding of market trends and IT users' expectations. We help software vendors and IT services companies better shape, execute and promote their own strategy in coherence with market needs and in anticipation of tomorrow's expectations.

Capitalizing on more than 40 years of experience, we operate out of seven countries with a network of 150 experts.

For more information, please visit www.teknowlogy.com and follow us on Twitter or LinkedIn.

ABOUT THE PAC RADAR

The PAC RADAR is a graphical representation and written analysis of the positioning of various IT providers within a defined market segment at a specific point in time. The positioning and characterization of selected companies within the PAC RADAR is conducted on the basis of an analytical assessment of criteria which PAC previously defined for this analysis.

The selection, positioning, and characterization of companies within the PAC RADAR is not subject to any vested interests whatsoever. PAC does not support any providers that are represented in the PAC RADAR, and does not give any recommendations to technology users. The PAC RADAR represents a result from market research only and must not be taken as a recommendation for action.

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