# Leaders in SAP Business AI and Joule-Related Services Worldwide 2026

SITSI® I Vendor Analysis I PAC INNOVATION RADAR

## Positioning of NTT DATA

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# INTRODUCTION

SAP-related services remain heavily shaped by S/4HANA. To borrow a sports analogy: we are approaching crunch time: There are less than two years left before the end of mainstream maintenance in late 2027. While paid extension options exist, many customers remain confident they can complete their migrations in time.

Service providers have ramped up capacity, improved migration methodologies, and developed tools and templates to accelerate projects. And AI is already casting its shadow: early adopters among providers are leveraging AI in project execution and delivery to speed up migrations, reduce costs, and optimize operational services.

**What does this mean for customers?**

Organizations should carefully assess their migration partner's portfolio to ensure access to advanced tools and AI-driven solutions that support S/4HANA migration. **PAC's RADAR user tool** can help identify suitable providers.

**Implications for service providers**

These developments will reshape providers' mid-term business models. They must prepare for a new SAP reality where S/4HANA will gradually lose momentum as a growth engine. Customers are expected to shift focus toward modernizing Line-of-Business (LoB) solutions—areas often deferred due to the massive resource and budget commitments required for S/4HANA migration.

**Business AI –** Looking ahead, providers will need to support customers in integrating custom extensions and third-party applications via SAP BTP, as well as embedding **Business AI and GenAI** into back-office processes. This requires adapting to new customer demands in a **post-migration era.** Many providers are expanding their portfolio of predefined AI use cases for business processes. Consulting expertise and a rich set of AI-related assets will become critical selection criteria for customers.

**C&SI –** Recent years have seen a shift toward **brownfield migrations,** reducing demand for deep process consulting as many organizations postpone process modernization. However, consulting needs remain significant—especially for unlocking S/4HANA's potential in analytics, AI, and automation. Providers are also increasingly expected to deliver **cloud consulting and integration,** not only because S/4HANA often runs in cloud environments, but also to integrate SAP and partner SaaS solutions into the ERP landscape. Geopolitical tensions add another layer of complexity, driving European customers to seek **sovereign cloud alternatives** for sensitive ERP workloads.

**Application Management–** The move toward cloud-based deployment models and a **"Keep-the-Core-Clean"** approach is redefining SAP application management. Under RISE contracts, technical application management is largely standardized and handled by SAP. In S/4HANA environments, functional application management increasingly focuses on custom extensions outside the core. For SaaS-based SAP solutions, providers must pivot toward supporting LoB processes, integration services, and compliance-related offerings.

**Hosting –** As S/4HANA moves to cloud platforms, hosting services and the provider landscape are transforming. Public cloud hosting typically relies on hyperscaler infrastructure (AWS, Microsoft Azure, Google Cloud), making expertise in migration and operations on these platforms essential. While demand for private cloud resources has declined, sovereignty concerns could revive interest in local data centers. Providers need strong consulting skills with regard to sovereignty requirements and possible solutions, ideally with access to a sovereign infrastructure in order to meet these requirements.

**Conclusion –** With the end of S/4HANA mainstream maintenance approaching, we expect significant shifts in SAP-related service demand and offerings. Against this backdrop, **PAC's RADAR series on SAP services** is a key tool for evaluating provider positioning and competencies across implementation and operations. The RADARs cover the full value chain—**C&SI, application management, public and private cloud hosting—**as well as strategic topics like **Business AI, Joule,** and, of course, the dominant theme: **SAP S/4HANA.**

RADAR

# PAC INNOVATION RADAR "LEADERS IN SAP BUSINESS AI AND JOULE-RELATED SERVICES WORLDWIDE 2026"

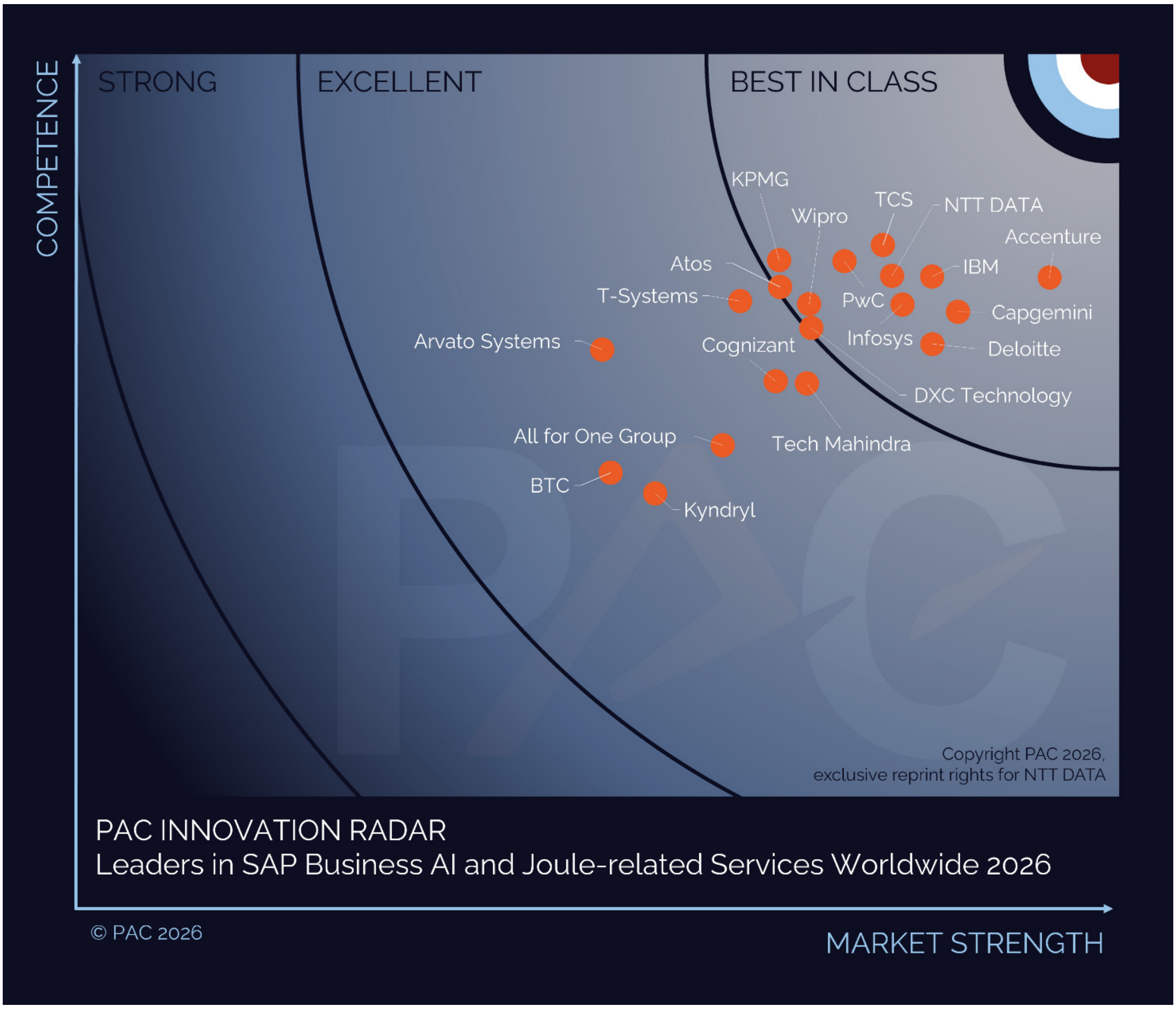



*Fig. 1: PAC INNOVATION RADAR "Leaders in SAP Business AI and Joule-Related Services Worldwide 2026*

The evaluation criteria are weighted and assigned to the clusters "competence" and "market strength". Based on all scores and weightings, the overall score is calculated. From the resulting overall score, each provider receives their characteristic positioning within the PAC RADAR.

Here, the following applies: The closer a company is to the center, the closer they are to meeting customers' requirements.

The classification of providers is based on the overall score:

| | |
|---|---|
| "Best in Class" | 1.00 – 1.99 |
| "Excellent" | 2.00 – 2.99 |
| "Strong" | 3.00 – 3.99 |

# REVIEW OF TOP-SEEDED PROVIDER NTT DATA

| Leaders in SAP Business AI and Joule-Related Services Worldwide 2026 | | Positioning: Best in Class |
|---|---|---|
| **Cluster** | **Average** | **NTT DATA** |
| **Market Strength** | 2.25 | 1.66 |
| **Competence** | 2.03 | 1.70 |
| **Total Score** | **2.12** | **1.68** |

| Criteria rated significantly ABOVE AVERAGE (more than 0.75) | Criteria rated significantly BELOW AVERAGE (more than 0.75) |
|---|---|
| • Anchoring of SAP services within the organization<br>• Employee resources for SAP services – Europe<br>• Employee resources for SAP services – Germany<br>• Employee resources for SAP services – UK<br>• Focus on the retail sector<br>• SAP S/4HANA-related resources – Europe<br>• Coverage of SAP-related AI use cases<br>• Portfolio of proprietary horizontal and vertical SAP-related solutions<br>• Portfolio of proprietary accelerators, tools, and templates<br>• SAP project experience – number of recently completed projects<br>• Experience in SAP S/4HANA Public Cloud Edition (native SaaS)<br>• Recognition by the competition – SAP AM worldwide | • Focus on the financial services sector (BFSI) |

# OBJECTIVE OF THE PAC RADAR

**What is the PAC RADAR?**

The PAC RADAR is an effective tool for the holistic evaluation and visual positioning of software and ICT service providers on local markets. Numerous ICT and business decision-makers in user companies of all industries and company sizes rely on the PAC RADAR when selecting their partners and developing their sourcing strategies.

With the help of predefined criteria, PAC evaluates and compares providers' strategies, development, and market position, in addition to their performance and competencies within specific market segments.

Each PAC RADAR focuses on a specific IT market segment. Up to 30 leading providers are evaluated per segment. Participation in the PAC RADAR is free of charge.

All providers are evaluated using PAC's proven methodology, which is based on a detailed self-disclosure from each provider and–optionally–on personal interviews.

PAC reserves to also evaluate and position relevant providers in the PAC RADAR that do not participate in the self-disclosure process.

After the evaluation of the predefined criteria, each provider's position is plotted in the PAC RADAR. The criteria are classified by clusters and can all be attributed to the "Competence" and "Market Strength" clusters.

The provider evaluation, including a market description, is published as a report.

**PAC RADAR graph**

The PAC RADAR graph is a visual presentation of the results of the provider evaluation with regard to their market strength (horizontal axis) and competence (vertical axis) in the respective analyzed market segment.

The closer a company is to the center, the closer they are to meeting customers' requirements.

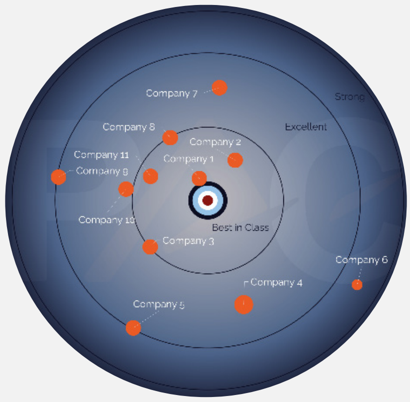



*Fig. 2: PAC RADAR graph (exemplary presentation)*

**What is the PAC INNOVATION RADAR?**

Concept and methodology of the PAC INNOVATION RADAR are similar to those of the traditional PAC RADAR.

While the traditional PAC RADAR focuses on mature market segments, the PAC INNOVATION RADAR, on the other hand, positions providers in new and innovative market segments, or in specific niche markets.

Thus, the focus of the evaluation is on the portfolio, vision, strategy, and early client engagements rather than on existing revenue numbers and resources.

**PAC INNOVATION RADAR graph**

The PAC INNOVATION RADAR graph is a visual presentation of the results of the provider evaluation.

The closer a company is to the top right corner, the closer they are to meeting customers' requirements.

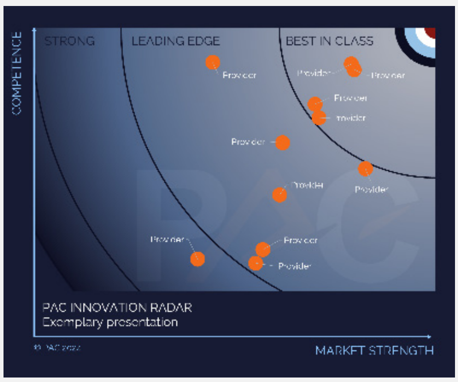
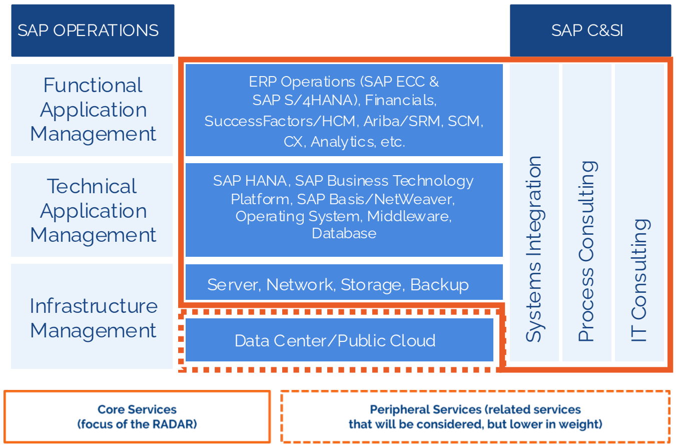



*Fig. 3: PAC INNOVATION RADAR graph (exemplary presentation)*

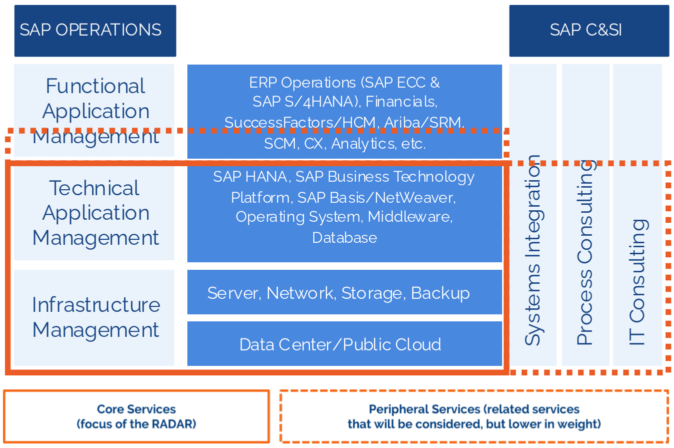
# DEFINITIONS

### SAP Consulting & Systems Integration (C&SI)




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, such as cloud transformation or migration) and **solutions development and digital innovation** based on the SAP software and/or cloud platform.

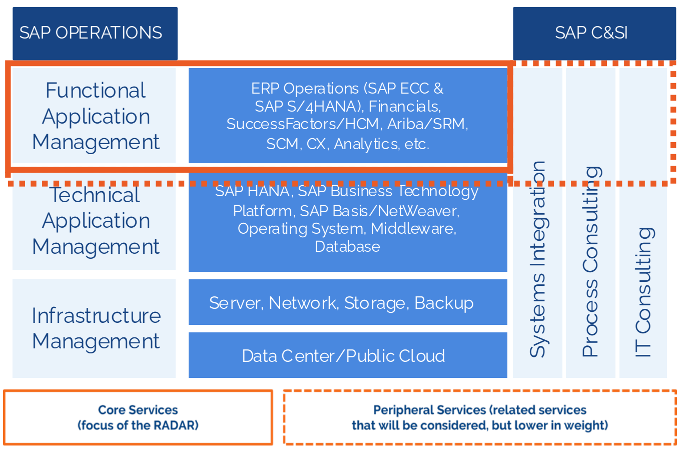
### SAP Hosting




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 or, less common, on the client'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.

### SAP Application Management (AM)



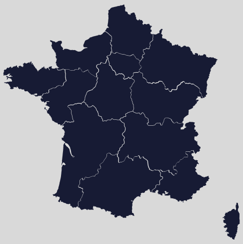

SAP AM refers to the **support, maintenance, and enhancement of existing SAP applications** under a long-term multi-year) contract, with a commitment to fulfilling predefined service level agreements (SLAs).

This PAC RADAR covers both **stand-alone application management** and **embedded application management** (e.g., as part of comprehensive IT outsourcing engagements).

# SCOPE

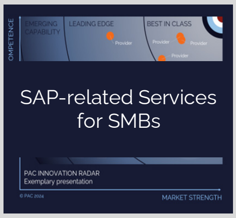
As part of the PAC RADAR on SAP-related Services, PAC will create PAC RADARs on the main SAP-related services segments – C&SI, application management and hosting – and will create PAC INNOVATION RADARs that cover the IT services defined above for specific topics, regions and clientele:

## FRANCE




## GERMANY







## UK

# PAC RADAR EVALUATION METHOD

## Provider selection & participation

**What providers are positioned in the PAC RADAR?**

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., SMBs).

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.

**What do providers have to do in order to be considered in a PAC RADAR analysis?**

The decision as to which providers are considered in the PAC RADAR analysis is entirely up to PAC. Providers do not have any direct influence on this decision.

However, in the run-up to a PAC RADAR analysis, providers can make sure in an indirect way that PAC can adequately evaluate their offerings and positioning – and thus their relevance – e.g., by means of regular analyst briefings, etc.

**Why should providers accept the invitation to participate actively?**

Whether or not a provider participates in the RADAR process does not actually affect their inclusion and positioning in the PAC RADAR, nor their assessment. However, there are a whole host of benefits associated with active participation:

- Participation ensures that PAC has access to the largest possible range of specific and up-to-date data as a basis for the assessment.
- Participating providers can set out their specific competencies, strengths, and weaknesses as well as their strategies and visions.
- The review process guarantees the accuracy of the assessed factors.
- The provider gets a neutral, comprehensive, and detailed view of their strengths and weaknesses as compared to the direct competition – related to a specific service in a local market.
- A positioning in the PAC RADAR gives the provider prominence amongst a broad readership as one of the leading players in the segment under consideration.

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## Considered providers by segment

| Leaders in SAP-related Services Worldwide 2026 | Leaders in SAP Consulting & Systems Integration Worldwide 2026 | Leaders in SAP S/4HANA-related Service Worldwide 2026 | Leaders in SAP Business AI and Joule-related Service Worldwide 2026 | Leaders in SAP-related Services in Europe 2026 | Leaders in SAP Consulting & Systems Integration in Europe 2026 |
|---|---|---|---|---|---|
| Accenture | Accenture | Accenture | Accenture | Accenture | Accenture |
| All for One Group | All for One Group | All for One Group | All for One Group | All for One Group | All for One Group |
| Arvato Systems | Arvato Systems | Arvato Systems | Arvato Systems | Arvato Systems | Arvato Systems |
| Atos | Atos | Atos | Atos | Atos | Atos |
| BTC | BTC | BTC | BTC | BTC | BTC |
| Capgemini | Capgemini | Capgemini | Capgemini | Capgemini | Capgemini |
| Cognizant | Cognizant | Cognizant | Cognizant | CGI | CGI |
| Deloitte | Deloitte | Deloitte | Deloitte | Cognizant | Cognizant |
| DXC Technology | DXC Technology | DXC Technology | DXC Technology | Deloitte | Deloitte |
| IBM | IBM | IBM | IBM | DXC Technology | DXC Technology |
| Infosys | Infosys | Infosys | Infosys | IBM | IBM |
| KPMG | KPMG | KPMG | KPMG | Infosys | Infosys |
| Kyndryl | Kyndryl | Kyndryl | Kyndryl | Inetum | Inetum |
| NTT DATA | NTT DATA | NTT DATA | NTT DATA | KPMG | Kyndryl |
| PwC | PwC | PwC | PwC | Kyndryl | NTT DATA |
| Sopra Steria | Sopra Steria | Sopra Steria | Sopra Steria | NTT DATA | PwC |
| T-Systems | T-Systems | T-Systems | T-Systems | PwC | Reply |
| TCS | TCS | TCS | TCS | Reply | Sopra Steria |
| Tech Mahindra | Tech Mahindra | Tech Mahindra | Tech Mahindra | Sopra Steria | T-Systems |
| Wipro | Wipro | Wipro | Wipro | T-Systems | TCS |
| | | | | TCS | Tech Mahindra |
| | | | | Tech Mahindra | valantic |
| | | | | valantic | Wipro |
| | | | | Wipro | |

| Leaders in SAP Application Management in Europe 2026 | Leaders in SAP Hosting in Europe 2026 | Leaders in SAP S/4HANA-related Service in Europe 2026 | Leaders in SAP Business AI and Joule-related Service in Europe 2026 | Leaders in Public Cloud-based SAP Hosting in Europe 2026 | Leaders in SAP-related Services in France 2026 |
|---|---|---|---|---|---|
| Accenture | Accenture | Accenture | Accenture | Accenture | Accenture |
| All for One Group | All for One Group | All for One Group | All for One Group | All for One Group | Atos |
| Arvato Systems | Arvato Systems | Arvato Systems | Arvato Systems | Arvato Systems | Capgemini |
| Atos | Atos | Atos | Atos | Atos | CGI |
| BTC | BTC | BTC | BTC | BTC | Cognizant |
| Capgemini | Capgemini | Capgemini | Capgemini | Capgemini | Deloitte |
| CGI | Deloitte | CGI | CGI | Deloitte | DXC Technology |
| Cognizant | DXC Technology | Cognizant | Cognizant | DXC Technology | IBM |
| Deloitte | IBM | Deloitte | Deloitte | IBM | Infosys |
| DXC Technology | Infosys | DXC Technology | DXC Technology | Inetum | Inetum |
| IBM | Kyndryl | IBM | IBM | Infosys | Kyndryl |
| Infosys | NTT DATA | Infosys | Infosys | Kyndryl | PwC |
| Inetum | T-Systems | Inetum | Inetum | NTT DATA | Sopra Steria |
| Kyndryl | TCS | Kyndryl | Kyndryl | TCS | T-Systems |
| NTT DATA | Wipro | Lufthansa Industry Solutions | Lufthansa Industry Solutions | T-Systems | TCS |
| PwC | | NTT DATA | NTT DATA | Wipro | Wipro |
| Sopra Steria | | PwC | PwC | | |
| T-Systems | | Reply | Reply | | |
| TCS | | Sopra Steria | Sopra Steria | | |
| Tech Mahindra | | T-Systems | T-Systems | | |
| valantic | | TCS | TCS | | |
| Wipro | | Tech Mahindra | Tech Mahindra | | |
| | | valantic | valantic | | |
| | | Wipro | Wipro | | |

RADAR

| Leaders in SAP-related Services in the UK 2026 | Leaders in SAP-related Services in Germany 2026 | Leaders in SAP Consulting & Systems Integration in Germany 2026 | Leaders in SAP-related Services for SMBs in Germany 2026 | Leaders in Legacy & Private Cloud-based SAP Hosting in Germany 2026 |
|---|---|---|---|---|
| Accenture | Accenture | Accenture | All for One Group | All for One Group |
| All for One Group | All for One Group | All for One Group | Arvato Systems | Arvato Systems |
| Atos | Arvato Systems | Arvato Systems | Atos | Atos |
| Capgemini | Atos | Atos | BTC | BTC |
| Cognizant | BTC | BTC | Capgemini | Capgemini |
| Deloitte | Capgemini | Capgemini | DXC Technology | DXC Technology |
| DXC Technology | Cognizant | Cognizant | IBM | IBM |
| IBM | Deloitte | Deloitte | Lufthansa Industry Solutions | Lufthansa Industry Solutions |
| Infosys | DXC Technology | DXC Technology | NTT DATA | NTT DATA |
| Kyndryl | IBM | IBM | Reply | T-Systems |
| NTT DATA | Infosys | Infosys | T-Systems | valantic |
| PwC | Kyndryl | Kyndryl | valantic | |
| Sopra Steria | Lufthansa Industry Solutions | Lufthansa Industry Solutions | | |
| T-Systems | NTT DATA | NTT DATA | | |
| TCS | PwC | PwC | | |
| Tech Mahindra | Reply | Reply | | |
| Wipro | Sopra Steria | Sopra Steria | | |
| | T-Systems | T-Systems | | |
| | TCS | TCS | | |
| | Tech Mahindra | Tech Mahindra | | |
| | valantic | valantic | | |
| | Wipro | Wipro | | |

## The concept

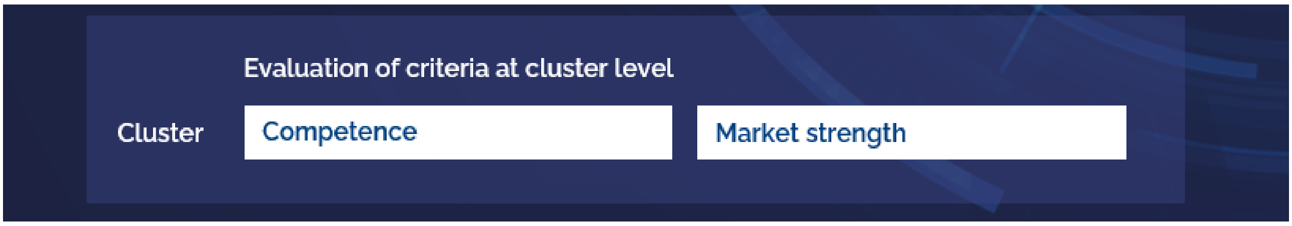


*Fig. 4: PAC RADAR – evaluation method*

PAC uses **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 design, pricing, customer structure, customer references, investments, partnerships, certifications, etc.;
- 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, mainly 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;

**Reissue of published RADARs**

The scores in the PAC RADAR represent an assessment of the providers within the given peer group in the year in which the respective PAC RADAR is published.

The evaluation may not be directly comparable with that of any previous version due to subsequent content modifications. In particular, it does 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 may include:

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

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# Evaluation criteria

## General criteria

**General criteria (considered at a European level to varying extents for several RADARs)**

**Competence**

- History – SAP C&SI services
- History – SAP AM services
- History – SAP hosting services
- History – public cloud-based SAP hosting services
- Anchoring of SAP services within the organization
- Focus on the manufacturing sector
- Focus on the financial services sector (BFSI)
- Focus on the public sector
- Focus on the utilities sector
- Focus on the retail sector
- Focus on the services sector (professional services, telecom, etc.)
- Focus on the transport sector
- Functional mix of SAP services consultants (process consulting, implementation, development, architecture)
- SAP-related public cloud competencies (incl. coverage of the major platforms) – worldwide
- Portfolio – coverage of the SAP C&SI service value chain
- Coverage of RISE-related services
- Coverage of GROW-related services
- Coverage of SAP-related AI use cases
- Portfolio of proprietary horizontal and vertical SAP-related solutions
- Portfolio of proprietary accelerators, tools, and templates
- Portfolio of third-party tools and templates
- Portfolio – coverage of the SAP AM service value chain
- AM for SAP SaaS solutions
- Coverage of certifications (ISO, CMMI, ITIL, etc.)
- SAP services – focus on medium-sized and small accounts in Germany
- SAP services – focus on large accounts in Germany
- Coverage of different pricing models – SAP C&SI
- Lighthouse projects in Business AI and AI
- Lighthouse projects in SAP S/4HANA
- Coverage of transformation services within the SAP-related AM services portfolio
- SAP certifications and partnerships

**Market strength**

- Employee resources for SAP services – worldwide
- Employee resources for SAP services – Europe
- Employee resources for SAP services – France
- Employee resources for SAP services – Germany
- Employee resources for SAP services – UK
- Coverage of different industries – related to the number of SAP consultants – Worldwide
- SAP S/4HANA-related resources – worldwide
- SAP S/4HANA-related resources – Europe
- SAP Business AI-related resources – worldwide
- SAP-related resources for technology and integration (BTP) – worldwide
- Strength and balance of the SAP-related global delivery
- Service desk – number of covered languages
- Data center & hosting resources – Europe
- Data center & hosting resources – Germany
- Employee resources for public cloud-based SAP hosting in Europe
- SAP hosting portfolio – sovereign cloud offering
- SAP project experience – number of recently completed projects
- Experience in SAP S/4HANA projects
- Experience in SAP S/4HANA Public Cloud Edition (native SaaS)
- Recognition by the competition – SAP C&SI worldwide
- Recognition by the competition – SAP C&SI in Europe
- Recognition by the competition – SAP AM worldwide
- Recognition by the competition – SAP AM in Europe
- Recognition by the competition – SAP hosting (traditional & private cloud & public cloud) worldwide

| **Leaders in SAP Business AI and Joule-related Service Worldwide 2026** | |
|---|---|
| Dedicated criteria / criteria with higher weighting | |
| • Employee resources for SAP services – worldwide | • Coverage of SAP-related AI use cases |
| • Coverage of different industries – related to the number of SAP consultants – Worldwide | • Portfolio of proprietary accelerators, tools, and templates |
| • SAP Business AI-related resources – worldwide | • Portfolio of third-party tools and templates |
| • SAP-related resources for technology and integration (BTP) – worldwide | • SAP project experience – number of recently completed projects |
| • Functional mix of SAP services consultants (process consulting, implementation, development, architecture) | • Lighthouse projects in Business AI and AI |
| • SAP-related public cloud competencies (incl. coverage of the major platforms) – worldwide | • Recognition by the competition – SAP C&SI worldwide |

RADAR

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RADAR

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More on www.pacanalyst.com.