



# Leaders in SAP Business AI and Joule-related Services in Europe 2026

SITSI® | Vendor Analysis | PAC INNOVATION RADAR

## Positioning of DXC Technology

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January 2026



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## DOCUMENT INFORMATION

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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**.

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

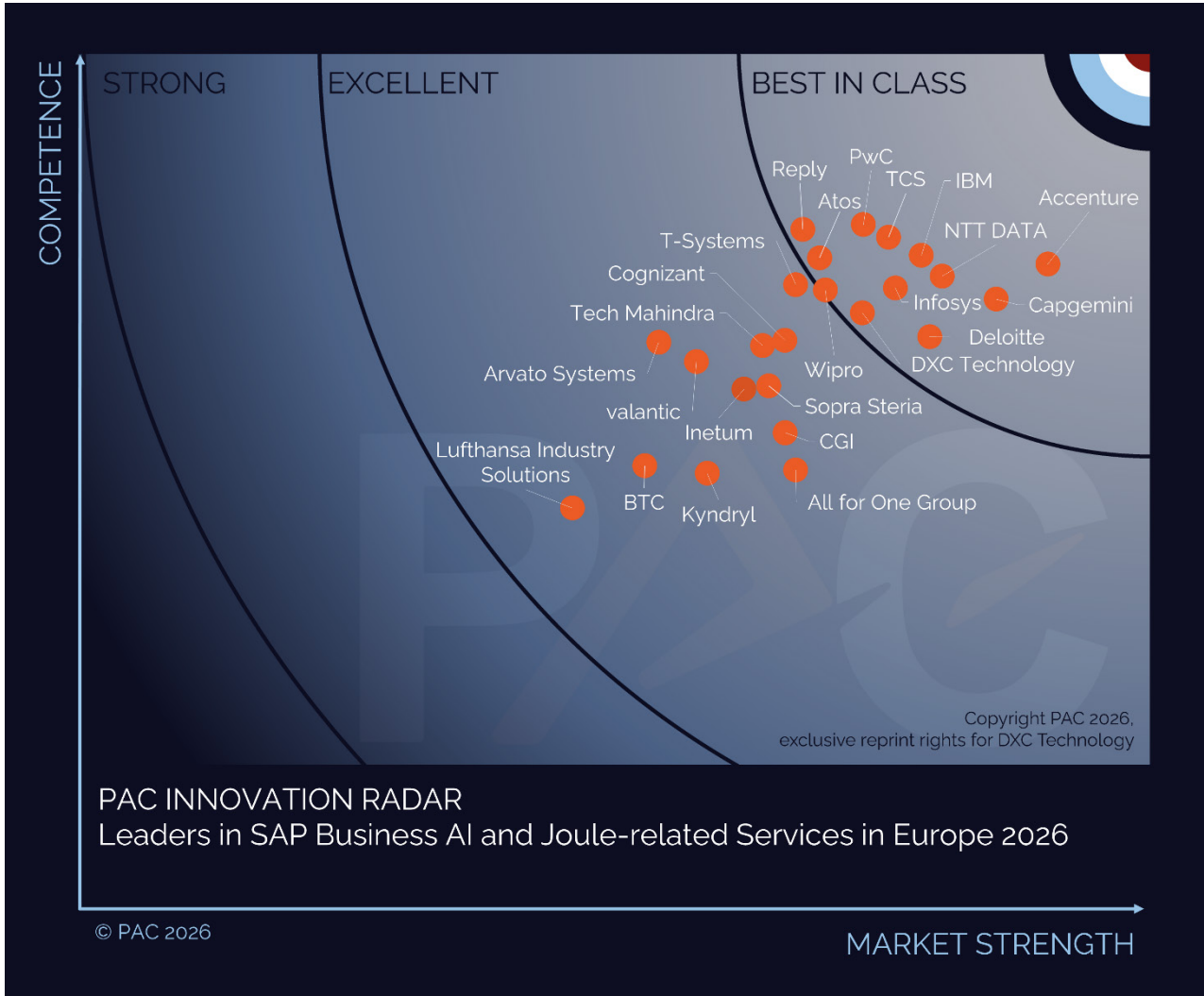


Fig. 1: PAC INNOVATION RADAR "Leaders in SAP Business AI and Joule-related Services in Europe 2026"

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 DXC TECHNOLOGY

Leaders in SAP Business AI and Joule-related Services in Europe 2026		Positioning: Best in Class
Cluster	Average	DXC Technology
Market Strength	2.24	2.04
Competence	2.03	1.97
<b>Total Score</b>	<b>2.11</b>	<b>1.99</b>

Criteria rated significantly ABOVE AVERAGE (more than 0.75)	Criteria rated significantly BELOW AVERAGE (more than 0.75)
<ul style="list-style-type: none"> <li>Employee resources for SAP services – France</li> <li>Focus on the financial services sector (BFSI)</li> <li>Strength and balance of the SAP-related global delivery</li> <li>Reference customer evaluation: evaluation of the quotation phase – across SAP services</li> <li>Reference customer evaluation: evaluation of account management – across SAP services</li> </ul>	<ul style="list-style-type: none"> <li>Functional mix of SAP services consultants (process consulting, implementation, development, architecture)</li> </ul>

## 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.

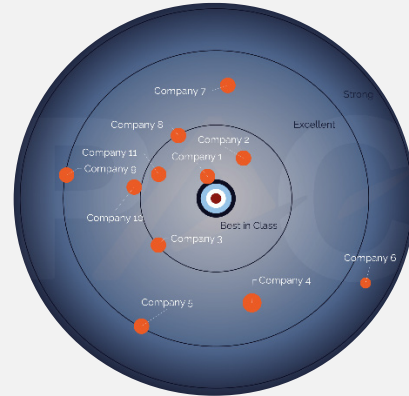


Fig. 2: PAC RADAR graph (exemplary presentation)

### 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.

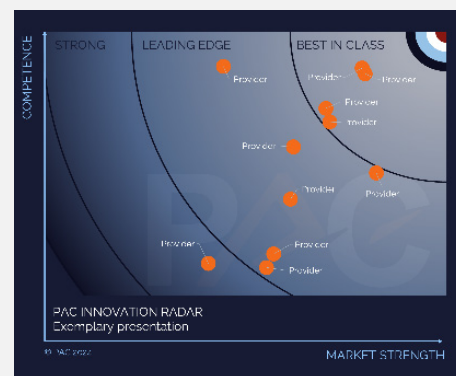
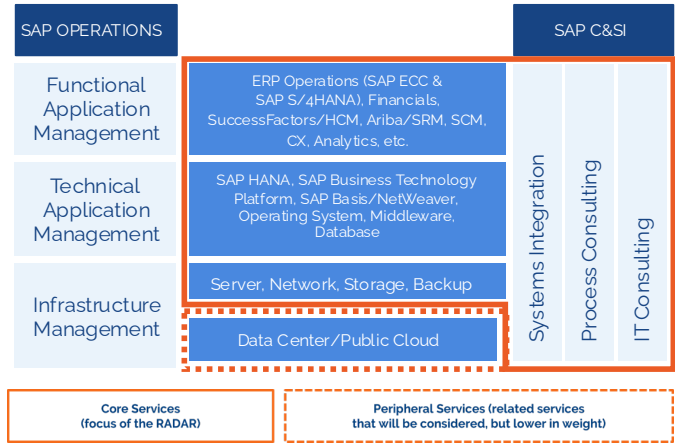


Fig. 3: PAC INNOVATION RADAR graph (exemplary presentation)

## DEFINITIONS

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

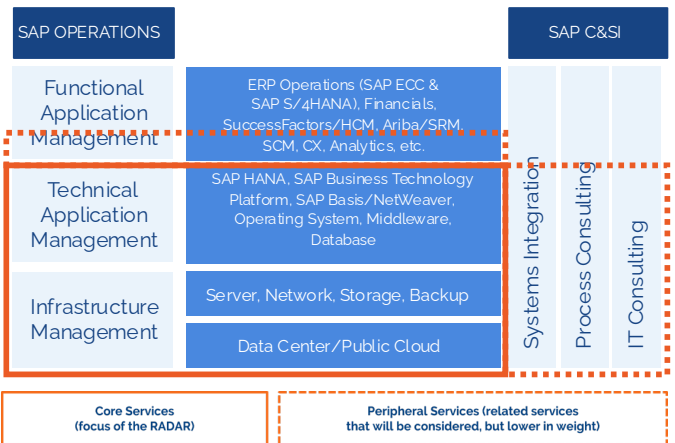
SAP C&SI includes SAP-related **IT consulting services** (planning, specification, and design of SAP systems or the SAP-related part of systems), **IT-related process consulting** within the framework of SAP-related projects (which beside purely **IT-related services** such as the audit of SAP system 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**.

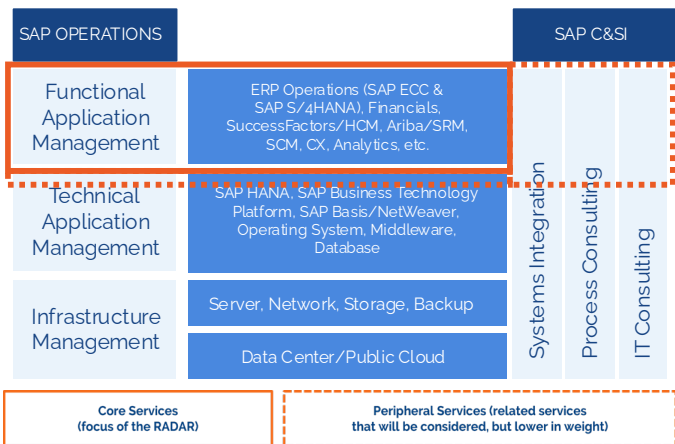
This PAC RADAR covers both cloud-based and "traditional" hosting models.



### 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:

## GLOBAL





**PAC RADAR  
SAP Services**



**PAC RADAR  
SAP C&SI**



**PAC RADAR SAP  
S/4HANA-related  
Services**



**PAC RADAR SAP  
Business AI and  
Joule-related**

## EUROPE





**PAC RADAR  
SAP Services**



**PAC RADAR  
SAP C&SI**



**PAC RADAR  
SAP Hosting**



**PAC RADAR  
SAP AM**



**PAC RADAR SAP  
S/4HANA-related  
Services**

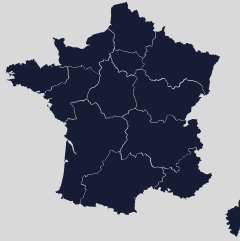


**PAC RADAR SAP  
Business AI and  
Joule-related  
Services**

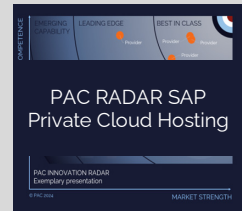
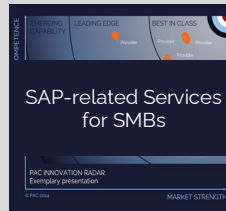


**PAC RADAR SAP  
Public Cloud Hosting**

# 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.

## 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 & Joule-related Services 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 Services in Europe 2026	Leaders in SAP Business AI & Joule-related Services 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
		NTT DATA	NTT DATA	Wipro	Wipro
		PwC	PwC		
		Reply	Reply		
		Sopra Steria	Sopra Steria		
		T-Systems	T-Systems		
		TCS	TCS		
		Tech Mahindra	Tech Mahindra		
		valantic	valantic		
		Wipro	Wipro		

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

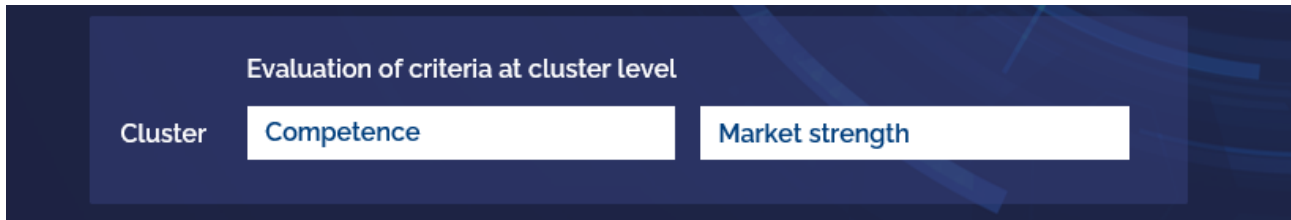


Fig. 4: PAC RADAR – evaluation method

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.

## 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 Services in Europe 2026

Dedicated criteria / criteria with higher weighting

- Employee resources for SAP services – Europe
- SAP Business AI-related resources - worldwide
- SAP-related resources for technology and integration (BTP) - worldwide
- Functional mix of SAP services consultants (process consulting, implementation, development, architecture)
- SAP-related public cloud competencies (incl. coverage of the major platforms) - worldwide
- Coverage of SAP-related AI use cases
- Portfolio of proprietary accelerators, tools, and templates
- Portfolio of third-party tools and templates
- SAP project experience – number of recently completed projects
- Lighthouse projects in Business AI and AI
- Recognition by the competition – SAP C&SI in Europe

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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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## ABOUT PAC

We are a content-based company with a consulting DNA. PAC is the leading European consulting and analyst firm supporting software & IT service vendors worldwide. Since 1976, we have helped our clients to understand market dynamics, grow their revenue and raise their profile. Our unrivalled understanding of European markets, and deep research coverage help key market players to define their strategy, optimize their go-to-market and increase market share. PAC is an analyst-led consultancy with a team of over 100 experts across Europe. We provide market research and analysis on more than 30 countries worldwide, delivered through our portfolio pillars, Guidance, Insights, and Visibility, and our renowned SITSI® research platform.

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