



Market Analysis

IT Services

SAP Cloud Migration Services

Report Abstract

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54 pages

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Who is This Market Analysis For?

NelsonHall's Market Analysis of SAP Cloud Migration Services report is a comprehensive market assessment report designed for:

- Sourcing managers investigating sourcing developments within the use of vendors for SAP Cloud Migration Services
- Operational decision makers exploring the benefits and inhibitors of undergoing SAP Cloud Migration initiatives
- Vendor marketing, sales, and business managers developing strategies to target SAP Cloud Migration opportunities
- Financial analysts and investors specializing in the IT services sector, including SAP Cloud Migration Services.

Key Findings & Highlights

One of the most common approaches to migrating SAP to the cloud has been the migration of legacy landscapes with minimal transformation. In some cases, the transformation involved migrating the database to HANA or the operating system. However, in recent years, there has been an increasing adoption of SAP S/4HANA, contributing to a larger proportion of SAP cloud adoptions. This adoption can occur through migrating legacy environments or implementing new SAP instances directly on the cloud. However, the exact percentage of SAP cloud migrations represented by S/4HANA is not readily available.

Clients who have migrated or adopted SAP landscapes in cloud environments commonly realize value through reduced IT and costs. By shifting from on-premises infrastructure to a cloud landscape, clients can take advantage of the scalability and flexibility offered by the cloud, enabling them to scale resources up and down to meet demand.

To meet clients' evolving needs, vendors are expanding their portfolio of cloud adoption offerings. While a technical lift and shift of a legacy SAP environment have traditionally been the starting point for cloud adoption, leading vendors now provide bundled offerings that offer an industrialized migration to a new landscape pre-configured to address specific industry or functional requirements.

IT service vendors heavily invest in their SAP Cloud Migration capabilities to deliver these services effectively. These investments typically focus on four main areas:

- Transforming the skillsets of their teams to ensure they have the necessary expertise in SAP cloud migration
- Offerings are more cloud-focused, aligning with the latest SAP cloud solutions and best practices
- Mature assets and tools, including automation and migration frameworks, to streamline the migration process and improve efficiency
- Expanded portfolio of industry-focused offerings, providing tailored solutions for specific verticals or business requirements.

Scope of the Report

The report analyzes the worldwide market for SAP Cloud Migration Services and addresses the following questions:

- What is the current and future market for SAP Cloud Migration services?
- What are the client segments for SAP Cloud Migration services and their characteristics? What are the drivers, benefits, and inhibitors for each segment?
- What is the SAP Cloud Migration services markets' size and growth by client segment and geography?
- How did spending grow in 2022-23, and how will it increase in the next five years?

SAP Cloud Migration Services Vendor Assessments Available for:

- Capgemini
- NTT Data
- Infosys
- Cognizant
- LTI
- Mindtree
- Eviden
- Mphasis
- Tech Mahindra

About The Author

Eric is a Principal Analyst and a member of NelsonHall's IT Services research team.

Prior to joining NelsonHall, Eric's career was in the global IT Services industry, working for EDS, HP, and British Telecom (BT America). His initial experience was in Finance and Accounting, managing financial analysts, and as the controller of HP division Consumer Network Services. Subsequent experience centered on global bid management of strategic deals with over \$50m TCV and complex pursuits involving multi-country and/or multi-service lines. The scope of services in these deals included workplace services, data center, application development, cloud compute, and telephony.

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About NelsonHall

NelsonHall is the leading global analyst firm dedicated to helping organizations understand the 'art of the possible' in digital operations transformation. With analysts in the U.S., U.K., Continental Europe, and Asia, NelsonHall provides buy-side organizations with detailed, critical information on markets and vendors (including NEAT assessments) that helps them make fast and highly informed sourcing decisions. For vendors, NelsonHall provides deep knowledge of market dynamics and user requirements to help them hone their go-to-market strategies. NelsonHall conducts rigorous, primary research and is widely respected for the quality, depth, and insight of its analysis.

We would be pleased to discuss how we can bring benefit to your organization. You can contact us via the following relationship manager: Guy Saunders at guy.saunders@nelson-hall.com

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