A research report comparing provider strengths, challenges and competitive differentiators

ISG Provider Lens™
SAP HANA and Leonardo Ecosystem Partners
Global 2019

Quadrant Report

Customized report courtesy of:
Mindtree

July 2019
About this Report

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The research and analysis presented in this report includes research from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that was current as of February 25, 2019 – March 25, 2019. ISG recognizes that many mergers and acquisitions have taken place since that time but those changes are not reflected in this report.

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EXECUTIVE SUMMARY

SAP's S/4HANA offering has started gaining momentum among enterprises since its launch in 2015. This momentum shift is reflected in the company’s S/4HANA customer base, which has witnessed a growth of close to 30 percent in 2019. From an offering perspective, S/4HANA forms the core of the Intelligent Enterprise and the company is looking at S/4HANA to strike a chord with enterprise customers automation requirements by automating their business processes and reduce complexity in their organization’s ERP landscape. SAP’s S/4HANA has had adoption across large and medium enterprise customers in the manufacturing, consumer packaged goods (CPG), retail, energy, automotive and utilities industries in both on-premises and cloud implementations.

We observe that enterprises are taking a customized, thoroughly evaluated and business need-driven adoption to S/4HANA adoption ranging from landscape transformation to conversions (greenfield, brownfield or bluefield approaches) based on the complexity of their existing SAP ERP architectures. There has also been a gradual change in the posture and outlook of enterprise customers towards S/4HANA, and the initial inertia for this portfolio of SAP is being replaced with optimism and positivity.

SAP has been introducing regular version updates to S/4HANA that incorporate features to keep pace with the changing requirements of enterprise clients. The company has also embarked on the innovation path that keeps its customers’ digital futures sight by introducing features around pattern detection, outcome prediction and action roadmap for S/4HANA. Such endeavors showcase the company’s vision to go beyond remaining relevant to becoming an integral stakeholder in its customer’s enterprise ERP growth story.

The key trends are summarized below.

- **Higher proportion of on-premises S/4HANA adoption among large enterprises:** Customers that are looking for core process transformation, and face complexity in geographic scale and application customization are preferring on-premises deployment models compared to cloud hosting, which is finding traction among relatively smaller sized enterprises with limited scale.

- **Framework utilization for efficient S/4HANA implementation:** Providers are using proprietary frameworks with standardized templates and methods to address different technical and process areas of the value chain in S/4HANA and other SAP services implementations.

- **Industry-specific solutions for accelerated transformation:** Providers are building industry-specific solutions and accelerators for S/4HANA and SAP Leonardo for the manufacturing, retail, consumer packaged goods (CPG) and utilities industries to help enterprise customers that seek implementation expertise and business agility. Enterprises are looking for such solutions in the provider's offering portfolio as a differentiator to help them in their journey to becoming an Intelligent enterprise and achieve faster time-to-market.
Use of bots and automation to reduce resolution time across managed services:
Service providers are using or planning to use bots in AMS services to respond to basic queries such as logging the ticket, providing the status of the ticket, reduce the time to resolution and prevent possible delays in resolution. Providers also are further automating services related to L1/L2 support, project reporting and have realigned the workforce to reassign staff that were working on these services to higher value and complex functions.

Providers are enabling SAP Leonardo adoption by building proof of concepts:
There is an ambiguity in the enterprises’ mindset about implementing SAP Leonardo for their IT infrastructure, which has slowed SAP Leonardo adoption. In response, service providers are using the SAP Leonardo to build proof-of-concepts (PoC) to help address a specific industry issues or empower enterprises with emerging technologies. The service providers demonstrate these solutions to their clients to showcase the solution’s capabilities before the client decides to go ahead a PoC. The demonstrations help clients understand how SAP Leonardo can be used in their enterprise, and allow the service provider to demonstrate its ability to implement the solution.
Introduction

Definition

SAP is well known for its enterprise resource planning (ERP), data management products and digital focused offerings. This report compares SAP service providers and their capabilities to implement, migrate, host or manage SAP services.
Definition (cont.)

Scope of the Report

The SAP HANA & Leonardo Ecosystem Partners 2019 global report is a comprehensive, objective analysis and evaluation of the service providers. The report focuses on trends associated with SAP HANA and its market. As part of this global report, ISG classified 23 providers for SAP study as either leaders, market challengers, product challengers or contenders in six areas of specialization: SAP S/4HANA & Business Suite on HANA Transformation, SAP S/4HANA & Business Suite on HANA Managed Services, SAP BW/4 on HANA and BW on HANA Transformation & Operations, SAP Leonardo Transformation, SAP Cloud Platform Support Services and SAP HANA Cloud Infrastructure and Platform Services.

- SAP S/4HANA & Business Suite on HANA Transformation: An assessment of companies that provide consulting and system integration services for developing, deploying and testing enterprise applications using SAP S/4HANA and SAP Business Suite with SAP Fiori as the user interface.
- SAP S/4HANA & Business Suite on HANA Managed Services: An assessment of vendors that provide managed services (operations) for maintenance and support functions comprising monitoring, remote support and centralized management of applications across SAP S/4HANA and SAP Business Suite.
- SAP BW/4 on HANA and BW on HANA Transformation & Operations: An assessment of providers on their ability to strategize, develop, modify and implement real-time analytics using the SAP HANA platform using public, on-premise or hybrid cloud models.
- SAP Leonardo Transformation: An assessment of providers of services for digital transformation using SAP Leonardo to build intelligent business functionalities leveraging HANA database, which includes artificial intelligence (AI), machine learning (ML), blockchain and IoT technologies, packaged as platform-as-a-service (PaaS) and using SAP Cloud Platform (SCP).
- SAP Cloud Platform Support Services: An assessment of provider capabilities to design, develop, modify, integrate and support applications for enterprise systems on SAP Cloud Platform.
- SAP HANA Cloud Infrastructure and Platform Services: An assessment of providers on their capability to deploy and host SAP HANA and related platforms, which includes infrastructure services such as operationalizing infrastructure, infrastructure installation and provisioning, along with go-live and operations support.
Provider Classifications

The ISG Provider Lens™ quadrants were created using an evaluation matrix containing four segments, where the providers are positioned accordingly.

**Leader**
The “leaders” among the vendors/providers have a highly attractive product and service offering and a very strong market and competitive position; they fulfill all requirements for successful market cultivation. They can be regarded as opinion leaders, providing strategic impulses to the market. They also ensure innovative strength and stability.

**Product Challenger**
The “product challengers” offer a product and service portfolio that provides an above-average coverage of corporate requirements, but are not able to provide the same resources and strengths as the leaders regarding the individual market cultivation categories. Often, this is due to the respective vendor’s size or their weak footprint within the respective target segment.

**Market Challenger**
“Market challengers” are also very competitive, but there is still significant portfolio potential and they clearly lag behind the “leaders.” Often, the market challengers are established vendors that are somewhat slow to address new trends, due to their size and company structure, and have therefore still some potential to optimize their portfolio and increase their attractiveness.

**Contender**
“Contenders” are still lacking mature products and services or sufficient depth and breadth of their offering, while also showing some strengths and improvement potentials in their market cultivation efforts. These vendors are often generalists or niche players.
Rising Star

Rising stars are mostly product challengers with high future potential. When receiving the “rising stars” award, such companies have a promising portfolio, including the required roadmap and an adequate focus on key market trends and customer requirements. Also, the “rising stars” has an excellent management and understanding of the local market. This award is only given to vendors or service providers that have made extreme progress towards their goals within the last 12 months and are on a good way to reach the leader quadrant within the next 12-24 months, due to their above-average impact and innovative strength.

Not In

This service provider or vendor was not included in this quadrant as ISG could not obtain enough information to position them. This omission does not imply that the service provider or vendor does not provide this service.
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# SAP HANA and Leonardo Ecosystem Partners - Quadrant Provider Listing 2 of 2

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SAP HANA and Leonardo Ecosystem Partners Quadrants
Definition

ISG assesses consulting and system integration provider services for developing, deploying and testing enterprise applications using SAP S/4HANA and SAP Business Suite with SAP Fiori as the user interface. Assessment areas also include providers’ capabilities for planning, design and modelling of applications across the enterprises’ operating model.
SAP S/4HANA & BUSINESS SUITE ON HANA TRANSFORMATION

Eligibility Criteria

- The minimum eligibility criteria for assessment in this quadrant will be providing development, integration, testing of ERP services using SAP S/4HANA with the HANA in-memory computing platform for at least one implementation of S/4HANA or SAP Business Suite by the service provider.

Observations

- Accenture's strong SAP practice, Intelligent Enterprise platform and specific industry solutions are its key differentiators in the S/4HANA market.
- Capgemini's extensive digital core offerings, broad industry focus and framework makes it a leader in this segment.
- Cognizant investment in SAP digital Collaboratories, proprietary methodology and implementation framework for S/4 HANA gives them an edge over competition.
- Deloitte showcases its leadership in the market with its focused approach towards S/4 HANA, preconfigured industry and domain solutions and strong SAP partnership.
- HCL's extensive industry-focused BASE templates, proprietary solutions and Chatbot build for its SAP services make the company a specialist in this segment.
- IBM's SAP model company framework, BLUEFIELD™ approach and unique methodologies in its Rapid Move program makes it a preferred choice for enterprise clients.
Infosys' diversified S/4 HANA offerings, focused reskilling and expanding footprints across globe makes it a leader in this segment.

NTT DATA's in-house proprietary tools and its strategy of expanding through acquisitions are its key differentiators in the market and makes the company a unique player in this segment.

Wipro's strong SAP skilled FTE base, unique delivery methodology and investment in co-innovation labs gives it an advantage over competition.

Tech Mahindra's pre-defined industry accelerators, automated platform for migration and roadmap development, and unique 3-4-3 strategy makes it more competitive than other challengers and makes it a Rising Star.
**Definition**

The assessment in this quadrant will include providers’ capability to provide managed services (ongoing operations) for maintenance and support functions comprising monitoring, remote support, centralized management of applications across SAP S/4HANA and SAP Business Suite.
### Eligibility Criteria

- The providers need to provide maintenance and support services across applications, data and security specifically for SAP HANA and related platforms.

### Observations

- Accenture's strong application management, innovative in-house tools and assets and industry-specific solutions makes it a leader in this segment.
- Atos' strength in AMS lies in its strong application management services (AMS) practice and SAP Bullion offering for HANA.
- Capgemini's ADMnext framework, continuous improvement program and wide presence across industries are its key differentiators.
- Cognizant uses its strong network of SAP professionals, intelligent ERP and COGNIVATE methodology to win large deals for SAP AMS.
- DXC's strong SAP Basis support, extensive partner ecosystem and sales through targeted campaigns are its fundamental strengths in the AMS market.
- HCL has a proprietary model for AMS delivery and a tool for the next-gen maintenance that it a competitive advantage.
**Observations**

- IBM's strong enterprise SAP managed services, multiple management options plus its migration tools and methodologies give it a distinct advantage.

- Wipro strong unique delivery methodology, ServiceNXT framework and dedicated centers of excellence (CoEs) give it a competitive advantage and makes it a leader in this segment.

- Tech Mahindra's wide industry presence, unique automated platform and enhanced offerings give it advantages against the other competitors and have helped it become the Rising Star in this segment.
Definition

The quadrant assesses the service provider capabilities on their ability to strategize, develop, modify and implement real-time analytics using SAP HANA platform using public, on-premise or hybrid cloud models. The consulting services are assessed across data management strategy and process optimization resulting in strategic benefits such as cost optimization, improved customer/user experience and integration services, including the ability to extract and process data from other platforms. The assessment also includes provider's industry knowledge, innovation and the ability to operationalize applications using BW/4HANA.
The providers that develop, migrate, integrate and test SAP BW platform using multi-cloud models for data warehousing are considered in this quadrant.

- Accenture showcases its leadership in BW by its strong BW HANA practice, financial industry focus and BW capabilities.
- Capgemini’s Intelligent Enterprise offering, industry solutions and approach of upselling its BW/4 HANA offering with S/4 HANA migration keep it ahead of its competition.
- HCL’s core business analytic services, well-defined framework and BW focused reskilling efforts helps it win deals in this segment.
- IBM’s key strengths for BW HANA lie in its strong SAP partnership, BW/HANA modernization and differentiated migration approach for BW/4HANA.
- Infosys has strong accelerators and business warehouse tools, multi-dimensional teams and is expanding its capabilities through acquisitions, which all make it a leader in this segment.
- Tech Mahindra’s innovative tools-led approach, frameworks for BW/HANA and defined methodologies for understanding the customer’s need provide an edge over its competition.
- Wipro’s well-defined framework, analytics-enabled BW offerings, and data discovery platform on SAP make it a leader in this segment.
- Cognizant’s extended BW/4HANA service offering, SAP data lake implementation and distinctive framework for managing BW HANA gives it an advantage over other challengers in this segment and makes it the Rising Star.
Definition

The quadrant assesses providers on services for digital transformation using SAP Leonardo to build intelligent business functionalities leveraging HANA database. SAP Leonardo includes a suite of artificial intelligence (AI), machine learning (ML), blockchain and IoT technologies, packaged as platform-as-a-service deployed on HANA database and utilizing SAP Cloud Platform for development. The assessed capabilities also include business transition, industry-specific implementations and deployment on public, hybrid and on-premise cloud.

Source: ISG Research 2019
Eligibility Criteria

- The providers should have delivered projects either AI, machine learning, blockchain or IoT using SAP Leonardo as a standalone platform or included design thinking in the offering.

Observations

- Accenture's broad industry and domain focus, dedicated innovation-focused centers and strong R&D focus make it a leader in this segment.
- Capgemini's digital factory approach, industry accelerators and dedicated innovation labs are its key differentiators in the market.
- Cognizant showcases its leadership in this segment by its SAP digital Collaboratories, preconfigured industry solutions and its RUN BETTER framework.
- HCL's standalone Leonardo service offerings, strong practice in SAP Leonardo and preconfigured accelerators make it a leader in this segment.
- Wipro's end-to-end SAP Leonardo support, data discovery platform on SAP, and its strong partnership with SAP for Leonardo provide a differentiated and value-based option for enterprise clients.
- Tech Mahindra's innovation in the SAP digital space, extensive partner ecosystem, and differentiated four-step approach keeps it ahead of other challengers in the market, and helped it gain Rising Star designation.
Definition

This segment examines provider capabilities to design, develop, modify, integrate and support applications for enterprise systems on SAP Cloud Platform (SCP). The assessment includes integration platform-as-a-service (PaaS) and application development platform-as-a-service for data-based, mobile-enabled services, analytics, application development and deployment across multi-cloud platforms.
Eligibility Criteria

- The providers should have implemented SAP Cloud Platform for at least one customer.

Observations

- Accenture’s dedicated innovation focus, strong research and development focus, and investment in centers of excellence (CoEs) keeps it a leader in this segment.
- Capgemini’s industry-specific solutions, dedicated innovation lab, and standalone offerings in SAP Leonardo are its key differentiators.
- HCL’s Blu-thinking for migration, strong SAP Cloud Platform practice and unique approaches to understand its customers better provide a strong value proposition.
- IBM’s core strengths for SAP Cloud Platform lie in its PaaS platform expertise and SAP Model Company framework.
- Infosys’ DevOps approach to SCP and its preconfigured and fully integrated systems provide a differentiated, value-based option for enterprise clients.
- Tech Mahindra extensive set of portfolio services, robust partner ecosystem and innovation in the digital space give it a distinct advantage over competition.
- Mindtree’s next-gen SCP services, industry-focused solutions and ability to extend its capabilities through partnerships helped it become the Rising Star in this segment.
RISING STAR: MINDTREE

Overview
Mindtree is focused on emerging technologies such as blockchain, artificial intelligence, machine learning and IoT within its SAP Leonardo portfolio. As part of its service lines, Mindtree’s SAP offerings include SAP Leonardo application design, rapid prototyping and industry innovations. Mindtree’s SAP practice operates under its Bluefin Solutions brand with 1,700 FTEs dedicated to SAP services globally. Mindtree has an innovative approach to emerging technologies and is focused on SAP Cloud Platform and Leonardo offerings, including industry-specific accelerators for the consumer packaged goods (CPG), retail and manufacturing verticals.

Strengths

Next-gen SCP services: Mindtree has started investing in next gen technologies such as machine learning and AI to transform its services for clients. The cornerstone of this service is its AI Assured Delivery program, which helps minimize risk, enhance quality and bring cost competitiveness to its services.

Extending capabilities through partnerships: Mindtree has multiple partnerships to expand its capabilities in SCP and its applications. Partnerships with cloud hyperscalers Azure, AWS and GCP help Mindtree deploy SCP in Cloud Foundry Environment. Its partnerships with Hyperledger, Apple and UiPath helped the company to develop blockchain, mobile and RPA solutions to further enhance its capabilities.

Industry-focused Leonardo solutions: Mindtree has developed many applications for business optimization and cost reduction in numerous industries. Mindtree created the MOTIF on time and in full order fulfillment suite to assist CPG companies with supply chain optimization and visibility. MOTIF was one of the first certified industry accelerators on SAP Leonardo.

Caution
Mindtree's offerings are inclined towards CPG verticals and the company needs to bring other industries into its radar to increase its customer and revenue base.
Definition

The quadrant examines infrastructure providers on their capability to deploy and host SAP HANA and related platforms. The assessment includes infrastructure services such as operationalizing infrastructure, infrastructure installation and provisioning, along with go-live and operations support. The providers can optionally also describe their capabilities for providing services to leverage platforms, and therefore databases, across infrastructure.
SAP HANA CLOUD INFRASTRUCTURE AND PLATFORM SERVICES

Eligibility Criteria

- The providers should have carried out one implementation on infrastructure or, in case of relevance in a certain region, platforms for SAP products.

Observations

- Amazon Web Services (AWS) has an extensive partner ecosystem, well-architected framework and tools and extensive services portfolio, which give it a distinct advantage and make it as a leader in this segment.

- IBM's end-to-end cloud managed services, wide deployment options and focus on integrating SAP with other IBM services are its core differentiators.

- Microsoft Azure's enhanced global cloud services, high availability on SAP HANA, and SAP HANA production use on Azure offers it a distinct value proposition.

- NTT DATA's extensive portfolio of cloud services, proprietary frameworks and its significant inorganic growth through acquisitions help win deals in this space.

- Google Cloud Platform's (GCP) Anthos application management platform, growing global SI partnerships and enhanced machine types for workloads give it competitive edge over other challengers, and helped it become a Rising Star.
Methodology
The ISG Provider Lens™ 2019 – "SAP HANA and Leonardo Ecosystem Partners" research study analyses the relevant software vendors and 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.

The study was divided into the following steps:

1. Definition of SAP HANA and Leonardo Ecosystem Partners
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. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
6. Use of the following key evaluation criteria:
   - Strategy & vision
   - Innovation
   - Brand awareness and presence in the market
   - Sales and partner landscape
   - Breadth and depth of portfolio of services offered
   - Technology advancements
Authors and Editors

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Lead Analyst

Kartik Subramaniam is the Lead Analyst for SAP HANA and Application Development and Maintenance (ADM). He brings in close to 10 years of experience in primary as well as Secondary Research, Advisory and Consulting experience from leading IT companies such as Accenture, IBM, IDC and TNS. Kartik has worked on many Research and Advisory assignments in the areas of offering in application development and maintenance, multi layered/pace layered IT/applications, cybersecurity and infrastructure services. Apart from research, Kartik also worked closely with the strategy and sales teams providing insights on strategic planning for offerings and creating seller enablement deliverable through analytics at Accenture and IBM respectively.

Jan Erik Aase, Editor
Director

Jan Erik Aase is a director and principal analyst for ISG. He has more than 35 years of collective experience as an enterprise client, a services provider, an ISG advisor and analyst. Jan Erik has overall accountability for the ISG Provider Lens™ reports, including both the buyer-centric archetype reports and the worldwide quadrant reports focused on provider strengths and portfolio attractiveness. He sets the research agenda and ensures the quality and consistency of the Provider Lens™ team.
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