ISG Provider Lens™ Quadrant Report | 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 generated €11,104 million in revenue last year in the EMEA region, which was 45 percent of its total revenue. SAP has had focus on the Nordics region and established an Experience Center in Copenhagen, Denmark. SAP has multiple other initiatives in the region, including SAP Innovation Forum Nordics, which is a mini-SAPPHIRE event focused towards Nordics market, SAP Quality Awards for Nordics and SAP Next-Gen, which facilitates purpose-driven partnerships in the Nordics. SAP Innovation Forum Nordics includes partner showcase sessions for service providers to present innovative proof-of-concepts and solutions. The SAP Next-Gen program is a global movement of purpose-driven partners that are now joining forces to accelerate innovation with purpose around the world. Partnerships across this region aim to help Nordic companies and governments achieve their sustainable development goals while linking champions of the 17 UN Sustainable Development Goals (SDGs) to the SAP Next-Gen program’s global network of startups, accelerators, purpose-driven partners, academia, students, citizens, non-profits, institutions, celebrity activists, artists, government leaders, royalty and philanthropists.

The Nordic enterprises are implementing S/4HANA for finance management, supply chain management and to improve transactional and operational reporting. These organizations are implementing BW on HANA to view a single source of the truth and to optimize supply chain distribution. There has been a gradual increase in the adoption of public cloud services for S/4HANA. There is also a drive for blockchain adoption in the Nordics, led by the Nordic Blockchain Association, which is a community partnership. This association partners with various other blockchain communities including the Dutch government to co-create best practices.

Key trends in the Nordics for SAP HANA and Leonardo systems are presented below.

- **Market relevant solutions with “Intelligent Enterprise” as the proposition:** Providers are building industry-specific solutions for S/4HANA and going to market with a proposition of enabling an “Intelligent Enterprise.” Enterprises that are on their digital transformation journey to becoming an intelligent enterprise are seeking these solutions, which helps them to achieve faster time-to-market and address the challenges specific to their landscape.

- **Various initiatives addressing the SAP skills shortage:** Providers are addressing the shortage of SAP talent in the Nordics region through partnerships, training college graduates, cross-training existing employees and setting up nearshore facilities across Europe for service delivery. Global providers are partnering with Nordic-specific companies to deliver services in the region. They are also partnering with education centers to upskill their employees for the required skillset. Hiring and training college graduates for SAP-specific skills is also an approach that the companies are taking. Cross-skilling employees for S/4HANA skillset is expected to address talent shortage in the region. For delivery specific to Nordics regions, providers are considering nearshoring options from countries within Europe, including Poland, to provide services to their clients.
Poland emerging as a nearshore option for SAP: With skilled SAP professionals in short supply in the Nordics, the providers are left with no choice but to tap the SAP talent pool in other regions. While most of the work is moved to regions where the talent pool is high, there are some cases where the provider would like to retain the work at the client site or a nearby location. Most providers are looking to Poland as their preferred nearshore location. Poland recently has been emerging as an IT hub. Its proximity to the Nordics region makes nearshoring in Poland a viable strategic option for providers.

Use of bots and automation to reduce resolution time across managed services: Automating L1/L2 support and resolving incidents in less time has been a focus area for most SAP service providers. The providers are using or planning to use bots to respond to basic queries such as logging the ticket, communicating the ticket status, time taken to resolution, any possible delays in resolution. Providers also are automating services related to L1/L2 support, project reporting and have redeployed employees that were working on L1/L2 support to handle more complex situations by training them for such tasks.

Local partners and regional acquisitions are growth enablers for providers: Providers are pursuing associations with local partners and acquisitions of regional companies as a strategy to expand their footprint in the Nordics. Associations with local partners help multinational service providers with execution capabilities, enables them to sync with clients in less time and reduces the cultural gap among the teams. Providers are also looking to acquire any regional players that complement their existing capabilities for SAP to expand their footprint in the Nordics region.

Low adoption of BW on HANA and BW/4HANA: Nordics is a small market for BW/4HANA, where the adoption is very low. BW on HANA adoption is low. There are a few enterprises implementing BW on HANA for its data management, and to streamline data visibility and optimize processes along with S/4HANA. However, the growth of BW on HANA in the Nordics is plateauing.

Providers are enabling SAP Leonardo adoption by building proofs of concept: There is an ambiguity in the enterprises’ mindset about implementing SAP Leonardo for their IT infrastructure, resulting in slow adoption of SAP Leonardo. In response, providers are building proof of concept (PoC) demonstrations and projects using the SAP Leonardo solution to help address a specific industry issue or empower enterprises with emerging technologies. Service providers demonstrate these solutions to their clients to showcase the solution’s capabilities before the clients decide to go ahead with these proof-of-concepts. This approach helps develop an understanding of SAP Leonardo and can be used within the client’s enterprise and allows the service provider to demonstrate its ability to implement the solution for the client.

Number of blockchain-based SAP Leonardo proof-of-concepts: Due to the community partnerships in the Nordics for implementing blockchain in public sector, more organizations are considering leveraging blockchain for certain functions such as smart contracts. This region is expected to see an increase in blockchain projects. The service providers are leveraging this trend and targeting blockchain-based contracts in this region.
Partnerships for hardware and advanced digital solutions: Providers are partnering with hardware product vendors, including drone vendor, to provide advanced digital solutions. Such partnerships help service providers to integrate new devices with SAP solutions and provide an end-to-end solution for an industry or a business function.
Introduction

Definition

During the last few years, various database providers have established in-memory technology. As opposed to traditional technologies, in-memory technologies store most or all relevant application data within the memory of the hardware in use. Direct benefits include faster data access and dramatically accelerated applications. Initial use cases were related to data analytics applications, but the drastic performance increase has shifted the focus to business processes acceleration within transactional applications.

SAP HANA technology has had a strong impact in changing the market. It changes infrastructure requirements and improves SAP's broad application portfolio, providing data management optimization and the interaction between data analytics and transactional systems. SAP S/4HANA allows users to radically simplify database structures within the SAP Business Suite. Meanwhile, SAP created BW/4HANA, a new version of its business data warehouse optimized for the HANA database. In 2018 the company launched C/4HANA, a renewed solution based on SAP Hybris that leverages the HANA database.
Definition (cont.)

Furthermore, the deployment of these packages as SaaS has become increasingly important. Agility plays a key role to speed innovation, and SAP supports it through the SAP Leonardo Platform. As these advancements are developing, there remains continuous demand for qualified support for SAP systems through SAP’s partner ecosystem. SAP’s extensive ecosystem and partner network serve as a vital success driver. The SAP ecosystem is made up of more than 18,000 partners worldwide that build, sell, service and run SAP solutions and technology.

The ISG Provider Lens™ study offers IT decision makers:

- Transparency on the strengths and weaknesses of relevant providers;
- A differentiated positioning of providers by segments;
- Market focus including global, the U.S., Germany, the U.K., Nordics and Brazil.

ISG studies serve as an important decision-making basis for positioning key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their current vendor relationships and potential new engagements.

Scope of the Report

ISG studies are intended to anticipate the investigation efforts and buying decisions of typical enterprise clients. When contemplating a significant strategy transformation, making purchase-versus-rent decisions for infrastructure, implementing agile practices or incorporating automation into their environments, enterprise clients will benefit from a study that examines an entire ecosystem for a certain service line.

Therefore, ISG studies comprise multiple quadrants covering the spectrum of services that an enterprise client requires.
Definition (cont.)

**SAP S/4HANA & BUSINESS SUITE ON HANA TRANSFORMATION**

In this quadrant, 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. Planning, designing, and modelling of applications across the operating model of enterprises will also be an assessment area. The minimum eligibility criterion for assessment in this quadrant is the provision for development, integration, and 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.

**SAP S/4HANA & BUSINESS SUITE ON HANA MANAGED SERVICES**

The assessment in this quadrant will cover providers’ capability to offer 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. They need to provide maintenance and support services specifically for SAP HANA and related platforms across applications, data, or security.

**SAP BW/4 ON HANA AND BW ON HANA TRANSFORMATION & OPERATIONS**

This quadrant assesses the ability of service providers to strategize, develop, modify, and implement real-time analytics using the SAP HANA platform that employs public, on-premise or hybrid cloud models. The consulting services are assessed across data management strategy, 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 to/from other platforms. The assessment also includes the industry knowledge, innovation, and ability of providers to operationalize applications using BW/4HANA. The providers that develop, migrate, integrate and test the SAP BW platform using multi-cloud models for data warehousing are considered in this quadrant.
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.
# SAP - HANA and Leonardo Ecosystem Partners - Quadrant Provider Listing 1 of 2

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## SAP - HANA and Leonardo Ecosystem Partners - Quadrant Provider Listing 2 of 2

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Definition

ISG assesses consulting and system integration provider services for developing, deploying and testing enterprise applications using SAP S/4HANA and SAP Business Suite on HANA with SAP Fiori as the user interface. In addition, planning, design, and applications modeling across the enterprise clients’ operating model are also an assessment area.

The providers are assessed on their expertise to leverage SAP Activate framework and proprietary tools to provide SAP S/4HANA solutions to enterprises across different industry segments and revenue segments. The providers are also scored on their ability to provide greenfield, brownfield implementations on cloud and on-prem versions of SAP S/4HANA across different business cases. Their ability to staff skilled resources for the projects specific to Nordics region, initiatives on cross-skilling and up-skilling and use of automated tools to improve the delivery time are some of the parameters by which the providers are scored on for this quadrant.
SAP S/4HANA & BUSINESS SUITE ON HANA TRANSFORMATION

Eligibility Criteria

- The participant provides development, integration, deployment and testing for SAP S/4HANA;
- It has at least one case of S/4HANA implementation or SAP Business Suite on HANA. Multiple projects provide better ratings;
- It has current SAP accreditations that authorize implementations;
- Project management expertise and methodologies to handle the complexities of large projects;
- The provider has experience in serving Nordics enterprise clients.

Observations

Nordics is a focus region for SAP and the company is extending its reach there through various initiatives, including bringing together the SAP users, partners and developers to a single knowledge exchange platform, to drive the adoption of S/4HANA and its related products. The service providers are helping their clients by defining a technology roadmap for adopting S/4HANA in greenfield or brownfield implementations. Providers are co-investing in business case validations for run and transformation programs with clients that are embarking on a modernization journey.

Some service providers are penetrating Nordics regional markets in partnership with local specialists that bring in region-specific knowledge and niche capabilities that strongly align with the service providers’ focus and roadmap. The providers are addressing the S/4HANA skill shortage in this region through these partnerships and through training and development programs. Providers are also considering nearshoring in Poland as an option.

Another major trend in S/4HANA implementations is service providers are using tools and accelerators to leverage automation and AI to optimize migrations and transformations.
Some observations on the leaders for this quadrant include:

- Accenture has more than 15 co-development initiatives with SAP under Project F1, which is Accenture's deep collaboration with SAP to innovate, co-develop and co-deliver SAP core and industry solutions.
- Atos has a strong SAP expertise with 12,950 practitioners globally. Atos has partnerships with hyperscale cloud providers to enable quick deployment for clients that choose to make cloud transformation part of their SAP S/4HANA implementation.
- Capgemini goes to market with its Renewable Enterprise proposition for S/4HANA targeting those enterprises that want to constantly adopt to market changes. This proposition has been developed in association with SAP. Capgemini has approximately 35 SAP S/4HANA certified consultants in Nordics.
- Cognizant has many SAP experts in Nordics and provides multiple S/4HANA offerings across the life sciences, manufacturing, energy and utility, retail, consumer goods, banking and financial services and insurance industries.
- HCL has 400 SAP practitioners in the Nordics. The provider supports BLUEFIELD implementations and provides preconfigured solutions, accelerators and subject matter expertise in specific industries and processes in its Base90 offering.
- NTT DATA has a strong portfolio with successful implementations across 20 functional areas. NTT DATA acquired Sweden-based EINS Consulting to strengthen its capabilities in the Nordics.
- Tech Mahindra is upskilling and cross-skilling its SAP resources in the Nordics through focused programs to develop expertise and increase the number of certified consultants in the region.
- Infosys is a Rising Star and has 4 percent of their SAP consultants are S/4HANA certified in Nordics. Infosys provides end-to-end, industry-tailored services ranging from value discovery to implementation to support for S/4HANA.
**Definition**

The assessment of this quadrant includes a providers’ capability to deliver managed services (operations) for maintenance and support functions comprising of monitoring, remote support, and centralized management of applications across SAP S/4HANA and SAP Business Suite. The qualified participants demonstrate maintenance and support services specifically for SAP HANA and related platforms across applications, data or security.

Typical SAP managed services providers can support multiple clients remotely, from delivery centers that leverage resource sharing and apply advanced tools to automate support processes. These providers have robust ITIL processes and possibly ISO20,000 accreditation on incident management, problem management and release management. Application lifecycle management is necessary expertise for requirement management, version control and quality assurance. CMMi accreditation is expected, however not mandatory. Leaders typically have robust application's change management governance, strict change approval processes and use automation to reduce the number of support staff.
Eligibility Criteria

- Participants offer maintenance and support services with SAP HANA and related platforms specialization/certification;
- Managed services for SAP HANA applications include data and security;
- The service provider has delivery centers in Nordics and can deliver services to multiple client sites.

Observations

In the Nordics, service providers are executing SAP managed services by leveraging resources from their cost centers. The providers are increasing the partnerships in this region to acquire local expertise and to establish closer client relationships. Clients are constantly trying to reduce costs, and in response providers are building tools and accelerators based on automation and artificial intelligence (AI) to assess the best possible approach for providing services to clients.

Most of the service providers are optimizing resource allocation for L1, L2, L3 support levels by implementing bots for support services such as incident resolution, project management inquiries and status reporting.

Following are some observations on the leaders for this quadrant.

- Accenture's Ticket resolver automatically resolves incidents based on AI and BASIS Process monitoring that combines Solution Manager monitoring with other logs to create a correlation and alerting engine, and provides digital dashboards for visualization.
- Atos provides a next-generation automation platform called SyntBots that uses intelligent automation to transform IT operations, DevOps and processes across the entire enterprise. The bots manage repetitive tasks and repeatable business processes.
Observations

- Capgemini has strong expertise, with 40 percent of its European SAP HANA practitioners working in Nordics. The heavy concentration is an indication of the company’s focus in the region and ability to cater to clients.

- Cognizant is an SAP-certified Application Management Services partner and has five delivery centers in the Nordics. It shares expertise with SAP across five technology areas – applications, analytics, database, mobile and cloud – to enable innovative business capabilities.

- HCL offers Autonomics (automation + analytics) services through its standardized DRYiCE framework. Its offerings are aligned to ITIL V3, incorporate best-of-breed tools, take a vendor agnostic approach and provide service from certified professionals.

- Mindtree provides managed application services to enterprises across three pillars: Prevent, Predict and Perform. The company has 100 managed services FTE in the Nordics.

- Tech Mahindra provides natural language processing (NLP) algorithms and machine learning based solution, TACTiX, that triggers AI component when incident is logged in the system, categorizes incidents based on inputs from knowledge repository, presents with top-matching recommendations along with related categories, root cause and provides with standard operating procedures.

- NTT DATA is the Rising Star in the quadrant and has more than 10 in-house tools and accelerators that can be used across the lifecycle of projects in the SAP environment for upgrades, service, enhancements and performance optimization.
Mindtree uses its tools and accelerates to optimize the cost pressure on enterprises that results from implementing digital transformation and creates the right ratio of spend-on-run vs. investments in new projects, while ensuring business continuity.

Mindtree could increase its partnerships in the Nordics region, which would increase its ability to provide the local expertise needed for servicing managed services clients.

ATLAS managed service framework: The company uses ATLAS™ to conduct a 360 degree assessment of assess key dimensions of the client's application. The assessment considers ease of outsourcing, transition complexity, automation ROI, agile maturity, DevOps maturity, the value of IT investments, production risks, software resiliency, maintainability and technical debt. A major benefit of doing the assessment is gaining insights into the portfolio to determine transition speed, and approach.

Automating incident response using bots: Mindtree has more than 518 bots in use, of which 113 are specifically used for SAP. Bots reduce the number of L1 and L2 resources and are mainly leveraged for incident response to reduce response time.
### Definition

This quadrant assesses the ability of service providers to strategize, develop, modify, and implement real-time analytics on SAP Business Warehouse (SAP BW) platform on HANA database (BW on HANA) and the more simplified and integrated BW/4HANA. The services are assessed across data management strategy, process optimization resulting in strategic benefits such as cost optimization, improved customer/user experience and integration services. Multiple BW hosting alternatives are considered, from a private/inhouse data center to hybrid cloud solutions.

The assessment also includes a provider's industry knowledge, innovation and the ability to operationalize applications using BW/4HANA and integrating the solution with other SAP and non-SAP products and solutions.

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**Source:** ISG Research 2019
Eligibility Criteria

- The service provider has SAP BW certified practitioners;
- The company has SAP partner authorization or accreditation on BW, S/4HANA and SAP Analytics;
- Consulting experience around data modeling, integration and analytic tools other than BW;
- The participant has delivered BW projects in Nordics.

Observations

Since the inception of BW/4HANA, enterprise uptake of the product has not been high. BW/4HANA 2.0, which was released in February 2019, is expected to ease the implementation difficulties. However, there are very few enterprises in the Nordics using BW on HANA for data warehousing. These enterprises primarily use BW on HANA to reduce the total cost of operations. Most implementations in this region aim to re-align organization's process which allows cost optimization and to reduce the footprint of IT infrastructure. While the adoption of BW on HANA in Nordics is expected to mostly plateau and is still a small market for BW/4HANA in Nordics

The service providers are leveraging frameworks, tools and accelerators to assess, transform and manage applications on BW on HANA and BW/4HANA along with SAP’s Activate framework. Some providers are planning joint webinars with SAP to educate the market about the solutions, tools and accelerators they co-developed with SAP. Providers that understand how to convert legacy BW environments into a clean, usable, innovative BW/4HANA data warehouse and to transform legacy BI applications to BW on HANA are leading the market.
Some observations on the leaders for this quadrant include:

- **Accenture** has transformed its financial application architecture with the implementation of SAP S/4HANA, and amplified analytics with SAP BW on HANA powered by Microsoft Azure.

- **Capgemini** has six proprietary solutions specifically for Business Warehousing on HANA. The pre-built solutions enable faster implementation, accelerate benefit realization and lower the total cost of ownership for its clients.

- **Cognizant** leverages automation in its in-house tools and frameworks to reduce overall engagement timelines and costs including. Its STRIDE framework helps users design scalable enterprise data management and analytics strategies, and the SAP HANA Delta Platform accelerates migration from legacy databases to SAP HANA.

- **Mindtree** provides strategic advisory services to help enterprises implement the best approach for their data warehousing and business intelligence challenges and offers full implementation support across assessments and blueprinting, scoping, full delivery services, testing, data migration, support management after the system goes live and AMS services for continued successful operations.

- **NTT DATA** offers own preconfigured BW/4 HANA- and BW on HANAsolutions focused for specific line of businesses and industries. Its IP has special technical features for value added implementations of BW/4 HANA and BW on HANA on SAP Analytics Cloud.

- **Wipro** leverages its HOLMES artificial intelligence as the core platform to deliver wide-ranging insights such as preventive action to avoid customer attrition, predictive maintenance to minimize asset downtime and practices to reinforce online reputation.
Mindtree provides strategic advisory services to help enterprises implement the best approach for their data warehousing and business intelligence challenges and full implementation support across assessments and blueprinting, scoping, full delivery services, testing, data migration, support management after the go-live and AMS services for continued successful operations.

**Strengths**

**Mindtree's solution approach for analytics:** The provider utilizes the latest technologies and proprietary templates to help clients generate real benefits and become insight-driven businesses with its standard approach of four core principles: define a business-led problem; develop a solution iteratively through a test-and-learn mechanism; evaluate the solution for further investment; when benefits justify, scale solutions by embedding them in both IT systems and business processes.

**Cross-skilling and up-skilling consultants:** Mindtree is running an internal initiative called T-Shaped consultants in which the consultants are cross-skilled and upskilled consultants in different areas, including BW on HANA and BW/4HANA. Many of the company's BW consultants are undergoing TOGAF training, which will improve its skilled resources in the region.

**Caution**

Mindtree could add delivery centers in the Nordics and expand its presence across the region to help provide services to clients.
SAP LEONARDO TRANSFORMATION

Definition

SAP Leonardo includes a suite of artificial intelligence, machine learning, blockchain and IoT technologies, packaged in a platform-as-a-service. It runs on HANA database and integrates to SAP Cloud Platform for applications development. The quadrant assesses providers on services for digital transformation using SAP Leonardo to build intelligent business functionalities leveraging the HANA database.

Service provider capabilities include business transition, industry-specific implementations and deployment on public, hybrid and on-premise cloud. The provider should have delivered projects applying AI, ML, blockchain or IoT on SAP Leonardo platform and providing design thinking services to their clients. Innovative solutions/proof-of-concepts and use of multiple technologies in a provider’s portfolio increases its ranking in this assessment.
The service provider can demonstrate solutions developed on SAP Leonardo;

Participant companies have SAP certified personnel;

The partner company has all required SAP accreditation/authorization;

The company has offices and clients in Nordics

The two-year-old SAP Leonardo is seeing slow adoption by Nordic firms. Most of the contracts in the region are for SAP Leonardo consulting services and there have been fewer implementations and migrations. Some of the noteworthy implementations in this region are focused on the blockchain functionality in SAP Leonardo to implement services such as smart contracts or blockchain-based food tracking. SAP Leonardo is expected to see an adoption in this region with the increased overall digital adoption and the drive for blockchain adoption through consortia.

Service providers are partnering with local companies, including hardware and software firms, to provide an end-to-end solution to their clients. They are building proof-of-concepts (PoCs) and preconfigured industry solutions to reduce implementation time.

Some observations on the leaders for this quadrant include:

- Accenture provides outcome-based pricing for digital projects and uses its Liquid Studio for SAP Leonardo capabilities to co-develop new solutions with SAP to simplify and fast track its clients’ journeys to digital business.

- Capgemini provides outcome-based or risk-sharing models for some parts of transformation projects, thereby enabling a partnership-based approach towards its customers.
Observations (cont.)

- Cognizant's Connected Vehicle Platform solution is based on SAP Leonardo and is powered by IoT on SAP Cloud Platform (SCP). It helps to increase data monetization by monitoring vehicle fleets from a centralized view and delivering insights that provide one point of control for automotive clients.

- HCL has four pre-configured SAP Leonardo accelerators that are approved and marketed directly by SAP. These offerings include IoT for fleet management and using blockchain as an asset retirement ledger, and HCL has approximately 30 other preconfigured solutions promotes on its own.

- Mindtree offers a free full-day workshop for clients to identify real "move the needle" problems for their business and to help them plan how to solve them rapidly through design-led innovation.

- NTT DATA partners with ProDrone, a professional drone system solution company, to provide SAP Leonardo services and deliver a minimum viable software product (MVP) automating the detection of hogweed.

- Wipro is a Rising Star and has eight accelerators that have been certified by SAP and are listed in the SAP App Center. These accelerators – Intelligent Pipeline, Connected Supply, Trusted Logistics, Smart Home, Quality Insights, Greenhouse Management, Pellucid Reverse Logistics and Planogram Compliance – are based on IoT, machine learning and blockchain.
Mindtree's SAP practice has partnered with SAP on the Leonardo Partner Medallion Initiative. In this initiative SAP provides support and certification for new industry innovation accelerators, including collections of tools and materials for specific industries and business functions. Partners can tailor these for each customer in a fixed-time, fixed-scope enablement process. Mindtree has several SAP Leonardo initiatives and projects in the Nordics.

**Strengths**

**Availability of 80 percent pre-built industry accelerators:** Mindtree has launched an industry accelerator for SAP Leonardo enabling “on-time and in-full” order fulfillment for CPG and manufacturing companies. The solution is called MOTIF (Mindtree's On-Time In-Full Solution) and is powered by SAP Leonardo. It helps the companies to avoid costly penalties by ensuring their product shipments are delivered to customers complete and on time.

**Free full day workshops for Leonardo clients:** Mindtree offers a free full day workshop to help clients to identify problems that have a meaningful impact on the business and help them plan to solve them rapidly. Based on SAP Leonardo and the design-led innovation concept, Mindtree works with customers to solve the right problem with the right technology. Following the workshop the typical timeframe for creating a pilot solution is typically 12 weeks, depending on complexity.

**Caution**

Partnerships required, specifically for solutions where cross-collaborations is necessary (Blockchain)
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
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