SAP HANA and Leonardo Ecosystem Partners
UK 2019

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

Mindtree
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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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Enterprises that already have an older version of SAP ERP and are planning to move to S/4HANA through brownfield approach are strategizing their S/4HANA conversion path. They need to develop a transformation roadmap for their transitioning their BW environment into BW/4HANA. Some of service providers are also offering a bluefield approach for enterprises that wish to retain certain differentiating capabilities in their current ECC system and migrate select configurations and custom code to the new systems while implementing S/4HANA.

Key SAP HANA and Leonardo trends across the UK are summarized below.

- **Increased in SAP adoption despite Brexit:** Despite the uncertainty on the Brexit, there is expected to be slight growth in SAP the across the UK. The enterprise segments that already have an ECC solution or an SAP-based IT architecture, and those that are planning to implement S/4HANA on a long-term basis, are typically the segments that are opting for smaller engagements with providers to progress their IT roadmap. These smaller deals allow the enterprises to address their company's IT needs and make future plans while maintaining flexibility to manage the needs and contingencies arising from Brexit.
**Executive Summary**

- **Bots and automation are reducing resolution time in managed services:** Automation of L1 and L2 support and resolving incidents in less time have been focus areas for most SAP managed services providers. The providers are using or planning to use bots to respond to basic tasks such as logging a ticket, providing the status of a ticket, reducing time taken to resolution and preventing any possible delays in resolution. Providers also are automating other services related to L1/L2 support and project reporting, and have redeployed some of their workforce that had been performing these activities to handle more complex situations by training them for such tasks.

- **Increased cloud deployments for S/4HANA:** In the UK, ISG observes that small enterprises are adopting cloud deployments of S/4HANA. These are enterprises that are nimble to IT changes and do not have architectural constraints. S/4HANA on cloud adoption is more seen among smaller enterprises than large ones. The smaller enterprises may intend to directly adopt S/4HANA and not go through the transition of S/4HANA through Suite on HANA (SoH) as an intermediary.

- **Industry-specific solutions with digital as the proposition:** Providers are building industry-specific solutions for S/4HANA, especially for manufacturing, retail, consumer packaged goods (CPG) and utilities, and going to market with a digital transformation proposition. Companies that are on a transformation journey to become an intelligent enterprise are seeking these industry-specific solutions, which helps them to achieve faster time-to-market performance and address the challenges specific to their paradigm.
Transition roadmaps to BW/4HANA dependent on enterprises' transition to S/4HANA: Customers focused on ERP conversion from ECC to S/4HANA are looking for a partner that can also convert their BW environment without increasing risk or disrupting the business. Adopting BW/4HANA is reliant on customers deciding to convert from ECC or Business Suite to S/4HANA. Providers are helping enterprises with transition roadmaps, consulting for migration strategies and providing advice on infrastructure specifically for BW/4HANA.

Providers are enabling SAP Leonardo adoption by building proof of concepts: Most enterprises are ambiguous about implementing SAP Leonardo as part of their IT infrastructure, so SAP Leonardo has been slow. Providers are responding to the market reluctance by building proof of concepts (PoCs) for a SAP Leonardo solution that helps address a specific industry issue or empowers enterprises with emerging technologies. Service providers demonstrate these solutions to their clients to showcase the solution's capabilities before the client decides to go ahead with the PoC project. This approach helps develop an understanding of how SAP Leonardo can be used within the client's enterprise, and allows the service provider to demonstrate its ability to implement the solution for the client.
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.

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 legacy and emerging SAP systems through SAP's partner ecosystem, due to the wide use and high market share of complex SAP solutions.

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.
Definition (cont.)

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.

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 are also assessed. 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.
Definition (cont.)

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

The assessment in this quadrant covers providers’ capability to offer managed services for maintenance and support functions comprising monitoring, remote support and centralized management of applications across SAP S/4HANA and SAP Business Suite. Providers need to provide maintenance and support services specifically for SAP HANA and related platforms across applications, data and 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 or user experience and integration services, including the ability to extract and process data from other platforms. The assessment also includes the provider’s industry knowledge, innovation and ability 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.

SAP LEONARDO TRANSFORMATION

This quadrant assesses providers on services for digital transformation using SAP Leonardo to build intelligent business functionalitites leveraging the HANA database. SAP Leonardo includes a suite of artificial intelligence (AI), machine learning (ML), blockchain and Internet of Things (IoT) technologies, packaged as Platform-as-a-Service deployed on the HANA database and using SAP Cloud Platform (SCP) for development. Capabilities assessed also include business transition, industry-specific implementations and deployment on public, hybrid and on-premise cloud. The providers should have delivered projects involving AI, ML, blockchain or IoT using SAP Leonardo as a standalone platform or include design thinking in their offerings.
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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SAP HANA and Leonardo Ecosystem Partners Quadrants
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. Planning, design and applications modeling across the enterprise clients' operating model are also assessed.

The providers are evaluated on their expertise in leveraging the SAP Activate framework and proprietary tools to provide SAP S/4HANA solutions to enterprises across different industry segments and revenue sizes. The providers are also scored on their ability to provide greenfield and brownfield implementations in cloud and on-premises versions of SAP S/4HANA across different business cases. Some of the other parameters providers also scored on include their ability to staff skilled resources for projects in the UK, initiatives on cross-skilling and up-skilling their staff, and their use of automated tools to improve the delivery time.

Source: ISG Research 2019
SAP S/4HANA & BUSINESS SUITE ON HANA TRANSFORMATION

Eligibility Criteria

- The participant provides development, integration, testing and deployment 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 UK enterprise clients.

Observations

In the current scenario, the UK remains a moderately attractive business environment. Due to the geopolitical situation, the enterprises are not committing to heavy investments in their IT landscape due to uncertainties in rules and regulations, and the potential changes that may be required in IT architecture. With this backdrop, the enterprises that are considering migrations to S/4HANA are those that have existing SAP systems and those that are forced to transition from ECC to S/4HANA due 2025 deadline for end of support.

Most of the clients that are investing in S/4HANA are motivated by processing real-time data and to achieve deeper consumer insights. The service providers are helping clients in S/4HANA implementation with various tools, frameworks and accelerators. These resources have been built to optimize the transformation services for S/4HANA through greenfield, brownfield and bluefield approaches. The providers are going to market by leveraging these tools, accelerators and frameworks with a focus on specific industries for which they have expertise.
SAP S/4HANA & BUSINESS SUITE ON HANA TRANSFORMATION

Observations (cont.)

In most S/4HANA contracts, business transformation takes the front foot. The providers are producing quantifiable benefits for clients through a partnership-driven approach. Providers are partnering not only with the clients to deliver digital transformation, but also with local, niche technology firms so they can offer holistic services and solutions using S/4HANA. The service providers are offering human-centric design thinking capabilities coupled with local expertise to help robust transformation services to the UK clients. Providers also are driving co-innovation programs with SAP to develop new solutions based on S/4HANA, to co-develop tools and accelerators to reduce the time taken for transformation. Some providers are putting their tools and accelerators in the SAP App Center, which is the digital enterprise marketplace for third party solutions.

Some observations on the leaders for this quadrant include are below.

- Accenture offers smart brownfield SAP S/4HANA migration in which a shell copy of the leading system is created with existing implemented processes and leverages the SAP System Landscape Optimization (SLO) tool for migration of all data or a select set.

- Atos has a strong local expertise, with 3 percent of its SAP practitioners working the UK, 32 percent of these consultants being S/4HANA certified. Atos provides its Codex solution which is an extensive repository of business use case accelerators to address all business information needs and help clients in their digital transformation journey.

- Capgemini has completed multiple acquisitions in the last 18 months targeted to develop its product portfolio for “Intelligent Enterprise,” a proposition which the provider is taking to market for SAP S/4HANA.
HCL has a $30 million R&D budget for SAP and leverages its proprietary DRYiCE framework for providing S/4HANA services. HCL’s strategy is focused on industry innovation and industry-specific templates and innovations.

Mindtree is an SAP Gold partner and has been a strategic partner since 2008. Mindtree’s acquisition of Bluefin Solution in 2015 strengthened its partnership with SAP and complemented its capabilities to show market leadership.

NTT DATA has a strong portfolio of SAP S/4HANA offerings and a systematic, data-driven approach to guide its customers through their digital journeys using S/4HANA. It focuses on multiple industries including manufacturing, healthcare and life sciences, retail and CPG.

Tech Mahindra’s Epselon framework is noteworthy. The tool provides an automated assessment of the enterprise baseline information enabling digital transformation for its clients and provides tools and accelerators across the software development lifecycle.

Infosys is a Rising Star in this quadrant and is a Strategic Services Partner for SAP. In the UK, approximately 20 percent of Infosys’ SAP HANA experts are certified in S/4HANA and the company is highly focused on the large and midsized market segments. The provider has a strong SAP practice in the UK and plans on expanding its client base by 30 percent.
Mindtree is an SAP Gold partner and has been a strategic partner since 2008. Mindtree’s acquisition of Bluefin Solution in 2015 strengthened its partnership with SAP and has complemented its capabilities to demonstrate market leadership, specifically in the UK. The majority (57 percent) of Mindtree’s S/4HANA certified professionals are based in UK and 45 percent of the company’s SAP revenue is generated there, thereby providing the strength and scale to deliver consulting and implementation services for UK-based clients.

**Overview**

**QuickDeploy framework for SAP S/4HANA**: This accelerator is tailor-made to help enterprises start their S/4HANA journeys. The tools simplify and accelerate deployment of SAP solutions, thereby reducing the time required to operate and thus enabling customer-focused improvements.

**Focus on specific industries and business functions**: Mindtree leverages its industry-specific templates, which include a fully-fledged CFIN 1809 proof of concept plus fashion and CPG templates. It also has a focus on S/4HANA deployments for finance, sales and distribution, procurement, warehouse management, inventory management, plant maintenance, production planning and control, product lifecycle management and project system.

**Heavy SAP customer concentration in the UK**: The majority of Mindtree’s implementations are in the UK, and it has more contracts in the UK than other service provider. Mindtree has expertise in the region plus experience-based industry accelerators powered by data, which help reduce the implementation time for S/4HANA.

**Strengths**

While Mindtree does provide cloud deployments for SAP S/4HANA, it has completed more on-premises projects.

The company’s focus remains on CPG and retail and could be expanded to other industries.

2019 ISG Provider Lens™ Leader

Mindtree’s expertise in servicing UK customers through partnerships and by leveraging its accelerators to provide quick turnaround for the clients is commendable.

ISG Provider Lens™ Quadrant Report | July 2019
The assessment for this quadrant includes a providers’ capability to deliver managed services (ongoing 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 and 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 on incident management, problem management and release management. Application lifecycle management (ALM) is necessary expertise for requirement management, version control and quality assurance. 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 for SAP HANA and related platforms specialization/certification;
- Managed services for SAP HANA applications include data and security;
- The service provider has delivery centers in UK and can deliver services to multiple client sites.

Observations

The companies in the UK that have SAP solutions seek managed services providers that can create quantifiable benefits for cost optimization, productivity improvements and return on investment. Most providers are using bots to automate incident response, thereby optimizing operations across L1, L2 and L3 support services and reducing the resource allocation needed for these services.

The service providers are expanding their reach in the UK by partnering with local providers to leverage their market expertise and to improve client relationships across the tenure of managed services contracts.

Some observations on the leaders for this quadrant are presented below.

- Accenture has strong SLA adherence framework using Accenture Delivery Metrics to measure delivery performance progress and quality.
- Capgemini is a certified SAP Application Management Services Partner and has numerous tools and accelerators to improve productivity, ease code maintenance, provide accurate reporting, automate monitoring and accelerate service delivery.
Cognizant’s managed services employees are trained to handle support services across all L1, L2 and L3 levels and to use automation to handle customer's SAP application support.

HCL’s Lucy is an AI-enabled cognitive virtual assistant with natural language processing (NLP) abilities. It has a persona that enables a user to have human-like conversations with no wait time and is available to interact with users 24x7x365. Lucy comes with approximately 600 use cases out of the box.

Mindtree is investing in AI to automate incident response and project management tasks with REBot. There are more than 518 bots in use, of which 113 are specifically used for SAP, thereby reducing the required human resources for L1/L2 support.

Tech Mahindra uses task bots to predict, prevent and detect issues and suggest recommendations based on learning history and past system feedbacks, thereby helping to reduce ticket resolution time by 40 percent for managed services.

Wipro's SAP-certified automation services are powered by its HOLMES artificial intelligence platform and help it deliver end-to-end capabilities for managed services providing live insights, predictive analytics and business process optimization.

Atos is a Rising Star and provides The Bridge, a strategic monitoring platform capable of 24x7 process-oriented monitoring of traditional applications, infrastructure and cloud-deployed services.
Mindtree has achieved high client growth in the UK, with an increase of 400 percent in last year. The company could increase its CoE footprint outside India to showcase its capabilities to the clients in the UK. That would help Mindtree to increase its customer reach in the region and to demonstrate its abilities to clients.

**ATLAS managed service framework:** The company uses ATLAS™ to conduct a 360 degree assessment of 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, waves 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 needed L1 and L2 resources and are mainly used for incident response to reduce response time.

**Quantifiable ROI provided for Mindtree's clients** – Mindtree provides continuous improvement for its managed services clients by leveraging its automation and RPA tools and accelerators, resulting in year-over-year productivity and cost savings. Continuous improvement is supported by Mindtree's dedicated CoE (Center of Excellence), a consulting-led SAP innovation lab that provides a solution library, accelerators, other IP, expert advice, reusable assets and industry templates.

There are three pillars to Mindtree's application management services: Prevent, Predict and Perform. It seeks to prevent incidents through various means by using its Autonomous Command Center to monitor processes, jobs, ETL operations, interfaces and more, and to flag conditions before they become incidents. It uses machine learning algorithms to predict a failure, then automatically assigns corrective tasks to bots that resolve issues before or as they occur. Perform is oriented to applying the right skills, at the right time, at the right place, at the right cost for service delivery. Mindtree offers onsite, offshore, nearshore and hybrid service delivery and has flexible engagement models for managed services, shared services, resource augmentation and capacity building. Mindtree has approximately 300 FTEs working in managed services in the UK.

**Caution**

The company could increase its CoE footprint outside India to showcase its capabilities to the clients in the UK. That would help Mindtree to increase its customer reach in the region and to demonstrate its abilities to clients.
Definition

This quadrant assesses the ability of service providers to strategize, develop, modify and implement real-time analytics on the SAP Business Warehouse (SAP BW) platform on HANA database (BW on HANA) and on the more simplified and integrated BW/4HANA. The providers are assessed on data management strategy, process optimization resulting in strategic benefits such as cost optimization, improved customer or 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 ability to operationalize applications using BW/4HANA in addition to integrating the solution with other SAP and non-SAP products and solutions.
**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 in data modeling, integration and analytic tools other than BW;
- The participant has delivered BW projects in UK.

**Observations**

In the UK, there are clients who are using BW or BW on HANA for their data warehousing capabilities. The customers that are migrating from ECC to S/4HANA and have traditional BW or BW on HANA are deciding to move their BW instance over to BW/4HANA at the same time as their S/4HANA conversion. Many providers are successfully converting their client's systems to BW/4HANA along with S/4HANA conversion. Providers are offering services to upgrade, optimize, consolidate, rationalize and migrate existing BW customers and to convert legacy data warehousing applications to BW on HANA.

Enterprises are evolving their strategies for data-driven approaches to harness the power of data, to offer process optimization and support effective decision making. To support the data-driven strategy of enterprises, providers are ensuring operational consistency during BW/4HANA migration. Providers are offering a partnership approach to their clients to establish continuous innovation in their data warehouse and data management practices.
Service providers are offering "greenfield" or new BW/4HANA deployments if the customer's source system remains constant and the client has an existing SAP system. The services provided leverage standard accelerators and framework to reuse code from the existing solution. If the deployment is for greenfield S/4HANA and a new SAP implementation, the provider proposes new enterprise analytics strategy. If the customer's usability requirement is higher, a SAP Shell conversion approach for accelerated migration could be used.

Some observations on the leaders for this quadrant are presented below.

- Accenture has expertise in financial analytics for BW on HANA and BW/4HANA implemented along with SAP S/4HANA.
- Capgemini has strong go-to-market capabilities and plans to provide advanced integration capabilities and simplified modeling to customers that are moving their BW instance to BW/4HANA at the same time as their S/4HANA conversion.
- Cognizant's value-added services for BW/4HANA and BW on HANA include more than 25 solutions built on the HANA platform and BW Automation Kit, which is a repository of over 30 tools and accelerators to bring in best practices and automation at various stages of a BW/4HANA and BW on HANA project execution.
- Mindtree's Analytics Strategy Assessment helps clients to develop a holistic data and analytics strategy for meeting tactical business objectives successfully with BW on HANA and BW/4HANA.
- Wipro provides full implementation support that includes all aspects of an implementation such as product evaluation, consulting and business case definition, prototyping and discovery, business blueprinting, development, testing, post go-live support and managed services, with a focus on the manufacturing and utilities verticals.
Mindtree provides strategic advisory services to help enterprises implement the best approach for their data warehousing and business intelligence challenges. It also offers full implementation support across assessments and blueprinting, scoping, full delivery services, testing, data migration, post-implementation support management and AMS services for continued successful operations. The provider has 65 BW/BI certified professionals working in the UK, which are part of its 250-member global team.

**Strengths**

**Multiple focus areas in SAP BW:** Mindtree has focus areas across the software development lifecycle including installation and upgrade, migration, regression testing and transformation to help clients to ensure quality deliverables. The company up-skills its resources using regular internal knowledge sharing programs in combination with formal training by SAP.

**Analytics strategy assessment framework:** The analytics strategy assessment will help clients to develop a holistic data and analytics strategy for meeting tactical business objectives successfully. It is used as an input into a wider review of organizations' data and analytics strategy to provide objective feedback on the current state of their capability, with practical recommendations from Mindtree as to how the client might prioritize and execute certain elements of the strategy.

**Caution**

Mindtree has its only one UK delivery center in London. It could expand its presence to help provide services to clients across the region.
SAP Leonardo includes a suite of artificial intelligence (AI), machine learning (ML), 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-premises clouds. The provider should have delivered projects applying AI, ML, blockchain or IoT on SAP Leonardo platform in addition to providing design thinking services to clients. Innovative solutions, proofs-of-concept (PoCs) and the use of multiple technologies in the provider's portfolio increases its ranking in this assessment.
Eligibility Criteria

- The service provider can demonstrate solutions developed on SAP Leonardo;
- Participant companies have SAP certified personnel;
- The company has all required SAP accreditations and authorization;
- The company has offices and clients in UK.

Observations

According to UK and Ireland SAP User Group (UKISUG), of the 345 members surveyed in 2018, just 6 percent plan on using Leonardo to support their IoT or machine learning projects, which just 2 percent up from the previous year. The adoption of SAP Leonardo is low in the UK. Added to the economic uncertainty, there is not much growth of Leonardo in the UK.

Most of the major service providers are collaborating with SAP under the Medallion Partner Program for Leonardo. The providers are building specific industry solutions and proof-of-concept projects to demonstrate Leonardo uses and its benefits. The service providers are using design thinking and ideation workshops as part of developing assessments and are using their proprietary digital transformation frameworks. Most providers have preconfigured solutions, for example farm-to-fork traceability for the food industry using blockchain, connected vehicles platforms, digital maturity assessment frameworks, and supply chain tracking programs. These preconfigured offerings reduce the time to SAP Leonardo-based solutions and to realize their benefits. Providers are targeting partnerships as an avenue to sell their products and to expand capabilities to implement solutions.
Some observations on the leaders for this quadrant follow.

- Accenture has many SAP Leonardo offerings and a strong partner network. It also has many collaboration initiatives with SAP and the companies together have developed more than 80 applications.

- Capgemini’s SAP Innovation Center team built more than 15 innovative use cases which includes the concept of Supply Chain with IoT and the Highway to S/4HANA offerings. Capgemini’s presentation of new innovative use-cases, along with the design thinking method, ensure that clients visiting its innovation centers can quickly identify the key topics driving their business agenda.

- HCL’s Leonardo offering is under the broad banner of DigitalIgnition, which is a combination of services, software, products, accelerators and design thinking approaches to deliver innovation that can grow into full-scale production scenarios in four to 14 weeks. HCL has 523 Leonardo experts globally.

- Mindtree provides an industry accelerator powered by SAP Leonardo called MOTIF (Mindtree's On-Time In-Full Solution) that enables fast, accurate order fulfillment for CPG and manufacturing companies.

- NTT DATA has strong capability to provide Leonardo solutions and integrate them with other SAP and non-SAP environments including C/4HANA, Hadoop, augmented reality devices and Google TensorFlow.

- Wipro has strong Leonardo expertise with approximately 1,500 practitioners worldwide that have been trained and working on Leonardo. The provider has the expertise to integrate Leonardo with approximately 10 non-SAP platforms including Microsoft IoT platform, Raspberry Pi, Alexa, Intel OpenVino and Google TensorFlow.

- Cognizant is a Rising Star and its 4i framework is based on human-centric design based on its phases of Inspire, Ideate, Innovate and Illustrate. The framework focuses on value realization, compliance, governance and efficiency improvements.
Mindtree’s partnership-based approach for SAP Leonardo and extremely flexible ways of working are complemented by its industry-specific tools and accelerators and provides a competitive advantage amongst its peers.

Mindtree has a focused approach for SAP Leonardo across the retail, CPG and manufacturing industries. Diversification across other industries could bring it additional revenue and expand its capabilities.

**Strengths**

**Availability of 80 percent pre-built industry accelerator:** Mindtree has released 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) 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.

**Innovation factory for co-innovation with clients:** Mindtree’s technology centre of excellence and its Innovation CoE offer clients co-development services, which is called Innovation Factory. The provider sets-up a co-innovation DevOps pod for the client and help it get started with constant innovation. Over a period, this pod is transitioned to internal customer resources to create capability for innovation.

**Automated Enterprise solution for four industries:** Mindtree conceptualized “Automated Enterprise” solution in 2017 and this has evolved with SAP to create intelligent enterprise solutions for select industries – consumer products, manufacturing, banking and financial services. Mindtree has been a part of its customers’ data-driven journey and this solution is a cornerstone of its offerings.

**Caution**

Mindtree has a focused approach for SAP Leonardo across the retail, CPG and manufacturing industries. Diversification across other industries could bring it additional revenue and expand its capabilities.
METHODOLOGY

The ISG Provider Lens™ 2019 – "SAP HANA and Leonardo Ecosystem Partners" research study analyses the relevant software vendors and service providers in the USA 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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