ISG Provider Lens™

SAP HANA and Leonardo Ecosystem Partners

SAP HANA Cloud Infrastructure and Platform Services

A research report comparing provider strengths, challenges and competitive differentiators

Global 2019

Quadrant Report

Customized report courtesy of:

NTT DATA

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 ISG believes to be current as of February 25, 2019 – March 25, 2019,for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

All revenue references are in U.S. dollars ($US) unless noted.

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ISG Provider Lens™

ISG Provider Lens™

ISG Provider Lens™ delivers leading-edge and actionable research studies, reports and consulting services focused on technology and service providers' strengths and weaknesses and how they are positioned relative to their peers in the market. These reports provide influential insights accessed by our large pool of advisors who are actively advising outsourcing deals as well as large numbers of ISG enterprise clients who are potential outsourcers.

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EXECUTIVE SUMMARY

SAP's S/4HANA offering was launched in 2015 and has started gaining momentum among enterprises. This momentum shift is reflected in the company's S/4HANA customer base, which has growth of close to 30 percent in 2019. From an offering perspective, S/4HANA forms the core of SAP's Intelligent Enterprise vision, and the company is looking at S/4HANA to strike a chord with enterprise customers looking for efficiencies and automation by automating their business processes and reducing complexity in their 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 toward 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 in sight by introducing features around pattern detection, outcome prediction and an 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, preferring on-premises deployment models compared to cloud hosting, which is finding traction among relatively smaller 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, 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.

- **Bots and automation applied to reduce resolution time across managed services:** Service providers are using or planning to use bots in AMS services to respond to basic activities such as logging a ticket, providing the status of a ticket and to reduce the time to resolution and prevent possible delays in resolution. Providers also are further automating services related to L1 and L2 support and project reporting, and have realigned their workforces to reassign staff that were doing these tasks to higher value and more complex functions.
- **Providers are enabling SAP Leonardo adoption by building proof of concepts:** Enterprises are ambiguous about implementing SAP Leonardo for their IT infrastructure, which has slowed SAP Leonardo adoption. In response, service providers are using SAP Leonardo to build proof-of-concept (PoC) demonstrations to help address a specific industry issues or empower 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 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

Simplified illustration

SAP HANA & Leonardo Ecosystem Partners	
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	SAP HANA Cloud Infrastructure and Platform Services

Source: ISG 2019

Definition

SAP is well known for its enterprise resource planning (ERP) software, 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 service providers. The report focuses on trends associated with SAP HANA and its market. As part of this global report, ISG classified 27 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 (ongoing 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-premises 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 solutions with 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.

Provider Classifications (cont.)

Each ISG Provider Lens™ quadrant may include a service provider(s) who ISG believes has a strong potential to move into the leader's quadrant.

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

	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	SAP HANA Cloud Infrastructure and Platform Services
Accenture	Leader	Leader	Leader	Leader	Leader	Not In
Atos	Rising Star	Leader	Market Challenger	Product Challenger	Product Challenger	Product Challenger
AWS	Not In	Not In	Not In	Not In	Not In	Leader
Birlasoft	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Contender
Capgemini	Leader	Leader	Leader	Leader	Leader	Market Challenger
Century Link	Contender	Contender	Contender	Contender	Contender	Contender
Cognizant	Leader	Leader	Rising Star	Leader	Product Challenger	Not In
Deloitte	Leader	Not In	Not In	Not In	Not In	Not In
DXC	Product Challenger	Leader	Not In	Contender	Contender	Product Challenger
EPAM	Contender	Contender	Contender	Not In	Not In	Not In
Fujitsu	Contender	Contender	Contender	Not In	Not In	Not In
GCP	Not In	Not In	Not In	Not In	Not In	Rising Star
HCL	Leader	Leader	Leader	Leader	Leader	Market Challenger
IBM	Leader	Leader	Leader	Not In	Leader	Leader

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

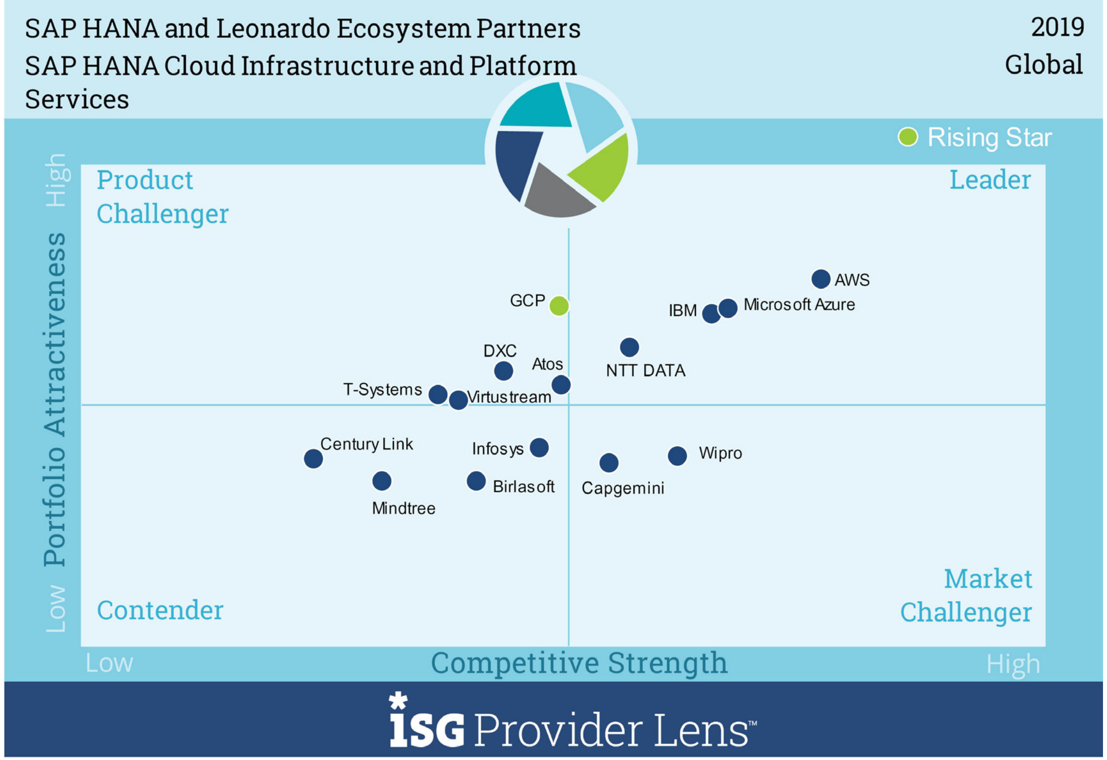
	SAP S/4HANA & Business Suite on HANA Transformation	SAP S/4HANA & Business Suite on HANA Managed Services	SAP BW/4 on HANA and BW on HANA Transformation & Operations	SAP Leonardo Transformation	SAP Cloud Platform Support Services	SAP HANA Cloud Infrastructure and Platform Services
Infosys	Leader	Product Challenger	Leader	Product Challenger	Leader	Contender
ITC Infotech	Product Challenger	Not In	Not In	Not In	Not In	Not In
LTI	Product Challenger	Contender	Not In	Not In	Contender	Not In
Microsoft Azure	Not In	Not In	Not In	Not In	Not In	Leader
Mindtree	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Rising Star	Contender
Mphasis	Contender	Contender	Not In	Not In	Not In	Not In
NTT DATA	Leader	Product Challenger	Product Challenger	Market Challenger	Contender	Leader
T-Systems	Contender	Contender	Contender	Product Challenger	Contender	Product Challenger
TCS	Not In	Not In	Not In	Not In	Not In	Not In
Tech Mahindra	Rising Star	Rising Star	Leader	Rising Star	Leader	Not In
Virtustream	Not In	Not In	Not In	Not In	Not In	Product Challenger
Wipro	Leader	Leader	Leader	Leader	Market Challenger	Market Challenger

SAP HANA and Leonardo Ecosystem Partners Quadrants

SAP HANA CLOUD INFRASTRUCTURE AND PLATFORM SERVICES

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.



Source: ISG Research 2019

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, platform 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 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 offer 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 a competitive edge over other challengers, and helped it become a Rising Star.

AWS

Overview

AWS (Amazon Web Services) is the largest cloud service provider in the world. It has 55 availability zones within 20 geographic regions. The AWS global infrastructure is comprised of 66 availability zones within 21 geographic regions with announced plans for 12 more availability zones and four more regions in Bahrain, Indonesia, Italy, and South Africa. AWS is working with many core global and regional service integrators, managed service providers and technology suppliers to expand its SAP capabilities. AWS first offered production HANA services in 2012. Current work with SAP includes their FAST AWS and SAP Transformation Program (FAST) tooling collaboration and the S/4 MOVE Xperience Program to support HANA migrations.

Strengths

Extensive portfolio of services: AWS offers one of the most comprehensive and feature-rich cloud platforms. Its SAP customers can choose to run their workloads in 20 global regions using the most SAP-certified instance types among cloud providers. AWS provides customers a flexible architecture to implement their SAP systems, ranging from 244 GB to 50 TB, and integrates AWS services to build a cloud-native enterprise architecture solving IoT, analytical or machine learning requirements.

Well-Architected Framework and tool: AWS' Well-Architected Framework was developed based on five pillars: operational excellence, security, reliability, performance efficiency and cost optimization. This framework gives AWS customers and partners a consistent approach to evaluate architectures and implement designs that might scale over time. The Well-Architected Tool is based on Well-Architected Framework and helps to review the state of workloads and compare them with the latest AWS architectural best practices.

Extensive partner ecosystem: AWS has an extensive partner ecosystem to deliver professional and managed services to facilitate adoption of its IaaS offerings.

Caution

Amazon Web Services (AWS) offers more than 165 services, which can be cumbersome for enterprise clients to keep a track and determine which would suit them best.

2019 ISG Provider Lens™ Leader

AWS is an industry leader for SAP global infrastructure and innovation services. With its strong partnership with SAP and other leading global system integrators, ISG expects AWS to expand its ecosystem with more value-adding services, tooling and innovation.

IBM

Overview

IBM's leading SAP infrastructure services include a large portfolio of hosting offerings encompassing hardware, software and hybrid cloud options. IBM operates 25 SAP-certified cloud data centers and three main SAP service centers in North America plus 27 additional SAP data centers worldwide.

Caution

IBM needs to improve information dissemination across multiple channels, such as marketing collaterals and brochures specific to its SAP related services delivered through its infrastructure.

Strengths

End-to-end cloud managed services: IBM provides a comprehensive product portfolio and end-to-end managed services for infrastructure, which includes change management, configuration, security monitoring and patching, asset management, OS patching, database management and middleware. The company also provides fully managed high-availability, backup and disaster recovery solutions across the globe.

Heavy focus on integrating SAP with IBM cognitive services: IBM's SAP infrastructure services create customer value by offering SAP in conjunction with IBM Watson cognitive solutions and services, which can integrate IoT, blockchain chatbots, and other predictive services. HANA and Watson are available from the IBM Cloud and SAP Cloud Managed Services team and are also available for on-premises use.

Wide deployment options: IBM provides multiple deployment options for its customers, including on-premises, IBM data center and approved third-party, shared or dedicated facilities. The company also offers a wide choice of compute, storage and network configurations that are highly flexible, scalable and available, from fully virtualized to bare metal, with support for Linux, Windows and IBM AIX and multiple database and middleware options.

2019 ISG Provider Lens™ Leader

IBM Cloud Services is a production-ready cloud environment built for enterprise-class performance. Its robust Infrastructure services combined with a full set of managed services make it fit-for-purpose for both on- or off-premises cloud hosting requirements of large enterprises.

MICROSOFT AZURE

Overview

Microsoft and SAP have partnered to offer certified SAP solutions for migrating and deploying SAP applications to Microsoft Azure to provide a hybrid and full cloud experience. Enterprises can trust Azure's reliable and secure infrastructure platform that enables them to quickly deploy SAP solutions in the cloud. Microsoft Azure offers 54 regions worldwide, offering scale, data resiliency and compliance for global customers.

Strengths

Strong engagements with SAP: Microsoft and SAP have come together to empower digital transformation and innovation. SAP is already running its own business-critical systems on Azure, and Microsoft has 110,000 internal users running SAP. Integrated enterprise-class support is provided by co-located support staff.

SAP HANA for production use on Azure: Microsoft offers SAP BW on HANA and S/4HANA deployments on the Azure environment (with up to 20 TB in-memory capacity). This enables Microsoft as one of the few players to deploy large instances of SAP BW and SAP Business Suite on SAP HANA on Azure. The service provides the most flexibility and cost-effective approach of the top public cloud providers for SAP HANA solutions.

High availability for SAP HANA: Microsoft provides high availability for SAP HANA (on-premise deployment) using HANA system replication or shared storage. HANA system replication is currently the only supported high availability function on Azure VMs.

Caution

Microsoft Azure services are relatively expensive when compared to the other cloud providers in the market, and hence, Azure may not be the first choice for enterprises with limited resources and spend capacity.

2019 ISG Provider Lens™ Leader

Microsoft is experiencing a substantial increase in Azure hosting for large SAP production environments, as SAP is sunsetting legacy systems by 2025 and all its new solutions and services will be offered on a cloud-first approach.

NTT DATA

Overview

NTT DATA is a certified SAP partner and its cloud offerings include its SAP Migration and Management Services, Managed Cloud Services, Cloud Advisory Services and Cloud Migration Services. Currently the company offers both Cloud and SAP as separate services and the company plans for an SAP transformation offering to cover planning- and migration-related areas. NTT DATA has expanded its SAP capabilities and geographical presence through recent acquisitions. The company now has more than 15,000 SAP practitioners and nine innovation labs around the world.

Strengths

Extensive cloud services portfolio: NTT DATA offers a wide variety of SAP cloud services, which gives its clients a high degree of flexibility to choose the best alternative based on their unique situation. NTT DATA can deploy, migrate, manage or support SAP on AWS, Azure, Google Cloud Platform and an NTT DATA private cloud, including on-premises SAP components.

Proprietary frameworks: NTT DATA's cloud services are designed to provide monitoring and operational management tasks for the customer's cloud-based infrastructure or virtual data center, using Information Technology Infrastructure Library (ITIL®) based methodologies. NTT DATA's sales materials clearly highlight the functional abstracts, training and calculation templates, deep service information and service catalog the company can provide.

Significant inorganic growth: NTT DATA uses acquisitions to increase it SAP capabilities and footprint globally. For example, the company acquired Itelligence and Everis, which helped it gain a strong base in the SMB market in Europe, the Middle East and Africa. In the past few years, NTT DATA acquired Goldfish ICT, EINS Consulting, Sybit and gen-ius to further extend its SAP capabilities, particularly in Europe.

Caution

NTT DATA has relatively thin resource concentration outside Europe and should focus on increasing its strength in the U.S. and other geographies to support the growing needs SAP HANA business users.

2019 ISG Provider Lens™ Leader

NTT DATA's strong SAP practice, capability to offer support services to other cloud providers like AWS, Azure, Google Cloud Platform to deploy SAP services, and its regional support make the company a leader in this segment.

GOOGLE CLOUD PLATFORM (GCP)

Overview

Google has partnered with SAP to enable enterprises to run their core SAP service on Google Cloud Platform (GCP), and to co-develop technologies. GCP has developed a massive IT infrastructure that is grouped into multiple zones (data centers) in each major geographic region. GCP is currently operating 46 zones within 15 regions, and has more than 100 points of presence. In addition to major SAP services, GCP offers Compute Engine (IaaS), App Engine (an application platform-as-a-service, or aPaaS), Container Engine (a Docker container service) and Cloud Functions (a "server-less computing" capability).

Strengths

Anthos Platform: Anthos is a platform Google developed to address service management and managed operations requirements with a focus on application modernization. The platform supports multi-cloud deployment options such as GCP and on-premise to help companies develop, deliver and modernize applications.

Improved machine types to run SAP workloads: Google recently announced the n1-ultramem-160 machine type, which has nearly 4TB of RAM. The virtual machine (VM) instances are optimized to run SAP HANA's in-memory database and are fully supported by SAP for production workloads. Back-end applications benefit from the ultra-low latency from running alongside in-memory database services.

Growing global system integrator (SI) partnerships: Google and Accenture co-created the Accenture Google Business Group (AGBG) to help organizations move workloads to GCP. Other growth partners aligned with GCP include Atos, Deloitte, Rackspace, HCL, TCS, Wipro, Mindtree and Cognizant.

Caution

Compared to other hyperscalers, GCP is relatively new to the market, hence the company has to invest more on its marketing capabilities like brochures, use cases and other collateral to expand its customers and increase the revenue stream.

2019 ISG Provider Lens™ Leader

GCP's recent global infrastructure, network, and partner growth is extremely impressive. Google is very strong in artificial intelligence and machine learning within the healthcare, consumer packaged goods, media and entertainment industries.

Methodology

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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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.

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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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