

**\*ISG** Provider Lens™

# SAP HANA and Leonardo Ecosystem Partners

SAP S/4HANA & Business Suite on HANA Transformation

Global 2019

Quadrant  
Report



A research report  
comparing provider  
strengths, challenges  
and competitive  
differentiators

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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## 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.

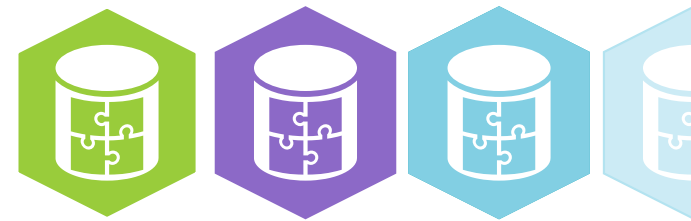
We observe that enterprises are taking a customized, thoroughly evaluated and business need-driven adoption to S/4HANA adoption, ranging from landscape transformation to conversions (greenfield, brownfield or bluefield approaches) based on the complexity of their existing SAP ERP architectures. There 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

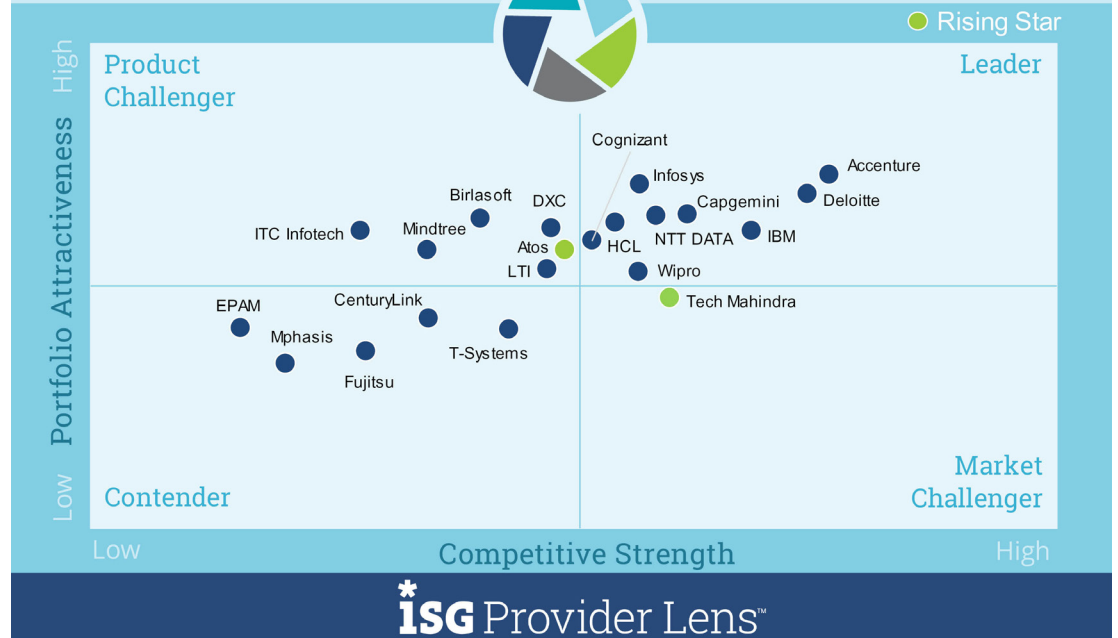
## SAP S/4HANA & BUSINESS SUITE ON HANA TRANSFORMATION

### Definition

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

SAP HANA and Leonardo Ecosystem Partners  
SAP S/4HANA & Business Suite on HANA  
Transformation

2019  
Global



Source: ISG Research 2019

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

### Eligibility Criteria

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

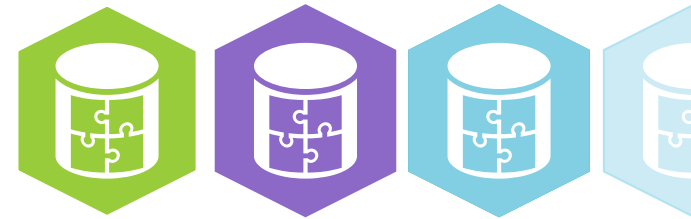
### Observations

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

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

### Observations

- Infosys' diversified S/4HANA offerings, focused reskilling and expanding footprints across the globe makes it a leader in this segment.
- NTT DATA's in-house proprietary tools and its strategy of expanding through acquisitions are its key differentiators in the market and make the company a unique player in this segment.
- Wipro's strong SAP-skilled FTE base, distinctive delivery methodology and investment in co-innovation labs gives it an advantage over competition.
- Tech Mahindra's pre-defined industry accelerators, automated platform for migration and roadmap development, and 3-4-3 strategy make it more competitive than other challengers and establish it as a Rising Star.
- Atos strong and focused S/4HANA approach, robust integration, and their unique proprietary tools and accelerators makes them a Rising Star.



## NTT DATA

### Overview

NTT DATA is a certified SAP partner and its S/4HANA offerings include consulting, hosting, application management and global managed services. NTT DATA has recently expanded its SAP capabilities and geographical presence through acquisitions. NTT DATA has more than 15,000 SAP practitioners and nine innovation labs worldwide.

### Strengths

**Playback approach with ACCELERATE tool:** NTT DATA's Playback approach uses multi-iteration and helps customers to visualize the solution in the early stage of project lifecycle. The approach is coupled with the company's ACCELERATE project tool to track deliverables, issues, risks, key decisions and defects in a collaborative environment, thus leading to higher efficiency and productivity.

**Proprietary tool for landscape transformation:** Uptimizer, an S/4HANA upgrade diagnostic tool developed by NTT DATA, helps in modernizing and transforming an SAP landscape. The tool identifies the objects that break at the line of the code when upgraded from ECC to S/4HANA, thereby reducing efforts and eliminating inefficiencies during the transformation.

**Significant inorganic growth:** NTT DATA uses acquisitions to increase its SAP capabilities and footprint globally. For example, the company acquired Itelligence and Everis, which helped it gain a strong base in EMEA's SMB market. 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

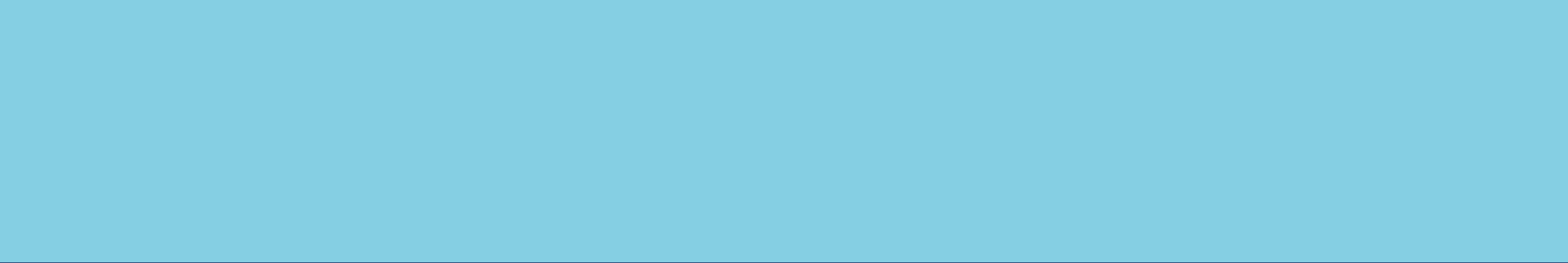
NTT DATA has executed a fair number of S/4HANA contracts in Europe but needs to increase its global coverage.



## 2019 ISG Provider Lens™ Leader

NTT DATA offers a balanced portfolio and solid approach to S/4HANA conversions and new implementations that are complemented by an array of tools, accelerators and industry solutions suited for both large and mid-sized enterprises. ISG believes that NTT DATA's recent acquisitions will help the company gain customers in various industries.





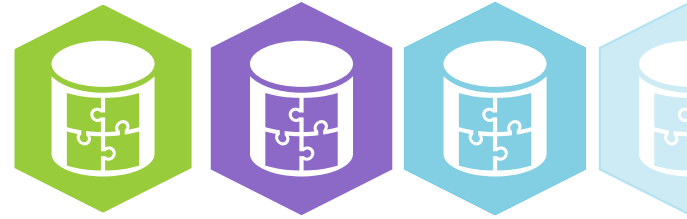
# Methodology

## 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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