

SAP HANA and Leonardo Ecosystem Partners

U.S. 2020

Quadrant Report



A research report
comparing provider
strengths, challenges
and competitive
differentiators

Customized report courtesy of:



July 2020

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 May, 2020, 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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1	Executive Summary
3	Introduction
12	SAP S/4 HANA System Transformation – Large Accounts
16	SAP S/4 HANA System Transformation – Midmarket
21	Managed Application Services for SAP ERP
26	Managed Platform Services for SAP HANA
31	SAP Cloud Platform and SAP Leonardo Services
35	Methodology

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EXECUTIVE SUMMARY

S/4HANA, SAP's intelligent and integrated ERP system running on SAP HANA, has been helping enterprises to transform their business processes through the use of artificial intelligence (AI) either on the cloud or on-premise. SAP S/4HANA aims to alleviate enterprise business process problems through its interactive interface and by applying analytics to speed insights delivery. While the on-premises edition offers more customizations and requires a greater S/4HANA management effort, the cloud edition suits enterprises seeking limited customizations, automatic upgrades and faster implementation. S/4HANA has application for a wide range of industries across both large and midsize enterprises.

ISG observes a two-tier adoption model as one of the S/4HANA trends gaining momentum in the coming months. Led by their business needs, enterprises are opting for on-premises S/4HANA with heavy customizations for their main office, and the cloud version for their satellite/regional offices or subsidiaries, which require less investment and customizations. Another potential market comprised of enterprises presently on SAP ECC but contemplating moving to S/4HANA in the future is also surfacing.

The S/4HANA certified professionals serve as one of the differentiators for providers to showcase their expertise in managing complexity and delivering services. Investments in reskilling initiatives have yielded results for providers, as they have grown the base of SAP- and S/4HANA-certified professionals in their organizations.

There is an increasing focus to integrate agile and DevOps processes into SAP services, across development, implementation and managed services. Providers are not only plainly leveraging their proprietary tools and accelerators to deliver S/4HANA services, but are integrating agile and DevOps methodologies with their frameworks to increase efficiencies and reduce the delivery time cycles. From a marketing strategy perspective, providers are undertaking region/city-specific roadshows and marketing activities to reach out to a larger spectrum of potential clients. Meanwhile, a few service providers have used a combined strategy of industry- and region-specific marketing to penetrate the U.S. market.

Due to the change in the macroenvironment scenario and sentiments from COVID-19, enterprises are procrastinating their decisions to go for large-scale S/4HANA implementations and transformation. Such investments are being deferred or delayed. This is affecting a sizeable portion of the decisions in the S/4HANA landscape, while a complete hold or freeze on S/4HANA deals or decisions can be seen as a fringe development among a few companies. Enterprises are discussing activities with providers to “keep the lights on,” both from the management and investment perspectives. This is crystallizing a shorter time horizon for management decisions on S/4HANA. SAP has extended support to SAP Business Suite 7 core applications including ECC 6.0. That move, along with the unfavorable business environment due to COVID-19, could result in enterprises delaying their shift to S/4HANA and continuing with their existing ERP setup with managed services.

Service providers have adjusted to the present uncertainty due to COVID-19 and have ramped up their SAP services by enabling their workforces with remote technology for

carrying out business. They have mobilized their workforces by leveraging the work-from-home model, using remote operations tools and new collaboration methods to ensure uninterrupted service delivery to their clients. A few service providers have also come up with quick-to-deploy solutions for supply chain and other areas to help their clients remotely continue their operations.

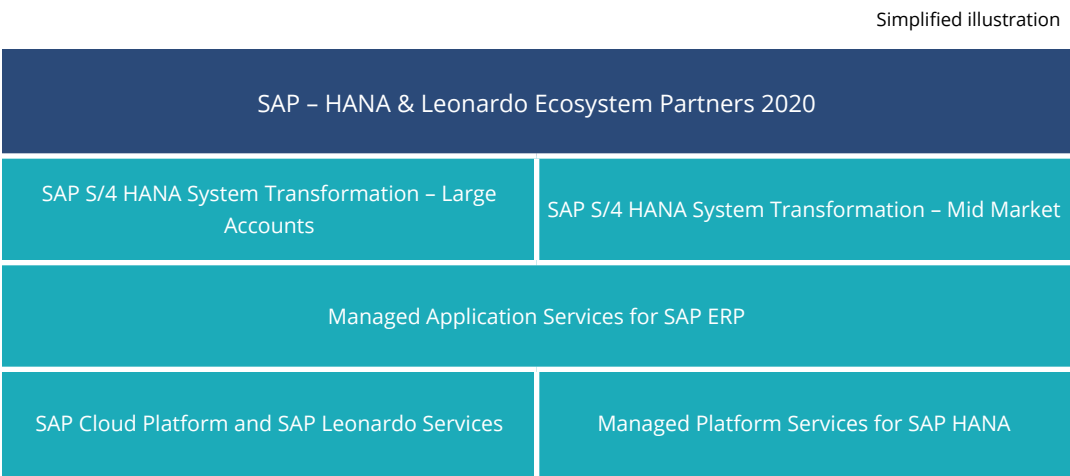
Against the backdrop of COVID-19, enterprises could contemplate a move to cloud as a measure to rein in costs. We expect an uptake in migration to cloud in the next few months, including S/4HANA migrations and efforts from providers to facilitate such moves to cloud through frameworks and preconfigured templates.

Some of the key S/4HANA, SAP Cloud Platform (SCP) and Leonardo trends are summarized below.

- **Frameworks, tools and accelerators for S/4HANA services delivery expand:** Providers are using a host of tools, proprietary frameworks, methodologies and templates for assessments, code reconciliation, data management, testing and other components of S/4HANA conversions and transformations for their clients. Areas served by these tools include assessing IT landscape, strategizing roadmaps, improving code management and automating support services.
- **Hybrid agile and DevOps methodologies being applied:** Service providers are investing and integrating hybrid agile and DevOps approaches such as Scaled Agile Framework (SAFe) for rapid development, prototyping, deployment and faster release cycles. Providers are also using agile sprints and have dedicated centers of excellence (CoEs) for them.

- **Industry-specific solutions for transformation:** Service providers have increased their focus on creating ready-to-run templates, industry-specific solutions and preconfigured offerings for S/4HANA, SCP and Leonardo to help customers with integration and business agility. Enterprises are looking for such solutions as a differentiator for faster time-to-market and to help them become an intelligent enterprise. Several providers have also established innovation centers, labs and other facilities to showcase their solutions and provide a platform for enterprises to experience them.
- **Bots and automation in managed services increase:** With a focus on lowering cost and increasing delivery speed, service providers are increasing their use of conversational AI, automation, robotic process automation (RPA), bots and chat queries for improving operational efficiency, streamlining incident management, triage configuration and more.
- **Emerging technologies-based SAP SCP and Leonardo platform solutions get specific:** Service providers are increasingly leveraging emerging technologies such as IoT and blockchain to create ready-to-use solutions for various industries and processes such as supply chain, retail, utilities, manufacturing and others. Providers are also developing strong partnerships with SAP to co-innovate and co-develop such solutions to serve specific use cases for different industries.
- **Partnerships with hyperscalers advancing:** Most of the service providers have developed alliances or partnerships with all the leading hyperscalers to provide platform application services in areas such as archiving, backup, disaster recovery, security, compliance and monitoring. Some of the providers have developed their own platform on a hyperscaler or offer the services on their own dedicated centers.

Introduction



Source: ISG 2020

Definition

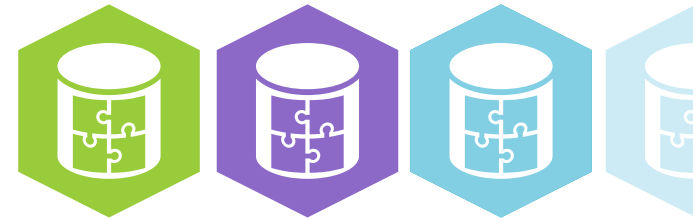
SAP is well known for its enterprise resource planning (ERP) software, data management products and digital focused offerings. This report compares IT service providers and their capabilities to implement, migrate, transform and manage SAP services such as SAP S/4HANA for large and midmarket companies, and their SAP application managed services, SAP managed platform services and SAP Cloud Platform and Leonardo services.

Definition (cont.)

Scope of Report

The SAP HANA & Leonardo Ecosystem Partners 2020 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 U.S. report, ISG classified 34 providers for SAP study as either leaders, market challengers, product challengers or contenders in five areas of specialization: SAP S/4 HANA System Transformation – Large Accounts, SAP S/4 HANA System Transformation – Midmarket, Managed Application Services for SAP ERP, Managed Platform Services for SAP HANA and SAP Cloud Platform and SAP Leonardo Services.

The report outlines key trends in different SAP services and will help heads of different lines of businesses, enterprise applications, SAP services and vendor management within organizations to understand the SAP market dynamics and service provider capabilities to meet their business needs.



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 3


	SAP S/4 HANA System Transformation – Large Accounts	SAP S/4 HANA System Transformation – Midmarket	Managed Application Services for SAP ERP	Managed Platform Services for SAP HANA	SAP Cloud Platform and SAP Leonardo Services
Accenture	● Leader	● Not In	● Leader	● Leader	● Leader
Atos	● Product Challenger	● Product Challenger	● Product Challenger	● Product Challenger	● Product Challenger
Birlasoft	● Not In	● Leader	● Product Challenger	● Contender	● Product Challenger
Capgemini	● Product Challenger	● Product Challenger	● Leader	● Leader	● Leader
CenturyLink	● Contender	● Not In	● Contender	● Not In	● Not In
Clarkston Consulting	● Not In	● Contender	● Not In	● Not In	● Not In
Cognizant	● Product Challenger	● Product Challenger	● Product Challenger	● Leader	● Product Challenger
Delaware	● Not In	● Contender	● Not In	● Not In	● Not In
Deloitte	● Leader	● Not In	● Not In	● Not In	● Not In
DXC	● Product Challenger	● Not In	● Leader	● Product Challenger	● Product Challenger
Ensono	● Not In	● Not In	● Not In	● Contender	● Not In

SAP HANA and Leonardo Ecosystem Partners - Quadrant Provider Listing 2 of 3

	SAP S/4 HANA System Transformation – Large Accounts	SAP S/4 HANA System Transformation – Midmarket	Managed Application Services for SAP ERP	Managed Platform Services for SAP HANA	SAP Cloud Platform and SAP Leonardo Services
GyanSys	● Not In	● Contender	● Not In	● Not In	● Not In
HCL	● Rising Star	● Product Challenger	● Leader	● Leader	● Leader
Hexaware	● Not In	● Leader	● Product Challenger	● Not In	● Not In
IBM	● Leader	● Not In	● Leader	● Leader	● Leader
Infosys	● Leader	● Leader	● Product Challenger	● Product Challenger	● Leader
Keytree	● Not In	● Product Challenger	● Not In	● Not In	● Contender
LTI	● Product Challenger	● Not In	● Not In	● Not In	● Not In
Mindset Consulting	● Not In	● Product Challenger	● Contender	● Not In	● Not In
Mindtree	● Not In	● Leader	● Product Challenger	● Product Challenger	● Product Challenger
Mphasis	● Not In	● Contender	● Contender	● Not In	● Not In
NTT DATA	● Product Challenger	● Leader	● Rising Star	● Leader	● Market Challenger

SAP HANA and Leonardo Ecosystem Partners - Quadrant Provider Listing 3 of 3

	SAP S/4 HANA System Transformation – Large Accounts	SAP S/4 HANA System Transformation – Midmarket	Managed Application Services for SAP ERP	Managed Platform Services for SAP HANA	SAP Cloud Platform and SAP Leonardo Services
Rackspace	● Not In	● Not In	● Not In	● Product Challenger	● Not In
Stefanini	● Not In	● Product Challenger	● Product Challenger	● Not In	● Contender
Suneratech	● Not In	● Product Challenger	● Product Challenger	● Not In	● Not In
TCS	● Leader	● Not In	● Leader	● Leader	● Leader
Tech Mahindra	● Product Challenger	● Product Challenger	● Leader	● Product Challenger	● Leader
T-Systems	● Contender	● Not In	● Product Challenger	● Product Challenger	● Contender
Velocity	● Not In	● Contender	● Not In	● Not In	● Not In
Virtustream	● Not In	● Not In	● Not In	● Product Challenger	● Not In
Wipro	● Product Challenger	● Leader	● Leader	● Leader	● Leader
Yash Technologies	● Not In	● Contender	● Contender	● Not In	● Contender
Zensar	● Not In	● Product Challenger	● Not In	● Not In	● Not In



SAP HANA and Leonardo Ecosystem Partners Quadrants

ENTERPRISE CONTEXT

SAP S/4HANA System Transformation - Large Accounts

This report is relevant to enterprises across industries in the U.S., for evaluating providers of SAP S/4 HANA consulting and implementation services for large system transformations.

In this quadrant report, ISG highlights the current market positioning of providers of SAP S/4 HANA consulting and implementation services to large accounts in the U.S., based on depth of service offering and market presence.

Enterprises are reluctant to migrate to SAP S/4 HANA owing to factors such as high costs; difficulties in data management, change management and custom code management; a shortage of talent or skill; and uncertainties about integrating with their legacy ERP systems. However, many enterprises have implemented or are implementing SAP S/4 HANA as a part of their digital transformation initiatives and are choosing the right provider to overcome the challenges and address talent/skill gaps.

Compared with other regions/countries, enterprises in U.S. are leading from front in the adoption of SAP S/4 HANA in their business processes. These enterprises have a specific IT infrastructure needs, of which easy scalability and adaptability are priorities. ISG also notes that many of these implementations take place in different cloud environments (public or private) based on the criticality of the data. A service provider can support an enterprise client by addressing the challenges (stated above) and providing them with optimal IT Infrastructure and SAP security.

The complexities of an SAP S/4 HANA implementation is directly proportional to the size of an enterprise, and becomes more complex when the implementation is on a global level. Therefore, large enterprise clients prefer service providers with a skilled workforce, high integration capabilities and a global presence. Most of the large enterprise implementations occur at a global level, involving multiple regions, hence, enterprises should not only look at the depth of offering of a service provider, but also its regional presence and local expertise.

Who should read the report:

Marketing and sales leaders should read this report to understand the relative positioning and capabilities of service partners that can help them effectively harness SAP S/4 HANA services for day-to-day analysis and dashboarding.

IT and technology leaders should read this report for a clear understanding of the strengths and weaknesses of service providers in the SAP S/4 HANA ecosystem, and understand how they integrate the latest technologies/capabilities into their S/4 HANA offerings to find a competitive edge in the market.

Line of business, industry leaders and finance leaders should read this report to understand the relative positioning of the partners that can help them effectively procure SAP S/4 HANA services with respect to their business/industry and to ensure return on investment.

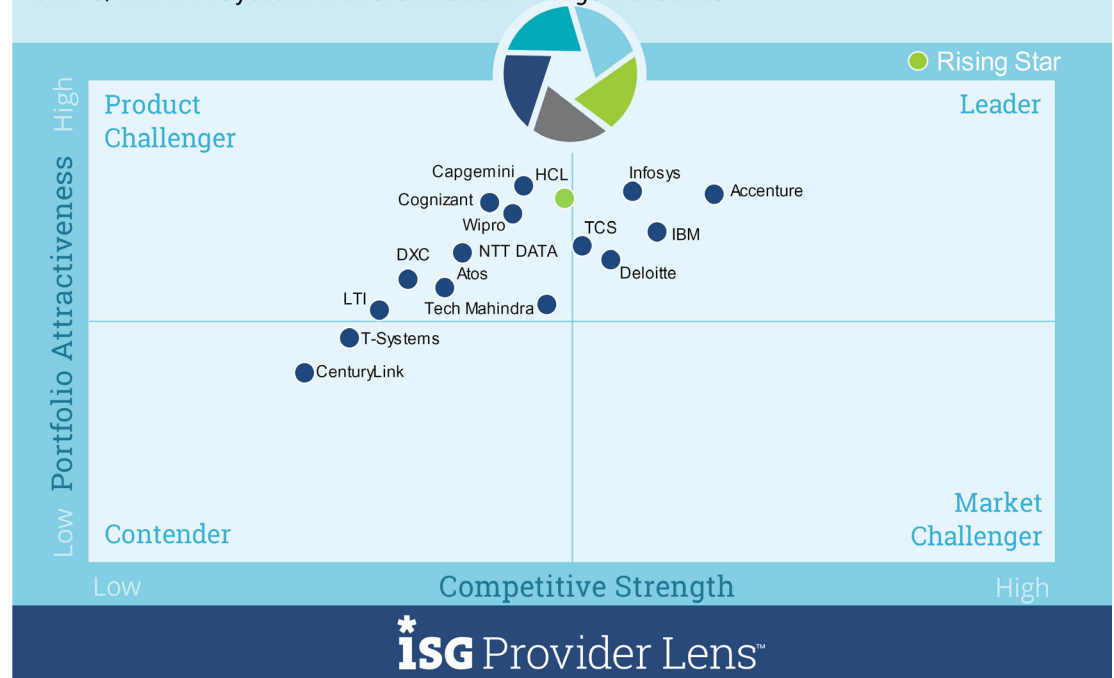
SAP S/4 HANA SYSTEM TRANSFORMATION – LARGE ACCOUNTS

Definition

ISG assesses consulting and system integration service providers for developing, deploying and testing enterprise applications using SAP S/4HANA and SAP Business Suite with SAP Fiori as the user interface. The transformation includes applications planning, design and modeling, while considering the service provider's ability to manage complexity and scale that are common characteristics among large enterprise clients. The participating providers are expected to have the frameworks, tools and accelerators to support the needs of large system transformations.

SAP HANA and Leonardo Ecosystem Partners SAP S/4 HANA System Transformation – Large Accounts

2020
U.S.



Source: ISG Research 2020

SAP S/4 HANA SYSTEM TRANSFORMATION – LARGE ACCOUNTS

Eligibility Criteria

- Participant's service portfolio to include SAP S/4HANA development, integration and testing with at least one implementation of S/4HANA or SAP Business Suite on HANA.
- Advisory capabilities and implementation experience in greenfield or brownfield S/4HANA.
- Provision to offer on-premises and cloud-based implementations.
- Availability of SAP-certified consultants and practitioners across regions to support multi-country and multi-language implementations.
- Ability to handle complexity and scale through optimal onshore-off-shore delivery models.

Observations

Service providers deliver S/4HANA transformations by leveraging a host of proprietary frameworks, methodology, tools and accelerators. They use them effectively to deliver services within various S/4HANA transformation areas such as assessments, discovery, migrations, conversions and development. Code reconciliation, assessments and industry-focused offerings are some of the common functional areas where providers made incremental additions to their intellectual property over last year. Several leading providers carried out tighter hybrid agile and DevOps integrations with SAP and S/4HANA services to benefit clients by enabling reduced delivery time and lower total cost of ownership. Although the COVID-19 pandemic disrupted travel and the movement of skilled resources across borders, service providers quickly ramped up their technology infrastructures and leveraged virtual desktop infrastructure (VDI) and other remote technologies to provide continued SAP S/4HANA support and services for their clients.

SAP S/4 HANA SYSTEM TRANSFORMATION – LARGE ACCOUNTS

Observations

- **Accenture's** large base of more than 50,000 SAP practitioners and 50 delivery centers plus proprietary assets such as the myConcerto platform and SAP integration with Model Company make it a leader in SAP S/4HANA.
- **Deloitte** remains a leader through its industry expertise with focus on the finance domain, accelerators and extensive consulting capabilities for S/4HANA.
- **IBM's** partnerships with ecosystem players like SNP, Syniti, Microsoft, AWS and Google and its robust S/4HANA services across the various lifecycle stages make it strong player in the market.
- **Infosys** offers a solid SAP S/4HANA services portfolio that is backed by its Innov8 framework for portfolio optimization, preconfigured assets and a focused go-to-market approach, making the company stand out from others in the market.
- **TCS**, with its large base of SAP S/4HANA consultants, robust services, tools and accelerators for assessments, migration and implementation, plus strong partnership with SAP, has emerged as a leader in S/4HANA domain.
- **HCL's** focused investments in the S/4HANA Move program, preconfigured Base90 industry templates, Factory model for conversions and wide range of tools make it a rising star.

ENTERPRISE CONTEXT

SAP S/4HANA System Transformation - Midmarket

This report is relevant to enterprises across industries in the U.S., for evaluating the providers of S/4 HANA consulting and implementation services for the midmarket (companies with less than 5,000 SAP users and revenues of less than \$1 billion).

In this quadrant report, ISG highlights the current market positioning of providers of S/4 HANA consulting and implementation services to the midmarket in the U.S., based on the depth of service offerings and market presence.

Enterprises are reluctant to migrate to S/4 HANA owing to factors such as high costs; difficulties in data management, change management and custom code management; a shortage of talent or skill gap; and uncertainties about integrating with legacy ERP systems. However, many enterprises have implemented or are implementing S/4 HANA as a part of their digital transformation initiatives and choosing the right provider to overcome the challenges and address talent/skill gaps.

Enterprises that have adopted have specific IT infrastructure needs, of which easy scalability and adaptability are the priorities. A service provider can benefit an enterprise client by addressing the challenges (stated above) and providing them with optimal IT infrastructure and SAP security.

Midmarket clients have few complex requirements, with smaller scale of projects, compared with large enterprises. Therefore, mid-sized enterprises prefer providers with strong

onshore and near shore delivery capabilities and high integration capabilities. Most of the mid-size enterprise clients may have non-SAP ERP systems, which means the mid-size clients should particularly look for service providers with migration capabilities and the ability to offer ready-to-use templates or solutions for specific micro-segments.

Who should read the report:

Marketing and sales leaders should read this report to understand the relative positioning and capabilities of service partners that can help them effectively harness SAP S/4 HANA services for day-to-day analysis and dashboarding.

IT and technology leaders should read this report to better understand the strength and weaknesses of service providers in the SAP S/4 HANA ecosystem, and understand how they integrate the latest technologies/capabilities into their S/4 HANA offerings to find a competitive edge in the market.

Sourcing and procurement managers should read this report for a clear understanding of the market and the service provider landscape of S/4 HANA offerings, and to help them identify or distinguish players based on their respective needs.

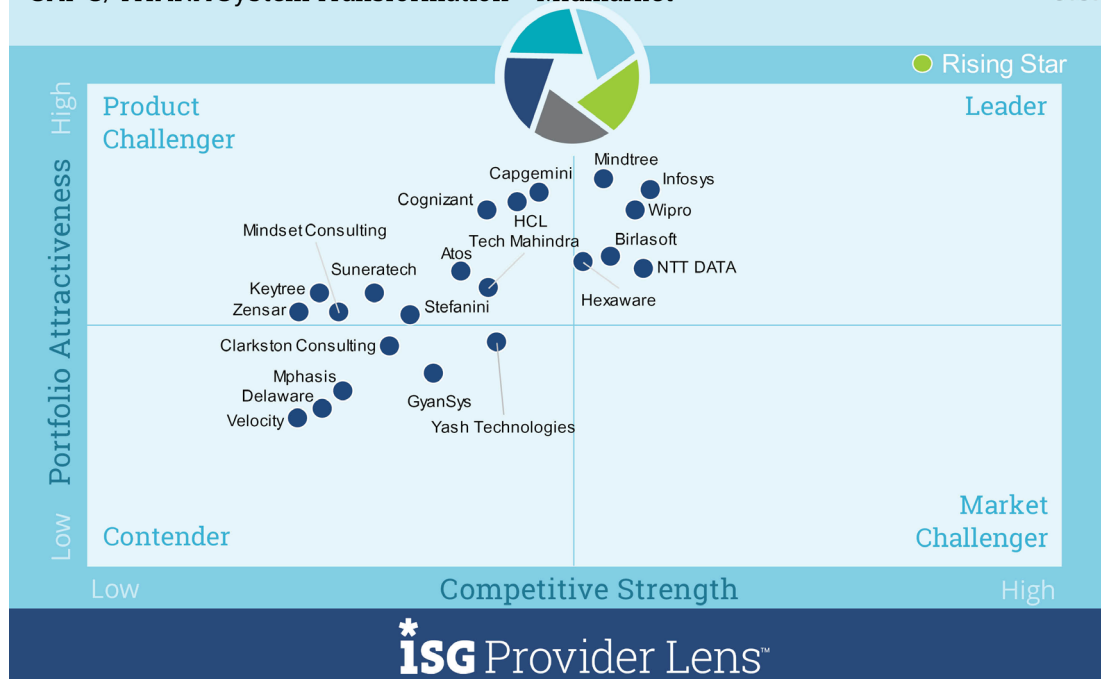
SAP S/4 HANA SYSTEM TRANSFORMATION – MIDMARKET

Definition

This quadrant assesses providers on their ability to offer rapid turnaround for S/4HANA implementations for clients in the midmarket (companies with less than 5,000 SAP users and revenues of less than \$1 billion). Midmarket clients have fewer complex requirements and less project scale when compared to large enterprises. The participating service provider can deploy SAP solutions using multiple methodologies, including SAP's packaged solutions for small and medium businesses (SMBs). It should use templates for S/4HANA, including industry-specific templates, to reduce the transformation cycle while leveraging standard processes. Multi-tenant S/4HANA implementations are included but not required for participating in this quadrant assessment. SAP-qualified partner-packaged solution providers are appreciated, but that certification is not required for inclusion in this quadrant.

SAP HANA and Leonardo Ecosystem Partners SAP S/4 HANA System Transformation – Midmarket

2020
U.S.



Source: ISG Research 2020

SAP S/4 HANA SYSTEM TRANSFORMATION – MIDMARKET

Eligibility Criteria

- Ability to apply SAP accelerators and templates for agile S/4HANA implementations.
- Capability to deliver advisory and implementation services for midsized client enterprises.
- Availability of ready-to-use templates or solutions for specific micro-segments.
- Ability to offer onshore or nearshore delivery for local clients; offshore delivery is welcome but not required or restricted for participation in this quadrant.

Observations

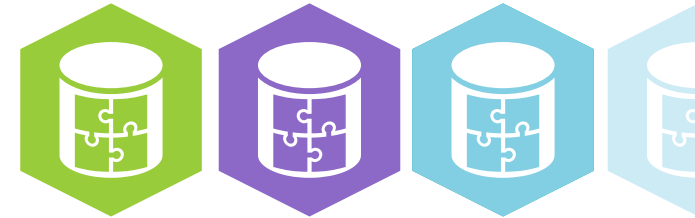
Service providers have created tools and templates to execute S/4HANA conversions and migrations for midmarket enterprises looking for a transformation from their existing ERP systems. Providers have also enhanced their focus on solutions for leading verticals and have created industry-specific templates for speedy S/4HANA implementation for their clients. The provider tools and accelerators serve to reduce implementation time for midmarket clients. As part of their go-to-market strategies, a few providers have targeted regions within the U.S. based on the concentration of industries and midmarket enterprises operating there.

- **Birlasoft**, with its U.S. footprint, customer experience centers and proprietary tools and accelerators for various functions such as monitoring, code conversions, migrations and implementation, becomes a leader in midmarket S/4HANA.
- **Hexaware**, with its Triadic framework for S/4HANA, helps midmarket companies based on their company model and landscape complexity and uses in-house tools and industry solutions.

SAP S/4 HANA SYSTEM TRANSFORMATION – MIDMARKET

Observations

- A combination of midmarket focus, Safe Passage conversion methodology, proprietary tools and accelerators for S/4HANA conversions and a three-pronged go-to-market strategy make **Infosys** a leader.
- **intelligence** (an NTT DATA company) has a large midmarket footprint and offers artificial intelligence (AI)- and machine learning (ML)-led solutions for business lines and industries, coupled with tools for monitoring, code reconciliation and other functions.
- **Mindtree** has showcased technological leadership through its in-house SAP Activate methodology, solutions, technical conversion factory for S/4HANA, project plans, cookbooks and tools that are well suited for midmarket clients, making it a leader.
- **Wipro's** large U.S. SAP practice uses an industry-based market approach along with co-development with SAP. Its established S/4HANA services, tools, accelerators and integrations for S/4HANA make the company a leader in the S/4HANA domain.



WIPRO



Overview

Wipro has an established SAP practice and the U.S. contributes to more than 30 percent of the company's SAP and Leonardo revenues. Wipro follows an industry-based market approach using specific offerings, industry-oriented roadshows and digital solution packages. Utilities, energy, manufacturing, automotive, consumer goods and high tech are the company's leading focus industries. Wipro engages with SAP through joint go-to-market strategizing, demand generation and co-selling activities. The company has been an SAP Global Strategic Services Partner and an SAP S/4HANA co-development partner for the retail and fashion industries. It has 20 percent of its S/4HANA implementations in the midmarket in the U.S.



Strengths

Established SAP S/4HANA practice: Wipro offers S/4HANA assessment, implementation and consulting services for its customers with a focus on the oil and gas, utilities, mining, manufacturing, automotive, retail and consumer goods, real estate and high-tech industries. The services it provides cover business value scope, an implementation plan, deployment strategy, testing plan and digital journey roadmap.

Robust set of framework, tools and accelerators: Wipro's proprietary SPEED 3.0 (Systems and Processes Enabled for Excellence in Delivery) framework is built on SAP's Activate methodology for implementations. Wipro has other proprietary assets including its Safe Passage to S/4HANA framework and MigMan (Migration Manager), which is a tool-based framework to augment the Safe Passage Methodology. The tool adds accuracy in planning and executing Suite on HANA (SoH) or S/4HANA migration projects.

Integrations with S/4HANA Cloud: Wipro offers integrations with SAP SuccessFactors, Ariba, Analytics Cloud, Integrated Planning, Hybris, Fieldglass, Central Finance and Concur. The company has already completed integration contracts for Integrated Planning, SuccessFactors and Ariba for S/4HANA Cloud.



Caution

Although Wipro has customers in S/4HANA Cloud, it could focus on expanding the base to tap into a larger market opportunity among midmarket companies in the U.S.



2020 ISG Provider Lens™ Leader

Wipro has a robust SAP S/4HANA practice with U.S. focus. It offers a wide portfolio of assessment, implementation and consulting services with frameworks, tools and accelerators to serve clients across various industries. The company has been a strong SAP partner and the partnership has evolved into co-innovation initiatives. Wipro also has a large staff of SAP practitioners and a balanced portfolio of implementations and conversions.

ENTERPRISE CONTEXT

Managed Application Services for SAP ERP

This report is relevant to enterprises across industries in the U.S., for evaluating providers of managed application services for SAP ERP.

In this quadrant report, ISG highlights the current market positioning of providers of managed application services for SAP ERP in the U.S., and the way they address the key challenges faced by enterprise clients in the country. These providers focus on helping enterprise clients effectively manage SAP ERP, which includes SAP S/4 HANA, SAP Enterprise Central Component (ECC) and legacy R3.

In the U.S., the need for automation and increase in SAP S/4 HANA implementation drives the demand for managed application services.

Like large enterprises, small and medium-sized enterprises seek managed application services for their existing SAP ERP solutions. These enterprises face the challenge of maintaining applications (both SAP and non-SAP), managing the IT landscape, resolving tickets and customizing development based on needs. Enterprises can benefit by investing in the services of managed application providers that can help in establishing their IT landscape as per need and adding bots (automation) for quick resolution of tickets.

Many enterprises are undertaking migration initiatives to move to the latest SAP ERP version as SAP will cease support services for its legacy ERP by 2027. Hence, enterprise clients should not only look for providers that can support existing ERP but also help in migrating their existing ERP.

Who should read the report:

IT and technology leaders should read this report for a clear understanding of the strengths and weaknesses of providers offering SAP ERP managed services, and their competency in developing frameworks and tools to effectively manage their applications.

Sourcing and procurement managers should read this report for a clear understanding of the service provider ecosystem for SAP ERP Managed services in U.S., and how the various providers can be compared with each other.

MANAGED APPLICATION SERVICES FOR SAP ERP

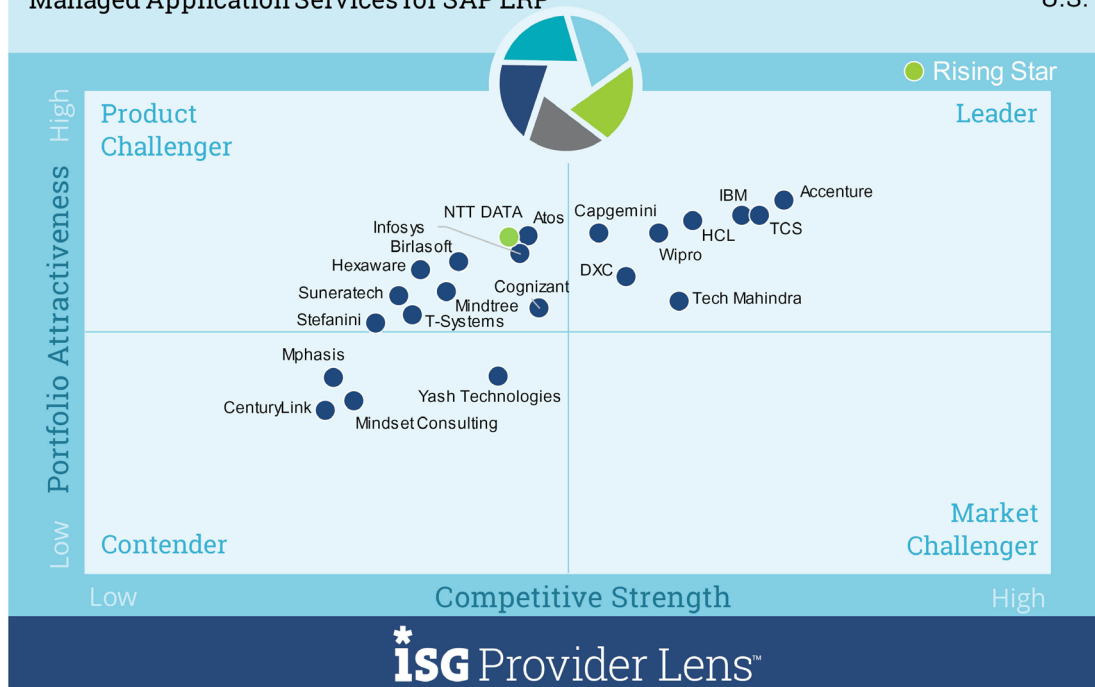
Definition

This assessment considers a provider's capability to offer managed services, including maintenance and support functions that comprise monitoring, remote support and centralized applications management for SAP S/4HANA and legacy SAP Business Suites such as ECC 6.0.

Managed application services for incidents include troubleshooting, Level 2 and Level 3 application support, user support, ticket lifecycle management, incident resolution, problem management, root cause analysis and interface with SAP product support (upon client authorization). Service requests typically include user management (add, change of user profile and disablement of user access), performance reports, database services, security (access) monitoring and license compliance. Providers that have center of excellence (CoE) certifications get better evaluations, but these certifications are not a requisite for participating in this quadrant.

SAP HANA and Leonardo Ecosystem Partners Managed Application Services for SAP ERP

2020
U.S.



Source: ISG Research 2020

MANAGED APPLICATION SERVICES FOR SAP ERP

Eligibility Criteria

- Ability to offer application optimization, application support and testing.
- Offer enhancements and changes pertaining to applications; apply SAP Service Pack Stacks (SPS) if required and predict the business impact of such updates.
- Capability to stabilize applications and offer SAP Basis support.
- Possess expertise in incident management, variety of ticket system tools, SAP Solution Manager and additional application documentation solutions

Observations

Managed applications services for SAP now have service providers using automation, bots, RPA and tools to deliver services to their clients. Providers have also extended the best practices from ADM-related managed services frameworks to SAP services. Most of the leaders use framework-led delivery to bring in standardization and best practices to reduce delivery time, and pass on the benefits to the clients. Service providers also have many proprietary tools for various managed services functions such as data management, monitoring, incident management and testing, with a focus on simplifying tasks and making the operational elements intelligent.

- **Accenture's** delivery is led through its Intelligent Enterprise Platform, Liquid Application Management and robust application management services, and is provided through its large resource base, which make the company a leader.
- **Capgemini** is a leader in application management services owing to its mix of the proprietary ADMnext delivery framework, business process-focused method, tools and bots for service automation.

MANAGED APPLICATION SERVICES FOR SAP ERP

Observations cont.

- **DXC Technology's** investments to transform its managed services operations model to embed automation in functions have helped make it a leader in SAP managed services.
- **HCL** has a solid digital-led delivery focus on application management services. The company showcases its leadership through its Digital AMS framework, integration automation services and a battery of internally developed tools and accelerators for workflow automation, chat and testing.
- **IBM** has a 45-year partnership with SAP and offers end-to-end SAP managed services. IBM integrates flexibility, continuous innovation and automation in its delivery, making it stand out among other players.
- **TCS'** market leadership stems from its proprietary ignio™ AI.ERPOps automation product that delivers cognitive automation to manage resources, and its large array of tools for neural automation, data management and monitoring to manage SAP ERP environments.
- **Tech Mahindra's** automation-based AMS solution, innovation framework, performance enhancing tools and accelerators and high degree of automation differentiate it from other players in managed services.
- **Wipro's** strength in AMS lies in its automation-led framework that is focused on simplification and enabling intelligent operations, its Holmes-backed tools for various managed services areas, and its APEX delivery model that uses non-linearity, security and analytics.
- **NTT DATA's** bots-led delivery, AMS tooling to bring standardization and cost optimization, and robust managed services portfolio give it advantages against the other competitors and have helped it become the rising star in this segment.

WIPRO



Overview

Wipro, one of the leading Indian IT service providers, is a certified Application Management Services Provider. The company offers AMS support services across delivery models, which consist of a flexible structure that enables customers to fine-tune their SAP landscape. Some of the AMS services include SAP module support, business continuity (applications), 24-by-7 real-time automated monitoring and alerting, SAP health checks and analysis, upgrades, patching, performance management, scaling and data management. The company also offers application management services for ECC 6.0 and has more than 3,400 practitioners dedicated to this service. It uses over 150 bots based on its HOLMES cognitive automation for administration, business process efficiency and monitoring.



Strengths

APEX delivery model: Wipro's tool-based APEX delivery model for managed services helps clients realize value by leveraging non-linearity, security, analytics, competency-based support and transparency in transitions. The framework also increases speed to market with lower costs, led by its integrated scalability, automation, tools, reusable assets and processes.

Automation tools for managed services: Wipro offers customers several proprietary tools and assets as a part of its AMS services. Some of them include Holmes My Personal Assist, Holmes Chat, Holmes Cog Search, Holmes Data Transfer Workbench, Holmes ERP Preventive Workbench, SAP Batch job Monitoring, SAP ABAP Code reviewer, Holmes SAP Basis Workbench, SAP Process Buddy and Holmes Application Automation Center. The tools cover automation, queries, user conversations, IDOC records, preventive checks, monitoring, centralized BASIS console and incident management.

Nextgen AMS Framework: Wipro's Nextgen AMS themes pivot around the tenets of simplify, intelligent automation, accelerate and experience. The company, through these themes, helps customers move towards leaner operations, benefit from proactive automation, focus on cycle time reduction and concentrate on metrics.



Caution

Wipro could increase its Basis support professionals in the U.S. to address the large and growing business needs of SAP customers.



2020 ISG Provider Lens™ Leader

Wipro offers application management services as a part of its Next Gen AMS model, which is supported by the Apex delivery model and focuses on simplification, automation, security, analytics and competency-based support for its customers. The company also leverages a plethora of proprietary in-house tools and accelerators centered around HOLMES to accentuate the managed services.

ENTERPRISE CONTEXT

Managed Platform Services for SAP HANA

This report is relevant to enterprises across industries in the U.S., for evaluating providers of managed platform services for SAP HANA.

In this quadrant report, ISG highlights the current market positioning of providers of managed platform services in the U.S., and the way they address the key challenges faced by enterprise clients in the country. These providers focus on helping enterprise clients effectively migrate or maintain workloads either in their own datacenters or in the cloud.

Enterprises are facing the challenge of keeping their IT infrastructure updated to optimally run SAP systems without errors or downtime. While some enterprises schedule periodic updates for their infrastructure, others do on the basis of their needs. In addition, enterprises face challenges like staff shortage, difficulties in choosing the right provider, and the buy in from key decision makers within a short period of time. An enterprise can benefit from investing in managed platform providers that can manage its infrastructure with regular (end-to-end) updates and help in enhancing processes and ensuring operational efficiency.

Enterprise clients that are procuring managed platform services should consider the credentials of the service provider in terms of its capabilities in operating in the cloud and level of certifications.

Marketing, sales and field services leaders should read this report to understand the relative positioning and capabilities of partners that can help them to procure managed platform services. The report also highlights the capabilities of service providers in maintaining or migrating data in data centers and the cloud.

IT and technology leaders should read this report for a clear understanding of the strengths and weaknesses of service providers, comprehend the degree of partnership with hyperscalers and how they integrate the latest technologies/capabilities into their offerings to find a competitive edge in the market.

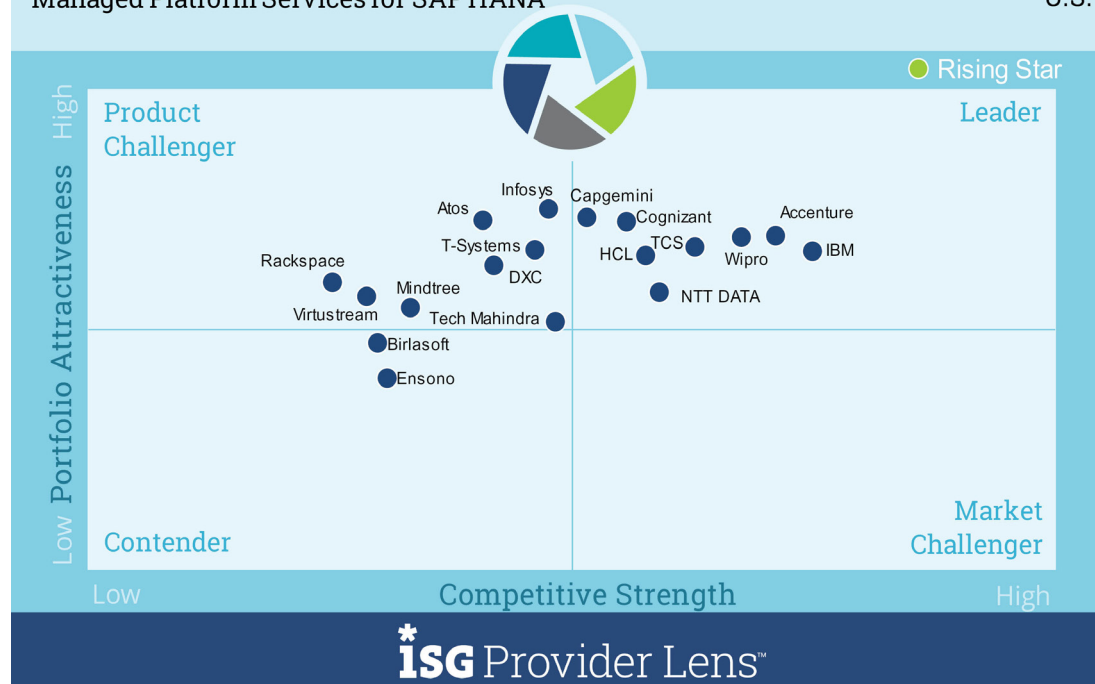
MANAGED PLATFORM SERVICES FOR SAP HANA

Definition

The initial technical barriers and client resistance to moving ERP to the cloud are gradually disappearing, forcing clients to decide among in-house hosting, traditional outsourcing, cloud IaaS and PaaS. The hosting decision follows the hardware obsolescence lifecycle, and HANA in-memory imposes a new dynamic to hardware choices, operations and tooling. This quadrant assesses providers of infrastructure services comprising hardware installs and maintenance routines, hybrid cloud management, access security, monitoring, system availability, interface performance, disaster recovery management, backup, restore, data compliance (retention and access), data breach protective measures at the data center level, job scheduling, batch processing, file transfers,

SAP HANA and Leonardo Ecosystem Partners Managed Platform Services for SAP HANA

2020
U.S.



Source: ISG Research 2020

MANAGED PLATFORM SERVICES FOR SAP HANA

Definition (cont.)

archiving, and all infrastructure and operations services that are required to run SAP ERP or SAP HANA applications. This quadrant analysis privileges providers that demonstrate expertise in maintaining smooth S/4HANA operations, which requires deep knowledge about the underlying in-memory database technology. Furthermore, strong capabilities in optimizing this type of application, including data volume management, are preferred assets. However, the provider should retain the capacity to support SAP HANA and legacy SAP ERP versions for clients that have old instances running simultaneously with S/4HANA.

Eligibility Criteria

- Ability of participant to offer Tier III level data center facilities (certified or not) to host S/4HANA or is a certified hyperscale cloud partner that specializes in S/4HANA.
- Should be an experienced managed data center service provider.
- Demonstrate the capacity to migrate SAP ERP and large databases from one data center to another, including the cloud.
- Minimum accreditations include ISO 27001 (security), incident management ITIL and HANA certified staff.

MANAGED PLATFORM SERVICES FOR SAP HANA

Observations

Almost all the service providers offer managed platform services such as monitoring, backup, archiving, disaster recovery, data management and advisory services. Some providers deliver managed platform services either through a proprietary offering on their own data centers or through hyperscalers. Almost all the service providers have partnerships with all the leading hyperscalers. The SAP HANA managed platform providers leverage internal and third party tools to carry out the different management functions.

- **Accenture's** migration capabilities, extensive support and proprietary assets for digital platform integration make it a strong player in this segment.
- **Capgemini** differentiates itself through its "Renewable Enterprise" go-to-market approach, proprietary Capgemini Cloud Automation for SAP and dedicated management services.
- **Cognizant's** unique mPaaS offering, partnerships with hyperscalers and services for SAP cloud advisory and assessment, implementation, migration provisioning, metering, monitoring and security make it a leader.

- **HCL** leadership differentiates from others through its broad base of platform services, partnership with hyperscalers and strong technical coverage to all the leading areas within platform services, including backup, containerization, AIOps and data management.
- **IBM's** rich infrastructure legacy and leadership in service delivery, coupled with expertise in SAP services in areas like cloud migration, SLA management and security capabilities, make it a leader.
- **NTT DATA** partners with all the leading hyperscalers in the U.S. and provides advisory-backed SAP cloud services. The company showcases strong SAP credentials and offers a wide range of services from migration to managed support for SAP on AWS, Azure, Google Cloud Platform and NTT DATA Private Cloud.
- **TCS** emerges as a leader in platform services for SAP and is backed by its broad PaaS offering covering a wide gamut of areas such as containers, data, databases, big data, workplace, blockchain and information management, comprehensive SLAs and strong security services.
- **Wipro's** BoundaryLess Enterprise (BLE) concept sets it apart. Wipro gives clients the resources and flexibility to build enterprise IT as a service, offers complete HANA lifecycle services and is the sole solution partner for SAP Model Company for Utilities.

WIPRO



Overview

Wipro provides a cloud framework to build an enterprise IT-as-a-service model called BoundaryLess Enterprise (BLE). The company offers SAP and SAP HANA lifecycle services including consulting and advisory services, digital infrastructure design covering infrastructure sizing, high availability, disaster recovery, backup, archiving, build, migration, managed and optimization services on private, public or hybrid clouds. Migration to public cloud is offered through Cloud Studio, which is an automated platform for SAP migration planning and execution on AWS, Microsoft Azure and Google Cloud Platform. Wipro has a dedicated team to address end-to-end security and regulatory compliance requirements.



Strengths

BoundaryLess Enterprise (BLE): The BLE platform provides clients with a Universal Marketplace where all their IT requirements can be sourced as-a-service from IaaS and PaaS cloud providers. BLE helps clients aggregate, compare and arbitrate services across different providers and customized intermediary services. BLE is based on the solution tenets of marketplace platform operations, business operations and service management.

Large practitioner base and practice enhancements: Wipro has more than 700 migration experts, 150 SAP migration/upgrade engagements and 20 tools, levers and accelerators. Wipro has enhanced its practice to include cloud assessment and design using BLE Cloud Studio, security assessments, operations driven by machine learning, and optimizations using Moogsoft and Splunk. It has leveraged its past OS/DB migration experience to build a robust SAP cloud migration framework called Safe Passage to Cloud. The proprietary migration methodology incorporates SAP best practices, cookbooks, tools and accelerators.

SAP partnership: Wipro is the sole solution partner for SAP Model Company for Utilities and works with hyperscalers including Azure, AWS and GCP to help customers accelerate their cloud adoption. The company is also part of the SAP and Microsoft Embrace strategic program.



Caution

Wipro highly focuses on manufacturing but could expand to other priority industries such as utilities, retail and consumer packaged goods.



2020 ISG Provider Lens™ Leader

Wipro's BoundaryLess Enterprise helps clients build cloud frameworks based on the enterprise IT-as-a-Service model. The company has a wide range of SAP and SAP HANA services for various design and execution areas. Those assets plus its large practitioner base, strong partnerships with hyperscalers and a breadth of technical platform services make the company a leader.

ENTERPRISE CONTEXT

SAP Cloud Platform and SAP Leonardo Services

This report is relevant to enterprises across industries in the U.S., for evaluating service providers offering SAP Leonardo services and SAP cloud platform.

In this quadrant report, ISG highlights the current market positioning of providers of SAP Leonardo Services and SAP Cloud Platform in the U.S., and their capabilities in designing, developing, modifying, integrating and supporting applications for enterprise systems on the SAP cloud platform and in delivering services for digital transformation using SAP Leonardo.

Many enterprises are using multiple applications (both SAP and non-SAP) in their procurement and supply chain processes to track/backtrack or check the status of a shipped product to ensure timely delivery and improve their supply chain processes. Since these enterprises use multiple applications to check the status of a product, end-to-end, the corresponding user experience is complicated and time consuming. The enterprises need to look for providers that can integrate SAP and non-SAP applications with pre-built templates using technologies such as artificial intelligence (AI), machine learning (ML), blockchain, and analytics and create a single dashboard to enhance user experience and increase process efficiency.

Since service providers offer consulting, discovery and prototyping, and application services, enterprise clients that are procuring the SCP and Leonardo services should opt for providers based on their respective needs.

Marketing, sales and field services leaders should read this report to understand the relative positioning and capabilities of service partners that can help to implement SCP and Leonardo services effectively. The report also highlights the advanced capabilities of service providers, including application development, and use of application programming interfaces (APIs) and new methodologies.

IT and technology leaders should read this report for a clear understanding of the strength and weaknesses of service providers and to comprehend how they integrate the latest technologies/capabilities into their offerings to find a competitive edge in the market.

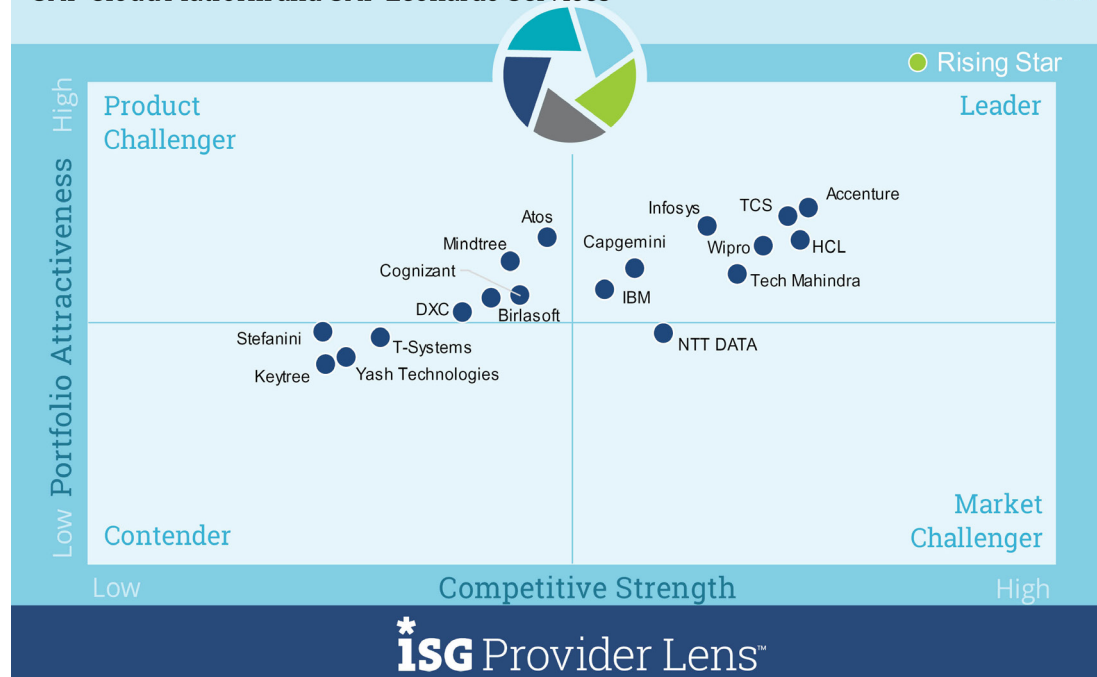
SAP CLOUD PLATFORM AND SAP LEONARDO SERVICES

Definition

This segment examines the capabilities of providers to design, develop, modify, integrate and support applications for enterprise systems on SAP Cloud Platform (SCP) and deliver services for digital transformation using SAP Leonardo. SAP Cloud Platform services include platform-as-a-service (PaaS) and application development platform-as-a-service (aPaaS) for data-based, mobile-enabled services, analytics, application development and deployment across multi-cloud platforms. SAP Leonardo services comprise artificial intelligence (AI), machine learning (ML), blockchain and IoT technologies, packaged as a platform-as-a-service that is integrated in the HANA database.

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

2020
U.S.



Source: ISG Research 2020

SAP CLOUD PLATFORM AND SAP LEONARDO SERVICES

Eligibility Criteria

- Demonstrate cases of delivering projects pertaining to AI, ML, blockchain or IoT using SAP Leonardo and SAP Cloud Platform (or as a standalone platform).
- Exhibit proofs of concept (PoCs) that leverage SAP Leonardo.
- Capability to deliver consulting and implementation services for SAP Cloud Platform or SAP Leonardo.

Observations

Service providers made focused investments in emerging technologies to develop solutions to help enterprises become “intelligent” and help them integrate their solutions with the S/4HANA ecosystem. Several providers have created Leonardo- and SCP-based accelerators and solutions that have an industry focus to serve specific use cases in those industries. They have been developed using some form of an innovation-led proprietary platform or approach for Leonardo and SCP. Providers also give enterprise clients an experience-led engagement by showcasing their solutions through experience centers or innovation hubs.

- **Accenture's** leadership in SAP SCP and Leonardo can be seen through its innovation-focused investments that have led it to develop assets from its proprietary Liquid Studio along with co-innovation with SAP to create digital solutions.
- **Capgemini's** large repository of accelerators for various industries and functions such as shipping and logistics, and its network of designers, technologists, sector experts and business partners integrated through the Applied Innovation Exchange platform, differentiate the company from other leading players.

SAP CLOUD PLATFORM AND SAP LEONARDO SERVICES

Observations

- **HCL** emerges as a leader in SCP and Leonardo through its cloud native approach, strong partnership with SAP on innovation engagements and a broad base of tools and accelerators that use IoT, machine learning, AI, blockchain and design thinking.
- **IBM** has industry solutions that have been developed by leveraging cognitive, blockchain and other capabilities for a host of industries. Those, along with its IMPACT platform for intelligent workflows and 45-year partnership with SAP, make the company a leader in SAP SCP and Leonardo.
- **Infosys's** innovation hubs and CoEs for SCP solution creation, its Infosys Live Enterprise and Innov8 platforms for innovative SAP solution development, preconfigured SCP solutions and Leonardo-related blockchain services make the company a leader.
- **TCS's** innovation and demo centers offer rich experience-led engagement to clients. These innovation centers, industry-based solutions for rail and medical devices, and proprietary Digital Reimagination Framework have uniquely positioned the company as a leader.
- **Tech Mahindra** has used its robust platform solutions to create several solutions and is on the path to enhancing its existing offerings. The company's strong endeavors to co-innovate and co-develop new solutions is reflected in its wide array of accelerators and the innovation services developed for supply chain, logistics and other industries, making it a leader among leaders.
- **Wipro** offers SAP SCP and Leonardo services by leveraging its innovation framework as a service across industries. The company's industry-led solution delivery, design thinking and co-innovation labs make it stand out among leaders in this domain.

WIPRO



Overview

Wipro's offerings for SAP SCP and Leonardo are comprised of innovation framework services, development as a service, integration services and security services. They are offered across industries. The company takes a factory approach for SCP and Leonardo developments as a part of its Development-as-a-Service and has a steady pool of more than 100 cross-trained resources in the U.S. Wipro can integrate various products (SaaS products, third party apps, SAP and non-SAP systems, etc.) and offers capabilities in several technology areas such as analytics, mobile enabled apps, SAP Fiori, containers, IoT, machine learning, artificial intelligence, blockchain, design thinking, customer experience and others as a part of its SCP and Leonardo offerings.



Strengths

Innovation framework as a service: The company has a framework to support continuous innovation. More than 60 accelerators have been developed within this framework and 10 have already certified by SAP. The company uses a customized co-innovation approach for every stage of a digital journey, from proof of concept to actual deployment and uses design thinking to deliver services. These services are being delivered through eight co-innovation labs and 15 digital pods.

Industry-led solution delivery: Wipro has created SAP-certified digital solutions for the energy, manufacturing, automotive, retail, utilities, real estate, fashion and mining industries. They cover maintenance, asset management, real time dashboarding, visibility and monitoring. Wipro offers several SAP-certified and demo-ready accelerators for applied intelligence, connected enterprise and trusted networks that are specific to industries.

Design thinking and co-innovation labs: Wipro can use a design thinking approach, which has been strengthened with the acquisitions of Designit and Cooper. It has a network of more than 20 co-innovation labs which helps it and co-develop with its customers. Wipro has invested in an SCP factory with a large pool of SCP skilled resources; the SCP factory is available for clients in the U.S., Europe and India.



Caution

Wipro could focus on increasing its base of resources working on both SCP and Leonardo in line with its peers in the U.S.



2020 ISG Provider Lens™ Leader

Wipro presents a strong digital story for clients that want expertise in tools, accelerators, innovation and development in SAP SCP and Leonardo. With an innovation-centric framework, co-innovation labs for fostering solution development and a plethora of accelerators serving the utilities, manufacturing, automotive, retail, real estate, fashion and mining industries, the company is a leader in SCP and Leonardo.

The image features a dark blue background with a light blue horizontal band at the top. On the left side, there are several circular icons resembling camera apertures, arranged in a diagonal line from the bottom left towards the center. These icons are in various shades of blue and white. The word "Methodology" is written in a white, serif font on the right side of the image.

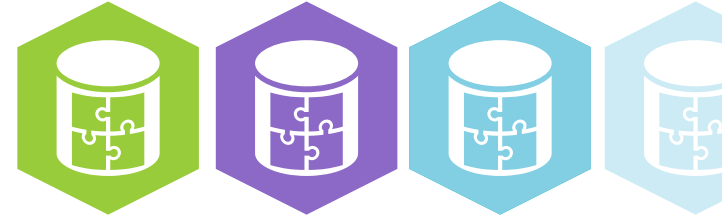
Methodology

METHODOLOGY

The ISG Provider Lens™ 2020 SAP HANA and Leonardo Ecosystem Partners research study analyzes the relevant software vendors and service providers in the U.S. 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 market
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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Kartik Subramaniam is the Lead Analyst for ISG's Provider Lens™ reports for Next-gen ADM and SAP HANA and Leonardo Ecosystem Partners . He brings in over 11 years of experience in primary and secondary research, advisory and consulting services from leading IT and research companies such as Accenture, IBM, IDC and TNS. Kartik has worked on research notes, briefing notes, industry speaking engagements, blogs and advisory engagements in the areas of offering in application development and maintenance, SAP, multi layered/pace layered IT/applications, cybersecurity and infrastructure services. Apart from research, Kartik also worked closely with strategy and sales teams providing insights on strategic planning for offerings and creating seller enablement deliverable through analytics at Accenture and IBM respectively.



ArulManoj M, Enterprise Context and Global Overview Analyst

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Arul has been working with ISG for more than two years and his area of expertise is on Application Development & Maintenance (ADM). During his tenure, he has developed content for ISG Provider Lens™ in the areas of Next-gen Application Development & Maintenance (ADM), SAP HANA and Leonardo Ecosystem and Data Analytics Services & Solutions. As part of ISG Provider Lens™, Arul is responsible for supporting research authors and authoring blogs about niche technologies, market trends and insights.

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Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor. Now as a research director, principal analyst and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

ISG Provider Lens™ Report: SAP HANA and Leonardo Ecosystem Partners

July 2020

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