



ISG Provider Lens™

SAP HANA® Services 2019

Definition

During the last few years, various database providers have established in-memory technology; as opposed to traditional technologies, in-memory technologies store most or all relevant application data within the memory of the hardware in use. Direct benefits include faster data access, accelerating applications dramatically. While first use cases often related to data analytics applications, the drastic increase of performance has shifted the focus to novel business processes within transactional applications. Within this context, SAP's respective offering, the HANA technology, probably has the strongest impact, because it is not only aligned with infrastructure aspects, but also with SAP's broad application portfolio and can be combined with data management optimization (data aging) approaches, improving interaction between data analytics and transactional systems. SAP's latest S/4HANA product also allows users to radically simplify database structures within the SAP Business Suite ("Run Simple"). Meanwhile SAP invented with the product BW/4HANA a new version of their Business Warehouse that is optimized for the operation using the HANA database, and in early 2018 they published with C/4HANA a renewed solution for CRM. Furthermore, the deployment of these packages as SaaS has become more and more important, which is also emphasized by SAP the "Cloud First" strategy by SAP. Nevertheless, due to the still high number of existing installations the demand for qualified support for On Premise will remain high for the time being.

The ISG Provider Lens™ study offers IT-decision makers:

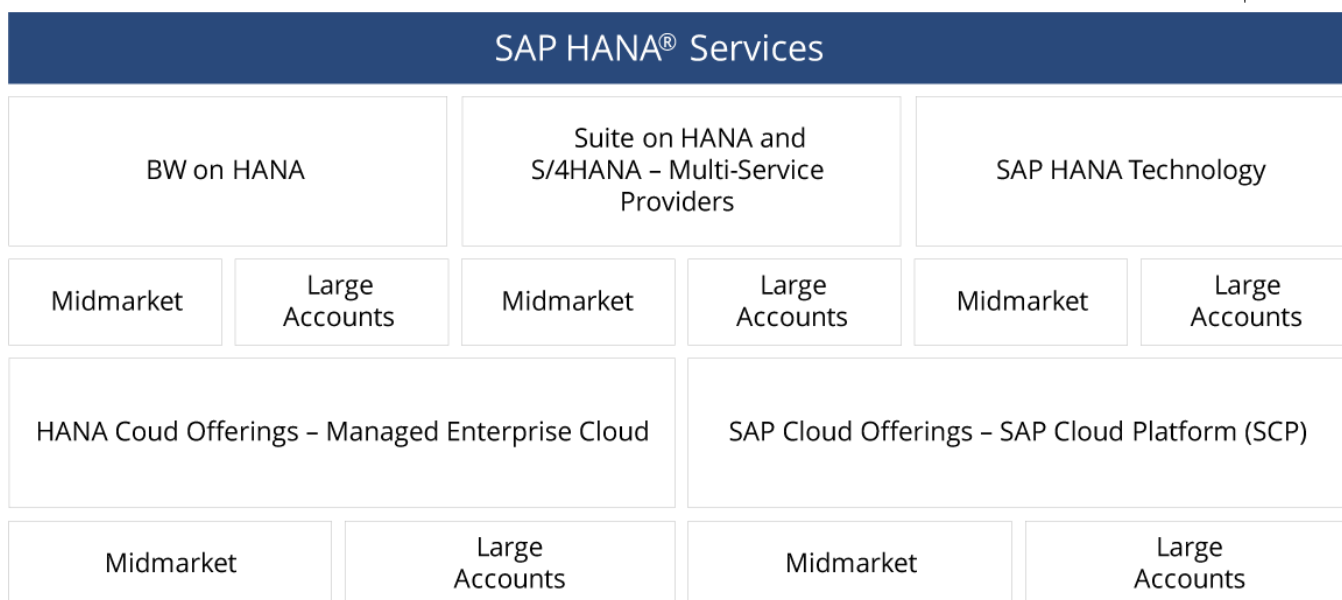
- Transparency of strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments
- Focus towards the local German market

Our study serves as an important decision-making basis for positioning, key relationships, and go-to-market considerations. ISG Advisors and enterprise clients also leverage information from these reports in evaluating their current vendor relationships and potential new engagements.

Quadrant Research

As part of the ISG Provider Lens™ Quadrant Study, we are introducing the following 10 quadrants on SAP HANA® Services.

Simplified illustration



Source: ISG 2018

BW on HANA

BW on HANA refers to services that address the usage of the HANA database for data analytics applications, with a focus on the SAP Business Warehouse. This category includes providers that offer such services and competences to clients from the midmarket and/or the large accounts segment.

Services include consulting on the technological possibilities of the in-memory technology for data analytics and implications for the system landscape. Implications for large accounts are often significant, since many of these companies have large-scale BW applications. Key for the successful usage of technology include support of common data analytics as well as specific methodologies and approaches for in-memory technology, specifically the definition and implementation of data structures. Comprehensive competences also include providers' support to help their clients implement, go live and operate their systems, for instance, based on suitable operational concepts.

Suite on HANA and S/4HANA – Multi-Service Providers

This segment includes providers that offer a comprehensive solution portfolio, from strategic consulting, design and planning to installation, going live and subsequent operations of Business Suite on HANA and S/4HANA. The focus is, again, on medium-sized businesses (midmarket) and/or large accounts.

Requirements include comprehensive know-how of these technologies as well as in-depth process and industry-specific know-how and related skills to design suitable solutions for the client's respective situation. Also, the providers must have implementation competence with SAP's standards. Other strengths include comprehensive experience with multiple system landscapes. Within the large accounts segment, existing, rather complex system landscapes pose an additional challenge.

SAP HANA Technology

This segment includes providers whose offering addresses the technological aspects of HANA projects, including the respective platform, and who have a focus on the midmarket and/or the large accounts segment. Competences include strategic consulting, the selection of suitable hardware (for in-house operations), HANA PaaS provisioning (if required), cost analyses and related operations concepts. Additional offerings include technical infrastructure provisioning and installation, go-live support and support for subsequent operations. Normally, this requires intense cooperation with SAP to comply with standards as well as respective certification. Many large accounts still prefer in-house operations; PaaS offerings are only slowly gaining adoption.

HANA Cloud Offerings – Managed Enterprise Cloud

This segment includes providers of services for a managed platform as a service, based on SAP HANA. Such cloud service also supplies related system management services and may include sales of the SAP HANA Enterprise Cloud (SAP HEC). This category includes providers that offer such services and competences to clients from the midmarket and/or the large accounts segment.

Relevant service components include requirements analysis for the respective application, technical design, implementation and subsequent operations. Additional challenges for providers that address the large accounts segment include the complex system landscapes within such large enterprises and resulting hybrid operations. Normally, this requires intense cooperation with SAP to comply with standards as well as respective certification.

SAP Cloud Offerings – SAP Cloud Platform (SCP)

This segment has a focus on services that are based on the SAP Cloud Platform (SCP), an in-memory-based platform for application development and integration. This category includes providers that offer such services and competences to clients from the midmarket and/or the large accounts segment.

SCP can be used to develop new internal as well as cloud-based applications and provides capabilities and options to advance existing applications and implement integration use cases (e.g., hybrid cloud). Within this context, services include support to help clients use SCP and also offerings of project activities to be conducted by the provider for their clients. Requirements include in-depth technological know-how and related skills to use this technology adequately within the client's respective environment. Considering the highly complex system landscapes of many large enterprises, this poses major challenges within the large accounts segment.

Schedule

The research phase is between **July and October 2018** during which survey, evaluation, analysis and validation will take place. Selected results will be presented to the media in **November 2018**.

We will roll out the survey on an online platform called Qualtrics. The invites will be sent with links to fill in the responses and submit.

Milestones	Beginning	End
Launch	May, 2018	
Survey (questionnaire)	July 10, 2018	August 14, 2018
Sneak previews	October 22, 2018	
Content provisioning	November 15, 2018	
Press release	November 22, 2018	

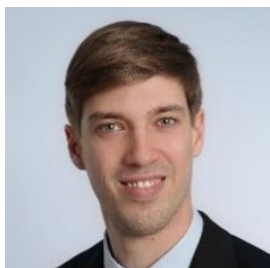
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Do you need any further information?

If you have any questions, please do not hesitate to contact us at isglens@isg-one.com.

About ISG

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