iSG Provider Lens™

2019

SAP HANA & Leonardo Ecosystem Partners 2019

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ISG Provider Lens™

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Definition

Over the last few years, various database providers have established in-memory technology. As opposed to traditional technologies, in-memory technologies store most or all relevant application data within the memory of the hardware in use. Direct benefits include faster data access and a dramatic acceleration of applications. Initial use cases often related to data analytics applications and the drastic increase in performance have shifted the focus to novel business processes within transactional applications.

In this context, SAP's respective offering, the HANA technology, likely has the strongest impact. This is because it is not only aligned with infrastructure aspects but also with SAP's broad application portfolio. It can also be combined with data management optimization (data aging) approaches, improving interaction between data analytics and transactional systems. SAP's S/4HANA product allows users to radically simplify database structures within the SAP Business Suite ("Run Simple"). Furthermore, SAP invented BW/4HANA, a new version of its Business Warehouse which is optimized for the operation using the HANA database. With C/4HANA, it released a renewed solution for CRM in early 2018. The deployment of these packages as SaaS has become increasingly important, as emphasized by SAP with its "Cloud First" strategy. Beside speed, innovation and agility play an important role which SAP supports through its Leonardo platform. Due to the high impact and market share of SAP solutions which are quite complex, there is a tremendous demand for qualified support through SAP's partner ecosystem which this study examines.

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

- Transparency of strengths and weaknesses of relevant providers

- Differentiated positioning of providers by segments

- Focus on different markets, including global, U.S., Germany, U.K., Nordics, and Brazil

This 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 LensTM quadrant study, we are introducing the following six* quadrants on SAP HANA and Leonardo Ecosystem Partners.

SAP HANA and Leonardo Ecosystem Partners	
SAP S/4HANA & Business Suite on HANA Transformation	SAP S/4HANA & Business Suite on HANA Managed Services
SAP HANA Cloud Infrastructure and Platform* Services	SAP Cloud Platform Support Services
SAP BW/4 on HANA and BW on HANA Transformation & Operations	SAP Leonardo Transformation

Source: ISG 2019

*All six won't be conducted for all regions

SAP S/4HANA & Business Suite on HANA Transformation

In this quadrant, ISG assesses consulting and system integration provider services for developing, deploying, and testing enterprise applications using SAP S/4HANA and SAP Business Suite with SAP Fiori as the user interface. Planning, designing, and modelling of applications across the operating model of enterprises will also be an assessment area. The minimum eligibility criterion for assessment in this quadrant is the provision for development, integration, and testing of ERP services using SAP S/4HANA with the HANA in-memory computing platform for at least one implementation of S/4HANA or SAP Business Suite by the service provider.

SAP S/4HANA & Business Suite on HANA Managed Services

The assessment in this quadrant will cover providers' capability to offer managed services (operations) for maintenance and support functions comprising monitoring, remote support, and centralized management of applications across SAP S/4HANA and SAP Business Suite. They need to provide maintenance and support services specifically for SAP HANA and related platforms across applications, data, or security.

SAP HANA Cloud Infrastructure and Platform Services

The quadrant examines infrastructure providers on their capability to deploy and host SAP HANA and related platforms. The assessment covers infrastructure services such as operationalizing infrastructure, infrastructure installation technicalities, and provisioning along with go-live and operations support. The providers can optionally also describe their capabilities in providing services leveraging platforms and databases across infrastructure through vendors or service providers. The providers should have carried out at least one implementation on infrastructure or, in case of relevance in a certain region, platforms for SAP products.

SAP Cloud Platform Support Services

This segment will examine provider capabilities to design, develop, modify, integrate, and support applications for enterprise systems on the SAP Cloud Platform. These include Integration Platform-as-a-Service and Application Development Platform-as-a-Service for data-based mobile-enabled services, analytics, and application development and deployment across multi-cloud platforms. The providers should have implemented SAP Cloud Platform for at least one customer.

SAP BW/4 on HANA and BW on HANA Transformation & Operations

This quadrant assesses the ability of service providers to strategize, develop, modify, and implement real-time analytics using the SAP HANA platform that employs public, on-premise or hybrid cloud models. The consulting services are assessed across data management strategy, process optimization resulting in strategic benefits such as cost optimization, improved customer/user experience and integration services, including the ability to extract and process data to/from other platforms. The assessment also includes the industry knowledge, innovation, and ability of providers to operationalize applications using BW/4HANA. The providers that develop, migrate, integrate and test the SAP BW platform using multi-cloud models for data warehousing are considered in this quadrant.

SAP Leonardo Transformation

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

Quadrants by Region

Quadrants	Global	US	UK	Nordics	Germany	Brazil
SAP S/4HANA & Business Suite on HANA Transformation	√	√	√	√	Update if necessary**	√
SAP S/4HANA & Business Suite on HANA Managed Services	√	√	√	√	Update if necessary**	√
SAP HANA Cloud Infrastructure and Platform* Services	√				Update if necessary**	√
SAP Cloud Platform Support Services	√				Update if necessary**	
SAP BW/4 on HANA and BW on HANA Transformation & Operations	√	√	√	√	Update if necessary**	√
SAP Leonardo Transformation	√	√	√	√	√	√
SAP HANA – Utilities	CPQ	CPQ	CPQ	CPQ	CPQ	CPR

*won't be conducted for all regions

** Although published in the study, the respective quadrants will be updated only if necessary since the last German study was published recently end of 2018.

Research production disclaimer:

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing work identified by the clients. This data is collected as part of the ISG FutureSource process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not to produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of information received directly from providers/vendors and the availability of expe-rienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.

Schedule

The research phase falls in the period between **February** and **May 2019** during which survey, evaluation, analysis, and validation will take place. The results will be presented to the media in **August 2019**.

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

Milestones	Beginning	End
Launch	February, 2019	
Survey (questionnaire)	February 25, 2019	March 25, 2019
Sneak previews	July 05, 2019	
Content provisioning	August 16, 2019	
Press release	August 23, 2019	

Refer to the link below to view/download the Provider Lens 2019 Research Agenda :
https://isg-one.com/docs/default-source/default-document-library/isg-provider-lens-annual-plan-2019.pdf?sfvrsn=c323cc31_0

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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.

Partial list of companies being invited for the survey

Are you in the list or do you see your company as relevant provider that is missing here? Then feel free to contact us to ensure your active participation in the research phase.

ABeamConsulting	Ensono	KPIT (Birlasoft)
Absoft	Envecon	L&T Infotech
Accenture	EPAM	Lemongrass Consulting
Agilityworks	Esri	Limelight solutions
Applexus Technologies	Exxis group	LTI
Approyo	FH	Mendix
Atos	Fujitsu	Microsoft Azure
AWS	Genpact	MilnerBrowne
BE one solutions AG	GLOSAP Consulting Pte Ltd	Mindtree
Beyondtechnologies	Google	Mphasis
Capgemini	GRC Nordic	MSG global
Centiq	GROM	NBS
Century Link	Groupsoft	Netmagic
CGI	HCL	NNIT
Cognitus Consulting	Hexaware	Nordcloud
Cognizant	Hitachi	Nordicmind
CSI	HPE	NTT Commmunications
Cygnet	IBM	NTT DATA
Deloitte	Illumiti Corp.	Opentext
Delware	Implema	Protera
Dimension Data (NTT)	Implement Consulting	PWC
DXC	Infopulse	Reply
Dynamo Infotech	Infosys	SAPHive
Echelon	ITC Infotech	Savantis Solutions LLC
Echelon Solutions Group	Itelligence	SCG
edenhousesolutions	Keytree	Seidor
Edenhpousesolutions	KMD	Sierra Consulting
Einr	KPIT	Sintel

Softek

Sonata Software

Sonda

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Symmetry

Syncronic

Syntel

SYSTEMA

TCS

Tech Mahindra

TechEdge

Techwave

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T-systems

Unisys

Velocity

Virtusa

Virtustream

Wipro

Yash technologies

Zalaris