

An abstract collage of skyscraper facades, primarily in shades of blue and teal, arranged in a geometric, overlapping pattern on the left side of the cover. The buildings are viewed from low angles, emphasizing their height.

***ISG** Provider Lens™

2021

SAP HANA Ecosystem
Services – 2021

imagine your future®

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Definition

With more than 21,000 partner companies, SAP has a significant impact on the IT market in terms of both innovation and global IT spending share. This research study will identify the top SAP partner companies that offer differentiated enterprise client services and deliver the best results from their clients' SAP S/4HANA investments.

SAP S/4HANA offers superior performance by using in-memory technology. As transformation projects require detailed planning and business participation, clients should refine their selection process and criteria to find the right partner for providing higher business value at a lower cost of transformation.

For clients that are new to SAP ERP or are hesitant to upgrade to SAP S/4HANA, this study will include case studies and success stories. ISG has identified viable tools and frameworks for large SAP transformations and greenfield SAP S/4HANA implementations that are delivered in record time for midmarket clients. The right partner can support clients and allay fears arising from the end of support for legacy SAP ERP, which is due in 2027.

With the introduction of the SAP Cloud Platform (SCP), it has become evident that major benefits of adopting SAP S/4HANA are its innovation backbone that is offered through SAP Cloud Platform (SCP) as well as the novel ways of leveraging application programming interfaces (APIs) and microservices. In this context, SAP partners have demonstrated innovation by using artificial intelligence (AI), analytics, Internet of Things (IoT), mobile apps, robotic process automation (RPA) and blockchain to disrupt markets and transform businesses.

For clients that have adopted SAP S/4HANA, this study assesses managed service providers that can contribute to superior application performance, including higher stability, availability and security. In addition, recently, AI and machine learning (ML) have been incorporated into application maintenance and operations to predict incidents and automate troubleshooting, ticketing processes and provisioning. This allows for increased scale, which can lower support costs. This study will identify service providers that effectively apply new technologies to support SAP S/4HANA and HANA databases.

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

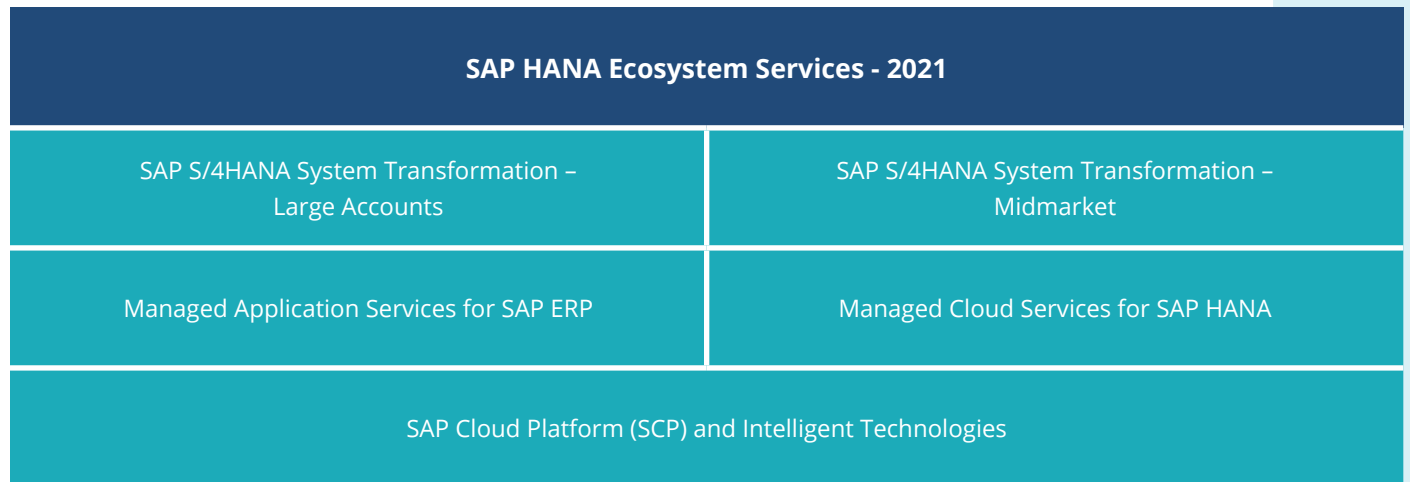
- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments
- Focus on different markets, including Brazil, France (new), Germany, the Nordics, the U.K. and the U.S.

For IT providers and vendors, ISG studies serve as an important decision-making basis for positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients use information from these reports to evaluate their current vendor relationships and identify potential new engagements.

Quadrant Research

As part of this ISG Provider Lens™ quadrant study, we are introducing the following five quadrants within SAP HANA Ecosystem Services:

Simplified illustration



Source: ISG 2021

SAP S/4HANA System Transformation – Large Accounts

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 evaluation includes planning, design and modeling of applications, taking into consideration the service provider's ability to manage the complexity and scale that are common characteristics of large enterprise clients. The participating companies are expected to have the frameworks, tools and accelerators to support the needs of large system transformations.

Eligibility criteria:

- Participant's service portfolio to include development, integration and testing of SAP S/4HANA with at least one implementation of S/4HANA or SAP Business Suite on HANA
- Demonstrate S/4HANA advisory capabilities and implementation experience on greenfield or brownfield deployments
- Provision to offer on-premises and cloud-based implementations
- Availability of SAP-certified consultants and practitioners across regions to support multicountry and multilanguage implementations
- Ability to handle complexity and scale through optimal onshore-offshore delivery models

SAP S/4HANA System Transformation – Midmarket

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

Eligibility criteria:

- Ability to leverage SAP accelerators and templates for agile SAP S/4HANA implementations
- Capability to deliver advisory and implementation services for midsize enterprise clients
- Availability of ready-to-use templates or solutions for specific microsegments
- Ability to offer onshore or nearshore delivery for local clients; offshore delivery is welcome but not restrictive for participation in this quadrant

Managed Application Services for SAP ERP

This quadrant assessment considers a service provider's capability to offer managed services, including maintenance and support functions that comprise monitoring, remote support and centralized management of applications 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 (adding and changing user profiles and disabling user access), performance reports, database services, security (access) monitoring and license compliance. Providers that have the Center of Expertise (CoE) certification are better evaluated, but this is not a prerequisite for participating in this quadrant.

Eligibility criteria:

- Ability of service provider to offer application optimization, application support and testing
- Ability to 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
- Demonstrated expertise in incident management, variety of ticket system tools, SAP Solution Manager and additional application documentation solutions

Managed Cloud Services for SAP HANA

This quadrant assesses service providers that manage hybrid cloud environments, security access, monitoring, system availability, interface performance, disaster recovery, backup, restoration, data compliance and other infrastructure and cloud operations. The initial technical barriers and client resistance to moving ERP to the cloud are gradually disappearing, enabling these providers to support clients in migrating from a private cloud to a public cloud in exceptional cases.

This quadrant privileges providers that demonstrate expertise in maintaining smooth SAP S/4HANA operations, which requires deep knowledge about the underlying in-memory database technology. Furthermore, strong capabilities to optimize this type of application include data volume management, application code management and cloud cost optimization. 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 SAP S/4HANA.

Eligibility criteria:

- Ability of service provider to provision, manage and operate SAP in the cloud, including, but not limited to, hyperscale public clouds, AWS, Azure and Google
- Demonstrate the capacity to support clients in their hybrid cloud implementations of SAP systems and databases, providing infrastructure design support at a minimum
- Offer Tier III data center choices to host SAP S/4HANA or be a certified cloud partner with SAP S/4HANA specialization
- Certified on data center security, data privacy and IT processes; minimum accreditations include ISO27001 (security) and IT Infrastructure Library (ITIL) incident management
- Have SAP-certified staff to support HANA and other SAP technologies

SAP Cloud Platform (SCP) and Intelligent Technologies

This segment examines the capabilities of providers in the design, development, change, integration and support of enterprise applications on SCP. These providers offer lab facilities for client experimentation with emerging technologies. They provide innovation workshops, design thinking and other methods to drive innovation around SAP S/4HANA. Alternatively, the company may have developed use cases and frameworks to accelerate innovation or extend SAP S/4HANA functionality. These include ready-to-use apps for fraud prevention and analytics dashboards that were presented to ISG in previous studies.

SCP services include platform-as-a-service and application development for data integration, mobile-enabled services, analytics and application development and deployment across multi-cloud platforms.

Eligibility criteria:

- Capability of service provider to deliver consulting and implementation services for SCP
- Expertise in AI, ML, blockchain and IoT technologies
- Demonstrate support of SCP applications with case studies
- Appropriate SAP certifications across SAP-certified applications, as well as certified engineers or partner-level certifications
- Leading SCP service partners ideally expected to provide case presentations through large events and SAP awards and gain client recognition

Quadrants by Region

This inaugural ISG Provider Lens™ study on SAP HANA Ecosystem Services – 2021 includes the following regions:

Quadrant	Global	U.S.	U.K.	Nordics	Germany	Brazil	France
SAP S/4HANA System Transformation – Large Accounts	Overview	✓	✓	✓*	✓	✓	✓
SAP S/4HANA System Transformation – Midmarket	Overview	✓	✓		✓	✓	✓
Managed Application Services for SAP ERP	Overview	✓	✓	✓	✓	✓	✓
Managed Cloud Services for SAP HANA	Overview	✓	✓	✓	✓	✓	✓
SAP Cloud Platform (SCP) and Intelligent Technologies	Overview	✓	✓	✓	✓	✓	✓

*Large Accounts and Midmarket quadrants are consolidated into a single SAP S/4HANA system transformation in the Nordics.

Archetype Report

In this report, ISG identifies and classifies the typical buyers within SAP HANA Ecosystem Services. It comprises five major segments of buyers as follows:

- **Transactional users:** In this buying scenario, clients have SAP ERP Central Component (ECC) as an existing ERP solution and are seeking services to manage this application. They are reluctant to move to a different ERP, primarily due to complexity, lack of investments, inability to manage the complex SAP environments and absence of skillsets.
- **Technical transitioners and cloud adopters:** In this buying scenario, clients intend to implement SAP S/4HANA and have SAP ERP Central Component (ECC) as their existing ERP offering. They want to implement SAP S/4HANA through Suites on HANA (SoH) or conversions (brownfield implementations) for both on-premises and cloud or implement SAP S/4HANA Cloud (as a service). They aim for stability in their business process and IT application landscape.
- **Landscape transformers:** In this buying scenario, clients want to realize the benefits of SAP S/4HANA and are ready to invest in an integrated ERP system as soon as possible. The enterprise leadership is prepared for an organizational process change and want to work toward a new ERP system to realize the benefits of responsive applications and a rich user interface.
- **Digital futurists:** In this buying scenario, clients want to bring in digital transformation using SAP S/4HANA and emerging technologies such as ML, AI and blockchain. They intend to move from the existing application architecture and leverage the power of these emerging technologies to provide value to their customers.

Schedule

The research phase falls in the period between **February and May 2021**, during which the survey, evaluation, analysis and validation will take place. The results will be presented to the media in **August 2021**.

Milestones	Beginning	End
Launch	February 17, 2021	
Survey Phase	February 17, 2021	March 10, 2021
Sneak Preview	June 2021	
Press Release	August 2021	

Please click [this link](#) to view/download the ISG Provider Lens™ 2021 research agenda.

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 the information received directly from providers/vendors and the availability of experienced 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 lead analysts.

Partial list of companies being invited for the survey

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

Abaco Consultores	CENSIO	ERP Logic
abat	Centiq	Esri
Abeam Consulting	CGI	ESS
Abington Advisory	Cisco	essence IT
Absoft	Clarkston Consulting	EVERY
Accenture	Codilog	EY
AgilityWorks	Cognitus Consulting	FH Consultoria Empresarial Ltda
All for One Steeb	Cognizant	FIS
Allgeier	Computacenter	Fujitsu
Appexus Technologies	CSI	Genpact
Applium	CubeServ	GISA
Approyo	DATAGROUP	GLOSAP Consulting Pte Ltd
Arvato	Delaware	GRC Nordic
AssuranceIT Consultoria	Deloitte	Groupsoft
Atos	Deutsche Telekom/ T-Systems	Grupo Meta
Avantum	Devoteam Alegri	HCL
Axians	Dimension Data	Hexaware
BCI Consulting	DXC	Hitachi
be one solutions	Dynamo Infotech	HPE
BearingPoint	Echelon Solutions Group	IBM
BRQ	Einr	Illumiti
Camelot ITLab	Engineering (ENGdB)	Implema
Cancom (Pironet)	Ensono	Implement Consulting
Capgemini	Envecon	Inetum (formerly GFI)
CAST Group	EPAM	Infopulse
cbs	Equinix	Infosys

Innovabee	NTT DATA	Syntax (formerly FIT)
ITC Infotech	Numen IT	Syntel
itelligence (NTT DATA)	oXya	SYSTEMA
ITS Group	PasàPas / K9 group	T-Con
Keytree	PWC	TCS
KMDti	QSC	Teamwork
KPIT (Birlasoft)	Reply	Tech Mahindra
KPMG	ROFF	Techedge
KUEHBERGER IT	Saberpoint	Techwave
L&T Infotech	Salt Solutions	TekLink
Logicalis	SAP Consulting	THOMSON REUTERS
Lumen Technologies	SAPHive	TietoEVERY
Mantu (formerly Amaris)	Savantis Solutions LLC	TIVIT
Megawork	SCG	Trustsis
Mendix	Scheer	T-Systems
META GROUP	Seidor	T-Systems"
metafinanz	Sintel	TVH Consulting
MHP	SNP	Unisys
Microexcel	SOA People	UST
Milner Browne	Softtek	Vexia
Mindset Consulting	Sonata Software	Virtusa
Mindtree	SONDA	Virtustream
Mphasis	Sopra Steria	Viseo
msg global	SPREAD	Wavestone
NEORIS	SPRO	Wharfedale
NEOSIGHT/Axys	Star IT	Wipro
NNIT	Stefanini	Yash Technologies
Nordcloud	Suneratech	Zalaris
Nordicmind	Syncronic	

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