ISG Provider Lens™

SAP HANA Ecosystem Services

Managed Application Services for SAP ERP

U.S. 2021

Quadrant Report

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

HCL

July 2021

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 2021, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

All revenue references are in U.S. dollars ($US) unless noted.

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EXECUTIVE SUMMARY

S/4HANA, SAP's intelligent and integrated enterprise resource planning (ERP) system running on SAP HANA, has been undergoing an evolution to meet the business requirements of enterprises that are looking for a clear digital core while embarking on their digital transformation journeys. It aims to help enterprises transform their business processes through the use of artificial intelligence (AI), either on the cloud or on-premises. With a focus on digital transformation, SAP S/4HANA aims to alleviate enterprise business processes through its interactive interface and by applying analytics to speed insights delivery.

The transformation delivered varies by macroeconomic factors, coupled with developments such as COVID-19 that have an impact across geographies. The pandemic impacted the adoption of SAP S/4HANA as enterprises slowed down their transformation momentum and focused more on cost efficiency and "keeping the lights on services" to operate in the uncertain circumstances. However, toward the latter part of 2020, a gradual recovery was observed, led by positive economic sentiments. As service providers settled down with remote modes of working for their employees, their projects continued to be delivered virtually without much disruption. One of the implications of COVID-19 has been remote working. This has led to consultants working from home or remote locations away from their offices. A key enabler of this new work model has been the increased adoption of collaboration tools.

With the need to rein in costs, enterprises could consider cloud as an enabler of cost reductions, upgrades and agility. At the same time, organizations could continue with a

staggered approach for SAP S/4HANA, to ensure minimum disruption to their existing business processes and derive maximum value for their investment and efforts.

Another key development in 2021 has been SAP's new campaign, "RISE with SAP." The initiative bundles existing SAP assets by offering business-transformation-as-a-service to enterprises and accelerating their cloud adoption. Clients benefit from reduced licensing costs. They can put their perpetual enterprise resource planning license into the deal and replace the annual ERP maintenance fee with a monthly pay that, bundled with cloud usage fees, makes a positive business case.

SAP offers both on-premises and cloud options for SAP S/4HANA to meet the business requirements of both large and midsize enterprises. While the on-premises option offers more customization and requires a greater management effort, the cloud option is suitable for enterprises seeking limited customizations, automatic upgrades and faster implementation.

The presence of S/4HANA certified professionals serves as one of the differentiators for providers, indicating their expertise in managing complexity and delivering services. Investments in reskilling initiatives have yielded results for providers; they have expanded the base of SAP- and S/4HANA-certified professionals in their respective organizations.

Service providers continue with their focus to integrate agile and DevOps processes into SAP services, across development, implementation and managed services. Providers are not only leveraging their proprietary tools and accelerators to deliver

S/4HANA services, but also are integrating agile and DevOps methodologies with their frameworks to increase efficiencies and reduce delivery time cycles. From a marketing strategy perspective, providers have innovation hubs to establish a connection with their customers and undertake innovation-led ideation initiatives in the U.S.

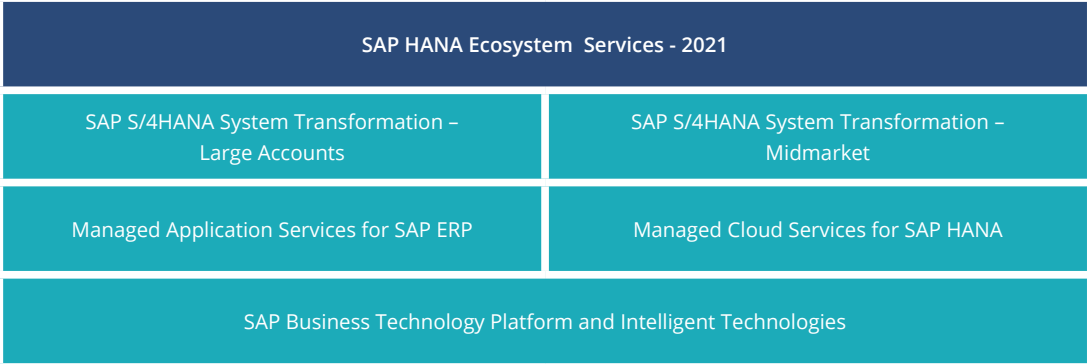Some of the key trends in the U.S. are summarized below.

- **Frameworks, tools and accelerators for SAP S/4HANA services delivery:** Service providers continue to focus on developing tools and accelerators to accelerate the SAP S/4HANA journeys of their customers. They are investing to shore up their assessment areas, code reconciliation, data management, testing and other components of S/4HANA conversions, transformations and migration tools. These assets and tools are powered by AI, enable safer and faster transformations, and reduce the SAP S/4HANA implementation time for enterprises.

- **Use of hybrid agile and DevOps methodologies:** Service providers are investing in and integrating hybrid agile and DevOps approaches such as Scaled Agile Framework (SAFe) for rapid development, creation of prototypes, deployment and faster release cycles. They 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 and SAP Business Technology Platform (SAP BTP) to help customers with integration and business agility. Enterprises are looking for such solutions as a differentiator for faster time-to-market, and to become intelligent

enterprises. Several providers have also established innovation centers, labs and other facilities to showcase their solutions and provide a platform for enterprises to experience them before deployment.

- **Increased use of bots and automation in managed services:** With a focus on lowering costs and increasing delivery speed, service providers are increasing their use of conversational AI, in the form of bots, and their use of robotic process automation (RPA) for improving operational efficiency, streamlining incident management, configuring triage and providing other benefits.

- **Intelligent focus and SAP BTP:** Service providers are leveraging emerging technologies such as Internet of Things (IoT) and blockchain to create ready-to-use solutions for various processes such as supply chain and for industries such as retail, utilities and manufacturing. Providers continue to leverage their partnerships with SAP to co-innovate and co-develop solutions to serve specific use cases for different industries. ISG defined the SAP Cloud Platform (SCP) and SAP Leonardo Services quadrant before SAP renamed its application programming interface (API) and innovation library platform Leonardo to Intelligent Enterprise platform. In 2021, SAP changed the name again, now calling it SAP Business Technology Platform (SAP BTP). This platform helps enterprises through integration, extension and data-to-value from all SAP and third-party applications and assets.

- **Partnerships with hyperscalers:** Most of the service providers have developed alliances or partnerships with all leading hyperscaler cloud services providers to offer platform application services in areas such as archiving, backup, disaster recovery, security, compliance and monitoring.

Introduction

Simplified illustration

SAP HANA Ecosystem Services - 2021

SAP S/4HANA System Transformation – Large Accounts	SAP S/4HANA System Transformation – Midmarket
Managed Application Services for SAP ERP	Managed Cloud Services for SAP HANA

SAP Business Technology Platform and Intelligent Technologies

Source: ISG 2021

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 spend. This research study identifies the top SAP partner companies that offer differentiated services to enterprise clients, and deliver the best results for 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 low cost.

For clients that are new to SAP ERP or are hesitant to upgrade to SAP S/4HANA, this study includes references to case studies and success stories. ISG has identified viable tools and frameworks for large SAP

Definition (cont.)

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 scheduled for 2027.

With the introduction of SAP BTP, it has become evident that the major benefits of adopting SAP S/4HANA are its innovation backbone, as offered through SAP BTP as well as the novel ways of leveraging APIs and microservices. In this context, SAP partners have demonstrated innovation by using AI, analytics, IoT, mobile apps, 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, ticket processing and provisioning. This allows for increased scale that can lower support costs. This study identifies 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 providers' relevant strengths and weaknesses
- A differentiated positioning of providers by segments
- Focus on different markets. This study focuses on the U.S.

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 potential engagements.

Definition (cont.)

Scope of the Report

This study considers the top service providers certified by SAP to support clients in ERP and HANA products. These service providers were qualified in five quadrants of the SAP HANA Ecosystem Services:

The **SAP S/4HANA System Transformation – Large Accounts quadrant** assesses consulting and system integration service providers on their abilities for developing, deploying and testing enterprise applications using SAP S/4HANA and SAP Business Suite, with SAP Fiori as the user interface. The participating companies are expected to have the frameworks, tools and accelerators to support the needs of large system transformations.

The **SAP S/4HANA System Transformation – Midmarket quadrant** assesses consulting and system integration service providers on their ability to offer a rapid turnaround for SAP S/4HANA implementations for clients in the midmarket (which ISG defines as companies with less than 5,000 SAP users or revenue of less than $1 billion).

The **Managed Application Services for SAP ERP quadrant** assesses service providers for their 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.

The **Managed Cloud Services for SAP HANA 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 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.

The **SAP Business Technology Platform (BTP) and Intelligent Technologies quadrant** examines the capabilities of providers in the design, development, change, integration and support of enterprise applications on SCP. These providers offer lab facilities for clients to experiment with emerging technologies. They offer innovation workshops, design thinking and other methods to drive innovation around SAP S/4HANA.

Provider Classifications

The provider position reflects the suitability of IT providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions IT providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket**: Companies with 100 to 4,999 employees or revenues between US$20 million and US$999 million with central headquarters in the respective country, usually privately owned.

- **Large Accounts**: Multinational companies with 5,000 or more employees or revenue above US$1 billion, with activities worldwide and globally distributed decision-making structures.

Provider Classifications

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly.

Leader

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Product Challenger

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Market Challenger

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

Contender

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in both products and services and a sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

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Provider Classifications (cont.)

Each ISG Provider Lens™ quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star. Number of providers in each quadrant: ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

Rising Star

Rising Stars have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not In

The service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

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SAP HANA Ecosystem Services - 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	SAP Business Technology Platform and Intelligent Technologies	Managed Cloud Services for SAP HANA
Accenture	● Leader	● Not in	● Leader	● Leader	● Leader
Applexus	● Not in	● Product Challenger	● Not in	● Not In	● Not In
Atos	● Product Challenger	● Product Challenger	● Product Challenger	● Product Challenger	● Rising Star
Birlasoft	● Not in	● Leader	● Product Challenger	● Contender	● Contender
Capgemini	● Leader	● Product Challenger	● Leader	● Leader	● Leader
Clarkston Consulting	● Not in	● Contender	● Not in	● Not in	● Not in
Cognizant	● Product Challenger	● Product Challenger	● Leader	● Product Challenger	● Leader
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	● Contender
EPI-USE	● Not in	● Rising Star	● Not in	● Contender	● Not In
GyanSys	● Not in	● Contender	● Not in	● Not In	● Not in

SAP HANA Ecosystem Services - 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	SAP Business Technology Platform and Intelligent Technologies	Managed Cloud Services for SAP HANA
HCL	Leader	Product Challenger	Leader	Leader	Product Challenger
Hexaware	Not in	Leader	Product Challenger	Not In	Not In
IBM	Leader	Not in	Leader	Leader	Leader
Infosys	Leader	Leader	Rising Star	Leader	Leader
LTI	Product Challenger	Not in	Not in	Not in	Not in
Lumen	Contender	Not in	Contender	Contender	Contender
Mindset Consulting	Not in	Product Challenger	Contender	Product Challenger	Not in
Mindtree	Not in	Leader	Product Challenger	Product Challenger	Not In
Mphasis	Not in	Product Challenger	Contender	Not In	Contender
Navisite	Not in	Rising Star	Contender	Contender	Not in
NTT DATA	Product Challenger	Leader	Product Challenger	Rising Star	Product Challenger
oXya	Contender	Not in	Contender	Not In	Contender

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SAP HANA Ecosystem Services - 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	SAP Business Technology Platform and Intelligent Technologies	Managed Cloud Services for SAP HANA
Softtek	Product Challenger	Not In	Product Challenger	Not In	Contender
Stefanini	Contender	Product Challenger	Product Challenger	Not In	Not In
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	Leader	Product Challenger
T-Systems	Product Challenger	Not in	Product Challenger	Product Challenger	Product Challenger
UST	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Contender
Virtustream	Not In	Not In	Not In	Not In	Product Challenger
Wipro	Rising Star	Leader	Leader	Leader	Leader
Yash Technologies	Not In	Contender	Contender	Contender	Not In
Zensar	Not In	Product Challenger	Not In	Not In	Not In

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SAP HANA Ecosystem Services Quadrants

ENTERPRISE CONTEXT

Managed Application Services for SAP ERP

This report is relevant to enterprises across industries in the U.S. for evaluating managed application services providers for SAP ERP, which includes SAP S/4HANA, SAP Enterprise Central Component (ECC) and legacy R3.

In this quadrant report, ISG highlights the current market positioning of providers of managed application services for SAP ERP in the U.S., and how each provider addresses the key challenges faced in the country. These providers focus on helping enterprise clients to effectively manage SAP ERP.

In the U.S., the need for automation and increase in SAP S/4HANA implementation drive the demand for managed application services. Enterprise clients are seeking service providers that can deliver managed application services quicker and at lower cost. Service providers are relying on high-end technologies, including bots and RPA for better efficiency.

Enterprise clients are seeking several managed application services for their SAP ERP solutions such as Level 2 and Level 3 application support, incident resolution, maintenance, security and user support. Enterprise clients need these services fine-tuned to their

business objectives with reduced risk and high agility to align with dynamic business environments. Enterprises are looking for a rapid solution design and optimized service delivery across their businesses from the service providers.

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

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 and how various providers can be compared with each other.
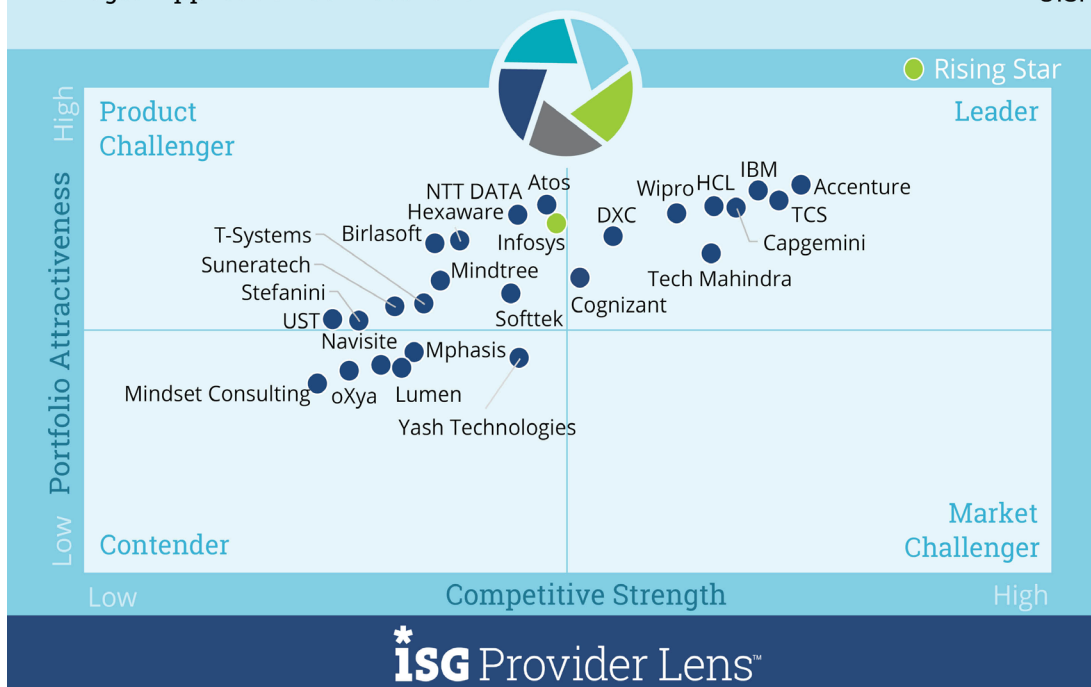
MANAGED APPLICATION SERVICES FOR SAP ERP

Definition

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 CoE certification are better evaluated, but this is not a prerequisite for participating in this quadrant.

Source: ISG Research 2021

MANAGED APPLICATION SERVICES FOR SAP ERP

Eligibility Criteria

- Ability 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

- Demonstrate expertise in incident management, handling a variety of ticket system tools, and management of SAP solutions and additional application documentation solutions

Observations

- **Accenture's** proprietary frameworks, robust capabilities, AI focus, network of delivery centers, consulting expertise, partnerships with hyperscalers and SAP management capabilities make it a leader in managed application services.

- **Capgemini** uses the ADMnext framework and other key elements from its larger application development and maintenance practice and extends them to its SAP application managed services. Its managed services are built on ITIL standards, and the company strengthens its practice with a large repertoire of tools and the Capgemini Intelligent Automation Platform (CIAP) framework.

- **Cognizant's** broad base of SAP managed application services, host of proprietary tools and frameworks, cloud-ready digital intellectual property and bot-centric framework make it a promising provider of managed application services for SAP ERP.

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MANAGED APPLICATION SERVICES FOR SAP ERP

Observations (cont.)

- **DXC** has a broad base of SAP managed services that are integrated with intelligent automation, Platform DXC, the Bionix platform and a large application DevOps toolchain.

- **HCL's** Digital AMS 2.0 framework, proprietary tools and third-party solutions enable it to deliver its "Digital Engineering & Digital AMS" value proposition for its clients.

- **IBM's** established managed services, delivered through flexible migration capabilities, security services, SLAs and multiple data centers, make it an obvious choice for large enterprises with robust AMS requirements for SAP ERP.

- **TCS's** longstanding partnership with SAP, global delivery network, base of trained SAP consultants, proprietary tools and frameworks, and ability to scale are its differentiators.

- **Tech Mahindra's** SAP managed services are supported by its proprietary ADOPT framework, along with a host of tools and accelerators that support a broad set of SAP operations and maintenance functions.

- **Wipro** delivers application management services through its Apex 2.0 delivery model and leverages a plethora of proprietary tools and accelerators centered around HOLMES™.

- **Infosys'** (the Rising Star) established SAP AMS Digital practice, backed by its ValuePLUS framework and AI-led tools and accelerators, deliver efficiencies and reduce TCO for enterprises.

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HCL

Overview

HCL's comprehensive lifecycle support application maintenance and support services deliver its "Digital Engineering & Digital AMS" value proposition. This is also a part of the company's "Transform Experience Transform Business" theme. HCL's SAP application services are powered by the iONA platform that brings in best-of-breed solutions catering to observability, knowledge management, business process flows, operational efficiency, persona journey and more. Experience transformation is engineered and delivered across all the layers through core simplification, process mining, digital platforms and bots. The company's AMS practice revenue and the U.S. client base grew steadily in 2020.

Strengths

ASM 2.0 framework: HCL delivers a digital application management services value proposition through ASM 2.0, its new methodology for managed services and transformation projects. The framework is powered by the AI- and machine learning-driven iONA smart operations platform (iONA stands for Intelligent Observe, Engage and Act). This framework offers smart application support and maintenance operations. It delivers a right-fit operating model, platform operations and insight-driven automation to enterprises.

Integrated automation services: HCL offers an end-to-end and comprehensive AIOps journey to the customers leveraging the Automation Maturity Model (AMM), Cognitive Orchestrated Robotic Experience (CORE) and Business Process Operational Analysis (BPOA).

Tools and accelerators: HCL's iONA platform brings in proprietary assets that include iSee, OpsWisdom, Kyle HCL Workload Automation, HCL One Test Suite, HCL AppScan, HCL Urban Code Deploy, the ADVISOR product suite, Lucy, iAutomate, iControl and MyXalytics. These cover automation, workflow optimization, test automation, background execution of workflows, automated application deployments, reporting and cognitive assistance.

Caution

HCL primarily offers flat fee pricing and should explore other models, such as value based, and outcome based, to ensure increased returns for enterprises.

2021 ISG Provider Lens™ Leader

HCL's application maintenance and support services are supported by its Digital AMS 2.0 framework, the AI/ML-driven iONA smart operations platform, proprietary tools and third-party solutions that enable the company to offer clients horizontal and vertical IT automation.

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Methodology

METHODOLOGY

The research study "ISG Provider Lens™ 2021 SAP HANA Ecosystem Services, U.S." analyzes the relevant software vendors/service providers in the Brazilian 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 Ecosystem Services 2021 market

2. Use of questionnaire-based surveys of service providers/vendor across all trend topics

3. Interactive discussions with service providers/vendors on capabilities and use cases

4. Leverage ISG's internal databases and advisor knowledge and experience (wherever applicable)

5. Detailed analysis and evaluation of services and service documentation based on the facts and figures received from providers and 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
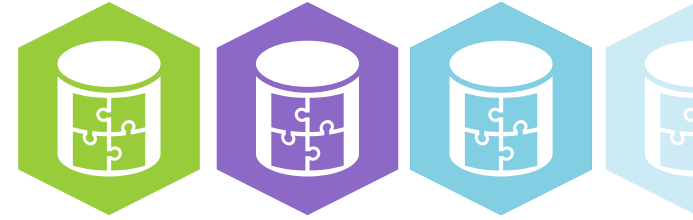
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Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, 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.

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