

SAP HANA Ecosystem Services

SAP Business Technology Platform and Intelligent Technologies

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.

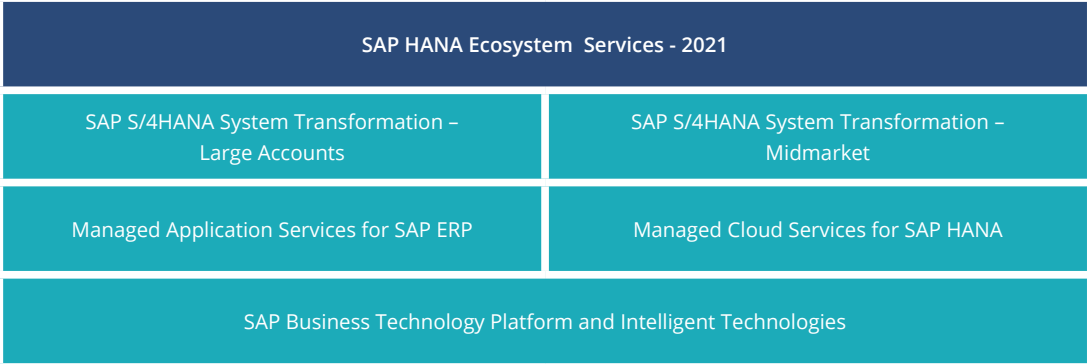
- **Frameworks, tools and accelerators for SAP S/4HANA services delivery:** Service providers continue to focus on developing tools and accelerators to accelerate the SAP S/4HANA journeys of their customers. They are investing to shore up their assessment areas, code reconciliation, data management, 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



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.

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.

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
Appexus	● 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

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



SAP HANA Ecosystem Services Quadrants

ENTERPRISE CONTEXT

SAP Business Technology Platform and Intelligent Technologies

This report is relevant to enterprises across industries in the U.S. for evaluating service providers offering SAP Business Technology Platform (BTP) and Intelligent Technologies.

In this quadrant report, ISG highlights the current market positioning of providers of SAP BTP and Intelligent Technologies in the U.S. It covers their capabilities in designing, developing, modifying, integrating and supporting applications for enterprise systems and in delivering services for digital transformation using SAP BTP and Intelligent Technologies.

As a part of their digital transformation, enterprises are looking to transform their processes and business operations and are making progress on their intelligent enterprise journeys. The focus on using high-end technologies such as analytics, AI and ML for processing SAP data has also increased among enterprises.

Enterprises also want to integrate their existing applications (both SAP and non-SAP) under one unified platform to enhance the user experience and increase process efficiency using technologies such as AI and ML. Service providers can integrate these solutions into one and help enterprises achieve agility, business value, data to value, and extensibility of SAP and non-SAP applications.

Who should read the report:

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

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

SAP BUSINESS TECHNOLOGY PLATFORM AND INTELLIGENT TECHNOLOGIES

Definition

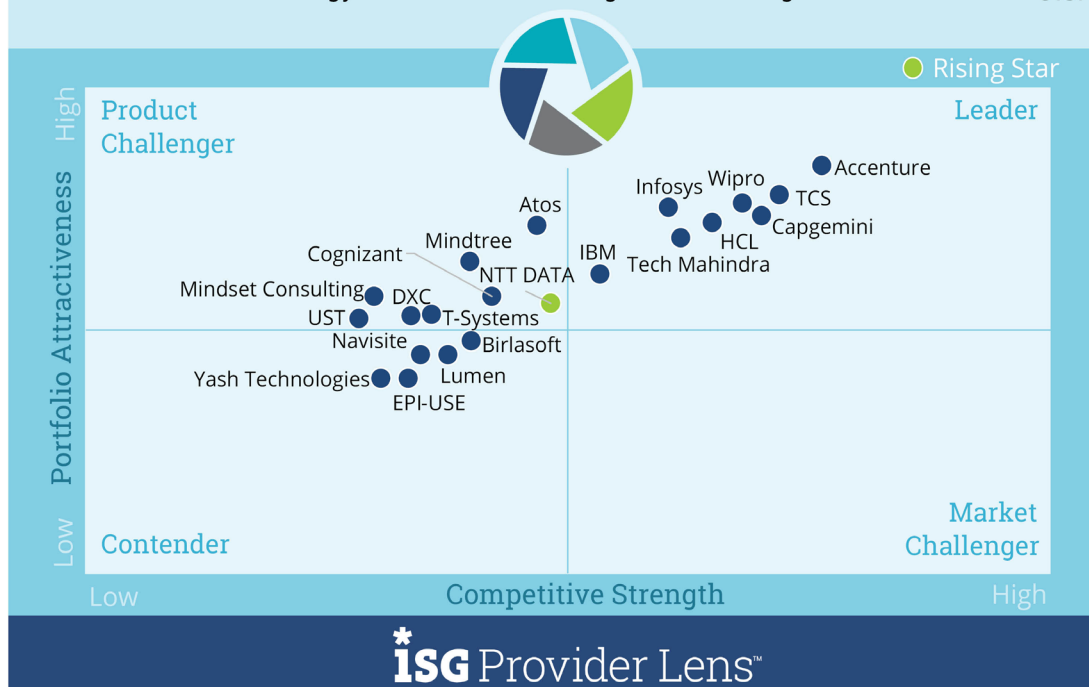
This quadrant examines the capabilities of providers in the design, development, change, integration and support of enterprise applications on Business Technology Platform (BTP). These providers offer lab facilities, enabling clients to experiment with emerging technologies. They provide innovation workshops, design thinking and other methods to drive innovation around SAP S/4HANA. Alternatively, the company may have developed 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. BTP 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.

SAP HANA Ecosystem Services

SAP Business Technology Platform and Intelligent Technologies

2021

U.S.



Source: ISG Research 2021

SAP BUSINESS TECHNOLOGY PLATFORM AND INTELLIGENT TECHNOLOGIES

Eligibility Criteria

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

Observations

- **Accenture** has created several industry and functional applications through co-development and co-innovation efforts with SAP that highlight its vision to be one of the leading players.
- **Capgemini** builds a clean digital core and transforms a client into a “renewable enterprise” through its Multipillar S/4HANA Architecture (MPSA), Applied Innovation Exchange platform and a large repertoire of tools.
- **HCL's** cloud-native approach to SAP BTP Band Intelligent Technologies, along with a bot library, tools, accelerators and frameworks such as Intelligent Process Engineering keep the company in the top league of players in this domain.
- **IBM's** longstanding partnership with SAP, rich development experience, initiatives such as IMPACT and industry solutions make the company a good choice for enterprises seeking a combination of industry experience and development expertise.

SAP BUSINESS TECHNOLOGY PLATFORM AND INTELLIGENT TECHNOLOGIES

Observations (cont.)

- **Infosys** with its good mix of preconfigured SAP BTP applications, tools and digital transformation focus, in combination with industry and line-of-business expertise, makes it a good fit for enterprises.
- **TCS's** industry-facing solutions, robust Digital Reimagination Framework and focus on blockchain, IoT, machine learning, AI, advanced analytics, big data and mobility components make it an established service provider with strong industry and domain expertise.
- **Tech Mahindra's** proprietary offerings, focused investments and a large base of industry-facing platform solutions reflect the company's leadership in delivering offerings using emerging technologies such as IoT and blockchain to serve client-specific needs.
- **Wipro's** expertise in tools, accelerators, innovation and development in SAP BTP, along with an innovation-centric framework, co-innovation labs for fostering solution development and a host of accelerators for a broad set of industries, make it a Leader.
- **NTT DATA's** balanced portfolio, repository of applications developed on the SAP BTP, and accelerators for both large and midsize enterprises make it a Rising Star.

HCL

Overview

HCL's overarching offering is called SAP Cloud Native and is built on the company's cloud applications development approach. HCL has several offerings covering SAP BTP. Some of the key services offered include SAP Cloud Native, iRPA, Factory and Bot Library, Intelligent UX for application development, Connected Asset Supply Chain for connecting intelligent assets using BTP, Rapid Analytics using SAP Analytics Cloud (SAC), and Industry Cloud applications for utilities, aerospace and defense and other verticals.

Strengths

SAP cloud-native approach: HCL accelerates cloud adoption and coding, such as ABAP on cloud, for customers through its Cloud Native labs and other offerings. The company has set up packages, including Introduction to Cloud Native for SAP, SAP Cloud Native Strategy, SAP Cloud Kickstarter and POC for clients, including SMEs, to show them the value of the platform.

Intelligent process engineering: HCL uses intelligent process engineering to implement the Intelligent Enterprise. This includes assessing ERP processes and identifying the scope for robotic process automation (RPA). It optimizes insight-lead processes and develops end-to-end digital threads designed around intelligent automation.

Tools, accelerators, and BOT library: HCL offers a series of SAP-certified tools and accelerators that use design thinking for customer experience, IoT, machine learning, AI, blockchain, business operations and intelligent enterprise elements. The company offers a factory-based bot delivery model and library to accelerate delivery.

Caution

HCL derives a large part of its revenue base from contracts valued at less than \$50 million in the U.S. The company could leverage its tools and accelerators to get into a higher ACV range.



2021 ISG Provider Lens™ Leader

HCL takes a cloud-native approach to the SAP BTP and Intelligent Technologies. It has focused on developing a bot library, tools, accelerators and frameworks such as Intelligent Process Engineering. The company has also established a strong partnership with SAP to engage in co-innovation using AI, machine learning and blockchain and to stay ahead of the development curve.

The slide features a dark blue background with a light blue header. 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 slide.

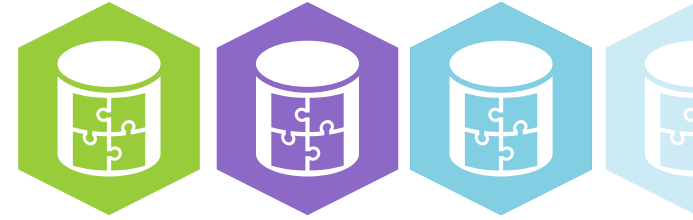
Methodology

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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ISG Provider Lens™ | Quadrant Report

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