

***ISG** Provider Lens™

SAP HANA and Leonardo Ecosystem Partners

SAP S/4 HANA System Transformation – Midmarket

U.S. 2020

Quadrant
Report



A research report
comparing provider
strengths, challenges
and competitive
differentiators

Customized report courtesy of:

MINDSET

July 2020

About this Report

Information Services Group Inc. is solely responsible for the content of this report. Unless otherwise cited, all content, including illustrations, research, conclusions, assertions and positions contained in this report were developed by, and are the sole property of Information Services Group Inc.

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, 2020, 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.

The lead author for this report is Kartik Subramaniam. The editors are Grant Gross and John Burnell. The enterprise context and global overview analyst is ArulManoj M. The data analyst is Vishal Kulkarni. The quality and consistency advisor is Yadu Singh.

ISG Provider Lens™

ISG Provider Lens™ delivers leading-edge and actionable research studies, reports and consulting services focused on technology and service providers' strengths and weaknesses and how they are positioned relative to their peers in the market. These reports provide influential insights accessed by our large pool of advisors who are actively advising outsourcing deals as well as large numbers of ISG enterprise clients who are potential outsourcers.

For more information about our studies, please email ISGLens@isg-one.com, call +49 (0) 561-50697537, or visit ISG Provider Lens™ under [ISG Provider Lens™](#).

ISG Research™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

For more information about ISG Research™ subscriptions, please email contact@isg-one.com, call +49 (0) 561-50697537 or visit research.isg-one.com.



- 1** Executive Summary
- 3** Introduction
- 12** SAP S/4 HANA System Transformation – Midmarket
- 22** Methodology

© 2020 Information Services Group, Inc. All rights reserved. Reproduction of this publication in any form without prior permission is strictly prohibited. Information contained in this report is based on the best available and reliable resources. Opinions expressed in this report reflect ISG's judgment at the time of this report and are subject to change without notice. ISG has no liability for omissions, errors or completeness of information in this report. ISG Research™ and ISG Provider Lens™ are trademarks of Information Services Group, Inc.



EXECUTIVE SUMMARY

S/4HANA, SAP's intelligent and integrated ERP system running on SAP HANA, has been helping enterprises to transform their business processes through the use of artificial intelligence (AI) either on the cloud or on-premise. SAP S/4HANA aims to alleviate enterprise business process problems through its interactive interface and by applying analytics to speed insights delivery. While the on-premises edition offers more customizations and requires a greater S/4HANA management effort, the cloud edition suits enterprises seeking limited customizations, automatic upgrades and faster implementation. S/4HANA has application for a wide range of industries across both large and mid-sized enterprises.

ISG observes a two-tier adoption model as one of the S/4HANA trends gaining momentum in the coming months. Led by their business needs, enterprises are opting for on-premises S/4HANA with heavy customizations for their main office, and the cloud version for their satellite/regional offices or subsidiaries, which require less investment and customizations. Another potential market comprised of enterprises presently on SAP ECC but contemplating moving to S/4HANA in the future is also surfacing.

The S/4HANA certified professionals serve as one of the differentiators for providers to showcase their expertise in managing complexity and delivering services. Investments in reskilling initiatives have yielded results for providers, as they have grown the base of SAP- and S/4HANA-certified professionals in their organizations.

There is an increasing focus to integrate agile and DevOps processes into SAP services, across development, implementation and managed services. Providers are not only plainly leveraging their proprietary tools and accelerators to deliver S/4HANA services, but are integrating agile and DevOps methodologies with their frameworks to increase efficiencies and reduce the delivery time cycles. From a marketing strategy perspective, providers are undertaking region/city-specific roadshows and marketing activities to reach out to a larger spectrum of potential clients. Meanwhile, a few service providers have used a combined strategy of industry- and region-specific marketing to penetrate the U.S. market.

Due to the change in the macroenvironment scenario and sentiments from COVID-19, enterprises are procrastinating their decisions to go for large-scale S/4HANA implementations and transformation. Such investments are being deferred or delayed. This is affecting a sizeable portion of the decisions in the S/4HANA landscape, while a complete hold or freeze on S/4HANA deals or decisions can be seen as a fringe development among a few companies. Enterprises are discussing activities with providers to “keep the lights on,” both from the management and investment perspectives. This is crystallizing a shorter time horizon for management decisions on S/4HANA. SAP has extended support to SAP Business Suite 7 core applications including ECC 6.0. That move, along with the unfavorable business environment due to COVID-19, could result in enterprises delaying their shift to S/4HANA and continuing with their existing ERP setup with managed services.

Service providers have adjusted to the present uncertainty due to COVID-19 and have ramped up their SAP services by enabling their workforces with remote technology for

carrying out business. They have mobilized their workforces by leveraging the work-from-home model, using remote operations tools and new collaboration methods to ensure uninterrupted service delivery to their clients. A few service providers have also come up with quick-to-deploy solutions for supply chain and other areas to help their clients remotely continue their operations.

Against the backdrop of COVID-19, enterprises could contemplate a move to cloud as a measure to rein in costs. We expect an uptake in migration to cloud in the next few months, including S/4HANA migrations and efforts from providers to facilitate such moves to cloud through frameworks and preconfigured templates.

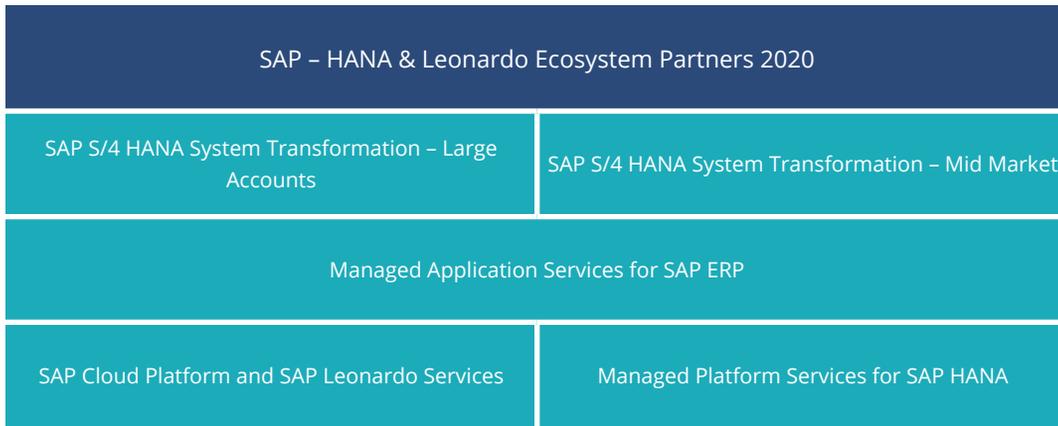
Some of the key S/4HANA, SAP Cloud Platform (SCP) and Leonardo trends are summarized below.

- **Frameworks, tools and accelerators for S/4HANA services delivery expand:** Providers are using a host of tools, proprietary frameworks, methodologies and templates for assessments, code reconciliation, data management, testing and other components of S/4HANA conversions and transformations for their clients. Areas served by these tools include assessing IT landscape, strategizing roadmaps, improving code management and automating support services.
- **Hybrid agile and DevOps methodologies being applied:** Service providers are investing and integrating hybrid agile and DevOps approaches such as Scaled Agile Framework (SAFe) for rapid development, prototyping, deployment and faster release cycles. Providers 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, SCP and Leonardo to help customers with integration and business agility. Enterprises are looking for such solutions as a differentiator for faster time-to-market and to help them become an intelligent enterprise. Several providers have also established innovation centers, labs and other facilities to showcase their solutions and provide a platform for enterprises to experience them.
- **Bots and automation in managed services increase:** With a focus on lowering cost and increasing delivery speed, service providers are increasing their use of conversational AI, automation, robotic process automation (RPA), bots and chat queries for improving operational efficiency, streamlining incident management, triage configuration and more.
- **Emerging technologies-based SAP SCP and Leonardo platform solutions get specific:** Service providers are increasingly leveraging emerging technologies such as IoT and blockchain to create ready-to-use solutions for various industries and processes such as supply chain, retail, utilities, manufacturing and others. Providers are also developing strong partnerships with SAP to co-innovate and co-develop such solutions to serve specific use cases for different industries.
- **Partnerships with hyperscalers advancing:** Most of the service providers have developed alliances or partnerships with all the leading hyperscalers to provide platform application services in areas such as archiving, backup, disaster recovery, security, compliance and monitoring. Some of the providers have developed their own platform on a hyperscaler or offer the services on their own dedicated centers.

Introduction

Simplified illustration



Source: ISG 2020

Definition

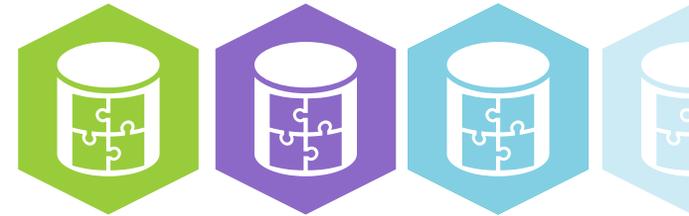
SAP is well known for its enterprise resource planning (ERP) software, data management products and digital focused offerings. This report compares IT service providers and their capabilities to implement, migrate, transform and manage SAP services such as SAP S/4HANA for large and midmarket companies, and their SAP application managed services, SAP managed platform services and SAP Cloud Platform and Leonardo services.

Definition (cont.)

Scope of Report

The SAP HANA & Leonardo Ecosystem Partners 2020 report is a comprehensive, objective analysis and evaluation of service providers. The report focuses on trends associated with SAP HANA and its market. As part of this U.S. report, ISG classified 34 providers for SAP study as either leaders, market challengers, product challengers or contenders in five areas of specialization: SAP S/4 HANA System Transformation – Large Accounts, SAP S/4 HANA System Transformation – Midmarket, Managed Application Services for SAP ERP, Managed Platform Services for SAP HANA and SAP Cloud Platform and SAP Leonardo Services.

The report outlines key trends in different SAP services and will help heads of different lines of businesses, enterprise applications, SAP services and vendor management within organizations to understand the SAP market dynamics and service provider capabilities to meet their business needs.



Provider Classifications

The ISG Provider Lens™ quadrants were created using an evaluation matrix containing four segments, where the providers are positioned accordingly.

Leader

The “leaders” among the vendors/providers have a highly attractive product and service offering and a very strong market and competitive position; they fulfill all requirements for successful market cultivation. They can be regarded as opinion leaders, providing strategic impulses to the market. They also ensure innovative strength and stability.

Product Challenger

The “product challengers” offer a product and service portfolio that provides an above-average coverage of corporate requirements, but are not able to provide the same resources and strengths as the leaders regarding the individual market cultivation categories. Often, this is due to the respective vendor’s size or their weak footprint within the respective target segment.

Market Challenger

“Market challengers” are also very competitive, but there is still significant portfolio potential and they clearly lag behind the “leaders.” Often, the market challengers are established vendors that are somewhat slow to address new trends, due to their size and company structure, and have therefore still some potential to optimize their portfolio and increase their attractiveness.

Contender

“Contenders” are still lacking mature products and services or sufficient depth and breadth of their offering, while also showing some strengths and improvement potentials in their market cultivation efforts. These vendors are often generalists or niche players.

Provider Classifications (cont.)

Each ISG Provider Lens™ quadrant may include a service provider(s) who ISG believes has a strong potential to move into the leader's quadrant.

Rising Star

Rising stars are mostly product challengers with high future potential. When receiving the “rising stars” award, such companies have a promising portfolio, including the required roadmap and an adequate focus on key market trends and customer requirements. Also, the “rising stars” has an excellent management and understanding of the local market. This award is only given to vendors or service providers that have made extreme progress towards their goals within the last 12 months and are on a good way to reach the leader quadrant within the next 12-24 months, due to their above-average impact and innovative strength.

Not In

This service provider or vendor was not included in this quadrant as ISG could not obtain enough information to position them. This omission does not imply that the service provider or vendor does not provide this service.

SAP HANA and Leonardo Ecosystem Partners - 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	Managed Platform Services for SAP HANA	SAP Cloud Platform and SAP Leonardo Services
Accenture	● Leader	● Not In	● Leader	● Leader	● Leader
Atos	● Product Challenger	● Product Challenger	● Product Challenger	● Product Challenger	● Product Challenger
Birlasoft	● Not In	● Leader	● Product Challenger	● Contender	● Product Challenger
Capgemini	● Product Challenger	● Product Challenger	● Leader	● Leader	● Leader
CenturyLink	● Contender	● Not In	● Contender	● Not In	● Not In
Clarkston Consulting	● Not In	● Contender	● Not In	● Not In	● Not In
Cognizant	● Product Challenger	● Product Challenger	● Product Challenger	● Leader	● Product Challenger
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	● Product Challenger
Ensono	● Not In	● Not In	● Not In	● Contender	● Not In

SAP HANA and Leonardo Ecosystem Partners - 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	Managed Platform Services for SAP HANA	SAP Cloud Platform and SAP Leonardo Services
GyanSys	● Not In	● Contender	● Not In	● Not In	● Not In
HCL	● Rising Star	● Product Challenger	● Leader	● Leader	● Leader
Hexaware	● Not In	● Leader	● Product Challenger	● Not In	● Not In
IBM	● Leader	● Not In	● Leader	● Leader	● Leader
Infosys	● Leader	● Leader	● Product Challenger	● Product Challenger	● Leader
Keytree	● Not In	● Product Challenger	● Not In	● Not In	● Contender
LTI	● Product Challenger	● Not In	● Not In	● Not In	● Not In
Mindset	● Not In	● Product Challenger	● Contender	● Not In	● Not In
Mindtree	● Not In	● Leader	● Product Challenger	● Product Challenger	● Product Challenger
Mphasis	● Not In	● Contender	● Contender	● Not In	● Not In
NTT DATA	● Product Challenger	● Leader	● Rising Star	● Leader	● Market Challenger

SAP HANA and Leonardo Ecosystem Partners - 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	Managed Platform Services for SAP HANA	SAP Cloud Platform and SAP Leonardo Services
Rackspace	● Not In	● Not In	● Not In	● Product Challenger	● Not In
Stefanini	● Not In	● Product Challenger	● Product Challenger	● Not In	● Contender
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	● Product Challenger	● Leader
T-Systems	● Contender	● Not In	● Product Challenger	● Product Challenger	● Contender
Velocity	● Not In	● Contender	● Not In	● Not In	● Not In
Virtustream	● Not In	● Not In	● Not In	● Product Challenger	● Not In
Wipro	● Product Challenger	● Leader	● Leader	● Leader	● Leader
Yash Technologies	● Not In	● Contender	● Contender	● Not In	● Contender
Zensar	● Not In	● Product Challenger	● Not In	● Not In	● Not In



SAP HANA and Leonardo Ecosystem Partners Quadrants

ENTERPRISE CONTEXT

SAP S/4HANA System Transformation - Midmarket

This report is relevant to enterprises across industries in the U.S., for evaluating the providers of S/4 HANA consulting and implementation services for the midmarket (companies with less than 5,000 SAP users and revenues of less than \$1 billion).

In this quadrant report, ISG highlights the current market positioning of providers of S/4 HANA consulting and implementation services to the midmarket in the U.S., based on the depth of service offerings and market presence.

Enterprises are reluctant to migrate to S/4 HANA owing to factors such as high costs; difficulties in data management, change management and custom code management; a shortage of talent or skill gap; and uncertainties about integrating with legacy ERP systems. However, many enterprises have implemented or are implementing S/4 HANA as a part of their digital transformation initiatives and choosing the right provider to overcome the challenges and address talent/skill gaps.

Enterprises that have adopted have specific IT infrastructure needs, of which easy scalability and adaptability are the priorities. A service provider can benefit an enterprise client by addressing the challenges (stated above) and providing them with optimal IT infrastructure and SAP security.

Midmarket clients have few complex requirements, with smaller scale of projects, compared with large enterprises. Therefore, mid-sized enterprises prefer providers with strong

onshore and near shore delivery capabilities and high integration capabilities. Most of the mid-size enterprise clients may have non-SAP ERP systems, which means the mid-size clients should particularly look for service providers with migration capabilities and the ability to offer ready-to-use templates or solutions for specific micro-segments.

Who should read the report:

Marketing and sales leaders should read this report to understand the relative positioning and capabilities of service partners that can help them effectively harness SAP S/4 HANA services for day-to-day analysis and dashboarding.

IT and technology leaders should read this report to better understand the strength and weaknesses of service providers in the SAP S/4 HANA ecosystem, and understand how they integrate the latest technologies/capabilities into their S/4 HANA offerings to find a competitive edge in the market.

Sourcing and procurement managers should read this report for a clear understanding of the market and the service provider landscape of S/4 HANA offerings, and to help them identify or distinguish players based on their respective needs.

SAP S/4 HANA SYSTEM TRANSFORMATION – MIDMARKET

Definition

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

SAP HANA and Leonardo Ecosystem Partners
SAP S/4 HANA System Transformation – Midmarket

2020
U.S.



Source: ISG Research 2020

SAP S/4 HANA SYSTEM TRANSFORMATION – MIDMARKET

Eligibility Criteria

- Ability to apply SAP accelerators and templates for agile S/4HANA implementations.
- Capability to deliver advisory and implementation services for midsized client enterprises.
- Availability of ready-to-use templates or solutions for specific micro-segments.
- Ability to offer onshore or nearshore delivery for local clients; offshore delivery is welcome but not required or restricted for participation in this quadrant.

Observations

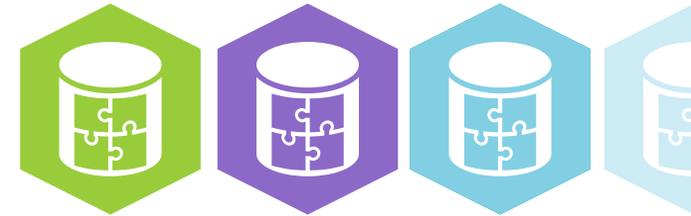
Service providers have created tools and templates to execute S/4HANA conversions and migrations for midmarket enterprises looking for a transformation from their existing ERP systems. Providers have also enhanced their focus on solutions for leading verticals and have created industry-specific templates for speedy S/4HANA implementation for their clients. The provider tools and accelerators serve to reduce implementation time for midmarket clients. As part of their go-to-market strategies, a few providers have targeted regions within the U.S. based on the concentration of industries and midmarket enterprises operating there.

- **Birlasoft**, with its U.S. footprint, customer experience centers and proprietary tools and accelerators for various functions such as monitoring, code conversions, migrations and implementation, becomes a leader in midmarket S/4HANA.
- **Hexaware**, with its Triadic framework for S/4HANA, helps midmarket companies based on their company model and landscape complexity and uses in-house tools and industry solutions.

SAP S/4 HANA SYSTEM TRANSFORMATION – MIDMARKET

Observations

- A combination of midmarket focus, Safe Passage conversion methodology, proprietary tools and accelerators for S/4HANA conversions and a three-pronged go-to-market strategy make **Infosys** a leader.
- **itelligence** (an NTT DATA company) has a large midmarket footprint and offers artificial intelligence (AI)- and machine learning (ML)-led solutions for business lines and industries, coupled with tools for monitoring, code reconciliation and other functions.
- **Mindtree** has showcased technological leadership through its in-house SAP Activate methodology, solutions, technical conversion factory for S/4HANA, project plans, cookbooks and tools that are well suited for midmarket clients, making it a leader.
- **Wipro's** large U.S. SAP practice uses an industry-based market approach along with co-development with SAP. Its established S/4HANA services, tools, accelerators and integrations for S/4HANA make the company a leader in the S/4HANA domain.



BIRLASOFT

Overview

Birlasoft is an Indian IT services provider headquartered in Pune. The company's S/4HANA digital transformation offering is part of its HANA service portfolio. Birlasoft enables S/4HANA digital transformation for its customers through implementations, technical conversion, migration, assessments and digital transformation. Its portfolio also has SAP S/4HANA Cloud, SAP S/4HANA Finance and Central Finance expertise and the Value Harvesting Roadmap (Vh) for HANA services. The company accelerates its clients' digital journeys by using proprietary tools and accelerators that reduce efforts by up to 90 percent. Birlasoft's base of SAP HANA and S/4HANA certified professionals and consultants grew steadily over the previous year in the U.S.

Strengths

Experience-focused customer centers: Birlasoft established a customer experience center in Raleigh, North Carolina, to showcase working demos of various solutions like SAP S/4HANA Industry Solutions, SAP Sales/Service/Commerce Cloud and IoT prototypes on SAP Leonardo. The facilities help visitors to experience digital transformation solutions based on emerging technologies across various SAP technologies.

Tools and accelerators: Birlasoft offers tools and accelerators such as BSL SmartEdge for system monitoring, Birlasoft HANA migration toolkit, ConvertEdge for code scan, intelligent ERP extensions for S/4HANA, BSL Accelerated Model Factory Framework and Birlasoft S4 SmartEDGE preconfigured solutions for the utilities, automotive and other industries. they are available to midmarket S/4HANA customers for both S/4HANA Cloud and Suites on HANA.

SAP expertise: Birlasoft has strong experience in implementing all the modules of the S/4HANA Core (which also includes the modules available in ECC). The company has deployed new S/4HANA innovations such as embedded transportation management, embedded extended warehouse management, embedded BPC and advanced variant configuration.

Caution

Birlasoft is highly focused on the manufacturing and healthcare industries and should consider expanding to other sectors to propel growth of its SAP practice.



2020 ISG Provider Lens™ Leader

Birlasoft is well suited to meet the SAP S/4HANA requirements of midmarket customers in the U.S. through its framework, combination of proprietary tools, accelerators and industry-led delivery approach. Its unique customer experience center in the U.S. provides an experience-led engagement.

HEXAWARE

Overview

Hexaware is an Indian IT service provider headquartered in Navi Mumbai. As a part of its HANA portfolio, the company offers business transformation, cloudification and collaborative SaaS services. Hexaware delivers S/4HANA and S/4HANA Cloud related advisory services, transformations, implementations, migrations and cloudification services using frameworks, preconfigured templates and tools. It uses its ACT and Triadic frameworks to deliver S/4HANA business modernization and landscape transformations for midmarket clients, which contribute more than 60 percent of the company's SAP S/4HANA Transformation revenue. Hexaware has outlined a focused approach for the manufacturing and consumer industries in the Midwest and Los Angeles regions in the U.S.

Strengths

Triadic framework: Hexaware's Triadic framework helps clients in their S/4HANA digital transformation journey by assessing their company model and landscape complexity and offering the optimal path to S/4HANA transformation. The framework reinforces the three dimensions of business model, landscape complexity and cloud appetite collectively, and gives enterprises a choice between a single-step or multi-step approach for the S/4HANA transformation.

Tools and accelerators: Hexaware has several proprietary tools to help in S/4HANA implementations. They include FITRITE for HANA readiness, WATCH for system performance and analytics and traceability, CONFORMIQ for business process assurance model, CloudMorphy for data migration and EZCOPY for automatic environment creation and provisioning.

Industry solutions: Hexaware also offers industry-specific solutions, including a co-manufacturing scenario using S/4HANA with IBP, transportation management and warehouse management.

Caution

Hexaware should increase focus on integrating more advanced AI capabilities such as contextual analytics and predictive capabilities into its SAP and SAP S/4HANA services.



2020 ISG Provider Lens™ Leader

Hexaware's framework, tools, accelerators and industry-focused templates accelerate the S/4HANA business modernization and landscape transformation journey for midmarket clients in the U.S.

INFOSYS

Overview

Infosys' SAP S/4HANA offerings enable landscape and business transformation through solution tools, accelerators and frameworks. Its breadth of services includes models, templates and tools such as the IDEA Activate methodology, Safe Passage Methodology, Catalyst tool and value-added services for S/4HANA and Business Suite on HANA. The company launched the Innov8 program to optimize its existing portfolio, better pursue bundled deals and develop new talent. It has carried out S/4HANA greenfield, brownfield and cloud implementations in the U.S. More than 30 percent of the company's U.S. S/4HANA contracts are with midmarket clients.

Strengths

Safe Passage Methodology: Infosys offers Safe Passage Methodology for brownfield S/4HANA Conversion projects. The methodology has new embedded tools and artifacts to help reduce conversion time and enable value realization for clients.

Tools and accelerators: The company has tools and accelerators to meet the different requirements during S/4HANA implementation or conversions. Some of them include the S/4Assist tool, Business Insighters, Instant Fiori tool, VRM methodology for system analysis, Panaya for test automation, code migration and optimization tool (CMO) for code reconciliation and ValuePlus and AssistEdge for system performance and automation.

Detailed go-to-market (G™) strategy: Infosys has a three prong go-to-market strategy comprised of reactive model, proactive model and channel-based GTM. Some of the focus areas in this GTM strategy include existing business growth, relationship building, a dedicated channel team, joint go to market with SAP, focused industry expansion and value added services for industries.

Caution

Infosys should focus on increasing its base of S/4HANA Cloud implementations to accelerate and tap into prospective clients seeking to move from ECC to S/4HANA in the coming year.



2020 ISG Provider Lens™ Leader

Infosys offers a balanced S/4HANA service portfolio comprising a conversion-focused framework, tools, a detailed go-to-market strategy and a S/4HANA skills development program for SAP professionals.

NTT DATA (ITELLIGENCE)

Overview

NTT DATA offers a wide range of SAP services to large and midmarket enterprises. It offers S/4HANA rapid readiness assessments, strategic advisory, business case development, implementation, upgrades, migrations and rollout services. It offers packaged solutions that are ready to run, one-stop-shop advisory and implementation services along with proprietary intellectual property and add-ons for midmarket clients. Approximately 60 percent of its S/4HANA Cloud implementations have been in midmarket. The company has a large base of clients and skilled resources in the practice.

Strengths

Robust S/4HANA capabilities: NTT DATA offers a spectrum of S/4HANA services ranging from planning to end digital transformation. The company delivers these services using process assessments, workshops and transformation roadmaps which are spread across planning, transition and sprint transformation stages.

Proprietary S/4HANA solutions: NTT DATA has a large set of proprietary business line and industry solutions within the S/4HANA, S/4HANA Cloud and Business Suite portfolio. For example, Itelligence, a fully owned subsidiary of NTT DATA, offers Add-On Hire and Rental, Add-On Cash and Countersales, it.BI booster for analytics, it.mds for master data services, it.lifescience, it.pharmazeuticals, it.healthcare and it.automotive.

Delivery focus on reducing time and TCO: NTT DATA has tools and accelerators to help customers reduce TCO and implementation time. These include Uptimizer, 6X Extreme automation for system monitoring and code reconciliation CI/CD.

AI- and ML-centric S/4HANA service: NTT DATA embeds artificial intelligence and machine learning in its S/4HANA roadmap, which includes end-to-end bot lifecycle, RPA tools, partnership with automation providers and more than 100 RPA analysts, developers and other staff resources.

Caution

Although NTT DATA increased its S/4HANA experts and S/4HANA certified professionals, it needs to translate this into client growth in the U.S.



2020 ISG Provider Lens™ Leader

NTT DATA has a large SAP S/4HANA practice and has expanded its trained resources and experts. Its offers S/4HANA services for all the stages, from planning and assessment to end transformation.

The company fortifies its services with tools, accelerators and ready-to-use templates that help in achieving speed and reducing complexity in implementation services.

MINDTREE

Overview

Mindtree is a leading IT services provider whose wide range of SAP S/4 HANA services include greenfield implementation, a technical conversion factory, SMART implementation, public cloud implementation, Central Finance implementation, S/4HANA business case and roadmap offerings and Business Suite on HANA implementation. These services are offered in combination with tools and accelerators that are available for the CPG, manufacturing, apparel and footwear, aftermarket and retail industries. A strong SAP partner, Mindtree has a history of co-innovation of SAP and also partners with several tools-based service providers such as CBS, SNP and Inveny. Mindtree grew its S/4HANA customer base in 2019.

Strengths

In-house methodology for S/4HANA implementation: Mindtree uses its in-house methodology, an enhanced version of SAP Activate, for S/4HANA implementation. The company has enriched this by supporting it with accelerators. Some of Mindtree's differentiators include industry templates, its implementation approach (hybrid with partners), business case offerings, roadmap development guidance and other advisory services.

Proprietary solutions: Mindtree offers proprietary solutions such as a technical conversion factory for S/4HANA, project plans, cookbooks powered by MAPS (Mindtree Accelerated Platform for S/4HANA), custom code remediation, testing scripts, machine learning applications, the MOTIF solution for order fulfillment and machine learning (ML) applications for maintenance for S/4HANA, S/4HANA Cloud and Business Suite on HANA.

Tooling to support rollouts: The company also offers tools and accelerators such as SAP S/4 CFIN template, S/4HANA remediation tool set, SAP semi-automatic code remediation, SAP manufacturing template, SAP consumer packaged goods template, SAP AFS and SAP aftermarket services template to accelerate implementation for midmarket clients.

Caution

With economic uncertainty looming due to COVID-19, Mindtree should reduce focus from manufacturing and consumer goods and spread to other industries to maintain a steady growth from SAP services.



2020 ISG Provider Lens™ Leader

Mindtree has a strong repertoire of S/4HANA capabilities for midmarket clients and offers S/4HANA-specific implementations, conversions and migrations. It has used AI and ML to build several tools and accelerators for specific industry requirements, code remediation and maintenance, which help accelerate the client's digital transformation journey.

WIPRO

Overview

Wipro has an established SAP practice and the U.S. contributes to more than 30 percent of the company's SAP and Leonardo revenues. Wipro follows an industry-based market approach using specific offerings, industry-oriented roadshows and digital solution packages. Utilities, energy, manufacturing, automotive, consumer goods and high tech are the company's leading focus industries. Wipro engages with SAP through joint go-to-market strategizing, demand generation and co-selling activities. The company has been an SAP Global Strategic Services Partner and an SAP S/4HANA co-development partner for the retail and fashion industries. It has 20 percent of its S/4HANA implementations in the midmarket in the U.S.

Strengths

Established SAP S/4HANA practice: Wipro offers S/4HANA assessment, implementation and consulting services for its customers with a focus on the oil and gas, utilities, mining, manufacturing, automotive, retail and consumer goods, real estate and high-tech industries. The services it provides cover business value scope, an implementation plan, deployment strategy, testing plan and digital journey roadmap.

Robust set of framework, tools and accelerators: Wipro's proprietary SPEED 3.0 (Systems and Processes Enabled for Excellence in Delivery) framework is built on SAP's Activate methodology for implementations. Wipro has other proprietary assets including its Safe Passage to S/4HANA framework and MigMan (Migration Manager), which is a tool-based framework to augment the Safe Passage Methodology. The tool adds accuracy in planning and executing Suite on HANA (SoH) or S/4HANA migration projects.

Integrations with S/4HANA Cloud: Wipro offers integrations with SAP SuccessFactors, Ariba, Analytics Cloud, Integrated Planning, Hybris, Fieldglass, Central Finance and Concur. The company has already completed integration contracts for Integrated Planning, SuccessFactors and Ariba for S/4HANA Cloud.

Caution

Although Wipro has customers in S/4HANA Cloud, it could focus on expanding the base to tap into a larger market opportunity among midmarket companies in the U.S.



2020 ISG Provider Lens™ Leader

Wipro has a robust SAP S/4HANA practice with U.S. focus. It offers a wide portfolio of assessment, implementation and consulting services with frameworks, tools and accelerators to serve clients across various industries. The company has been a strong SAP partner and the partnership has evolved into co-innovation initiatives. Wipro also has a large staff of SAP practitioners and a balanced portfolio of implementations and conversions.

PRODUCT CHALLENGER: MINDSET

Overview

Minneapolis-based Mindset offers SAP services to improve the UX and customer experience of SAP solutions. The company provides design thinking-led UX/Fiori applications, end-to-end implementation services for SAP S/4HANA, enterprise warehouse management, transformation management, managed services and SAP talent solutions. Mindset is the only SAP AppHaus Design partner in the U.S. and has over 60 SAP clients. The company is focused on client satisfaction with an high NPS (Net Promotor Score) of 74.

Strengths

Design thinking focus: Mindset offers design thinking-driven custom development for SAP. It provides transformational value services for S/4HANA, which go beyond plain technical implementation or migration and are delivered using its blueprinting PLUS Design Thinking approach. Its design thinking-led Fiori deliverables reveal the strengths of the dynamic tiles and data within the application for its clients.

S/4HANA framework: Mindset offers a framework-driven approach for S/4HANA services with a focus on data, partner collaborations, unified user experience, and adoption of agile methodology to accelerate transformations.

Capabilities for S/4HANA digital transformation: The company offers services for the entire S/4HANA journey, covering value assessment, adoption, strategy, roadmap, proof of concepts (PoCs), migration, implementation and go-live execution built on design-oriented, agile-based processes.

Caution

The company should focus on expanding its base of certified consultants for SAP S/4HANA and SAP HANA.



2020 ISG Provider Lens™ Product Challenger

Mindset offers a broad portfolio of SAP S/4HANA services that are based on design thinking, UX and agile processes. It covers various phases of the S/4HANA transformation journey to meet the digital transformational needs of enterprise clients.



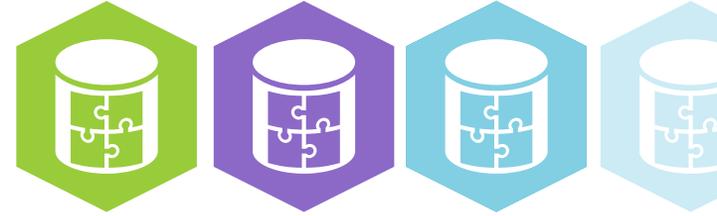
Methodology

METHODOLOGY

The ISG Provider Lens™ 2020 SAP HANA and Leonardo Ecosystem Partners research study analyzes the relevant software vendors and service providers in the U.S. 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 and Leonardo Ecosystem Partners market
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & use cases
4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)
5. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & 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



Authors and Editors



Kartik Subramaniam, Author

Lead Analyst

Kartik Subramaniam is the Lead Analyst for ISG's Provider Lens™ reports for Next-gen ADM and SAP HANA and Leonardo Ecosystem Partners . He brings in over 11 years of experience in primary and secondary research, advisory and consulting services from leading IT and research companies such as Accenture, IBM, IDC and TNS. Kartik has worked on research notes, briefing notes, industry speaking engagements, blogs and advisory engagements in the areas of offering in application development and maintenance, SAP, multi layered/pace layered IT/applications, cybersecurity and infrastructure services. Apart from research, Kartik also worked closely with strategy and sales teams providing insights on strategic planning for offerings and creating seller enablement deliverable through analytics at Accenture and IBM respectively.



ArulManoj M, Enterprise Context and Global Overview Analyst

Senior Analyst

Arul has been working with ISG for more than two years and his area of expertise is on Application Development & Maintenance (ADM). During his tenure, he has developed content for ISG Provider Lens™ in the areas of Next-gen Application Development & Maintenance (ADM), SAP HANA and Leonardo Ecosystem and Data Analytics Services & Solutions. As part of ISG Provider Lens™, Arul is responsible for supporting research authors and authoring blogs about niche technologies, market trends and insights.

Authors and Editors



Jan Erik Aase, Editor

Director

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.

ISG Provider Lens™ Report: SAP HANA and Leonardo Ecosystem Partners

July 2020

© 2020 Information Services Group, Inc. All Rights Reserved



ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 700 clients, including more than 75 of world's top 100 enterprises, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis. Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,300 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data. For more information, visit www.isg-one.com.