

***ISG** Provider Lens™

SAP HANA® Services

Germany 2019

Quadrant
Report



A research report
comparing provider
strengths, challenges
and competitive
differentiators

August 2018

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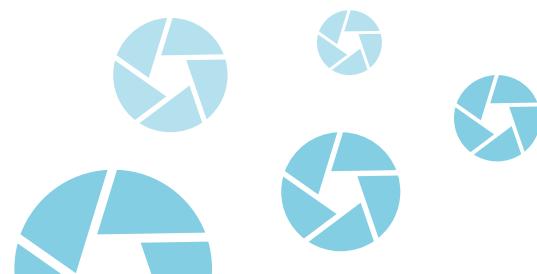
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EXECUTIVE SUMMARY

Recently, the market for HANA-based system landscapes has been characterized by its increasing focus on new products such as BW/4HANA, S/4HANA etc., while the focus on potential temporary migration solutions based on the HANA database, e.g., Business Suite on HANA, is decreasing. Reasons for this development include SAP's completion of functionality of these new products and also SAP's announcement to discontinue support for current products by 2025. All companies with comprehensive SAP system landscapes must now consider suitable roadmaps for the required migrations by 2025.

Many of these user organization are still rather uncertain regarding the business case, specifically when migration is mostly perceived as migration to a new version without accounting for additional business benefits achieved through HANA-based system landscapes or when such benefits cannot be evaluated and assessed due to a lack of experience. For providers within this segment it is essential to not only provide support for technical issues but to also bring in comprehensive expertise for developing a suitable system strategy and roadmap for the individual user company. Considering this timeframe until 2025, the rather hesitant involvement with required migrations and the expected scope of efforts, we expect significantly increasing demands for respective service offerings. In the large enterprise segment, this will drive the trend towards providers with global delivery structures, since these providers are probably able to actually supply the required resources. Respective offerings, for instance, "migration factories", are already available, and specifically companies with a high degree of SAP adoption will achieve respective

benefits. On the other hand, medium-sized businesses with only few SAP installations are interested in support by medium-sized providers with highly local delivery structures, since local closeness facilitates, for instance, agile project methodologies.

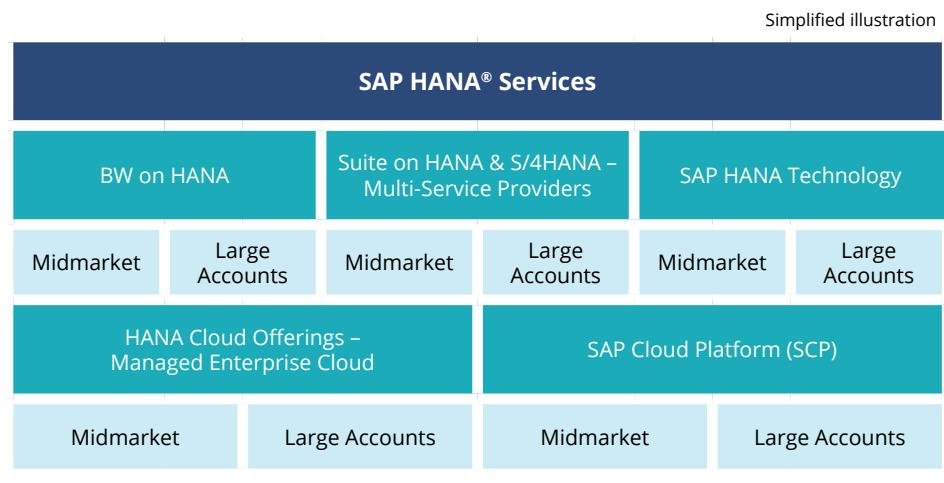
Another significant influencing factor in this market is the rapid extension of cloud-based infrastructure for SAP HANA. Hyperscale providers such as Amazon Web Services or Microsoft Azure have driven and enhanced their local presence and for most upcoming projects, decision-makers are also considering options to a cloud-based deployment model. SAP, too, is driving this trend through their "Cloud First" strategy and respective proprietary offerings, e.g., the HANA Enterprise Cloud (HEC). Within this context, it is important to have in mind that public cloud adoption requires a significantly higher degree of standardization, compared to previous implementations.

Another challenge for companies with a high degree of SAP adoption is SAP's high speed of innovation. For many of these companies developing a roadmap for the next few years will be a continuous effort, since such new developments often require continuous modification to the respective strategy. Providers are challenged to remain up-to-date with latest developments to be able to proactively evaluate and assess their impact on their clients' roadmaps and system strategies accordingly.

Introduction

Definition

During the last few years, various database providers have established the in-memory technology, where, as opposed to traditional technologies, a large part or all relevant application data are stored in the memory of the respective hardware in use. A direct benefit is accelerated access to data and, thus, much faster applications. First use cases were often related to data analytics applications. Meanwhile, the focus is shifting to novel business processes in transactional applications, based on the drastically improved performance. Within this context, SAP's HANA technology offering probably has the strongest impact, since this technology goes beyond mere infrastructure aspects to address the broad SAP application portfolio; also, it can be combined with data management optimization approaches (data aging) and improves the integration of data analytics with transactional systems. SAP's S/4HANA product radically simplifies database structures within the SAP Business Suite ("Run Simple"). Meanwhile SAP has launched BW/4HANA, a new version of their Business Warehouse, based on and optimized for the HANA database; since early 2018 C/4HANA, a new CRM solution, has been available in the market. Another increasingly important factor is SaaS-based provisioning, which is also demonstrated with SAP's "Cloud First" strategy. Considering the high share of existing installations, demand for competent on-premise support services will remain high for the foreseeable future.



Definition (cont.)

SAP has meanwhile announced that support for the S/4HANA-based versions of their SAP Business Suite will be discontinued by 2025 and has thus set a timeline for upcoming migrations, which will increase the demand for respective qualified staff significantly. Considering this situation, companies are still slow to initiate respective migration projects, which might cause bottlenecks in the years to come. For providers who offer relevant services this is an opportunity but also a challenge.

SAP has meanwhile provisioned the SAP Cloud Platform (SCP) as a centralized platform that allows users to integrate systems within their individual system landscape as well as perform integration within IoT environments, i.e., the Internet of Things, for instance, sensor-based production data, machine learning functionality etc. Thus, SCP is key for future innovations and plays a decisive role within the SAP HANA context.

Bw On Hana

BW on HANA refers to services that address the usage of the HANA database for data analytics applications, with a focus on the SAP Business Warehouse. This category includes providers that offer such services and competences to clients from the midmarket and/or large accounts segment.

Services include consulting on the technological possibilities of the in-memory technology for data analytics and implications for the system landscape. Implications for large accounts are often significant, since many of these companies have large-scale BW applications. Key for the successful usage of technology also include support of common data analytics as well as specific methodologies and approaches for in-memory technology, specifically the definition and implementation of data structures. Comprehensive competences also include providers' support to help their clients implement, go live and operate their systems, for instance, based on suitable operational concepts.

Definition (cont.)

Suite On Hana & S/4Hana – Multi-Service Provider

This segment includes providers that offer a comprehensive solution portfolio, from strategic consulting, design and planning to installation, going live and subsequent operations of Business Suite on HANA and S/4HANA. The focus is on the midmarket and large accounts segment.

Requirements include comprehensive know-how of these technologies as well as in-depth process and industry-specific know-how and related skills to design suitable solutions for the client's respective situation. Also, the providers must have implementation competence with SAP's standards. Other strengths include comprehensive experience with multiple system landscapes. Within the large accounts segment, existing, rather complex system landscapes pose an additional challenge.

SAP Hana Technology

This segment includes providers whose offering addresses the technological aspects of HANA projects, including the respective platform, and who have a focus on the large accounts segment. Competences include strategic consulting, the selection of suitable hardware (for in-house operations), HANA PaaS provisioning (if required), cost analyses and related operations concepts. Additional offerings include technical infrastructure provisioning and installation, go-live support and support for subsequent operations. Normally, this requires intense cooperation with SAP to comply with standards as well as respective certification. While many large accounts still prefer in-house operations; the degree of adoption of PaaS offerings is increasing.

Definition (cont.)

Hana Cloud Offering – Managed Enterprise Cloud

This segment includes providers of services for a managed platform as a service, based on SAP HANA. Such cloud service also supplies related system management services and may include sales of the SAP HANA Enterprise Cloud (SAP HEC). This category includes providers that offer such services and competences to clients from the midmarket and/or large accounts segment.

Relevant service components include requirements analysis for the respective application, technical design, implementation and subsequent operations. Additional challenges for providers that address the large accounts segment include the complex system landscapes within such large enterprises and resulting hybrid operations. Normally, this requires intense cooperation with SAP to comply with standards as well as respective certification.

SAP Cloud Platform (SCP)

This segment has a focus on services that are based on the SAP Cloud Platform (SCP), an in-memory-based platform for application development and integration. This category includes providers that offer such services and competences to clients from the midmarket and/or large accounts segment.

SCP can be used to develop new internal as well as cloud-based applications and provides capabilities and options to advance existing applications and implement integration use cases (e.g., hybrid cloud). Within this context, services include support to help clients use SCP and also offerings of project activities to be conducted by the provider for their clients. Requirements include in-depth technological know-how and related skills to use this technology adequately within the client's respective environment. Considering the highly complex system landscapes of many large enterprises, this poses major challenges within the large accounts segment.

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

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 Star" 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 Star" 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® Services - Quadrant Provider Listing 1 of 4

	BW on HANA		Suite on HANA & S/4 HANA		SAP HANA Technology		HANA Cloud Offerings - Managed Enterprise Cloud		SAP Cloud Platform (SCP)	
	Midmarket	Large Accounts	Midmarket	Large Accounts	Midmarket	Large Accounts	Midmarket	Large Accounts	Midmarket	Large Accounts
abat	● C	● Not in	● C	● Not in	● Not in	● Not in	● Not in	● Not in	● Not in	● Not in
Accenture	● Not in	● MC	● Not in	● MC	● Not in	● Not in	● Not in	● Not in	● Not in	● MC
Devoteam Alegri	● PC	● Not in	● L	● PC	● Not in	● Not in	● C	● Not in	● PC	● Not in
All for One Steeb	● Not in	● Not in	● L	● PC	● L	● PC	● PC	● PC	● PC	● PC
Allgeier	● MC	● Not in	● PC	● PC	● PC	● Not in	● Not in	● Not in	● PC	● PC
AWS	● Not in	● Not in	● Not in	● Not in	● Not in	● Not in	● L	● L	● Not in	● Not in
Arvato	● PC	● PC	● RS	● PC	● PC	● PC	● Not in	● Not in	● RS	● PC
Atos	● L	● L	● L	● L	● L	● L	● L	● L	● L	● L
Avantum	● PC	● PC	● Not in	● Not in	● Not in	● Not in	● Not in	● Not in	● Not in	● Not in
Axians	● Not in	● Not in	● PC	● PC	● Not in	● Not in	● Not in	● Not in	● Not in	● Not in
BearingPoint	● Not in	● MC	● Not in	● MC	● Not in	● Not in	● Not in	● Not in	● Not in	● MC

● L – Leader / ● PC – Product Challenger / ● C – Contender / ● MC – Market Challenger / ● RS – Rising Star

SAP HANA® Services - Quadrant Provider Listing 2 of 4

	BW on HANA		Suite on HANA & S/4 HANA		SAP HANA Technology		HANA Cloud Offerings - Managed Enterprise Cloud		SAP Cloud Platform (SCP)	
	Midmarket	Large Accounts	Midmarket	Large Accounts	Midmarket	Large Accounts	Midmarket	Large Accounts	Midmarket	Large Accounts
Camelot ITLab	● PC	● PC	● PC	● PC	● Not in	● Not in	● Not in	● Not in	● Not in	● Not in
CANCOM	● Not in	● Not in	● Not in	● Not in	● L	● PC	● PC	● PC	● Not in	● Not in
Capgemini	● Not in	● L	● Not in	● L	● Not in	● Not in	● Not in	● Not in	● Not in	● MC
cbs	● PC	● Not in	● L	● PC	● Not in	● Not in	● Not in	● Not in	● L	● L
Cognizant	● Not in	● PC	● Not in	● Not in	● Not in	● Not in	● Not in	● Not in	● Not in	● Not in
Computacenter	● Not in	● Not in	● Not in	● Not in	● MC	● PC	● Not in	● Not in	● Not in	● Not in
CubeServ	● L	● L	● Not in	● Not in	● Not in	● Not in	● Not in	● Not in	● Not in	● Not in
DATAGROUP	● Not in	● Not in	● Not in	● Not in	● PC	● PC	● Not in	● Not in	● Not in	● Not in
Deutsche Telekom / T-Systems	● L	● L	● L	● L	● L	● L	● L	● L	● L	● L
Deloitte	● Not in	● Not in	● Not in	● MC	● Not in	● Not in	● Not in	● Not in	● Not in	● Not in
DXC Technology	● L	● L	● L	● L	● L	● L	● L	● L	● L	● L

● L – Leader / ● PC – Product Challenger / ● C – Contender / ● MC – Market Challenger / ● RS – Rising Star

SAP HANA® Services - Quadrant Provider Listing 3 of 4

	BW on HANA		Suite on HANA & S/4 HANA		SAP HANA Technology		HANA Cloud Offerings - Managed Enterprise Cloud		SAP Cloud Platform (SCP)	
	Midmarket	Large Accounts	Midmarket	Large Accounts	Midmarket	Large Accounts	Midmarket	Large Accounts	Midmarket	Large Accounts
FIS	● PC	● Not in	● PC	● Not in	● PC	● Not in	● Not in	● Not in	● PC	● Not in
FIT	● L	● PC	● L	● PC	● L	● PC	● PC	● PC	● L	● PC
Fujitsu	● L	● L	● L	● L	● L	● L	● L	● L	● L	● L
GISA	● Not in	● Not in	● C	● Not in	● C	● Not in	● Not in	● Not in	● Not in	● Not in
HCL	● Not in	● C	● Not in	● Not in	● Not in	● Not in	● Not in	● Not in	● Not in	● Not in
IBM	● Not in	● Not in	● Not in	● Not in	● Not in	● L	● Not in	● Not in	● Not in	● Not in
Infosys	● Not in	● PC	● PC	● PC	● Not in	● C	● Not in	● PC	● Not in	● L
Innovabee	● Not in	● Not in	● L	● Not in	● Not in	● Not in	● Not in	● Not in	● PC	● Not in
itelligence	● L	● L	● L	● L	● L	● L	● PC	● PC	● MC	● MC
KUEHBERGER IT	● Not in	● Not in	● Not in	● Not in	● C	● Not in	● Not in	● Not in	● Not in	● Not in
metafinanz	● C	● Not in	● C	● Not in	● Not in	● Not in	● Not in	● Not in	● C	● Not in

● L – Leader / ● PC – Product Challenger / ● C – Contender / ● MC – Market Challenger / ● RS – Rising Star

SAP HANA® Services - Quadrant Provider Listing 4 of 4

	BW on HANA		Suite on HANA & S/4 HANA		SAP HANA Technology		HANA Cloud Offerings - Managed Enterprise Cloud		SAP Cloud Platform (SCP)	
	Midmarket	Large Accounts	Midmarket	Large Accounts	Midmarket	Large Accounts	Midmarket	Large Accounts	Midmarket	Large Accounts
MHP	● PC	● PC	● PC	● C	● C	● C	● Not in	● Not in	● C	● PC
Microsoft	● Not in	● Not in	● Not in	● Not in	● Not in	● Not in	● L	● L	● Not in	● Not in
QSC	● C	● Not in	● Not in	● Not in	● PC	● Not in	● Not in	● Not in	● C	● Not in
Red Hat	● Not in	● Not in	● Not in	● Not in	● PC	● Not in	● Not in	● Not in	● Not in	● Not in
Scheer	● PC	● PC	● PC	● PC	● PC	● PC	● PC	● C	● C	● C
SNP	● Not in	● Not in	● MC	● C	● Not in	● Not in	● Not in	● Not in	● Not in	● Not in
Sopra Steria	● C	● Not in	● C	● C	● Not in	● Not in	● Not in	● Not in	● Not in	● Not in
TCS	● PC	● PC	● PC	● L	● PC	● PC	● C	● PC	● PC	● PC
Wipro	● Not in	● C	● Not in	● Not in	● Not in	● PC	● Not in	● C	● Not in	● Not in

● L – Leader / ● PC – Product Challenger / ● C – Contender / ● MC – Market Challenger / ● RS – Rising Star

SAP HANA® Services Quadrants

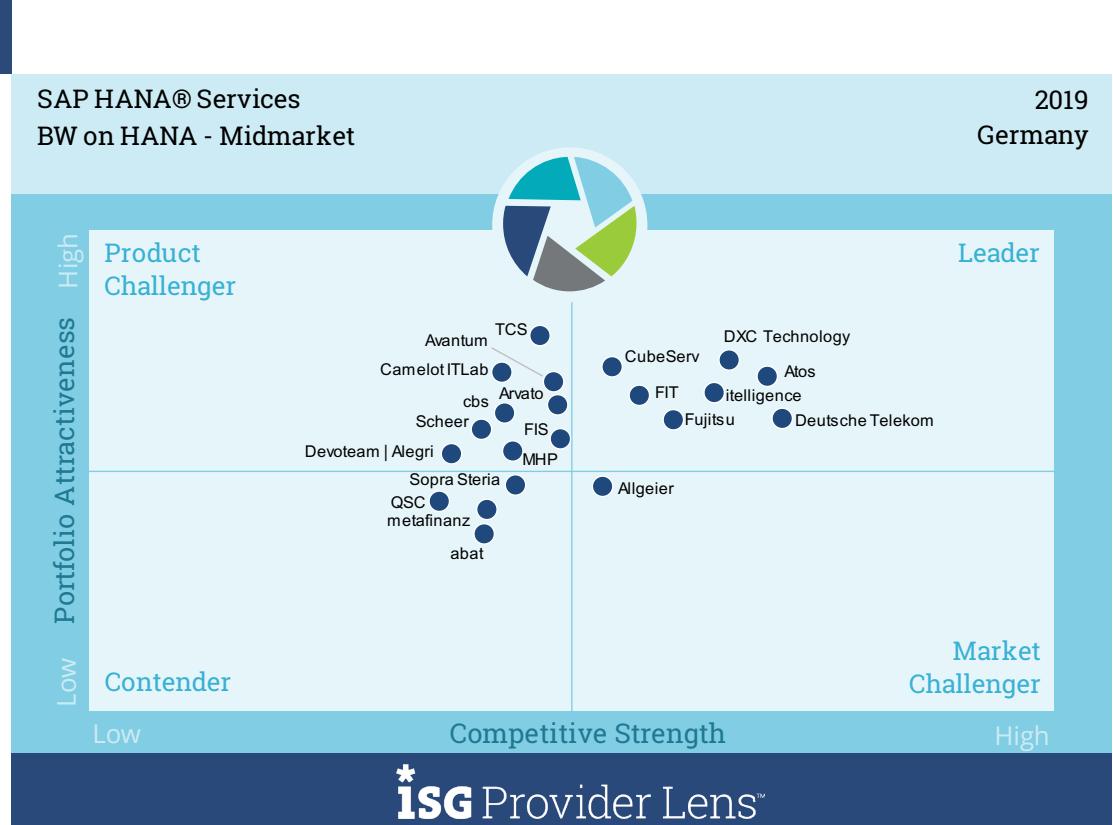


BW ON HANA – MIDMARKET

Definition

BW on HANA refers to services that address the usage of the HANA database for data analytics applications, with a focus on the SAP Business Warehouse. This category includes providers that offer such services and competences to clients from the midmarket segment.

Services include consulting on the technological possibilities of the in-memory technology for data analytics and implications for the system landscape. Key for the successful usage of technology also include support of common data analytics as well as specific methodologies and approaches for in-memory technology, specifically the definition and implementation of data structures. Comprehensive competences also include providers' support to help their clients implement, go live and operate their systems, for instance, based on suitable operational concepts.



BW ON HANA – MIDMARKET

Observations

- HANA has become the standard for SAP-based Business Warehouse applications. The previous Business Accelerator version, which is also based on in-memory technology, is hardly used anymore for new installations.
- With their recently launched BW/4HANA product SAP pursues a consistent strategy which targets at renewing the range of products to better leverage HANA-related opportunities. To limit the volume of data stored in-memory and thus achieve a sustainable cost level remains a key challenge. All leading providers have included respective services into their portfolio.
- Another important aspect for companies who run their transactional systems on S/4HANA is the use of the embedded BW on these systems for operational reporting purposes. In this case, data replication into a reporting system, e.g., an SAP BW, can often be eliminated or it is at least possible to significantly reduce the volume of data to be replicated. In some medium-sized businesses, the need for a separate reporting system may even be eliminated completely, which also reduces related efforts significantly and may have a clearly positive impact on respective HANA-related transformation projects. Leading providers also offer services to address this topic.
- Atos, CubeServ, Deutsche Telekom, DXC Technology, Freudenberg IT (FIT), Fujitsu and itelligence were able to maintain or even strengthen their leadership position. Capgemini is a newcomer to the leader quadrant, due to their convincing HANA-based business intelligence portfolio.

ATOS



Overview

Atos provides a comprehensive analytics portfolio, and BW on HANA or BW/4HANA are essential components of this offering, including more recent technological developments such as machine learning or IoT. Atos also accounts for optimization of a client's whole system architecture and related implications, rather than only addressing BW on HANA-specific aspects; this is specifically important for successful cost management within analytics use cases, which can also be applied within medium-sized businesses.



Strengths

Atos has comprehensive technological BW on HANA & BW/4HANA competence to address both transformation into a HANA-based analytics landscape and enhancements to an existing landscape. The portfolio of methods and procedures comprises all relevant phases, from conceptualization (e.g., data modelling, system strategy development) and implementation (e.g., design and development of efficient reports, integration of external data) to operations, which is supported by the provider's self-developed BW on HANA Cockpit.

The offering addresses both established topics and future-oriented developments, including forecasting approaches such as predictive maintenance as well as IoT aspects such as the integration of machine data which are captured directly within the respective process. For the latter approach, standardized connectivity to the cloud-based, open IoT operating system Mindsphere is available. The provider is also engaged in cooperation with SAP to develop connectivity to SAP Leonardo to address topics such as machine learning.

Atos addresses the requirements of midmarket businesses through lean approaches such as an agile project methodology or the development of models for easy-to-use operational reporting, supported by respective demo landscapes. Proof-of-concept packages with defined content and technical scopes are also available and are especially suited to determine basic solutions for midmarket businesses.

Defining and implementing a comprehensive data management to limit the amount of data to be stored (data aging) is an integral component of the portfolio.

Atos also has many references in the German midmarket segment.



Caution

The provider should present their offering with a focus on lean approaches to navigate midmarket businesses through the multitude of technological and methodological aspects.

It is not easy to understand the positioning of BW on HANA & BW/4HANA services in relation to the overall "Codex" analytics offering and a clearer description should be provided accordingly. The SAP 4 Codex initiative is a first step in this direction.



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Atos provides a comprehensive offering for designing, implementing and using BW on HANA & BW/4HANA and lean methods and procedures are available to specifically address midmarket requirements.

CUBESERV



Overview

CubeServ is a business intelligence, advanced analytics and information management specialist with a regional focus on the DACH region and a focus on SAP products; the provider has comprehensive know-how and many years of implementation experience to address all BW on HANA & BW/4HANA aspects as well as related products such as Business Objects, Lumira or Crystal Reports.



Strengths

CubeServ has a comprehensive portfolio of methods and procedures, supported by suitable templates, checklists etc. The targeted use of proprietary and SAP tools ensures an efficient approach both for consulting and implementation projects. The CubeServ portfolio, based on BW on HANA & BW/4HANA, also includes all relevant business intelligence components by SAP.

The technological basis is complemented with predefined standardized business solutions, such as for HR or the supply chain. The CubeServ offering is transparent for customers, based on standardized service packages, which helps clients plan concrete projects.

Their self-developed "CubeServ Analysis Office Report Book" is a powerful solution for integrating analytics applications in Microsoft Excel.

The portfolio also includes offerings to transform analytics applications into the cloud, primarily based on respective SAP offerings such as SAP Cloud Analytics. The provider's proprietary business solutions, e.g., predefined HR analytics cloud content, can also be deployed in the cloud.

Adequate support is provided for innovative approaches, such as predictive analytics, process mining or machine learning.

The portfolio also contains offerings for operating mid-sized analytics applications, to also allow midmarket businesses to benefit from the provider's comprehensive SAP competence.



Caution

Due to the provider's focus on business intelligence, advancements of the whole system landscape outside of BW are limited.

While specific functional expertise is available for some selected areas, the provider needs to fill gaps outside HR and supply chain use cases.



2019 ISG Provider Lens™ Leader

As a business intelligence specialist with a strong focus on respective SAP products CubeServ provides competent and comprehensive support for all phases of the development process and application management.

DEUTSCHE TELEKOM



Overview

In the European and, specifically, the German market Deutsche Telekom is an important provider of HANA services with BW on HANA & BW/4HANA as essential components. Based on their strong infrastructure and platform competence all application-related services for all phases of the development process and for application operations are available. A special focus is on larger midmarket businesses.



Strengths

Based on a "HANA Ready Assessment for BW", Deutsche Telekom's respective portfolio comprises a variety of tools, assessments and workshops for all phases of the decision-making and development process. The provider's competence also covers overall system architecture aspects, for instance, volume data management as a tool to better design respective systems through data tiering, nearline storage and archiving to facilitate system management and control. The provider has many years of experience in these areas.

Deutsche Telekom accounts for potential optimizations within HANA-based system landscapes for business intelligence, e.g., by leveraging embedded BW on the respective S/4HANA transactional systems for operational reporting purposes, which is specifically relevant for midmarket businesses, since such approach limits the volume of data to be stored in the BW and minimizes related costs accordingly.

Powerful standard solutions for dashboards to visualize reports are also included in the portfolio.

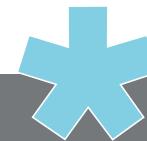
Innovative areas such as predictive analytics are supported through respective concepts and through R&D labs. The portfolio also includes connectivity to IoT components, e.g., for integrating sensor-based data collection in business intelligence solutions.



Caution

The focus of the portfolio is on platform-related and technical aspects of HA-NA-based solutions for business intelligence. The provider should strengthen their data model and content competence, for instance, through suitable functional reference models.

The comprehensive offering is rather complex for midmarket businesses. The provider should offer suitable and lean standard analysis and implementation packages.



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Deutsche Telekom provides a comprehensive end-to-end BW on HANA & BW/4HANA portfolio, complemented by innovative approaches.

DXC TECHNOLOGY



Overview

DXC Technology is a global full IT service provider (infrastructure, consulting, implementation and operations support) with a strong presence in the DACH region. The SAP portfolio is a core part of the DXC offering, and BW on HANA & BW/4HANA plays a key role for business intelligence purposes. Sufficient scalability is ensured, so the solutions are suitable for midmarket businesses as well as large enterprises.



Strengths

DXC has a broad offering of methodologies and procedures (DXC Global Method for Strategy & Planning) for BW on HANA & BW/4HANA that address system design as well as data management (archiving, data tiering, nearline storage) topics. DXC provides implementation support not only for SAP standard products but also for many available front-ends. Numerous offerings are available for system operations support, e.g., BW Housekeeping or BW Testing as a Service.

The portfolio is not limited to technology-driven aspects but also includes comprehensive analytics consulting services with a strong focus on the respective client's relevant aspects.

Big data aspects, both for external data integration and data management, are addressed adequately. Examples include Hadoop-based data volume management and query management based on SAP HANA VOEA, i.e., open-source components are also included.

Innovative topics such as predictive analytics or IoT are also addressed. Connectivity with the Leonardo IoT framework promoted by SAP is also an integral part of the service offering.

The available demo system landscape provides comprehensive coverage of these components, including implementation within a managed cloud.



Caution

The large range of offerings is not easy to understand. Predefined standard packages with a limited degree of complexity would make it easier to master the large variety of topics as well as design and tool decisions, especially for midmarket businesses.

Offerings and solutions are sometimes presented in German and sometimes in English, for no obvious reason, which is particularly confusing for midmarket businesses, who are uncertain about whether or not the local organization can provide the required competencies.



2019 ISG Provider Lens™ Leader

Based on their broad technology and application know-how, DXC Technology is able to provide comprehensive BW on HANA & BW/4HANA support.

FREUDENBERG IT



Overview

Freudenberg IT (FIT) is the captive IT service provider of the Freudenberg Group, a global technology company whose portfolio includes products, solutions and services for multiple sectors, including the automotive, machine engineering, textile, construction and telecommunications industries. As opposed to many other captive IT service providers Freudenberg IT also offers their services to external clients with the same portfolio depth; the focus is on globally active companies with a high manufacturing share. The SAP product range, specifically, HANA-based applications, constitute a key component of Freudenberg IT's portfolio, including business intelligence with services for BW on HANA & BW/4HANA.



Strengths

FIT has deep know-how of their clients' Business Warehouse needs, specifically within Industry 4.0 use cases in the manufacturing industry. The integration of data from the process control level via SAP MII is a key component of the portfolio and is also used for predictive analytics approaches. Respective services are also available as predefined packages (IoT as a service), which is especially attractive for midmarket businesses with limited internal resources.

The service portfolio comprises methodologies and procedures for the respective analytics application as well as system design within an overall HANA concept, including embedded BW for operational reporting directly out of transactional S/4HANA systems.

System design and operations also account for data management aspects. For instance, both data aging and information life cycle management solutions are supported, which contributes to clients' cost management efforts, which is especially significant for midmarket businesses.

Freudenberg IT has a clear concept for integrating big data into the respective analytics application. The focus is on Hadoop integration to manage large data volumes.



Caution

A stronger involvement of reference models for analytics applications, for instance, for financial reporting, would improve the efficiency of the design phase within projects even more. Overall, a stronger focus should be put on the content of analytics applications.

Freudenberg IT, as a captive service provider, is challenged to convince customers and assure them that they enjoy the same priority as internal clients.



2019 ISG Provider Lens™ Leader

Freudenberg IT provides a comprehensive BW on HANA & BW/4HANA portfolio with a focus on Industry 4.0 and also addresses system optimization aspects, with a focus on a suitable data management approach.

FUJITSU



Overview

Fujitsu is a global full IT service provider; the original portfolio had a focus on infrastructure services and related hardware and was massively enhanced during the last few years to also include application-related services, with a focus on SAP-related services, including HANA. The provider has also strengthened their presence in the DACH region significantly and has evolved into an important player within this segment.



Strengths

For BW applications, Fujitsu can leverage their industry-specific know-how of sectors such as the process-oriented and discrete manufacturing industries, the retail and the public sector. The Fujitsu corporation includes divisions with activities in the manufacturing industry, and therefore, the provider's know-how of this segment is especially high. For instance, a best practice for predictive analytics is available, which also covers maintenance aspects. Fujitsu's data scientists help clients with their BW on HANA analytics applications.

Fujitsu has a well-developed governance and strategy procedure model for business analytics that addresses clients' specific requirements. This model serves as basis for validated analytics application implementations in the pharmaceutical industry.

Fujitsu supports all kinds of delivery models, from on-premise solutions to cloud-based and hybrid approaches. Besides traditional analytics topics big data aspects are also addressed, based on the provider's "Data Lake" data management platform.

Fujitsu provides their own S/4HANA BI template, including predefined reports for multiple lines of business to allow for operational reporting without data replication and directly out of a transactional S/4HANA system.



Caution

The presentation of the portfolio seems to have a too strong focus on infrastructure aspects. The provider should strengthen aspects related to BW application, for instance, through suitable innovations. The provider should set up defined packages or managed services to ensure a better suitability of best practices for midmarket businesses.

Fujitsu should further develop the basic big data strategy to facilitate the usage of external platforms such as Hadoop. Existing data management competences should also be presented more clearly through a summary, for instance, within a general data aging concept.



2019 ISG Provider Lens™ Leader

Based on their high infrastructure competence, Fujitsu also provides a strong portfolio for business intelligence applications based on BW on HANA.

ITELIGENCE



Overview

itelligence AG is an IT service provider with a strong focus on the SAP product offering; the portfolio includes project services (design, implementation, initial operations) as well as application management, which is mainly provided as managed services. itelligence is part of NTT Data Group and covers large parts of this group's European SAP business. The company has also presences in Asia and North America. While itelligence AG has a focus on the midmarket segment, the provider is also a suitable partner for larger enterprises.



Strengths

itelligence has an extremely broad know-how of all functional areas that are relevant for business intelligence with BW on HANA & BW/4HANA. itelligence' approach goes beyond purely technical aspects; the design focus is clearly on use cases, as required by clients. The provider's "Addstore" offers standard consulting packages for the preliminary and strategy development phases, which is specifically helpful for midmarket businesses to ensure fast roadmap development.

itelligence provides functional reference solutions for analytics. The provider also supports innovative approaches such as predictive analytics and has the respective know-how (data scientists). Several applications based on SAP Cloud Analytics are also available.

Based on their broad competence, itelligence is able to always view the overall system strategy within individual projects and to optimally leverage SAP-related possibilities and options. Examples include the clear concept for using embedded analytics out of the respective HANA-based transactional systems.

SAP Fiori is used to present users analyses (from BI) as well as potential actions (in the transactional system) within one single interface and within the available functionality, cleverly leveraging available technologies for a user-centric business view.



Caution

itelligence could better communicate their big data focus.



2019 ISG Provider Lens™ Leader

itelligence' BW on HANA & BW/4HANA portfolio does not only provide comprehensive technological competence but also has a focus on content-related consulting, based on reference solutions."

BW ON HANA – LARGE ACCOUNTS

Definition

BW on HANA refers to services that address the usage of the HANA database for data analytics applications, with a focus on the SAP Business Warehouse. This category includes providers that offer such services and competences to clients from the large accounts segment.

Services include consulting on the technological possibilities of the in-memory technology for data analytics and implications for the system landscape. Implications for large accounts are often significant, since many of these companies have large-scale BW applications. Key for the successful usage of technology also include support of common data analytics as well as specific methodologies and approaches for in-memory technology, specifically the definition and implementation of data structures. Comprehensive competences also include providers' support to help their clients implement, go live and operate their systems, for instance, based on suitable operational concepts.



Source: ISG Research 2018

BW ON HANA – LARGE ACCOUNTS

Observations

- HANA has become the standard for SAP-based Business Warehouse applications. The previous Business Accelerator version, which is also based on in-memory technology, is hardly used anymore for new installations.
- With their recently launched BW/4HANA product SAP pursues a consistent strategy which targets at renewing the range of products to better leverage HANA-related opportunities. To limit the volume of data stored in-memory and thus achieve a sustainable cost level remains a key challenge. This is a specific challenge for large enterprises with very large data volumes and a key factor for transformation into a HANA-based system landscape. All leading providers have included respective services into their portfolio.
- Another important aspect for companies who run their transactional systems on S/4HANA is the use of the embedded BW on these systems for operational reporting purposes. In this case, data replication into a reporting system, e.g., an SAP BW, can often be eliminated or it is at least possible to significantly reduce the volume of data to be replicated and, thus, also reduces related efforts significantly and may have a clearly positive impact on respective HANA-related transformation projects. Leading providers also offer services to address this topic.
- Atos, CubeServ, Deutsche Telekom, DXC Technology, Fujitsu and itelligence were able to maintain or even strengthen their leadership position. Capgemini is a newcomer to the leader quadrant, due to their convincing HANA-based business intelligence portfolio.

ATOS



Overview

Atos provides a comprehensive analytics portfolio, and BW on HANA or BW/4HANA are essential components of this offering, including more recent technological developments such as machine learning or IoT. Within their concept creation and implementation projects, Atos also accounts for optimization of a client's whole system architecture and related implications, rather than only addressing BW on HANA-specific aspects. For large accounts who often run rather complex SAP system landscapes Atos offers comprehensive strategy consulting services that also provide adequate coverage of existing third-party solutions and relevant open-source components such as Hadoop, Spark, etc.



Strengths

Atos has comprehensive technological BW on HANA & BW/4HANA competence to address both transformation into a HANA-based analytics landscape and enhancements to an existing landscape. The portfolio of methods and procedures comprises all relevant phases, from conceptualization (e.g., data modelling, system strategy development) and implementation (e.g., design and development of efficient reports, integration of external data) to operations, which is supported by the provider's self-developed BW on HANA Cockpit.

The offering addresses both established topics and future-oriented developments, including forecasting approaches such as predictive maintenance as well as IoT aspects such as the integration of machine data which are captured directly within the respective process. For the latter approach, standardized connectivity to the cloud-based, open IoT operating system Mindsphere is available. The provider is also engaged in cooperation with SAP to develop connectivity to SAP Leonardo to address topics such as machine learning.

The portfolio includes a specific offering for strategic data management, which provides support companies with large data volumes, which are often found in large enterprises, to develop solutions for the intelligent management of these data and reduce related costs accordingly. This includes data aging concepts within the respective BW as well as the usage of these data within big data appliances such as Hadoop.

For integrating external data sources and other systems, Atos already uses the SAP Cloud Platform (SCP), which is in line with the trend towards software provider consolidation often pursued by large accounts.



Caution

It is not easy to understand the positioning of BW on HANA & BW/4HANA services in relation to the overall "Codex" analytics offering and a clearer description should be provided accordingly. The SAP 4 Codex initiative is a first step in this direction.

Due to the innovative topics and multitude of options to connect a BW on HANA with other applications, the portfolio is rather complex, and this complexity must be managed accordingly, for instance, through descriptions of typified solution scenarios for common situations within user organizations.



2019 ISG Provider Lens™ Leader

Atos provides a comprehensive offering for designing, implementing and using BW on HANA & BW/4HANA and also covers relevant innovative topics with great competence.

CAPGEMINI



Overview

Capgemini is a global full IT service provider with headquarters in France and India. IT services around the SAP product range are a key component of Capgemini's portfolio, and the offering covers all aspects, from design, development and implementation to application operations. Based on their European roots, Capgemini has a strong traditional focus on the European market, including Germany. Applications based on SAP BW on HANA & BW/4HANA are core components of the "Insights-Driven Organization" business intelligence strategy.



Strengths

Capgemini provides a broad BW on HANA & BW/4HANA portfolio for application development, implementation and operations and a broad catalog of methods and procedures as well as additional suitable templates, checklists etc. The provider also leverages industrialized approaches, for instance, for the standardized, highly plannable development of reports and dashboards.

Flexible delivery models, based on onshore, nearshore and offshore resources, are available and support cost optimization efforts.

The Digital Control Room is specifically interesting for large accounts. It visualizes business analytics results in a way that is suitable and useful for managers and executives to be used as a decision-support tool on various management levels.

Capgemini supports data volume management with a sophisticated "Multi-Temperature Data Model", accounting for the required cost containment for analytics applications.

Capgemini has a specific center of excellence (CoE) to address big data aspects, which also includes integration of other frameworks such as Hadoop.



Caution

The provider should strengthen their focus on optimizing the overall system architecture by optimally leveraging respective HANA options.

The provider should increase the availability of onshore resources with in-depth know-how of HANA-based business intelligence applications.



2019 ISG Provider Lens™ Leader

Capgemini is a powerful full service provider of HANA-based analytics applications with high technological competence and flexible delivery models.

CUBESERV



Overview

CubeServ is a business intelligence, advanced analytics and information management specialist with a regional focus on the DACH region and a focus on SAP products; the provider has comprehensive know-how and many years of implementation experience to address all BW on HANA & BW/4HANA aspects as well as related products such as Business Objects, Lumira or Crystal Reports.



Strengths

CubeServ has a comprehensive portfolio of methods and procedures, supported by suitable templates, checklists etc. The targeted use of proprietary and SAP tools ensures an efficient approach both for consulting and implementation projects. The CubeServ portfolio, based on BW on HANA & BW/4HANA, also includes all relevant business intelligence components by SAP. With this comprehensive expertise, CubeServ is an attractive partner for large accounts who use many SAP products within this context.

The technological basis is complemented with predefined standardized business solutions, such as for HR or the supply chain. The CubeServ offering is transparent for customers, based on standardized service packages, which helps clients plan concrete projects.

Their self-developed "CubeServ Analysis Office Report Book" is a powerful solution for integrating analytics applications in Microsoft Excel.

The portfolio also includes offerings to transform analytics applications into the cloud, primarily based on respective SAP offerings such as SAP Cloud Analytics. The provider's proprietary business solutions, e.g., predefined HR analytics cloud content, can also be deployed in the cloud.

Adequate support is provided for innovative approaches, such as predictive analytics, process mining or machine learning.



Caution

Due to the provider's focus on business intelligence, advancements of the whole system landscape outside of BW are limited.

As a highly specialized, medium-sized consulting company, taking over responsibility for large-scale projects within large accounts is still a challenge.

While specific functional expertise is available for some selected areas, the provider needs to fill gaps outside HR and supply chain use cases.



2019 ISG Provider Lens™ Leader

As a business intelligence specialist with a strong focus on respective SAP products CubeServ provides competent and comprehensive support for all phases of the development process and application management.

DEUTSCHE TELEKOM/T-SYSTEMS



Overview

In the European and, specifically, the German market Deutsche Telekom is an important provider of HANA services with BW on HANA & BW/4HANA as essential components. Based on their strong infrastructure and platform competence all application-related services for all phases of the development process and for application operations are available. The company has many years of experience with designing and operating complex system landscapes for large enterprises.



Strengths

Based on a "HANA Ready Assessment for BW", Deutsche Telekom's respective portfolio comprises a variety of tools, assessments and workshops for all phases of the decision-making and development process. The provider's competence also covers overall system strategy aspects, for instance, volume data management as a tool to better design even complex installations in large enterprises through data tiering, nearline storage and archiving to facilitate system management and control. The provider has many years of experience in these areas.

The provider accounts for potential optimizations within a HANA-based system landscape for business intelligence, for instance, by leveraging embedded BW on the respective S/4HANA transactional systems for operational reporting purposes, which limits the volume of data to be stored in the BW and, thus, the complexity of the respective system landscape, facilitating application operations and achieving significant cost savings, specifically in large enterprises.

Powerful standard solutions for dashboards to visualize reports are also included in the portfolio.

Innovative areas such as predictive analytics are supported through respective concepts and, in parts, through R&D labs. Big data aspects are addressed adequately, already in the analysis and design phases, and standardized solutions are available to integrate open-source components such as Hadoop.

The integration of data collected through IoT components into the respective business intelligence solution is an integral component of the portfolio. Deutsche Telekom's very powerful IoT portfolio is a specific strength, especially for large accounts.



Caution

The focus of the portfolio is on platform-related and technical aspects of HA-NA-based solutions for business intelligence. The provider should strengthen their data content competence, for instance, through suitable functional reference models.

The provider should strengthen the focus of their business intelligence portfolio on additional innovative approaches such as machine learning or process mining.



2019 ISG Provider Lens™ Leader

Deutsche Telekom provides a comprehensive end-to-end BW on HANA & BW/4HANA portfolio, complemented by innovative approaches.

DXC TECHNOLOGY



Overview

DXC Technology is a global full IT service provider (infrastructure, consulting, implementation and operations support) with a strong presence in the DACH region. The SAP portfolio is a core part of the DXC offering, and BW on HANA & BW/4HANA plays a key role for business intelligence purposes. Sufficient scalability is ensured, so the solutions are suitable for midmarket businesses as well as large enterprises.



Strengths

DXC has a broad offering of methodologies and procedures (DXC Global Method for Strategy & Planning) for BW on HANA & BW/4HANA that address system design as well as data management (archiving, data tiering, nearline storage) topics, which supports the efficient management of large-scale BW installations in large enterprises.

DXC provides implementation support not only for SAP standard products but also for many available front-ends. Numerous offerings are available for system operations support, e.g., BW Housekeeping or BW Testing as a Service.

The portfolio is not limited to technology-driven aspects but also includes comprehensive analytics consulting services with a strong focus on the respective client's relevant aspects.

Big data aspects, both for external data integration and data management, are addressed adequately. Examples include Hadoop-based data volume management and query management based on SAP HANA VOEA, i.e., open-source components are also included, which is a key benefit for large accounts with their normally very large data volumes.

Innovative topics such as predictive analytics or IoT are also addressed. Connectivity with the Leonardo IoT framework promoted by SAP is also an integral part of the service offering.

The available demo system landscape provides comprehensive coverage of these components, including implementation within a managed cloud.



Caution

The overall external presentation of offerings and solutions lacks transparency; for instance, there is a switch between German and English, for no obvious reason. Especially large enterprises with their multitude of requirements wonder whether the local organization can really provide the required competences.



2019 ISG Provider Lens™ Leader

Based on their broad technology and application know-how, DXC Technology is able to provide comprehensive BW on HANA & BW/4HANA support.

FUJITSU



Overview

Fujitsu is a global full IT service provider; the original portfolio had a focus on infrastructure services and related hardware and was massively enhanced during the last few years to also include application-related services, with a focus on SAP-related services, including HANA. The provider has also strengthened their presence in the DACH region significantly and has evolved into an important player within this segment.



Strengths

For BW applications, Fujitsu can leverage their industry-specific know-how of sectors such as the process-oriented and discrete manufacturing industries, the retail and the public sector. The Fujitsu corporation includes divisions with activities in the manufacturing industry, and therefore, the provider's know-how of this segment is especially high. For instance, a best practice for predictive analytics is available, which also covers maintenance aspects. Fujitsu's data scientists help clients with their BW on HANA analytics applications.

Fujitsu has a well-developed governance and strategy procedure model for business analytics that addresses clients' specific requirements and is especially suited for large enterprises. This model serves as basis for validated analytics application implementations in pharmaceutical companies, most of them large accounts.

Fujitsu supports all kinds of delivery models, from on-premise solutions to cloud-based and hybrid approaches. Besides traditional analytics topics big data aspects are also addressed, based on the provider's "Data Lake" data management platform.

The provider's analytics-based solution for fraud prevention (alert monitoring, data mining and fraud detection) is a specific feature that is specifically relevant for large accounts.

Fujitsu provides their own S/4HANA BI template, including predefined reports for multiple lines of business to allow for operational reporting without data replication and directly out of a transactional S/4HANA system.



Caution

Parts of the offering appear to have a too strong focus on the infrastructure; the provider should strengthen their focus on BW application aspects, for instance, through suitable innovations.

Fujitsu should further develop the basic big data strategy to facilitate the usage of external platforms such as Hadoop. Existing data management competences should also be presented more clearly through a summary, for instance, within a general data aging concept. These are interesting competences, specifically, for large accounts with large volumes of data.



2019 ISG Provider Lens™ Leader

Based on their high infrastructure competence, Fujitsu also provides a strong portfolio for business intelligence applications based on BW on HANA & BW/4HANA.

ITELIGENCE



Overview

itelligence AG is an IT service provider with a strong focus on the SAP product offering; the portfolio includes project services (design, implementation, initial operations) as well as application management, which is mainly provided as managed services. itelligence is part of NTT Data Group and covers large parts of this group's European SAP business. The company has also presences in Asia and North America. While itelligence AG has a focus on the midmarket segment, the provider is also a suitable partner for larger enterprises.



Strengths

itelligence has an extremely broad know-how of all functional areas that are relevant for business intelligence with BW on HANA & BW/4HANA. itelligence' approach goes beyond purely technical aspects; the design focus is clearly on use cases, as required by clients. The provider's "Addstore" offers standard consulting packages for the preliminary and strategy development phases.

itelligence provides functional reference solutions for analytics. The provider also supports innovative approaches such as predictive analytics and has the respective know-how (data scientists). Several applications based on SAP Cloud Analytics are also available.

Based on their broad competence, itelligence is able to always view the overall system strategy within individual projects and to optimally leverage SAP-related possibilities and options. Examples include the clear concept for using embedded analytics out of the respective HANA-based transactional systems. This is specifically interesting for large accounts with highly complex system landscapes who must keep an eye on potential optimizations.

The digital boardroom, a powerful solution to visualize business intelligence results in a way that is suitable and useful for displaying always up-to-date results from BW on HANA & BW/4HANA applications for managers and executives is highly interesting for companies with large management teams.

SAP Fiori is used to present users analyses (from BI) as well as potential actions (in the transactional system) within one single interface and within the available functionality, cleverly leveraging available technologies for a user-centric business view.



Caution

The provider has a clear understanding of big data within the SAP HANA & BW/4HANA context and can provide the respective competencies to help leverage big data accordingly and should better position this know-how within their portfolio.



2019 ISG Provider Lens™ Leader

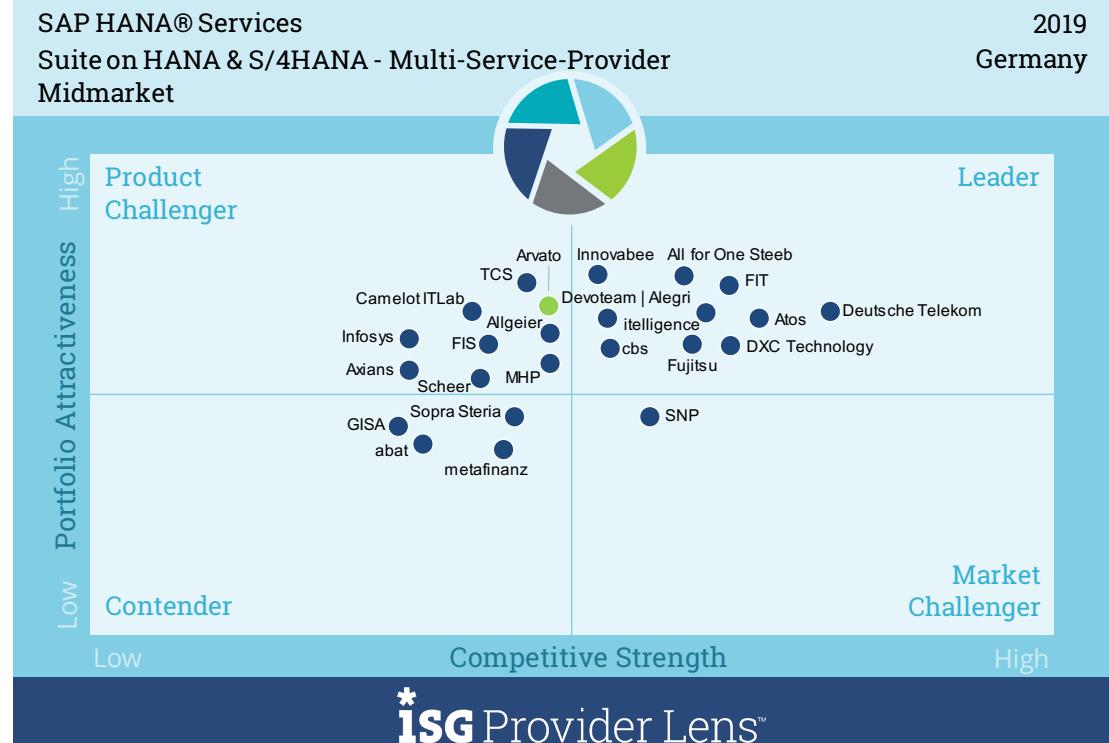
Based on their comprehensive technological BW on HANA &BW/4HANA competence itelligence is able to develop powerful and user-centric business intelligence applications.

SUITE ON HANA & S/4HANA – MULTI-SERVICE PROVIDERS – MIDMARKET

Definition

This segment includes providers that offer a comprehensive solution portfolio, from strategic consulting, design and planning to installation, going live and subsequent operations of Business Suite on HANA and S/4HANA. The focus is on medium-sized businesses (midmarket).

Requirements include comprehensive know-how of these technologies as well as in-depth process and industry-specific know-how and related skills to design suitable solutions for the client's respective situation. Also, the providers must have implementation competence with SAP's standards. Other strengths include comprehensive experience with multiple system landscapes.



Source: ISG Research 2018

SUITE ON HANA & S/4HANA – MULTI-SERVICE PROVIDERS – MIDMARKET

Observations

- Similar to the HANA technology segment, it is a key requirement for multi-service providers to address customers' need to develop a HANA transformation roadmap. Key parameters include the multitude of options of HANA-based system landscapes, SAP's innovative and rapid evolution and advancements of their product range, the announced discontinuation of support for previous products by 2025 and expected significant transformation investments.
- Independent of the selected model, i.e., a greenfield approach or an upgrade of the existing system landscape, it is important to determine suitable methods, procedures and available tools in order to limit expected costs. Many providers in this segment do not only use SAP's own standard tools but develop their own tools to close existing gaps and account for these requirements.
- As mentioned in the chapter about the HANA technology, medium-sized businesses relatively often select the greenfield approach. Provided implementation is closely based on the SAP standard, such approach allows for lean implementations based on preconfigured, industry-specific systems like those offered by some providers in this segment.
- Potential USPs for these providers include HANA-based innovations, e.g., IoT under SAP Leonardo or tighter integration of the shop floor within manufacturing use cases, in addition to Business Suite standard functionality.
- All for One Steeb, Atos, Deutsche Telekom DXC Technology, Freudenberg IT (FIT), Fujitsu and itelligence were able to maintain or even strengthen their leading position in this segment. Devoteam | Alegri, cbs Consulting and Innovabee are newcomers to the leader quadrant, due to their comprehensive competence and methods and tools that are specifically suitable for the midmarket segment. Arvato has the chance to achieve a leadership position within the foreseeable future in this segment and has therefore received the Rising Star award.

ALL FOR ONE STEEB



Overview

All for One Steeb is a full-service provider who primarily services the German market and has a strong focus on the SAP product range. The offering is mainly targeted at midmarket businesses, comprising HANA technology as well as application development and implementation and application operations.



Strengths

All for One Steeb is an end-to-end provider with a broad portfolio of proprietary procedure models. A special focus is on addressing industry- and customer-specific conditions to ensure tailored solutions for the respective customer.

All for One Steeb has a comprehensive business process library which can be used as basis for the efficient implementation and advancement of HANA-based Business Suite applications. The library covers multiple industries and is specifically suited to ensure lean projects for midmarket businesses with a focus on maximizing the degree of standardization of respective applications.

All for One Steeb offers powerful add-on components to enhance the Business Suite functionality, specifically for production, logistics and supply chain use cases.

Additional efficiency gains can be generated through the comprehensive usage of various tools by SAP or proprietary tools respectively. Agile project methodologies are available to ensure efficient projects.

The portfolio also accounts for the integration of various SAP cloud products (Ariba, SuccessFactors, Fieldglass etc.).



Caution

The provider must address the overall system landscape (ERP, BW, CRM etc.) more strongly to also help clients with respective HANA-based optimization projects.



2019 ISG Provider Lens™ Leader

Based on their profound process know-how and comprehensive technological competence All for One Steeb qualifies as a suitable end-to-end provider for HANA-based applications, specifically in the midmarket segment.

ATOS

Overview

Atos' portfolio for the multi-service provider segment for HANA comprises all kinds of standard tools for migrations and upgrades; together with the HANA technology consulting offering, this qualifies Atos as an end-to-end provider for HANA for HANA. In addition to this technological foundation, Atos is continuously enhancing their process consulting offering.

Strengths

Atos is an end-to-end provider and offers a broad portfolio consisting of the provider's proprietary procedure models, tools, assessments and hardware as well as cloud service provisioning options. Atos provides their own HANA readiness check as well numerous best-practice use cases to support concept development and design. A comprehensive demo system landscape is available to ensure a more efficient design of the analysis and design phases. Clients have the option to set up proof-of-concept systems based on system copies of existing SAP systems (either on-premise or cloud-based).

Flexible delivery models leverage onshore, nearshore and offshore resources to support client organizations with different requirements and of different sizes, which makes this offering a suitable option for midmarket businesses.

Innovative topics such as IoT or machine learning are also addressed, partly through cooperation with respective partners. For example, MindSphere and the respective cooperations ensure the integration of machine data in a broader sense into the ERP functionality. Another focus is on integrating third-party systems, based on the SAP Cloud Platform (SCP).

Atos pursues a targeted approach to optimize the client's individual system landscape, ensuring long-term cost management. Data volume management, from identifying unused data to archiving or deleting data, can be used, for instance, to limit the size of respective system instances to increase the performance and reduce cost accordingly.

The portfolio does not only cover technological aspects but also process-oriented topics, e.g., based on Design Thinking approaches, to identify optimization and innovation potentials within business processes.

* Provider Lens™



Caution

Considering the fast development and advancement of the portfolio, the provider is continuously challenged to improve the usability of the multitude of technological options through predefined standard packages.

Atos should also continue to strengthen process-oriented topics. Existing offerings, e.g., based on the Design Thinking approach, provide a good basis for such enhancement.



2019 ISG Provider Lens™ Leader

Atos is a powerful end-to-end provider in the SAP HANA market, offering a broad portfolio including proprietary procedure models, tools and best practices.

CBS CONSULTING



Overview

cbs Consulting is Materna Group's internal and central consulting provider with a focus on SAP-based applications. The company is a long-standing player in this market; the primary target group are medium-sized manufacturing companies.



Strengths

cbs Consulting has a well-developed portfolio of methodologies, procedures and tools; the focus is always on the enterprise-wide implementation of applications. The services comprise all phases of the development process, including the strategy development phase prior to the project. The available functionality covers all key areas, with a specific focus on supply chain applications.

The offering comprises the whole life cycle of an application, from concept development and implementation to systems operations and application management. A well-developed consulting offering is also available for the technology to be deployed.

The focus on mostly enterprise-wide applications is combined with system landscape optimization, either through suitable architecture consulting or strategies to harmonize multiple components.

Consulting on the suitable deployment of delivery models (on-premise, cloud, hybrid) is also available.



Caution

Sufficient resources to also conduct larger-scale projects remain a challenge.



2019 ISG Provider Lens™ Leader

cbs Consulting is a competent end-to-end provider, specifically for midmarket businesses, providing full-service options for implementing enterprise-wide applications.

DEUTSCHE TELEKOM



Overview

In the European and, specifically, the German market Deutsche Telekom is an important provider of HANA services. Traditional strong competencies include infrastructure, design and operations of platforms for SAP HANA. Based on their strong infrastructure and platform competence all application-related services for all phases of the development process and for application operations are available. Standardized and lean entry packages with transparent pricing models are also available, specifically for midmarket customers.



Strengths

Deutsche Telekom's Cloudifier methodology is a comprehensive framework for SAP HANA migration that covers all relevant technology and application aspects. "Jump Start" is the provider's dedicated methodology to ensure a fast entry into the transformation process; it addresses infrastructure aspects as well as basic ERP application and its lean basic configuration make it a specifically suitable approach for midmarket businesses.

Both the Cloudifier and the Jump Start methodologies are available based on clear and flexible pricing models, as is the HANA Readiness Scan which is offered at fixed prices for various levels of detail. This offering, too, is especially interesting for the midmarket segment.

Deutsche Telekom's portfolio also includes various in-house solutions based on SAP HANA, e.g., predictive analytics for the automotive industry and the "Spend Analyzer". The company benefits from their long-standing SAP experience; Deutsche Telekom (TSI) operates large SAP installations worldwide for their internal systems.

Deutsche Telekom's "Value Consulting" is an approach that helps clients develop a strategy prior to actual projects and based on a business process analysis to determine potential values and benefits.

Deutsche Telekom (TSI) operates their own innovation center where the provider develops many show and test cases.

Integration of SAP cloud solutions (Ariba, Concur, SuccessFactors etc.) is an integral part of the portfolio concept.



Caution

The strategy finding and decision-support phase prior to projects should be addressed more strongly, beyond the Value Consulting approach, which is more targeted ad individual processes, for instance, through offerings that address the general system strategy and its impact on business processes.

The portfolio lacks transparency considering the scope of management support of hybrid models that include third-party cloud offerings.

Overall, the portfolio still seems to have a too strong focus on infrastructure aspects.



2019 ISG Provider Lens™ Leader

Deutsche Telekom's portfolio features a comprehensive HANA transformation and operations offering as well as a multitude of in-house solutions.

DEVOTEAM | ALEGRI



Overview

Devoteam | Alegri is an IT service provider with a focus on the European and, specifically, the German market and applications based on Microsoft and SAP technologies. The offering is primarily targeted at medium-sized businesses and since the launch of SAP S/4HANA Devoteam | Alegri has set a clear focus on this product. Mid-2018 Alegri was acquired by Devoteam and has been renamed into Devoteam | Alegri.



Strengths

Devoteam | Alegri's service offering has a focus on Microsoft as well as on SAP products and their comprehensive usage. Devoteam | Alegri set a focus on S/4HANA at an early point in time and can demonstrate long and comprehensive experience with this technology.

The provider's SAP experiences include their own usage of an S/4HANA installation with enterprise cloud hosting based on Microsoft Azure.

Devoteam | Alegri is a one-stop shopping provider with an end-to-end portfolio, consisting of process, technology and implementation consulting. Many publications on best practices, technical options and methodologies emphasize the provider's high competence in this area.

The Alegri Cloud Automation Framework is a powerful platform which is specifically suitable for midmarket businesses to control and manage SAP systems, including databases.

Within projects, Devoteam | Alegri always has an eye on optimizing the overall system landscape, e.g., through data volume management or by distributing functionality between BW and ERP, which is an essential requirement to contain costs for the respective HANA-based landscapes.



Caution

A reference model for business processes, based on the provider's existing experiences, could help improve the efficiency of the design phase in future projects. It is important to observe the provider's positioning in the market, following the acquisition by Devoteam.



2019 ISG Provider Lens™ Leader

Based on their consistent focus on S/4HANA Devoteam | Alegri is a highly competent and powerful provider of complete services around this product.

DXC TECHNOLOGY



Overview

DXC Technology is a global full IT service provider (infrastructure, consulting, implementation and operations support) with a strong presence in the DACH region. The SAP portfolio is one of DXC's core portfolio components, supported by a broad partner network. The focus is on managed services, which make up more than half of revenues.



Strengths

DXC provides a complete SAP HANA end-to-end portfolio with very flexible delivery models. DXC can leverage a comprehensive catalog of standardized procedures and methodologies (templates, checklists, etc.). The targeted use of their own proprietary as well as SAP tools ensures an effective project approach. Demo systems for increasing the efficiency of the analysis and design phase are available or can be provisioned short-term.

DXC offers a comprehensive portfolio of on-demand solutions, ensuring a high degree of flexibility within concrete customer projects, both under infrastructure and application management aspects. The multitude of powerful managed services, including migrations, upgrades, custom code conversions etc. are one of DXC's strengths within the application management context.

Data management solutions are an integral component of the project approach, which is an essential cost containment means for applications for midmarket businesses.

DXC's "Business Outcome Services" is a business process optimization offering that uses the data of the respective HANA application to identify optimization potentials; after the redesign phase, progress is continuously monitored based on suitable dashboards. Entry levels of this offering are well suited to address midmarket requirements.



Caution

Clients must determine the suitability of the provider's global delivery mix for their specific, limited use case.

The DXC portfolio seems to have a rather strong focus on technology aspects, specifically in the strategy development and decision support phases. Beyond process optimization through the Business Outcome Services, the provider should strengthen their focus on the overall business value.



2019 ISG Provider Lens™ Leader

DXC provides a comprehensive end-to-end portfolio for developing and operating HANA-based system landscapes and has long-standing experience with respective transformation projects.

FREUDENBERG IT



Overview

Freudenberg IT is the captive IT service provider of the Freudenberg Group, a global technology company whose portfolio includes products, solutions and services for multiple sectors, including the automotive, machine engineering, textile, construction and telecommunications industries. As opposed to many other captive IT service providers Freudenberg IT also offers their services to external clients with the same portfolio depth; the focus is on companies with a high manufacturing share. The provider's portfolio has a focus on the SAP range of products, specifically the design, implementation and operations of HANA-based applications of the Business Suite.



Strengths

As an end-to-end provider, Freudenberg IT offers comprehensive HANA support, from planning and implementation to hosting and system operations. Based on Freudenberg's own internal HANA applications, the provider's specific strengths are the real-world detailed solutions for midmarket businesses with a high share of production.

The methodology (project plans, templates etc.) is a convincing basis for conducting respective projects and supports both traditional and agile approaches. Freudenberg IT leverages tested & proven tools to support various project activities such as test management, migration support, custom code conversion etc. Preconfigured best-practice systems are available to illustrate and explain questions related to the project design phases within the system to provide respective decision-making support.

Freudenberg IT has a comprehensive strategy and service offering for HANA-based IoT. The portfolio also provides strong integration of manufacturing execution systems into the HANA-based SAP Business Suite, also based on preconfigured offerings (manufacturing as a service).

Innovative SAP components, for instance, SAP Leonardo as a powerful IoT framework, are used to expand and enrich the portfolio.



Caution

A stronger focus could be laid on better integration with SAP's own cloud offerings such as Ariba, Concur, SuccessFactors etc.

Mobile app development still has a relatively strong focus on the manufacturing segment and the provider should advance the portfolio to include other segments accordingly.



2019 ISG Provider Lens™ Leader

Freudenberg IT provides a comprehensive end-to-end portfolio for designing, implementing and operating HANA-based applications of the SAP Business Suite which is specifically suited to address midmarket requirements.

FUJITSU

Overview

Fujitsu is a global full IT service provider; the original portfolio had a focus on infrastructure services and related hardware and was massively enhanced during the last few years to also include application-related services, with a focus on SAP-related services, including HANA. The provider has also strengthened their presence in the DACH region significantly and has evolved into an important player within this segment.

Strengths

"Process/4" is Fujitsu's proprietary methodology to provide comprehensive support to clients and help them with their digital transformation and respective S/4HANA-based implementation. Fujitsu uses industry-specific and functional templates to increase project efficiency. Fujitsu supports all kinds of delivery models, from on-premise solutions to cloud-based and hybrid approaches.

For ERP applications, Fujitsu can leverage their industry-specific know-how of sectors such as the process-oriented and discrete manufacturing industries, the retail and the public sector. The Fujitsu corporation includes divisions with activities in the manufacturing industry, and therefore, the provider's know-how of this segment is especially high.

Fujitsu uses their own methodology for process mining to support the analysis and design phase within clients' projects.

For systems operations Fujitsu provides a powerful business process monitoring and business process optimization solution, based on SAP's standard tools which are enhanced through the provider's in-house developments.

Integration of SAP cloud solutions (Ariba, Concur, SuccessFactors etc.) into the respective client's HANA landscape is an integral part of the portfolio concept.



Caution

Based on their successful infrastructure services, Fujitsu has significantly enhanced their offering for HANA application development and HANA operations and has evolved into a relevant player, also in this segment. Now the provider is challenged to strengthen their external presentation and awareness in the market.

The provider should set up defined packages or managed services to ensure a better suitability of their best practices for midmarket businesses.

The provider could strengthen their focus on mobile app development.



2019 ISG Provider Lens™ Leader

For HANA-based Business Suite applications Fujitsu provides a powerful end-to-end portfolio, from analysis and design to implementation and system operations.

INNOVABEE



Overview

Innovabee is an SAP HANA specialist with a focus on German midmarket businesses. The company pursues a consistent strategy to develop and implement cost-efficient, highly plannable solutions, based on preconfigured standard solutions without major customization.



Strengths

Innovabee pursues a consistent approach to ensure the fast implementation of preconfigured, industry-specific standard solutions without major modifications, based on agile methodologies. The company also provides well-developed and highly efficient methodologies and procedures, partly supported by self-developed tools.

Provided that implementations are mostly standard-based, Innovabee's specific methodology ensures above-average planning security for both budgets and project timelines.

Considering this approach and the frame conditions, Innovabee has a stringent focus on the midmarket segment only.

Innovabee has already won respective many respective references.

Recently, implementation based on the SAP S/4HANA cloud have been added to the portfolio to also offer agile and efficient, cloud-based implementation and system operations.



Caution

Innovabee should strengthen their embedded analytics offering, based on S/4HANA as an additional standard feature.

To really benefit from Innovabee's standardized approach, potential clients must be prepared to largely avoid modifications and customizations accordingly.



2019 ISG Provider Lens™ Leader

Innovabee's USP is the fast and cost-efficient S/4HANA implementation for midmarket businesses, based on industry-specific preconfigurations.

ITELLIGENCE



Overview

itelligence AG is an IT service provider with a strong focus on the SAP product offering; the portfolio includes project services (design, implementation, initial operations) as well as application management, which is mainly provided as managed services. itelligence is part of NTT Data Group and covers large parts of this group's European SAP business. The company has also presences in Asia and North America. While itelligence AG has a focus on the midmarket segment, the provider is also a suitable partner for larger enterprises. A key focus is on consulting and implementation services for HANA-based applications of the Business Suite, specifically, S/4HANA.



Strengths

itelligence provides a complete portfolio, from consulting and migration to platform and operations and including in-depth industry-specific and functional process templates to improve project efficiency. Based on their profound know-how of S/4HANA-related options to simplify data structures and applications accordingly, itelligence is able to actually achieve efficiency gains and significantly improve the respective business case.

itelligence' "Conversion Factory" is an offering for "traditional" migration projects that leverages a mix of offshore and onshore resources and has been used successfully in many projects already. This is an attractive option for midmarket business to ensure lean migrations.

Besides traditional approaches itelligence also leverages agile project methodologies, for instance, to conduct template-based "greenfield" implementations.

The provider works with the Fiori technology to provide a user interface that is highly customized to address users' specific situations. Analysis (from BI) as well as potential actions (in the transactional system) are presented in one single interface.

Integration of SAP's cloud solutions (Ariba, Concur, SuccessFactors etc.) is also included in the portfolio.



Caution

While itelligence already addresses IoT aspects, the provider should speed up respective IoT implementation, specifically by leveraging SAP Leonardo.



2019 ISG Provider Lens™ Leader

itelligence provides a complete end-to-end portfolio for HANA-based applications, making consistent use of SAP products.

RISING STAR: ARVATO



Overview

Arvato is the captive IT service provider of Bertelsmann Group, an international corporation and one of the largest media groups worldwide. As opposed to many other captive IT service providers Arvato offers their services to external clients with the same portfolio depth; the focus is on Europe and, specifically, Germany. The SAP product range, specifically, S/4HANA-based applications, constitute an important component of the overall portfolio.



Strengths

Arvato provides a powerful portfolio of methodologies and procedures, partly supported by self-developed tools, which is used within the Bertelsmann Group and is therefore a field-tested solutions, also for external clients. The focus is on the design and implementation of S/4HANA-based applications. Arvato's "Factory Approach" is used to transform existing SAP-based applications, ensuring efficient and highly standardized migrations.

The provider always strives to optimize the whole system landscape, for instance, through operational reporting via embedded BW and based on the transactional systems.

Arvato's Smart Logistics Platform, a specific S/4HANA extension, is a powerful IoT framework to support various logistics aspects, including sensor- or scanner-based data collection as well as mobile devices.

Based on their long-standing internal experience, Arvato provides a strategy development offering that is suitable for all kinds of customer situations.



Caution

Arvato is challenged to ensure that external clients are serviced with the same high priority as their internal customers.

The provider should further develop their public cloud services, based on the offerings of global technology providers.



2019 ISG Provider Lens™ Rising Star

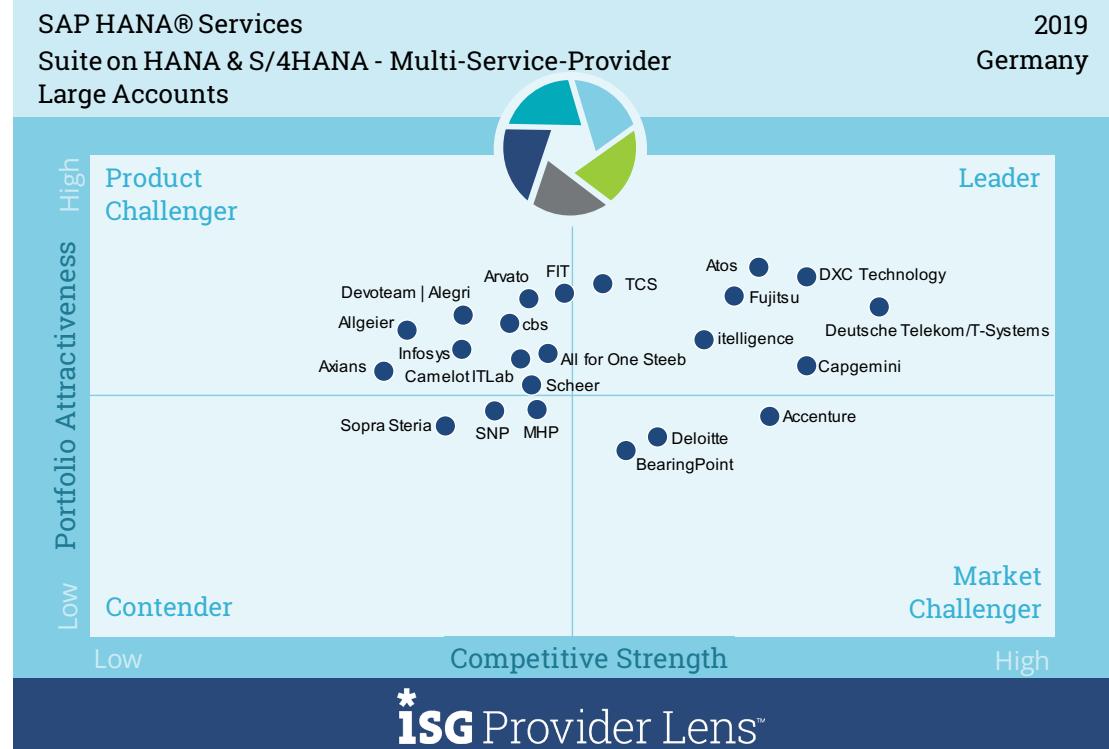
Based on their comprehensive experience within a global corporation and with external customers, Arvato can act as a multi-service provider for S/4HANA, based on their proven and tested, powerful consulting and implementation portfolio.

SUITE ON HANA & S/4HANA – MULTI-SERVICE PROVIDERS – LARGE ACCOUNTS

Definition

This segment includes providers that offer a comprehensive solution portfolio, from strategic consulting, design and planning to installation, going live and subsequent operations of Business Suite on HANA and S/4HANA. The focus is on the large accounts segment.

Requirements include comprehensive know-how of these technologies as well as in-depth process and industry-specific know-how and related skills to design suitable solutions for the client's respective situation. Also, the providers must have implementation competence with SAP's standards. Other strengths include comprehensive experience with multiple system landscapes. Within the large accounts segment, existing, rather complex system landscapes pose an additional challenge.



Source: ISG Research 2018

SUITE ON HANA & S/4HANA – MULTI-SERVICE PROVIDERS – LARGE ACCOUNTS

Observations

- Similar to the HANA technology segment, it is a key requirement for multi-service providers to address customers' need to develop a HANA transformation roadmap. Key parameters include the multitude of options of HANA-based system landscapes, SAP's innovative and rapid evolution and advancements of their product range, the announced discontinuation of support for previous products by 2025 and expected significant transformation investments.
- Independent of the selected model, i.e., a greenfield approach or an upgrade of the existing system landscape, it is important to determine suitable methods, procedures and available tools in order to limit expected costs. Many providers in this segment do not only use SAP's own standard tools but develop their own tools to close existing gaps and account for these requirements.
- As mentioned in the chapter about the HANA technology, large enterprises often have comprehensive, rather complex SAP-based system landscapes and therefore attach great value to a thorough analysis to determine the most suitable transformation path, and greenfield approaches are less attractive for this kind of transformation. Providers in this segment are specifically challenged to optimize the whole system landscape, based on HANA, to achieve the best business case.
- Potential USPs for these providers include HANA-based innovations, e.g., IoT under SAP Leonardo or tighter integration of the shop floor within manufacturing use cases, in addition to Business Suite standard functionality.
- Atos, Deutsche Telekom DXC Technology, Fujitsu and itelligence were able to maintain or even strengthen their leading position in this segment. Newcomers to the leader quadrant are Capgemini and TCS, who provide comprehensive portfolios and flexible delivery models to ensure cost-efficient implementation, specifically within large-scale transformation projects.

ATOS



Overview

Atos' portfolio for the multi-service provider segment for HANA comprises all kinds of standard tools for migrations and upgrades; together with the HANA technology consulting offering, this qualifies Atos as an end-to-end provider for HANA for HANA. In addition to this technological foundation, Atos is continuously enhancing their process consulting offering.



Strengths

Atos is an end-to-end provider and offers a broad portfolio consisting of the provider's proprietary procedure models, tools, assessments and hardware as well as cloud service provisioning options. Atos provides their own HANA readiness check as well numerous best-practice use cases to support concept development and design. A comprehensive demo system landscape is available to ensure a more efficient design of the analysis and design phases. Clients have the option to set up proof-of-concept systems based on system copies of existing SAP systems (either on-premise or cloud-based).

Flexible delivery models leverage onshore, nearshore and offshore resources to support client organizations with different requirements, ensuring the scalability required for large accounts and allowing companies with many migration projects to leverage the "Offshore Migration Factory".

Innovative topics such as IoT or machine learning are also addressed, partly through cooperation with respective partners. For example, MindSphere and the respective cooperations ensure the integration of machine data in a broader sense into the ERP functionality. Another focus is on integrating third-party systems, based on the SAP Cloud Platform (SCP).

Large accounts often run comprehensive SAP landscapes, consisting of ERP, BW and other components, where overall optimization is of high relevance. Atos pursues a targeted approach to optimize the client's individual system landscape, ensuring long-term cost management. Data volume management, from identifying unused data to archiving or deleting and even outsourcing data, based on a hot-warm-cold strategy, can be used, for instance, to limit the size of respective system instances to increase the performance and reduce cost accordingly.

The portfolio does not only cover technological aspects but also process-oriented topics, e.g., based on Design Thinking approaches, to identify optimization and innovation potentials within business processes.

ATOS



Caution

Atos should also continue to strengthen process-oriented topics. Existing offerings, e.g., based on the Design Thinking approach, provide a good basis for such enhancement.



2019 ISG Provider Lens™ Leader

Atos is a powerful end-to-end provider in the SAP HANA market, offering a broad portfolio including proprietary procedure models, tools and best practices.

CAPGEMINI



Overview

Capgemini is a global full IT service provider with headquarters in France and India. IT services around the SAP product range are a key component of Capgemini's portfolio, and the offering covers all aspects, from design, development and implementation to application operations. Based on their European roots, Capgemini has a strong traditional focus on the European market, including Germany. Applications based on SAP HANA are a core component of the portfolio.



Strengths

Capgemini provides a broad S/4HANA portfolio for application development, implementation and operations. Capgemini provides a broad catalog of methods and procedures and additional suitable templates, checklists etc.

Based on their industry-specific, preconfigured "Accelerators", Capgemini is in a strong position to conduct cost-effective and efficient projects. The PATH Framework which is the collection of the provider's methods is available globally and thus an interesting option for globally active large enterprises. The company has long-standing experience, specifically with large accounts in Europe, and is able to competently address complex requirements.

Flexible delivery models, based on onshore, nearshore and offshore resources, are available and support cost optimization efforts.

Capgemini has comprehensive experience with cloud-based implementations and leverages both SAP's related offerings and those of large global third-party providers.



Caution

The provider should increase the availability of onshore resources with in-depth know-how of HANA-based S/4HANA applications.



2019 ISG Provider Lens™ Leader

Capgemini provides a powerful end-to-end portfolio to develop and operate S/4HANA-based applications, based on a flexible mix of delivery resources.

DEUTSCHE TELEKOM/T-SYSTEMS



Overview

In the European and, specifically, the German market Deutsche Telekom is an important provider of HANA services. Traditional strong competencies include infrastructure, design and operations of platforms for SAP HANA. Based on their strong infrastructure and platform competence all application-related services for all phases of the development process and for application operations are available. Due to their size and comprehensive experience, the company is also able to cover the complex requirements of large enterprises.



Strengths

Deutsche Telekom provides a comprehensive solution portfolio for SAP HANA transformation projects, addressing platform-relevant as well as application-related aspects. These capabilities, together with the strong workforce base, enable Deutsche Telekom to provide complete offerings that address large-enterprise requirements, from concept development and design to implementation and application operations, based on their own resources.

Deutsche Telekom's Cloudfier methodology is a comprehensive framework for SAP HANA migration that covers all relevant technology and application aspects. "Jump Start" is the provider's dedicated methodology to ensure a fast entry into the transformation process; it addresses infrastructure aspects as well as basic ERP application.

Deutsche Telekom's portfolio also includes various in-house solutions based on SAP HANA, e.g., predictive analytics for the automotive industry and the "Spend Analyzer". The company benefits from their long-standing SAP experience; Deutsche Telekom (TSI) operates large SAP installations worldwide for their internal systems.

Deutsche Telekom's "Value Consulting" is an approach that helps clients develop a strategy prior to actual projects and based on a business process analysis to determine potential values and benefits.

Deutsche Telekom (TSI) operates their own innovation center where the provider develops many show and test cases.

Integration of SAP cloud solutions (Ariba, Concur, SuccessFactors etc.) is an integral part of the portfolio concept.

DEUTSCHE TELEKOM/T-SYSTEMS



Caution

The strategy finding and decision-support phase prior to projects should be addressed more strongly, beyond the Value Consulting approach, which is more targeted at individual processes, for instance, through offerings that address the general system strategy and its impact on business processes. This is specifically relevant for companies that run comprehensive SAP system landscapes to help them develop a sustainable, longer-term roadmap.

Besides cloud transformation, the provider must also address cases where the clients, specifically large accounts, decide to continue to operate their business-critical applications on premise, even long-term, if required. Overall, the portfolio still seems to have a too strong focus on infrastructure aspects.

The portfolio lacks transparency considering the scope of management support of hybrid models that include third-party cloud offerings.



2019 ISG Provider Lens™ Leader

Deutsche Telekom's portfolio features a comprehensive HANA transformation and operations offering as well as a multitude of in-house solutions.

DXC TECHNOLOGY



Overview

DXC Technology is a global full IT service provider (infrastructure, consulting, implementation and operations support) with a strong presence in the DACH region. The SAP portfolio is one of DXC's core portfolio components, supported by a broad partner network, including HP Enterprises (HPE), which has emerged of Hewlett Packard, as has DXC. The focus is on managed services, which make up more than half of revenues.



Strengths

DXC provides a complete SAP HANA end-to-end portfolio with very flexible delivery models. DXC can leverage a comprehensive catalog of standardized procedures and methodologies (templates, checklists, etc.). The targeted use of their own proprietary as well as SAP tools ensures an effective project approach. Demo systems for increasing the efficiency of the analysis and design phase are available or can be provisioned short-term.

DXC offers a comprehensive portfolio of on-demand solutions, ensuring a high degree of flexibility within concrete customer projects, both under infrastructure and application management aspects. The multitude of powerful managed services, including migrations, upgrades, custom code conversions etc. are one of DXC's strengths within the application management context. This is specifically interesting for large accounts with highly complex system landscapes who are continually facing the need to conduct respective projects and would like to outsource them to a service provider.

Optimization of complete system landscapes (ERP, BW, CRM etc.) across multiple components is an integral part of the project approach. This includes solutions for data management and for optimization the functional distribution between multiple components.

DXC's "Business Outcome Services" is a business process optimization offering that uses the data of the respective HANA application to identify optimization potentials; after the redesign phase, progress is continuously monitored based on suitable dashboards.



Caution

Due to the global delivery mix, the organizational complexity may be difficult for customers, especially in the context of projects for large enterprises.

The DXC portfolio seems to have a rather strong focus on technology aspects, specifically in the strategy development and decision support phases. Beyond process optimization through the Business Outcome Services, the provider should strengthen their focus on the overall business value.



2019 ISG Provider Lens™ Leader

DXC provides a comprehensive end-to-end portfolio for developing and operating HANA-based system landscapes and has long-standing experience with respective transformation projects.

FUJITSU



Overview

Fujitsu is a global full IT service provider; the original portfolio had a focus on infrastructure services and related hardware and was massively enhanced during the last few years to also include application-related services, with a focus on SAP-related services, including HANA. The provider has also strengthened their presence in the DACH region significantly and has evolved into an important player within this segment.



Strengths

"Process/4" is Fujitsu's proprietary methodology to provide comprehensive support to clients and help them with their digital transformation and respective S/4HANA-based implementation. Fujitsu uses industry-specific and functional templates to increase project efficiency. Fujitsu supports all kinds of delivery models, from on-premise solutions to cloud-based and hybrid approaches.

For ERP applications, Fujitsu can leverage their industry-specific know-how of sectors such as the process-oriented and discrete manufacturing industries, the retail and the public sector. The Fujitsu corporation includes divisions with activities in the manufacturing industry, and therefore, the provider's know-how of this segment is especially high. Based on the applied methodology and their long-standing experience, Fujitsu is able to conduct validated implementations of Business Suite applications in pharmaceutical companies.

Fujitsu uses their own methodology for process mining to support the analysis and design phase within clients' projects.

For systems operations Fujitsu provides a powerful business process monitoring and business process optimization solution. Fujitsu uses standard SAP tools which are enhanced through Fujitsu's own developments, which is important for large accounts and their often complex business process landscape.

Integration of SAP cloud solutions (Ariba, Concur, SuccessFactors etc.) into the respective client's HANA landscape is an integral part of the portfolio concept.



Caution

Based on their successful infrastructure services, Fujitsu has significantly enhanced their offering for HANA application development and HANA operations and has evolved into a relevant player, also in this segment. Now the provider is challenged to strengthen their external presentation and awareness in the market.

The provider could strengthen their focus on mobile app development.



2019 ISG Provider Lens™ Leader

For HANA-based Business Suite applications Fujitsu provides a powerful end-to-end portfolio, from analysis and design to implementation and system operations, which addresses the complex system requirements of large accounts.

ITELLIGENCE



Overview

itelligence AG is an IT service provider with a strong focus on the SAP product offering; the portfolio includes project services (design, implementation, initial operations) as well as application management, which is mainly provided as managed services. itelligence is part of NTT Data Group and covers large parts of this group's European SAP business. The company has also presences in Asia and North America. While itelligence AG has a focus on the midmarket segment, the provider is also a suitable partner for larger enterprises. A key focus is on consulting and implementation services for HANA-based applications of the Business Suite, specifically, S/4HANA.



Strengths

itelligence provides a complete portfolio, from consulting and migration to platform and operations and including in-depth industry-specific and functional process templates to improve project efficiency. Based on their profound know-how of S/4HANA-related options to simplify data structures and applications accordingly, itelligence is able to actually achieve efficiency gains and significantly improve the respective business case..

itelligence' "Conversion Factory" is an offering for "traditional" migration projects that leverages a mix of offshore and onshore resources and has been used successfully in many projects already. This is an interesting option for large accounts who are planning to migrate many individual systems.

Besides traditional approaches itelligence also leverages agile project methodologies, for instance, to conduct template-based "greenfield" implementations..

The provider works with the Fiori technology to provide a user interface that is highly customized to address users' specific situations. Analysis (from BI) as well as potential actions (in the transactional system) are presented in one single interface.

Integration of SAP's cloud solutions (Ariba, Concur, SuccessFactors etc.) is also included in the portfolio.

Within projects that deal with complex system landscapes itelligence has a focus on optimizing the whole landscape, e.g., through embedded BW for operational reporting directly out of the transactional systems. This is specifically interesting for large accounts.



Caution

While itelligence already addresses IoT aspects, the provider should speed up respective IoT implementation, specifically by leveraging SAP Leonardo.

Some parts of the portfolio seem to have a too strong focus on technological aspects. Business process topics, e.g., business process monitoring for business optimization purposes, should be strengthened accordingly.



2019 ISG Provider Lens™ Leader

itelligence provides a complete end-to-end portfolio for HANA-based applications, making consistent use of SAP products.

TCS

Overview

The TCS portfolio provides a very comprehensive coverage of industries and a very broad functionality of services, with a focus on SAP products and, specifically, HANA. A key focus is on managed services for application management. The provider also covers innovative topics such as IoT with SAP Leonardo. The company has several delivery centers in Germany.



Strengths

TCS' portfolio for HANA comprises powerful methods, approaches and tools that cover all life cycle phases of HANA-based applications. The provider's self-developed tools are mostly SAP-certified and enable clients to achieve significant cost reductions within HANA-related implementation projects, for instance, migrations, fit-gap analyses or analyses of system extensions and modifications.

The global delivery model combines a high degree of presence at respective project locations with cost optimization through offshore development resources.

Innovative topics such as IoT based on SAP Leonardo or artificial intelligence are integral components of the provider's portfolio.

The share of managed projects, where the provider takes over concrete implementation responsibility, is relatively high.

TCS provides various preconfigured industry-specific solutions based on S/4HANA on the provider's own TCS Cloud Platform.



Caution

The provider should strengthen their focus on optimizing the respective client's whole existing system architecture, based on available HANA options.



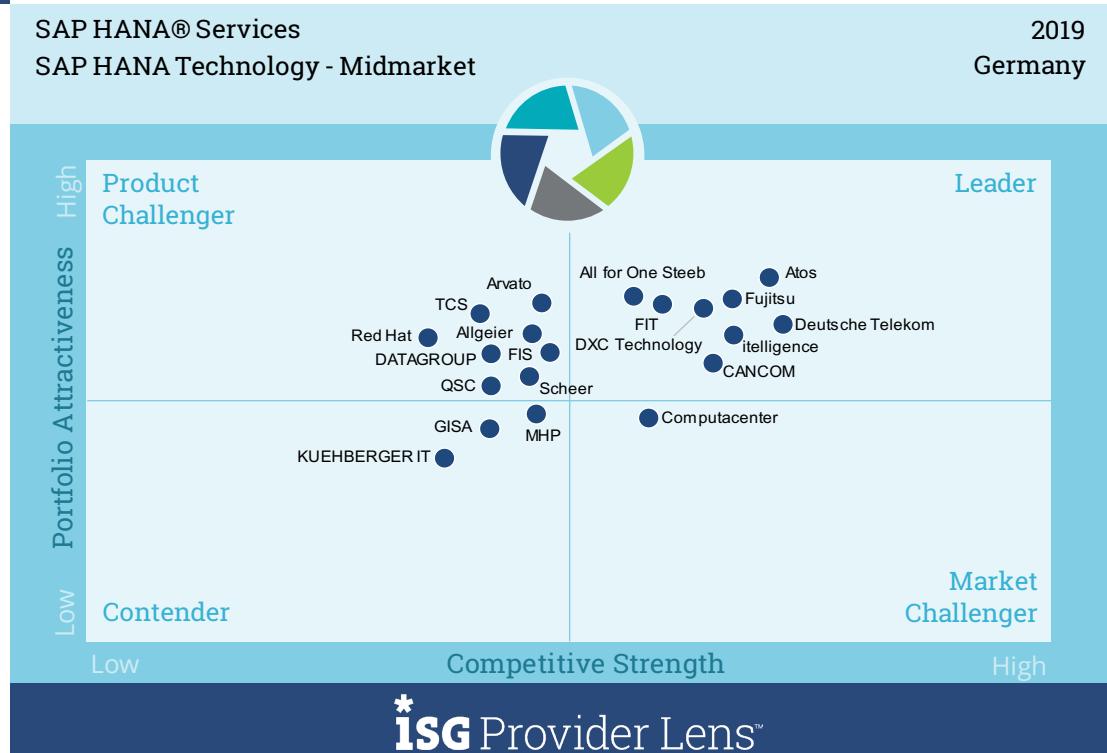
2019 ISG Provider Lens™ Leader

TCS is a powerful partner with a broad portfolio of services for HANA-based systems and also covers innovative topics such as IoT.

SAP HANA TECHNOLOGY – MIDMARKET

Definition

This segment includes providers whose offering addresses the technological aspects of HANA projects, including the respective platform, and who have a focus on the midmarket segment. Competences include strategic consulting, the selection of suitable hardware (for in-house operations), HANA PaaS provisioning (if required), cost analyses and related operations concepts. Additional offerings include technical infrastructure provisioning and installation, go-live support and support for subsequent operations. Normally, this requires intense cooperation with SAP to comply with standards as well as respective certification.



SAP HANA TECHNOLOGY – MIDMARKET

Observations

- Several years after the launch of SAP HANA and migration of the SAP product range to HANA many companies who have adopted SAP products are still discussing the suitability of transformation paths for their specific requirements, due to the profound changes related to HANA and also due to the high speed of innovation which SAP is demonstrating within the context of transforming their portfolio, making defined roadmaps still appear as a “moving target”. Also, significant costs and efforts are expected for such migration and naturally, companies strive to really understand potential implications before initiating such large-scale transformation. For service providers who provide HANA technology consulting and technical implementation support this situation bears significant market potential but also poses the challenge to actually acquire and maintain the required competence within this rapidly evolving environment.
 - Many HANA transformations are “greenfield” projects, i.e., rather than migrating existing systems, new systems are set up and optimized directly to fully leverage HANA-related opportunities.
- Interestingly, many midmarket businesses pursue such greenfield approach, also because many of these companies do not run a comprehensive SAP system landscape and transformation to HANA is a good opportunity to build up such landscape accordingly.
- In the past, SAP implementations often were rather expensive and time-consuming endeavors, and therefore, there is a high demand for lean approaches with short implementation times, e.g., based on agile methods. The simplified S/4HANA data structures provide a suitable basis for such approach, although still significant efforts must be expected, due to the continuously increasing functionality of SAP products.
 - The increasing adoption of cloud-based infrastructure (platform as a service) requires companies to determine the most suitable deployment model, and this is specifically important for the HANA technology. We expect that on-premise models will continue to play a key role.
 - Despite this rapid development, All for One Steeb, Atos, CANCOM, Deutsche Telekom, DXC Technology, Freudenberg IT (FIT), Fujitsu and itelligence were able to maintain their leading position in this market segment.

ALL FOR ONE STEEB



Overview

All for One Steeb is a full-service provider who primarily services the German market and has a strong focus on the SAP product range. The offering is mainly targeted at midmarket businesses, comprising HANA technology as well as application development and implementation and application operations.



Strengths

All for One Steeb's HANA technology consulting comprises all aspects relevant for HANA projects (technology selection, methodology, sourcing, implementation). All hosting options (on-premise, managed services, PaaS, also based on the provider's own Managed Enterprise Cloud) are available. A detailed analysis of the client's specific situation and resulting requirements is performed to offer tailored solutions with a high degree of standardization, which are specifically suited for midmarket businesses.

For the strategy development phase, All for One Steeb provides several predefined consulting packages which have been designed to develop a customer-specific roadmap and cover all kinds of situations (greenfield, brownfield, simple upgrade etc.).

All for One Steeb runs an R&D lab in cooperation with SAP and several other technology providers, which enables the provider to quickly leverage respective new developments within concrete projects.

Hybrid use cases with all relevant cloud providers (AWS, Azure, SAP) are supported.



Caution

The provider should strengthen their focus on data volume management aspects to limit the costs of the respective application.

Projects that address both the technology and the application require very precise coordination across the provider's multiple subsidiaries that contribute to the overall offering.



2019 ISG Provider Lens™ Leader

All for One Steeb's HANA offering covers all relevant aspects, including transformation into cloud-based solutions, ensuring tailored solutions for the respective client.

ATOS



Overview

Based on their long-standing presence in the infrastructure market, Atos enjoys a strong position in the HANA technology segment and has further strengthened this position with the Bull S.A. acquisition in 2015. The offering of powerful infrastructure for HANA-based applications is complemented by the provider's high-quality technology consulting services that also address the specific requirements of midmarket businesses.



Strengths

Atos has many years of experience with all kinds of infrastructure solutions for HANA (appliances, TDI) and provides their own proprietary BullSequana server line, a market-leading and SAP-certified hardware solution for HANA. The respective consulting and managed services offering comprises all technology and application management aspects and is complemented by the provider's own managed enterprise cloud offering.

Atos provides flexible solutions for operating HANA-based applications; customers have the option to take over operational responsibility themselves, which allows for the successive, partial outsourcing of operations within respective transformation strategies, facilitating such transformation for midmarket businesses accordingly.

Based on the integrated consulting approach for infrastructure and application, optimization of the respective HANA system landscape is an integral part of the offering. The provider's "Cloudification Concepts Feasibility Workshop" is an option for clients to develop a strategy for the successive deployment of cloud-based solutions. Atos' „Orchestrated Hybrid Cloud for SAP“ is a powerful managed service with one single interface for operating the resulting hybrid cloud use cases which covers both Atos' own components as well as third-party components, including public clouds such as Amazon Web Services or Microsoft Azure.

Atos has many references and use cases, also from the midmarket segment.



Caution

Within hybrid use cases, Atos should put a stronger focus on SAP's own cloud-based applications such as Ariba, Concur, SuccessFactors etc.



2019 ISG Provider Lens™ Leader

Atos provides a portfolio of powerful solutions for all relevant aspects of the HANA technology as well as a high degree of flexibility, which also suits midmarket businesses.

CANCOM



Overview

CANCOM SE with headquarters in Munich is an IT service provider with a focus on the German market; main areas of coverage include infrastructure services, i.e., technology consulting, hosting and cloud. Respective services for SAP-based applications and, specifically, HANA constitute an important part of the portfolio. The offering is mainly targeted at midmarket businesses, but is also suitable for larger enterprises.



Strengths

CANCOM provides flexible delivery models with a clear service structure and ensures a high degree of plannability for their clients, covering all relevant models, from on-premise and private to public cloud and hybrid models. Public cloud offerings of global third-party providers are also included within concrete customer situations.

CANCOM has many years of experience with SAP infrastructure planning, implementation and operations. The CANCOM portfolio comprises best practices and standard components for implementation and operations. The focus is on IaaS and PaaS; for SAP-based applications, the portfolio also includes SaaS and basis support offerings accordingly.

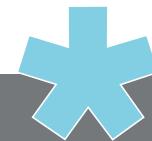
Connectivity to SAP's own cloud offerings such as Ariba, Concur, SuccessFactors etc. is also included in the portfolio.

CANCOM provides comprehensive advice during the preliminary phases of a project to help clients develop an individual roadmap that addresses their respective requirements.



Caution

The infrastructure focus limits options to optimize whole SAP system landscapes with several components (BW, ERP; SCM etc.), since such optimization approach would have to address the respective applications more comprehensively.



2019 ISG Provider Lens™ Leader

CANCOM is a highly competent full-service provider of all relevant infrastructure components for HANA-based applications.

DEUTSCHE TELEKOM



Overview

In the European and, specifically, the German market Deutsche Telekom is an important provider of HANA services. Traditional strong competencies include infrastructure, design and operations of platforms for SAP HANA. Deutsche Telekom provides a very comprehensive portfolio of respective consulting services and complete system operations offerings and covers all relevant use cases (on-premise, cloud, hybrid).



Strengths

Based on their many years of experience and their broad customer base, Deutsche Telekom is able to deliver adequate and competent consulting for all relevant use cases to determine a suitable HANA system strategy and required technologies and installations, addressing both application systems and required supporting systems such as SAP Solution Manager.

The company has a clear strategy for future hybrid use cases (on-premise/cloud) and provides adequate coverage of these use cases within their consulting and system strategy development services. The provider's "Cloudifier" methodology is a comprehensive concept that addresses all HANA transformation aspects with a focus on cloud-based solutions.

The "Jump Start" methodology is Deutsche Telekom's approach to ensure an easy and limited entry into the HANA environment, which suits midmarket businesses with their often limited resources and lack of experience.

Deutsche Telekom (TSI) provides a HANA platform solution with flexible scaling options and sophisticated service packages. The solutions provide suitable options for companies of all sizes, including midmarket businesses. Variable pricing models, from pay-as-you-use to fixed-price models, ensure a maximum of flexibility and security for clients.

The provider's high integration and operations know-how ensures reliable system operations and comprehensive solution competence for advancements and enhancements required to address changes within the customer's company, for instance, in the wake of M&A activities.



Caution

The management platform for operating complete system landscapes (Dynamic Services for SAP Solutions) has a strong focus on completely cloud-based use cases and the provider should add hybrid use cases accordingly.

The great multitude of models lacks transparency, specifically for midmarket businesses. A limited number of common standard packages, in addition to the Jump Start methodology, would be useful and helpful.



2019 ISG Provider Lens™ Leader

Deutsche Telekom's main strengths include their comprehensive, flexible and highly scalable platform solutions for HANA and related consulting competence.

DXC TECHNOLOGY



Overview

DXC Technology is a global full IT service provider (infrastructure, consulting, implementation and operations support) with a strong presence in the DACH region. The SAP portfolio is among the core offerings of the DXC portfolio; in addition to their own competencies, the provider leverages a broad partner network to address HANA technology aspects. The focus is on managed services, which make up more than half of revenues.



Strengths

DXC has many years of SAP HANA technology and infrastructure experience and is able to develop analyses and recommendations for suitable system strategies, resulting roadmaps and the project portfolio, accounting for all technology options (on-premise, cloud, hybrid).

Many standardized packages with workshops and assessments are available for various areas of the technology consulting offering; they can be combined individually to increase the plannability of transformation projects and allow for a phased transformation.

DXC offers a comprehensive portfolio of on-demand solutions for implementation and ensures a high degree of flexibility within concrete customer projects, both under infrastructure and application management aspects. The offering comprises the take-over of responsibility for integration of multiple components by DXC, including components from multiple providers, based on a broad partner network of renowned technology providers. This way it is possible to also adequately address the specific requirements of midmarket businesses, ensuring both an easy entry through suitable basic packages and scalability, when needed.



Caution

A stronger focus could be laid on better integration with SAP's own cloud offerings such as Ariba, Concur, SuccessFactors etc. The provider should also enhance their own competencies for innovative topics such as IoT, machine learning etc.



2019 ISG Provider Lens™ Leader

DXC is a powerful provider in the HANA technology segment and has a focus on advising clients on available technology options and the integration of multiple components into a suitable overall solution that addresses their specific requirements.

FREUDENBERG IT



Overview

Freudenberg IT is the captive IT service provider of the Freudenberg Group, a global technology company whose portfolio includes products, solutions and services for multiple sectors, including the automotive, machine engineering, textile, construction and telecommunications industries. As opposed to many other captive IT service providers Freudenberg IT also offers their services to external clients with the same portfolio depth; the focus is on globally active companies with a high manufacturing share. The SAP product range, including the HANA technology, constitutes an important component of the overall portfolio.



Strengths

Freudenberg IT has broad technology experience and supports all relevant models (on-premise, cloud, hybrid). A special focus is on determining the customer's specific situation and resulting requirements to provide tailored solutions, specifically for midmarket businesses while ensuring a high degree of standardization of technologies in use. The continuously growing customer base is proof of this successful approach.

Based on their comprehensive service portfolio, Freudenberg IT is able to make significant contributions to the respective client's overall system landscape (infrastructure optimization, application optimization, data management, life cycle management), also thanks to their long-standing and intense partnership with SAP.

In addition to powerful infrastructure services, Freudenberg IT also offers comprehensive strategic consulting for transformation to a HANA-based landscape, including options to use third-party public clouds. A healthy balance between cost reduction potentials through cloud-based, highly standardized approaches and highly flexible systems operations is also an important aspect of Freudenberg IT's strategy development approach.



Caution

Freudenberg IT should increase the visibility of their practical experience and competence for system landscape optimization.

The provider is challenged to provide an even clearer presentation of their strategy development approach which balances cost optimization and flexibility aspects,



2019 ISG Provider Lens™ Leader

Freudenberg IT's consulting portfolio covers all relevant aspects of the HANA technology and is highly field-tested, due to the provider's application within their own company.

FUJITSU



Overview

Fujitsu is a global full IT service provider and enjoys a strong and long-standing position in the segment for infrastructure services and related hardware. A key focus is on SAP, including HANA. The provider has also strengthened their presence in the DACH region significantly and has evolved into an important player within this segment.



Strengths

As a global provider with a strong presence in the DACH region, Fujitsu offers a complete portfolio for SAP HANA infrastructure analysis and design, including IaaS aspects. Fujitsu also offers a comprehensive portfolio for SAP system operations, including solution manager, business process monitoring and license management. Fujitsu supports all kinds of delivery models, from on-premise solutions to cloud-based and hybrid approaches.

The company also provides a sophisticated concept based on a clear and well-structured set of parameters, e.g., availability, performance, disaster recovery etc., to define prices and subsequent billing of services. Clearly defined services also provide a basis for pay-per-use models, not only for purely cloud-based environments.

Fujitsu provides powerful procedure models and best practices to support the transition into a HANA-based system landscape. The provider also ensures that plans and a roadmap are set up prior to a project which address the respective customer's requirements and specific situation - a key aspect for midmarket businesses who often lack the required comprehensive HANA know-how.



Caution

The provider is still in the process of building up a big data offering.

While innovative topics such as IoT, machine learning etc. are already included in the portfolio, they should be advanced further.



2019 ISG Provider Lens™ Leader

Fujitsu provides SAP-certified hardware for HANA as well as a comprehensive offering of consulting, implementation support and systems operations support for HANA technology.

ITELIGENCE



Overview

itelligence AG is an IT service provider with a strong focus on the SAP product offering; the portfolio includes project services (design, implementation, initial operations) as well as application management, which is mainly provided as managed services. itelligence is part of NTT Data Group and covers large parts of this group's European SAP business. The company has also presences in Asia and North America. While itelligence AG has a focus on the midmarket segment, the provider is also a suitable partner for larger enterprises.



Strengths

itelligence' portfolio covers all SAP HANA technology aspects (hardware concepts, data management, operations concepts). The offering is based on the "Addstore", clearly defined standard packages that can be combined into customer-specific services, which is especially interesting for midmarket businesses to be able to better plan the various project phases. Various consulting packages are available which address the specific customer's situation to determine the best transformation path, from simple upgrades to brownfield and greenfield approaches.

itelligence has a clear focus on Fiori as the central SAP user interaction framework and cleverly uses related options to deliver user-centric applications.

The provider also addresses hybrid on-premise - cloud use cases, including the management of related complexity.

Due to their focus on the SAP product portfolio itelligence can act as one-stop provider, specifically for clients who attach great value to a highly consolidated provider landscape for their business application systems.



Caution

The provider should enhance their focus on IoT aspects, specifically, the SAP Leonardo framework.



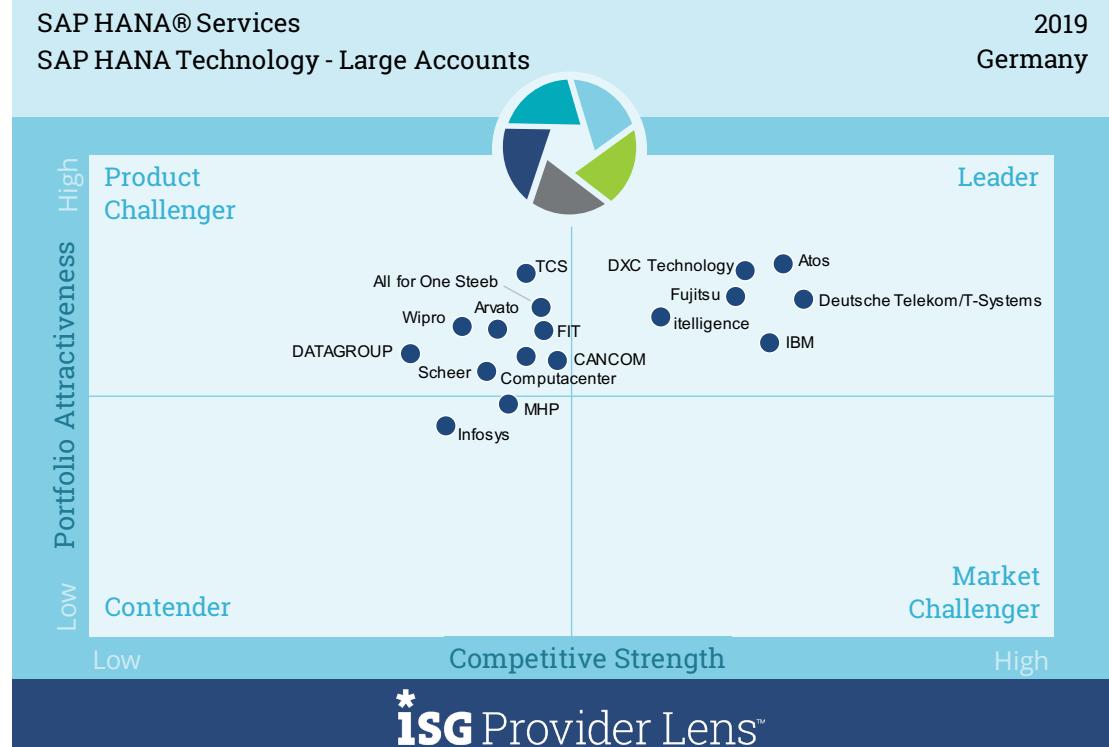
2019 ISG Provider Lens™ Leader

HANA technology consulting by itelligence covers all relevant aspects; strengths include the provider's high share of standardized service packages.

SAP HANA TECHNOLOGY – LARGE ACCOUNTS

Definition

This segment includes providers whose offering addresses the technological aspects of HANA projects, including the respective platform, and who have a focus on the large accounts segment. Competences include strategic consulting, the selection of suitable hardware (for in-house operations), HANA PaaS provisioning (if required), cost analyses and related operations concepts. Additional offerings include technical infrastructure provisioning and installation, go-live support and support for subsequent operations. Normally, this requires intense cooperation with SAP to comply with standards as well as respective certification. While many large accounts still prefer in-house operations; the degree of adoption of PaaS offerings is increasing.



SAP HANA TECHNOLOGY – LARGE ACCOUNTS

Observations

■ Several years after the launch of SAP HANA and migration of the SAP product range to HANA many companies who have adopted SAP products are still discussing the suitability of transformation paths for their specific requirements, due to the profound changes related to HANA and also due to the high speed of innovation which SAP is demonstrating within the context of transforming their portfolio, making defined roadmaps still appear as a “moving target”. Also, significant costs and efforts are expected for such migration and naturally, companies strive to really understand potential implications before initiating such large-scale transformation. Considering the high degree of complexity of SAP system landscapes in large enterprises, this is a highly significant issue for the large accounts segment. For service providers who provide HANA technology consulting and technical implementation support this situation bears significant market potential but also poses the challenge to actually acquire and maintain the required competence within this rapidly evolving environment.

- Within the large accounts segment, the trend towards greenfield approaches, i.e., the set-up of new, for HANA optimized systems, rather than upgrades of existing systems, is not as much adopted as in the midmarket segment, certainly due to the highly complex system landscapes and resulting expenses.
- For companies with highly consolidated system landscapes HANA transformation does not imply further consolidation and therefore these enterprises are trying to determine the most suitable date for such transformation and are often hesitating to initiate transformation accordingly.
- The increasing adoption of cloud-based infrastructure (platform as a service) requires companies to determine the most suitable deployment model, and this is specifically important for the HANA technology. We expect that on-premise models will continue to play a key role and that hybrid structures that combine cloud and on-premise systems will remain the dominating model, specifically within large enterprises.
- Despite the rapid development, Atos, Deutsche Telekom, DXC Technology, Fujitsu, IBM and itelligence were able to maintain their leadership position; Atos and itelligence were even able to considerably strengthen their relative position.

ATOS



Overview

Based on their long-standing presence in the infrastructure market, Atos enjoys a strong position in the HANA technology segment and has further strengthened this position with the Bull S.A. acquisition in 2015. The offering of powerful infrastructure for HANA-based applications is complemented by the provider's high-quality technology consulting services. Compared to the competition, Atos provides leading-edge scalability of their infrastructure offering, which is optimal for deployment within large enterprises, and related consulting services also provide comprehensive coverage of highly complex large-accounts requirements.



Strengths

Atos has many years of experience with all kinds of infrastructure solutions for HANA (appliances, TDI) and provides their own proprietary BullSequana server line, a market-leading and SAP-certified hardware solution for HANA. The respective consulting and managed services offering comprises all technology and application management aspects and is complemented by the provider's own managed enterprise cloud offering.

Based on the integrated consulting approach for infrastructure and application, optimization of the respective HANA system landscape is an integral part of the offering. The provider's approach also addresses scenarios with complex SAP system landscapes, consisting of ERP, BW and other systems and often used in large enterprise organizations.

For the concept development phase Atos provides permanently available demo systems and the option to install proof-of-concept systems based on a system copy of the customer's own SAP system (on-premise or cloud).

Atos provides flexible solutions for operating HANA-based applications; customers have the option to take over operational responsibility themselves, which allows for the successive, partial outsourcing of operations within respective transformation strategies, also within large enterprises where such transformation may take quite some time.

The provider's "Cloudification Concepts Feasibility Workshop" is an option for clients to develop a strategy for the successive deployment of cloud-based solutions. Atos' "Orchestrated Hybrid Cloud for SAP" is a powerful managed service with one single interface for operating the resulting hybrid cloud use cases which covers both Atos' own components as well as third-party components, including public clouds such as Amazon Web Services or Microsoft Azure.

ATOS



Caution

Within hybrid use cases, Atos should put a stronger focus on SAP's own cloud-based applications such as Ariba, Concur, SuccessFactors etc.



2019 ISG Provider Lens™ Leader

Atos provides a portfolio of powerful solutions for all relevant aspects of the HANA technology as well as a high degree of flexibility, which is a key requirement for large accounts.

DEUTSCHE TELEKOM/T-SYSTEMS



Overview

In the European and, specifically, the German market Deutsche Telekom is an important provider of HANA services. Traditional strong competencies include infrastructure, design and operations of platforms for SAP HANA. Deutsche Telekom provides a very comprehensive portfolio of respective consulting services and complete system operations offerings and covers all relevant use cases (on-premise, cloud, hybrid). Due to their size, Deutsche Telekom is able to address the highly complex requirements of large accounts.



Strengths

Based on their many years of experience and their broad customer base, Deutsche Telekom is able to deliver adequate and competent consulting for all relevant use cases to determine a suitable HANA system strategy and required technologies and installations, addressing both application systems and required supporting systems such as SAP Solution Manager.

The company has a clear strategy for future hybrid use cases (on-premise/cloud) and provides adequate coverage of these use cases within their consulting and system strategy development services. The provider's "Cloudifier" methodology is a comprehensive concept that addresses all HANA transformation aspects with a focus on cloud-based solutions.

Deutsche Telekom (TSI) provides a HANA platform solution with flexible scaling options and sophisticated service packages. The solutions provide suitable options for companies of all sizes, including large enterprises. Variable pricing models, from pay-as-you-use to fixed-price models, ensure a maximum of flexibility and security for clients.

The provider's high integration and operations know-how ensures reliable system operations and comprehensive solution competence for advancements and enhancements required to address changes within the customer's company, for instance, in the wake of M&A activities, which are quite common among large enterprises. The portfolio also covers the higher requirements of large accounts, such as near-zero downtime during upgrades or increased security.



Caution

The management platform for operating complete system landscapes (Dynamic Services for SAP Solutions) has a strong focus on completely cloud-based use cases and the provider should add hybrid use cases accordingly.

Overall, the portfolio seems to have a very strong focus on cloud-based landscapes. For large accounts hybrid operations will be the standard, at least for the foreseeable future; therefore, the provider should provide better long-term support of such hybrid use cases.



2019 ISG Provider Lens™ Leader

Deutsche Telekom's main strengths include their comprehensive, flexible and highly scalable platform solutions for HANA and related consulting competence.

DXC TECHNOLOGY



Overview

DXC Technology is a global full IT service provider (infrastructure, consulting, implementation and operations support) with a strong presence in the DACH region. The SAP portfolio is among the core offerings of the DXC portfolio; in addition to their own competencies, the provider leverages a broad partner network to address HANA technology aspects. The focus is on managed services, which make up more than half of the revenues.



Strengths

DXC has many years of SAP HANA technology and infrastructure experience and is able to develop analyses and recommendations for suitable system strategies, resulting roadmaps and the project portfolio, accounting for all technology options (on-premise, cloud, hybrid). Standardized packages consisting of workshops and assessments are available for individual aspects, which can be combined individually.

DXC offers a comprehensive portfolio of on-demand solutions for implementation and ensures a high degree of flexibility within concrete customer projects, both under infrastructure and application management aspects. The offering comprises the take-over of responsibility for integration of multiple components by DXC, including components from multiple providers, based on a broad partner network of renowned technology providers.

DXC's technology consulting also addresses data management aspects (archiving, data tiering etc.) to provide efficient system management support, which is especially helpful for larger companies.



Caution

A stronger focus should be laid on better integration with SAP cloud offerings such as Ariba, Concur, SuccessFactors etc.

The provider is challenged to convince large accounts of the suitability of a model where another provider takes over integration of multiple solutions; many companies still take over integration responsibility themselves.



2019 ISG Provider Lens™ Leader

DXC is a powerful provider in the HANA technology segment and has a focus on advising clients on available technology options and the integration of multiple components into a suitable overall solution that addresses their specific requirements.

FUJITSU



Overview

Fujitsu is a global full IT service provider and enjoys a strong and long-standing position in the segment for infrastructure services and related hardware. A key focus is on SAP, including HANA. The provider has also strengthened their presence in the DACH region significantly and has evolved into an important player within this segment.



Strengths

As a global provider with a strong presence in the DACH region, Fujitsu offers a complete portfolio for SAP HANA infrastructure analysis and design, including IaaS aspects. Fujitsu also offers a comprehensive portfolio for SAP system operations, including solution manager, business process monitoring and license management, which also addresses the multitude of requirements of large enterprises. Fujitsu supports all kinds of delivery models, from on-premise solutions to cloud-based and hybrid approaches.

The company also provides a sophisticated concept based on a clear and well-structured set of parameters, e.g., availability, performance, disaster recovery etc., to define prices and subsequent billing of services. Clearly defined services also provide a basis for pay-per-use models, not only for purely cloud-based environments.

The solutions are highly scalable and therefore suitable for large enterprises.

Fujitsu provides powerful procedure models and best practices to support the transition into a HANA-based system landscape and also ensures that plans and a roadmap are set up prior to a project and accounts for the highly complex system landscapes which are common among large enterprises and strives to optimize these landscapes, for instance, through a suitable data volume management approach.



Caution

The provider is still in the process of building up their big data offering, a topic which bears increasing relevance for large enterprises.

While innovative topics such as IoT, machine learning etc. are already included in the portfolio, they should be advanced further.



2019 ISG Provider Lens™ Leader

Fujitsu provides SAP-certified hardware for HANA as well as a comprehensive offering of consulting, implementation support and systems operations support for HANA technology.

IBM

Overview

IBM is a global full IT service provider with a focus on the large accounts segment and on infrastructure services. The company has many years of experience with supporting SAP-based applications, including HANA.

Strengths

As a global provider, IBM offers a complete portfolio that addresses all SAP HANA infrastructure aspects, including dedicated infrastructure, platform as a service and a comprehensive offering of cloud-based services. Based on the partnership with SAP, SAP-certified HANA migration centers are available, including best practices for S/4HANA migration and automated tools for faster migration, which is of key importance for large accounts with many systems that need to be migrated.

IBM provides clear templates and procedure models, including many HANA business cases and concrete ROI analyses.

The provider's size ensures the required scalability of services for large accounts.



Caution

The IBM portfolio has a major focus on technology aspects. Application implementation and management seem to be less relevant, which limits options to pursue a more comprehensive consulting approach.



2019 ISG Provider Lens™ Leader

IBM is a traditional partner for large accounts and provides these clients profound methodological know-how and many years of high technology competence.

ITELIGENCE



Overview

itelligence AG is an IT service provider with a strong focus on the SAP product offering; the portfolio includes project services (design, implementation, initial operations) as well as application management, which is mainly provided as managed services. itelligence is part of NTT Data Group and covers large parts of this group's European SAP business. The company has also presences in Asia and North America. While itelligence AG has a focus on the midmarket segment, the provider is also a suitable partner for larger enterprises.



Strengths

itelligence' portfolio covers all SAP HANA technology aspects (hardware concepts, data management, operations concepts). The offering is based on the "Addstore", clearly defined standard packages that can be combined into customer-specific services, which is especially interesting for clients to enable them to better plan the various project phases. Various consulting packages are available which address the specific customer's situation to determine the best transformation path, from simple upgrades to brownfield and greenfield approaches.

itelligence has a clear focus on implementing user-centric applications based on Fiori, SAP's central framework for designing user interfaces.

The provider also addresses hybrid on-premise - cloud use cases and ensures the management of related complexity.

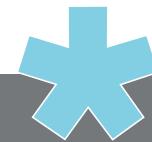
Due to their focus on the SAP product portfolio itelligence can act as one-stop provider, specifically for clients who attach great value to a highly consolidated provider landscape for their business application systems. This is the preferred strategy of many large enterprises, which makes itelligence an attractive provider for these clients.



Caution

The provider should enhance their focus on IoT aspects, specifically, the SAP Leonardo framework.

itelligence should strengthen their focus on mobile devices which are increasingly used to access SAP HANA-based applications.



2019 ISG Provider Lens™ Leader

HANA technology consulting by itelligence covers all relevant aspects; strengths include the provider's high share of standardized service packages.

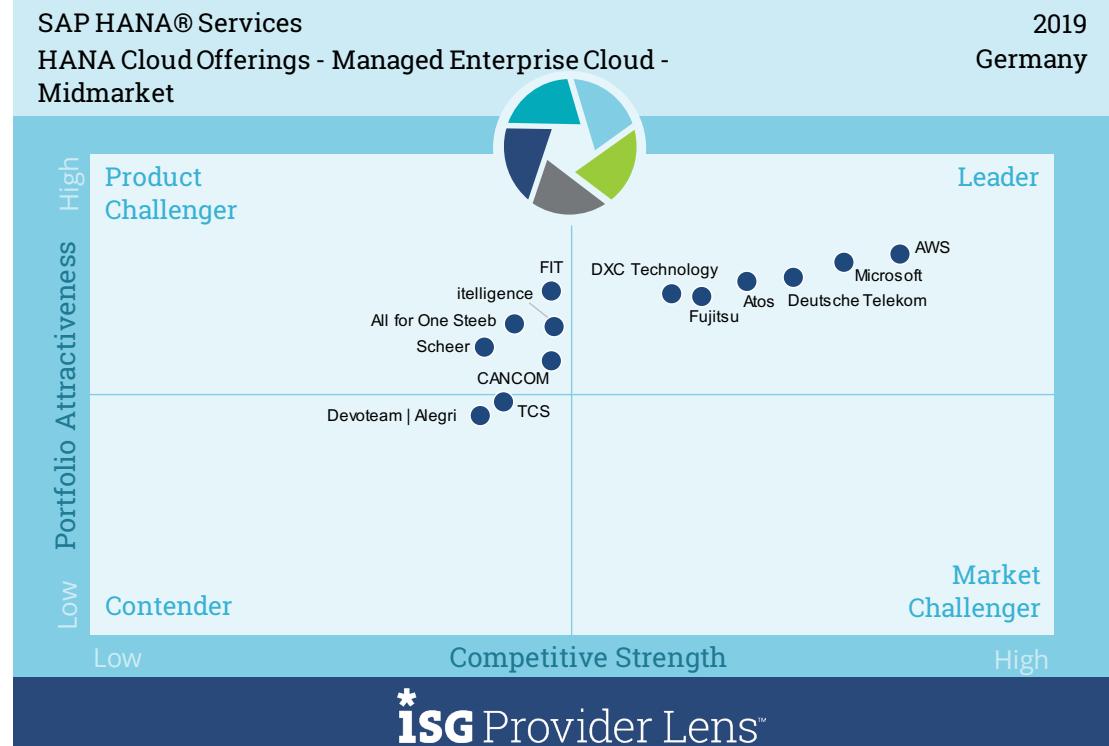
HANA CLOUD OFFERINGS – MANAGED ENTERPRISE CLOUD – MIDMARKET

Definition

This segment includes providers of services for a managed platform as a service, based on SAP HANA. Such cloud service also supplies related system management services and may include sales of the SAP HANA Enterprise Cloud (SAP HEC). This category includes providers that offer such services and competences to clients from the midmarket segment.

Relevant service components include requirements analysis for the respective application, technical design, implementation and subsequent operations. Additional challenges for providers include complex system landscapes and resulting hybrid operations.

Normally, this requires intense cooperation with SAP to comply with standards as well as respective certification.



HANA CLOUD OFFERINGS – MANAGED ENTERPRISE CLOUD – MIDMARKET

Observations

■ The adoption of platform-as-a-service offerings for HANA-based system landscapes has increased significantly during the last few years, also due to the market entry of hyperscale providers such as Amazon Web Services and Microsoft Azure, driven by the technological development, virtualization and resulting massive scalability for HANA systems. As a result, most HANA projects, both new installations and initiatives to transform existing system landscapes, are at least examining whether the usage of such platforms with their respective cost reduction potentials would be an option. This is especially an option for new installations of HANA-based systems, which are often performed in medium-sized businesses.

- To be able to use such options, applications and usage profiles (e.g., system availabilities and schedules for upgrades etc.) must be highly standardized. Related expenses during later operations must be weighed against cost reductions achieved through the platform, and public cloud solutions require an especially high degree of standardization.
- Many providers do not only offer their own managed cloud but also a managed service, combining one of the major hyperscale platforms with their own comprehensive operations support services.
- Atos, Deutsche Telekom, DXC Technology and Fujitsu were able to maintain their leading position in this segment. Amazon Web Services (AWS) and Microsoft Azure also qualified as leaders, due to their very powerful and comprehensive offerings.

AWS



Overview

AWS is one of the largest cloud providers worldwide and has worked to consistently advance their offering with services around the SAP product portfolio. The offering targets companies of all sizes and is enhanced quickly on a continuous basis.



Strengths

The AWS portfolio provides the whole scope of cloud-based infrastructure services for all company classes and comprises all key HANA-based products, both Business Suite on HANA and S/4HANA. AWS' strengths include a high degree of flexibility and extremely high scalability as well as a self-service option to allow customers to combine required services themselves.

Amazon also maintains a partner network in the German market to provide customers comprehensive support of AWS services.

Since 2017, clients have the option to choose a managed service under the responsibility of SAP (SAP HANA Enterprise Cloud) and based on the infrastructure provisioned by AWS.

AWS demonstrates an impressive speed of innovation, ensuring the fast availability of SAP's latest developments within the AWS portfolio.



Caution

Due to the high scope of functionality, the AWS portfolio is, inevitably, highly complex and therefore not easy to comprehend, specifically for midmarket customers who lack respective internal know-how. Such customers need support by AWS partners to ensure the effective management of this high degree of complexity.



2019 ISG Provider Lens™ Leader

AWS has evolved into one of the key providers of cloud-based services for the SAP product portfolio relatively quickly.

ATOS



Overview

Based on their long-standing experience within infrastructure service provisioning, Atos is a powerful provider of managed enterprise cloud services for SAP HANA, including comprehensive solutions to support hybrid cloud structures and operations, also based on third-party offerings. As a global provider Atos covers all regional requirements, for instance, concerning data storage in a specific region or country.



Strengths

Atos has many years of experience with operating their own managed enterprise cloud. Based on the Bull acquisition, Atos has improved their already strong position even further, specifically with respect to scalable solutions, data security and privacy and the big data readiness of their solutions.

Atos' "Orchestrated Hybrid Cloud for SAP" is a comprehensive solution that has been designed to provide integration with third-party platforms such as AWS, Microsoft Azure and SAP HEC. The provider's proprietary tool set is combined with ServiceNow to provide a powerful, portal-based cloud management solution. Clients can use this portal to change system distribution across multiple components themselves.

Atos cooperates with AppDynamics to add performance and availability monitoring functionality to these solutions.

Both the provider's own cloud solution and the management solution for hybrid use cases feature sufficient flexibility to provide efficient support of application landscapes with limited complexity, which are typical for midmarket businesses.

Atos runs many globally distributed data centers and is well equipped to address all kinds of regional requirements.



Caution

The provider should have a stronger emphasis on the standardization aspects within the context of a managed cloud.

To be able to use the option to define system distribution across multiple cloud offerings themselves via the customer portal, customers' staff must be qualified accordingly, which may be a challenge for midmarket businesses.



2019 ISG Provider Lens™ Leader

Based on their customers' existing hardware, Atos offers a convincing solution for a HANA managed cloud and also provides a platform for the overall management of hybrid use cases, including third-party providers.

DEUTSCHE TELEKOM



Overview

In the European and, specifically, the German market Deutsche Telekom is an important provider of HANA services. Traditionally, the company has very strong SAP HANA competences, from infrastructure to concept development and platform operations and has successfully extended their offering during the last few years to also include managed enterprise cloud operations. The offering addresses pure cloud as well as various hybrid use cases. A special focus is on larger midmarket businesses.



Strengths

Deutsche Telekom sells the SAP HANA Enterprise Cloud (SAP HEC) in cooperation with SAP SE as well as their own managed enterprise cloud, which is an essential component of the provider's proprietary Cloudifier methodology. This "Dynamic Services for SAP Solutions" offering provides industrialized operations of complex SAP system landscapes out of a private cloud. Connectivity to public cloud offerings such as the Open Telekom Cloud is also available.

Future dominating hybrid use cases are supported with a convincing concept, based on the combined Hybrid Cloud for SAP Solutions offering; third-party cloud applications where the client has taken over management responsibility, are also included.

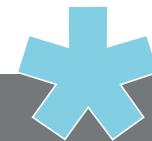
These offerings provide the required flexibility to also serve midmarket businesses, including flexible and transparent pricing models. Based on the provider's long-standing cloud application operations experience, demonstrated through many references and use cases, Deutsche Telekom can ensure the required scalability as well as high-availability operations.



Caution

Within the context of concrete projects for their clients, Deutsche Telekom must be careful to handle their two alternative solutions, the proprietary enterprise cloud and the SAP offering, in a way that avoids any competitive situation with partner SAP.

The portfolio lacks transparency considering the scope of management support of hybrid models that include third-party cloud offerings.



2019 ISG Provider Lens™ Leader

Deutsche Telekom has a strong focus on transforming customers' environments into cloud-based landscapes and provides a comprehensive and powerful proprietary managed enterprise cloud for HANA.

DXC TECHNOLOGY



Overview

DXC Technology is a global full IT service provider (infrastructure, consulting, implementation and operations support) with a strong presence in the DACH region. The SAP portfolio is one of DXC's core portfolio components, supported by a broad partner network. The focus is on managed services, which make up more than half of revenues and include the multitude of cloud-based services.



Strengths

DXC offers a scalable and comprehensive managed enterprise cloud for HANA-based applications, which is an integral part of the provider's on-demand offering. Management of systems for customers based on this cloud offering is done via a portal-based, highly automated platform which allows for the fast and easy configuration and provisioning of SAP systems by DXC.

Many years of comprehensive experience with SAP application management are a stable basis for operating the proprietary enterprise cloud.

DXC has comprehensive experience with the transformation of customer-specific system landscapes into a highly standardized cloud environment. The SAP Cloud Path framework combines respective methodologies, procedures and tools as well as industry-specific solutions to ensure efficient and fast transformations. DXC maintains partnerships with other renowned providers such as AWS and Microsoft (Azure) to be able to integrate their components into respective roadmaps, if necessary.

Standardized packages, including assessments, proofs of concept and strategy workshops, are available to help clients define a suitable cloud strategy and roadmap for their specific use case.



Caution

It is not easy to find out how DXC positions their own on-demand solutions, compared to third-party solutions (by AWS and Microsoft Azure and also SAP HEC). The provider should also position hybrid use cases more clearly within the portfolio.



2019 ISG Provider Lens™ Leader

As a global service provider DXC also provides a managed enterprise cloud for HANA as well as related concepts and approaches to transform customers' landscapes onto this platform.

FUJITSU



Overview

Fujitsu is a global full IT service provider and enjoys a strong and long-standing position in the segment for infrastructure services and related hardware. A key focus is on SAP, including HANA. The provider has also strengthened their presence in the DACH region significantly and has evolved into an important player within this segment.



Strengths

Fujitsu provides a well-structured enterprise cloud offering, which can be configured, based on a clear parameter set for service definition. The solution features a high degree of scalability and, compared to the competition, very flexible options to manage the required capacities.

The portfolio also includes integration with other cloud offerings (e.g., SAP or Microsoft Azure) as part of the provider's complete offering of services as well integration of on-premise components. A comprehensive platform for operations and system management of such hybrid use cases is also available to meet respective management requirements.

In addition to these cloud-based services, Fujitsu also provides competent advice on available options that address the specific customer's situation, on adequate target scenarios and on how to design a roadmap for this use case. The provider also helps customers with the phased implementation of a defined roadmap, which is a great help for midmarket customers facing all kinds of uncertainties when it comes to successfully develop and implement a transformation strategy.



Caution

Fujitsu does not sufficiently address SAP's Managed HANA Enterprise Cloud (HEC) offering.

The provider is still in the process of integrating IoT use cases.



2019 ISG Provider Lens™ Leader

Besides their own managed enterprise cloud for HANA Fujitsu also provides integration of third-party cloud products and competent support to design and implement multiple hybrid use cases.

MICROSOFT



Overview

For many years, Microsoft has been engaged in partnership with SAP to develop SAP-certified offerings for implementing and operating HANA-based applications in Microsoft Azure. Based on their experience and size, Microsoft is a key provider of cloud-based SAP applications.



Strengths

Based on their more than 20 years of cooperation with SAP, Microsoft ensures an up-to-date as well as field-tested, stable and reliable environment for HANA-based application operations. Most relevant application architectures are included, e.g., BW on HANA, Business Suite on HANA and S/4HANA.

With SAP HANA Enterprise Cloud, this offering also includes a private cloud that can meet higher security requirements, if required. Dedicated installations are available to meet even higher requirements.

The available infrastructure is highly scalable and flexible. Both BW and Business Suite are included in the offering, which allows customers to optimize their overall system landscape within the same environment and achieve additional optimization potentials.

Microsoft provides a very comprehensive documentation and competent advice on the individual offerings.



Caution

The highly diverse offering is rather complex and not always easy to understand, despite the good documentation, specifically for midmarket businesses.

To facilitate first steps, the provider should offer basic packages with a standardized scope of services.



2019 ISG Provider Lens™ Leader

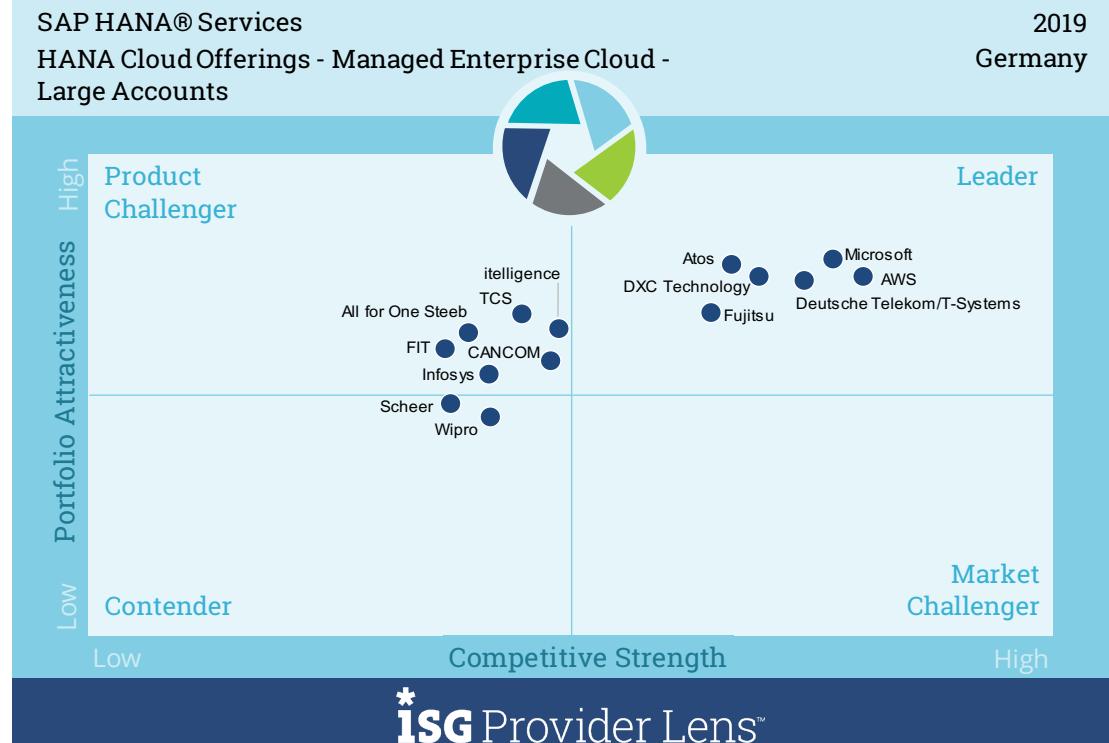
Based on their Azure platform, Microsoft provides a powerful, highly scalable and reliable platform for HANA-based applications.

HANA CLOUD OFFERINGS - MANAGED ENTERPRISE CLOUD – LARGE ACCOUNTS

Definition

This segment includes providers of services for a managed platform as a service, based on SAP HANA. Such cloud service also supplies related system management services and may include sales of the SAP HANA Enterprise Cloud (SAP HEC). This category includes providers that offer such services and competences to clients from the large accounts segment.

Relevant service components include requirements analysis for the respective application, technical design, implementation and subsequent operations. Additional challenges for providers that address the large accounts segment include the complex system landscapes within such large enterprises and resulting hybrid operations. Normally, this requires intense cooperation with SAP to comply with standards as well as respective certification.



HANA CLOUD OFFERINGS - MANAGED ENTERPRISE CLOUD – LARGE ACCOUNTS

Observations

- The adoption of platform-as-a-service offerings for HANA-based system landscapes has increased significantly during the last few years, also due to the market entry of hyperscale providers such as Amazon Web Services and Microsoft Azure, driven by the technological development, virtualization and resulting massive scalability for HANA systems. As a result, most HANA projects, both new installations and initiatives to transform existing system landscapes, are at least examining whether the usage of such platforms with their respective cost reduction potentials would be an option.
- To be able to use such options, applications and usage profiles (e.g., system availabilities and schedules for upgrades etc.) must be highly standardized. Related expenses during later operations must be weighed against cost reductions achieved through the platform, and public cloud solutions require an especially high degree of standardization.
- Large enterprises, with their highly complex system landscapes, will continue to use hybrid structures, combining on-premise and cloud-based components. For these clients, it is an essential requirement for providers to be able to support such hybrid operations based on suitable tools and management platforms. Many providers offer a managed service that combines one of the major hyperscale platforms with their own comprehensive operations support services, which is a valid option for such use cases.
- Atos, Deutsche Telekom, DXC Technology and Fujitsu were able to maintain their leading position in this segment. Amazon Web Services (AWS) and Microsoft Azure also qualified as leaders, due to their very powerful and comprehensive offerings.

AWS

Overview

AWS is one of the largest cloud providers worldwide and has worked to consistently advance their offering with services around the SAP product portfolio. The offering targets companies of all sizes and is enhanced quickly on a continuous basis.

Strengths

The AWS portfolio provides the whole scope of cloud-based infrastructure services for all company classes and comprises all key HANA-based products, both Business Suite on HANA and S/4HANA. The high flexibility and extreme scalability are especially attractive for large enterprises.

Amazon also maintains a partner network in the German market to provide customers comprehensive support of AWS services.

Since 2017, clients have the option to choose a managed service under the responsibility of SAP (SAP HANA Enterprise Cloud) and based on the infrastructure provisioned by AWS.

AWS demonstrates an impressive speed of innovation, ensuring the fast availability of SAP's latest developments within the AWS portfolio.



Caution

Due to the high scope of functionality, the AWS portfolio is, inevitably, highly complex, which is a considerable challenge, even for large accounts. Customers need support by AWS partners to ensure the effective management of this high degree of complexity.

Large enterprises who mostly have longer adaption cycles should clearly define to which extent they can benefit from the provider's high speed of innovation.



2019 ISG Provider Lens™ Leader

AWS has evolved into one of the key providers of cloud-based services for the SAP product portfolio relatively quickly.

ATOS



Overview

Based on their long-standing experience within infrastructure service provisioning, Atos is a powerful provider of managed enterprise cloud services for SAP HANA, including comprehensive solutions to support hybrid cloud structures and operations, also based on third-party offerings. As a global provider Atos covers all regional requirements, for instance, concerning data storage in a specific region or country.



Strengths

Atos has many years of experience with operating their own managed enterprise cloud. Based on the Bull acquisition, Atos has improved their already strong position even further, specifically with respect to scalable solutions, data security and privacy and the big data readiness of their solutions.

Atos' "Orchestrated Hybrid Cloud for SAP" is a comprehensive solution that has been designed to provide integration with third-party platforms such as AWS, Microsoft Azure and SAP HEC. The provider's proprietary tool set is combined with ServiceNow to provide a powerful, portal-based cloud management solution. Clients can use this portal to change system distribution across multiple components themselves, which is specifically attractive for large accounts with complex system landscapes.

Atos cooperates with AppDynamics to add performance and availability monitoring functionality to these solutions, which addresses key requirements of globally active companies and large accounts.

Atos runs many globally distributed data centers and is well equipped to address all kinds of regional requirements.



Caution

The provider should have a stronger emphasis on the standardization aspects within the context of a managed cloud.



2019 ISG Provider Lens™ Leader

Based on their customers' existing hardware, Atos offers a convincing solution for a HANA managed cloud and also provides a platform for the overall management of hybrid use cases, including third-party providers.

DEUTSCHE TELEKOM/T-SYSTEMS



Overview

In the European and, specifically, the German market Deutsche Telekom is an important provider of HANA services. Traditionally, the company has very strong SAP HANA competences, from infrastructure to concept development and platform operations and has successfully extended their offering during the last few years to also include managed enterprise cloud operations. The offering addresses pure cloud as well as various hybrid use cases. Based on their size, Deutsche Telekom can ensure the high scalability requirements of large enterprises.



Strengths

Deutsche Telekom sells the SAP HANA Enterprise Cloud (SAP HEC) in cooperation with SAP SE as well as their own managed enterprise cloud, which is an essential component of the provider's proprietary Cloudifier methodology. This "Dynamic Services for SAP Solutions" offering provides industrialized operations of complex SAP system landscapes out of a private cloud. Connectivity to public cloud offerings such as the Open Telekom Cloud is also available.

Future dominating hybrid use cases are supported with a convincing concept, based on the combined Hybrid Cloud for SAP Solutions offering; third-party cloud applications where the client has taken over management responsibility, are also included.

Based on the provider's long-standing cloud application operations experience, demonstrated through many references and use cases, Deutsche Telekom can ensure the required scalability as well as high-availability operations. Flexible and transparent pricing models ensure very good plannability of costs for customers.



Caution

Within the context of concrete projects for their clients, Deutsche Telekom must be careful to handle their two alternative solutions, the proprietary enterprise cloud and the SAP offering, in a way that avoids any competitive situation with partner SAP.

Many large enterprises are already operating or plan to operate hybrid models including third-party cloud offerings. The portfolio lacks transparency considering the scope of overall management support of such models by Deutsche Telekom.



2019 ISG Provider Lens™ Leader

Deutsche Telekom has a strong focus on transforming customers' environments into cloud-based landscapes and provides a comprehensive and powerful proprietary managed enterprise cloud for HANA.

DXC TECHNOLOGY



Overview

DXC Technology is a global full IT service provider (infrastructure, consulting, implementation and operations support) with a strong presence in the DACH region. The SAP portfolio is one of DXC's core portfolio components, supported by a broad partner network. The focus is on managed services, which make up more than half of revenues and include the multitude of cloud-based services.



Strengths

DXC offers a scalable and comprehensive managed enterprise cloud for HANA-based applications, which is an integral part of the provider's on-demand offering. Management of systems for customers based on this cloud offering is done via a portal-based, highly automated platform which allows for the fast and easy configuration and provisioning of SAP systems by DXC.

Many years of comprehensive experience with SAP application management are a stable basis for operating the proprietary enterprise cloud. DXC provides comprehensive coverage of higher performance, availability and security requirements which are typical for large accounts.

DXC has comprehensive experience with the transformation of customer-specific system landscapes into a highly standardized cloud environment. The SAP Cloud Path framework combines respective methodologies, procedures and tools as well as industry-specific solutions to ensure efficient and fast transformations. DXC maintains partnerships with other renowned providers such as AWS and Microsoft (Azure) to be able to integrate their components into respective roadmaps, if necessary.

Standardized packages, including assessments, proofs of concept and strategy workshops, are available to help clients define a suitable cloud strategy and roadmap for their specific use case.



Caution

It is not easy to find out how DXC positions their own on-demand solutions, compared to third-party solutions (by AWS and Microsoft Azure and also SAP HEC). The provider should also position hybrid use cases more clearly within the portfolio.



2019 ISG Provider Lens™ Leader

As a global service provider DXC also provides a managed enterprise cloud for HANA as well as related concepts and approaches to transform customers' landscapes onto this platform.

FUJITSU

Overview

Fujitsu is a global full IT service provider and enjoys a strong and long-standing position in the segment for infrastructure services and related hardware. A key focus is on SAP, including HANA. The provider has also strengthened their presence in the DACH region significantly and has evolved into an important player within this segment.

Strengths

Fujitsu provides a well-structured enterprise cloud offering, which can be configured, based on a clear parameter set for service definition. The solution features a high degree of scalability and, compared to the competition, very flexible options to manage the required capacities. The high scalability as well as the global distribution of data centers are specifically important for large enterprises.

The portfolio also includes integration with other cloud offerings (e.g., SAP or Microsoft Azure) as part of the provider's complete offering of services as well integration of on-premise components. A comprehensive platform for operations and system management of such hybrid use cases is also available to meet respective management requirements.

In addition to these cloud-based services, Fujitsu also provides competent advice on available options that address the specific customer's situation, on adequate target scenarios and on how to design a roadmap for this use case. The provider also helps customers with the phased implementation of a defined roadmap, which is a great help for midmarket customers facing all kinds of uncertainties when it comes to successfully develop and implement a transformation strategy.



Caution

The provider should better position and emphasize their highly powerful support for managing complex hybrid use cases which are typical within large enterprises. Fujitsu does not sufficiently address SAP's Managed HANA Enterprise Cloud (HEC) offering.

The provider is still in the process of building up a big data offering.



2019 ISG Provider Lens™ Leader

Besides their own managed enterprise cloud for HANA Fujitsu also provides integration of third-party cloud products and competent support to design and implement multiple hybrid use cases.

MICROSOFT



Overview

For many years, Microsoft has been engaged in partnership with SAP to develop SAP-certified offerings for implementing and operating HANA-based applications in Microsoft Azure. Based on their experience and size, Microsoft is a key provider of cloud-based SAP applications.



Strengths

Based on their more than 20 years of cooperation with SAP, Microsoft ensures an up-to-date as well as field-tested, stable and reliable environment for HANA-based application operations. Most relevant applications are included, e.g., BW on HANA, Business Suite on HANA and S/4HANA.

With SAP HANA Enterprise Cloud, this offering also includes a private cloud that can meet higher security requirements, if required. Customers have the option to use dedicated installations to address even higher requirements, which suits many large enterprise who often must cover respective high requirements accordingly.

The available infrastructure is highly scalable and flexible. Both BW and Business Suite are included in the offering, which allows customers to optimize their overall system landscape within the same environment and achieve additional optimization potentials.

Microsoft provides a very comprehensive documentation and competent advice on the individual offerings.



Caution

The highly diverse offering is rather complex and not always easy to understand, despite the good documentation.

To facilitate first steps, the provider should offer basic packages with a standardized scope of services.



2019 ISG Provider Lens™ Leader

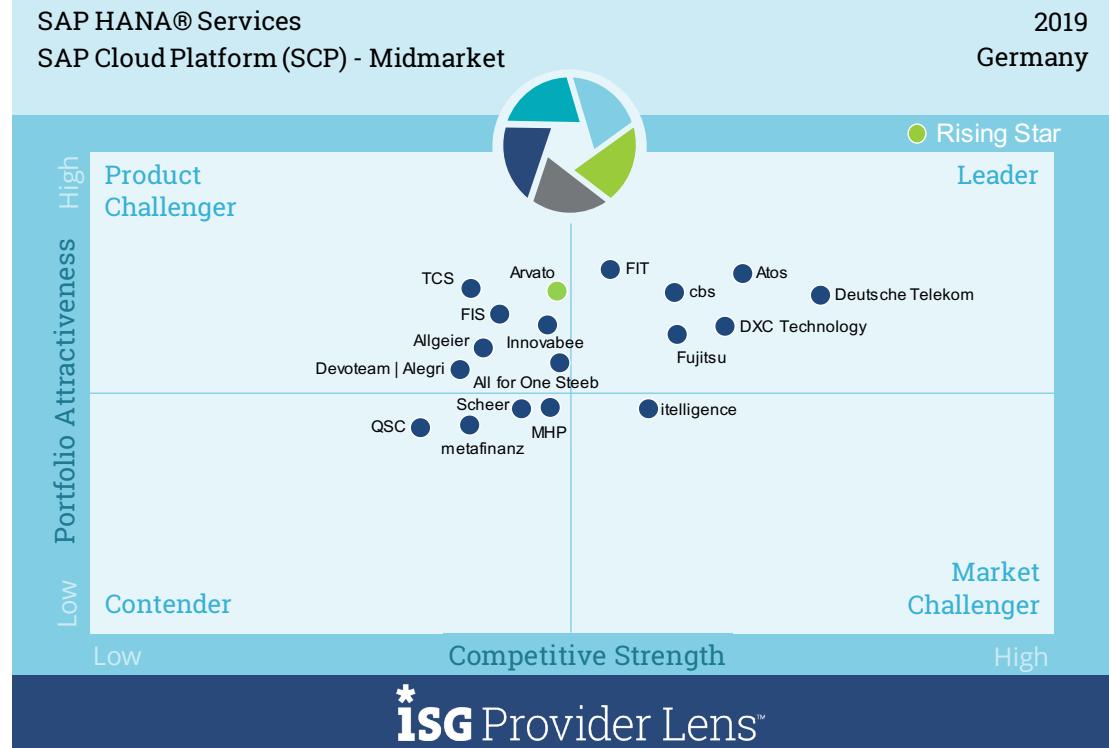
Based on their Azure platform, Microsoft provides a powerful, highly scalable and reliable platform for HANA-based applications.

SAP CLOUD PLATFORM (SCP) – MIDMARKET

Definition

This segment has a focus on services that are based on the SAP Cloud Platform (SCP), an in-memory-based platform for application development and integration. This category includes providers that offer such services and competences to clients from the midmarket segment.

SCP can be used to develop new internal as well as cloud-based applications and provides capabilities and options to advance existing applications and implement integration use cases (e.g., hybrid cloud). Within this context, services include support to help clients use SCP and also offerings of project activities to be conducted by the provider for their clients. Requirements include in-depth technological know-how and related skills to use this technology adequately within the client's respective environment.



SAP CLOUD PLATFORM (SCP) – MIDMARKET

Observations

- SAP positions their SAP Cloud Platform (SCP) as a central and strategic integration platform for SAP-based system landscapes and therefore is an essential component of many HANA transformation scenarios. Key aspects include
 - Integration of on-premise components with cloud-based components, which will be a much adopted use case in the foreseeable future;
 - Integration with IoT use cases, e.g., with sensor-based data or machine-learning approaches;
 - Integration of applications on mobile devices.
- SCP can also be used to run add-ons and system modifications outside the respective core application, while ensuring comprehensive integration.
- The SCP product has only been available for a few years, and therefore, user organizations lack respective SCP experience. For providers this bears opportunities to differentiate themselves from the competition.
- Atos, Deutsche Telekom, DXC Technology, Freudenberg IT (FIT) and Fujitsu were able to maintain or even strengthen their leading position in this segment. Due to their comprehensive competencies for all strategic SCP aspects, cbs Consulting was also able to achieve a leader position. Arvato has the potential to also join the leaders and has therefore been positioned as the Rising Star of this segment.

ATOS



Overview

The SAP Cloud Platform (SCP) as SAP's central integration platform enjoys a high priority within the Atos portfolio. The company has profound experience with this rather young technology and can already present several SCP-based use cases and solution scenarios.



Strengths

Atos makes comprehensive use of SCP as central integration platform in SAP-based environments. The company develops their own innovative SCP-based applications and has already gained comprehensive consulting competence to advise customers on their usage of SCP.

Together with MindSphere, the SAP Cloud Platform (SCP) is used extensively for integrating machine data into multiple systems (ERP, BW etc.). A joint development with Siemens also provides integration of sensor data with data from the respective ERP system, and many standardized apps have already been developed, based on this cooperation. As such, SCP is a key component of IoT best practices. Another example is machine learning, combined with SAP Leonardo..

SCP is used to develop mobile apps, ensure fast integration with the clients' respective system landscapes.



Caution

The provider could drive usage of SCP as integration platform for heterogeneous system landscapes as well as SCP as a means to connect add-ons while maintaining the standard core applications.



2019 ISG Provider Lens™ Leader

Atos demonstrates the strategic relevance of SCP within their portfolio and uses SCP for innovative topics.

CBS CONSULTING



Overview

cbs Consulting is Materna Group's internal and central consulting provider with a focus on SAP-based applications. The company is a long-standing player in this market; the primary target group are medium-sized manufacturing companies.



Strengths

cbs makes comprehensive usage of the SAP Cloud Platform (SCP) as central integration platform for SAP S/4HANA environments, thus following SAP's strategic SCP positioning.

SCP is used to enhance stable core applications with functionality developed with agile methodologies and, thus, as a key element of the overall architecture to accelerate extension developments while maintaining highly standardized core applications. cbs Consulting can already demonstrate respective use cases.

Mobile app development is also based on SCP, supporting agile development methodologies accordingly.



Caution

SCP should be used more often to integrate SAP's own cloud-based solutions such as Ariba, Concur, etc.



2019 ISG Provider Lens™ Leader

cbs Consulting provides powerful services for the SAP Cloud Platform (SCP) and knows how to leverage the many options of this platform extensively for their customers.

DEUTSCHE TELEKOM



Overview

In the European and, specifically, the German market Deutsche Telekom is an important provider of HANA services. Traditional strong competencies include infrastructure, design and operations of platforms for SAP HANA. Deutsche Telekom has added the SAP Cloud Platform (SCP) as central integration platform to their enhanced offering of managed enterprise clouds; it constitutes an integral part of the provider's HANA-related portfolio.



Strengths

Deutsche Telekom accounts for the future high relevance of the SAP Cloud Platform and has positioned SCP as the central integration platform within their portfolio. SCP is used to connect the provider's self-developed solutions as well as SAP's cloud solutions (Ariba, Concur, SuccessFactors etc.).

Mobile apps, too, can be developed, based on SCP, and Deutsche Telekom, as a provider of mobile services, can leverage their extensive know-how accordingly. This is especially attractive for midmarket businesses who often lack the required comprehensive internal competencies.

Integration of the provider's powerful IoT application is also based on SCP, which is in line with SAP's strategy. Thus, the company is well prepared and ready to address latest technological trends such as the integration of process-related data or machine learning.

Deutsche Telekom has already some references and use cases for this relatively new technology.



Caution

While the overall concept envisages a rather extensive usage of SCP as the central platform, the provider is challenged to implement respective steps accordingly. Also, the provider should have a stronger focus on SCP as a tool to run extensions and support standardized core applications accordingly.

The portfolio lacks clarity regarding the use of SCP as central component for connecting functionality based on SAP Leonardo.



2019 ISG Provider Lens™ Leader

Deutsche Telekom uses SPC according to its strategic relevance as central integration platform for HANA-based system landscapes.

DXC TECHNOLOGY



Overview

DXC Technology is a global full IT service provider (infrastructure, consulting, implementation and operations support) with a strong presence in the DACH region. The SAP portfolio is one of DXC's core portfolio components, supported by a broad partner network, including HP Enterprises (HPE), which has emerged of Hewlett Packard, as has DXC.



Strengths

The SAP Cloud Platform is an integral component of the DXC portfolio for HANA-based SAP applications to account for the high relevance of this product for managing future SAP system landscapes. Available services include system migration and maintenance, configuration, prototyping support and third-party connectivity.

The provider plans to use the SAP Cloud Platform for integration of multiple components within heterogeneous system landscapes. DXC has gained first experiences with using SCP for developing mobile applications. A clear focus is on SAP Fiori as central framework for interaction with the respective users. This competence is interesting for midmarket businesses who often lack the required know-how of this technology and do not want to build up such know-how themselves.

SCP also is the central component for integrating IoT components; SAP's Leonardo framework is also used for such scenarios. Functional solutions envisaged include areas such as machine learning, manufacturing execution, process automation and predictive maintenance. For the latter use case, DXC's business intelligence know-how is also leveraged accordingly.



Caution

As of to date, experience with SCP is relatively limited.

The provider should work to involve SCP for mobile applications and within the IoT context more strongly.

DXC should have a stronger focus on using SCP to run non-standard system extensions, rather than storing them within the respective core applications.



2019 ISG Provider Lens™ Leader

DXC's positioning of SCP within their portfolio accounts for SCP's strategic relevance and the provider is continuously developing more use cases accordingly.

FREUDENBERG IT



Overview

Freudenberg IT is the captive IT service provider of the Freudenberg Group, a global technology company whose portfolio includes products, solutions and services for multiple sectors, including the automotive, machine engineering, textile, construction and telecommunications industries. As opposed to many other captive IT service providers Freudenberg IT also offers their services to external clients with the same portfolio depth; the focus is on companies with a high manufacturing share. The SAP range of products, including the SAP Cloud Platform as central integration platform, constitutes a core component of the provider's portfolio.



Strengths

When defining customer-specific roadmaps, FIT also accounts for SCP and the related functionality to integrate heterogeneous system landscapes, following SAP's strategic positioning of SCP accordingly. The SAP Cloud Platform is also used for integrating the provider's own solutions into the HANA landscape (e.g., Manufacturing as a Service). A focus is on connectivity to SAP Leonardo, SAP's IoT framework.

The SAP Cloud Platform serves as basis for integrating various other products, e.g., SAP Cloud for Customer, Hybris etc. SCP is also used for prototyping innovative functionality, which is an interesting options to test and try new solutions at limited cost, which meets midmarket requirements accordingly.

SCP is also used for developing mobile apps; the focus is on manufacturing applications.



Caution

Using SCP for mobile app development, also outside the manufacturing sector, would be a useful additional service.

Freudenberg IT should have a stronger focus on running extensions on SCP rather than in the core applications to ensure a high degree of standardization.



2019 ISG Provider Lens™ Leader

Freudenberg IT is expanding SCP usage consistently and in line with SAP's strategic positioning of this platform; already, the provider offers attractive solutions based on this product.

FUJITSU



Overview

Fujitsu is a global full IT service provider and enjoys a strong and long-standing position in the segment for infrastructure services and related hardware. A key focus is on SAP, specifically, on HANA, including core components such as Business Suite and S/4HANA as well as supporting products such as the SAP Cloud Platform (SCP). The provider has also strengthened their presence in the DACH region significantly and has evolved into an important player within this segment.



Strengths

Using SCP is always included as an option when defining specific roadmaps for customers' specific system landscapes. Also, SCP is used as central platform for integrating heterogeneous system landscapes and plays a key role within concrete projects to develop the required new software components.

SCP is also envisaged as central platform for integrating IoT use cases such as manufacturing execution or machine learning.

Altogether, Fujitsu follows SAP's intended strategic positioning of SCP.

SCP is also the key component used for integrating SAP cloud solutions (Ariba, Concur, SuccessFactors etc.).



Caution

As of to date, experience with SCP is limited.

The provider should include the option of running system extensions on SCP rather than in the core applications to maintain the standard.

Fujitsu is currently still working on using SCP for developing and operating mobile apps and should drive such developments more strongly.



2019 ISG Provider Lens™ Leader

Fujitsu positions SCP according to SAP's strategic intention as a central integration platform for SAP HANA environments.

RISING STAR: ARVATO



Overview

Arvato is the captive IT service provider of Bertelsmann Group, an international corporation and one of the largest media groups worldwide. As opposed to many other captive IT service providers Arvato offers their services to external clients with the same portfolio depth; the focus is on Europe and, specifically, Germany. The SAP product range, specifically, S/4HANA-based applications, constitute an important component of the overall portfolio. The SAP Cloud Platform is used comprehensively to implement all kinds of integration requirements.



Strengths

Considering the strategic relevant of the SAP Cloud Platform (SCP), Arvato has bundled respective competence within a specific team. Also, the provider has already gained comprehensive experience, specifically with S/4HANA-related logistics applications.

SCP is also a suitable option to integrate Arvato's own Smart Logistics Platform. Another interesting use case, in cooperation with SAP, are the provider's onboarding services for companies who want to use SAP's global solution for package serialization in the pharmaceutical sector (advanced track & trace).

Arvato is driving mobile app development based on SCP.

Arvato uses SCP within the S/4HANA context as central integration platform, following SAP's strategic positioning of this platform.



Caution

Arvato is challenged to ensure that external clients are serviced with the same high priority as their internal customers.

The provider should have a stronger focus on using SCP to run extensions and modifications of core applications, thus maintaining highly standardized core applications.



2019 ISG Provider Lens™ Rising Star

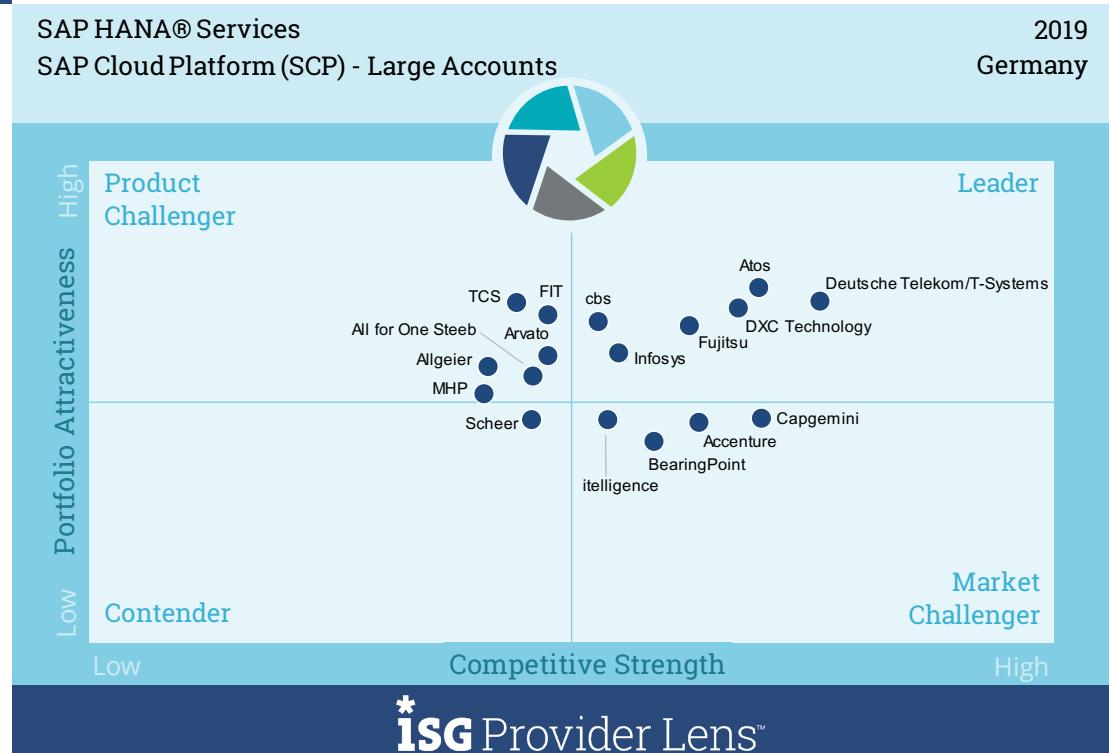
Arvato leverages SCP as strategic platform for integrating SAP S/4HANA-based applications.

SAP CLOUD PLATFORM (SCP) – LARGE ACCOUNTS

Definition

This segment has a focus on services that are based on the SAP Cloud Platform (SCP), an in-memory-based platform for application development and integration. This category includes providers that offer such services and competences to clients from the large accounts segment.

SCP can be used to develop new internal as well as cloud-based applications and provides capabilities and options to advance existing applications and implement integration use cases (e.g., hybrid cloud). Within this context, services include support to help clients use SCP and also offerings of project activities to be conducted by the provider for their clients. Requirements include in-depth technological know-how and related skills to use this technology adequately within the client's respective environment. Considering the highly complex system landscapes of many large enterprises, this poses major challenges within the large accounts segment.



SAP CLOUD PLATFORM (SCP) – LARGE ACCOUNTS

Observations

- SAP positions their SAP Cloud Platform (SCP) as a central and strategic integration platform for SAP-based system landscapes and therefore is an essential component of many HANA transformation scenarios. Key aspects include
 - Integration of on-premise components with cloud-based components, which will be a much adopted use case in the foreseeable future;
 - Integration with IoT use cases, e.g., with sensor-based data or machine-learning approaches;
 - Integration of applications on mobile devices.
- SCP can also be used to run add-ons and system modifications outside the respective core application, while ensuring comprehensive integration.
- The SCP product has only been available for a few years, and therefore, user organizations lack respective SCP experience. For providers this bears opportunities to differentiate themselves from the competition.
- Atos, Deutsche Telekom, DXC Technology, Freudenberg IT (FIT) and Fujitsu were able to maintain or even strengthen their leading position in this segment. Due to their convincing SCP competence, cbs Consulting and Infosys also qualified as leaders.

These aspects will play an increasingly important role specifically within complex system landscapes of large enterprises, which bears many opportunities for relevant providers.

ATOS



Overview

The SAP Cloud Platform (SCP) as SAP's central integration platform enjoys a high priority within the Atos portfolio. The company has profound experience with this rather young technology and can already present several SCP-based use cases and solution scenarios.



Strengths

Atos makes comprehensive use of SCP as central integration platform in SAP-based environments. The company develops their own innovative SCP-based applications and has already gained comprehensive consulting competence to advise customers on their usage of SCP.

Together with MindSphere, the SAP Cloud Platform (SCP) is used extensively for integrating machine data into multiple systems (ERP, BW etc.). A joint development with Siemens also provides integration of sensor data with data from the respective ERP system, and many standardized apps have already been developed, based on this cooperation. As such, SCP is a key component of IoT best practices. Another example is machine learning, combined with SAP Leonardo.

SCP is used to develop mobile apps, ensure fast integration with the clients' respective system landscapes. For instance, the provider has developed the Eco Dashboard App which provides a comprehensive view of a company's production facilities on mobile devices, based on SCP. This should be highly interesting for large accounts with complex production systems.



Caution

The portfolio should also include SCP as a means for running extensions to maintain standardized core applications.



2019 ISG Provider Lens™ Leader

Atos demonstrates the strategic relevance of SCP within their portfolio and uses SCP for innovative topics.

CBS CONSULTING



Overview

cbs Consulting is Materna Group's internal and central consulting provider with a focus on SAP-based applications. While this offering is primarily targeted as medium-sized customers, it is also interesting for large enterprises within the context of specific, clearly defined topics such as the use of the SAP Cloud Platform (SCP).



Strengths

cbs makes comprehensive usage of the SAP Cloud Platform (SCP) as central integration platform for SAP S/4HANA environments, thus following SAP's strategic SCP positioning.

SCP is used to enhance stable core applications with functionality developed with agile methodologies and, thus, as a key element of the overall architecture to accelerate extension developments while maintaining highly standardized core applications. cbs Consulting can already demonstrate respective use cases.

Mobile app development is also based on SCP, supporting agile development methodologies accordingly.



Caution

SCP should be used more often to integrate SAP's own cloud-based solutions such as Ariba, Concur, etc.



2019 ISG Provider Lens™ Leader

cbs Consulting provides powerful services for the SAP Cloud Platform (SCP) and knows how to leverage the many options of this platform extensively for their customers.

DEUTSCHE TELEKOM/T-SYSTEMS



Overview

In the European and, specifically, the German market Deutsche Telekom is an important provider of HANA services. Traditional strong competencies include infrastructure, design and operations of platforms for SAP HANA. Deutsche Telekom has added the SAP Cloud Platform (SCP) as central integration platform to their enhanced offering of managed enterprise clouds; it constitutes an integral part of the provider's HANA-related portfolio.



Strengths

Deutsche Telekom accounts for the future high relevance of the SAP Cloud Platform and has positioned SCP as the central integration platform within their portfolio. SCP is used to connect the provider's self-developed solutions as well as SAP's cloud solutions (Ariba, Concur, SuccessFactors etc.), which is important for large accounts who often strive to implement or have implemented a comprehensive HANA-based landscape.

Both custom and standard mobile apps can be developed, based on SCP, and Deutsche Telekom, as a provider of mobile services, can leverage their extensive know-how accordingly. This is important for large accounts who often want to limit efforts to build up respective internal competencies for these technologies.

Integration of the provider's powerful IoT application is also based on SCP, which is in line with SAP's strategy. Thus, the company is well prepared and ready to address latest technological trends such as the integration of process-related data or machine learning.

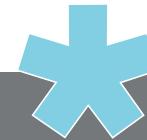
Deutsche Telekom has already some references and use cases for this relatively new technology.



Caution

While the overall concept envisages a rather extensive usage of SCP as the central platform, the provider is challenged to implement respective steps accordingly. Also, the provider should have a stronger focus on SCP as a tool to run extensions and support standardized core applications accordingly. In the future, this is a good option for large accounts, where core applications are often modified considerably, to maintain a higher degree of standardization of these applications.

The portfolio lacks clarity regarding the use of SCP as central component for connecting functionality based on SAP Leonardo.



2019 ISG Provider Lens™ Leader

Deutsche Telekom uses SPC according to its strategic relevance as central integration platform for HANA-based system landscapes.

DXC TECHNOLOGY



Overview

DXC Technology is a global full IT service provider (infrastructure, consulting, implementation and operations support) with a strong presence in the DACH region. The SAP portfolio is one of DXC's core portfolio components, supported by a broad partner network, including HP Enterprises (HPE), which has evolved of Hewlett Packard, as has DXC.



Strengths

The SAP Cloud Platform is an integral component of the DXC portfolio for HANA-based SAP applications to account for the high relevance of this product for managing future SAP system landscapes. Available services include system migration and maintenance, configuration, prototyping support and third-party connectivity.

The provider plans to use the SAP Cloud Platform for integration of multiple components within heterogeneous system landscapes. DXC has gained first experiences with using SCP for developing mobile applications. A clear focus is on SAP Fiori as central framework for interaction with the respective users.

SCP also is the central component for integrating IoT components; SAP's Leonardo framework is also used for such scenarios. Functional solutions envisaged include areas such as machine learning, manufacturing execution, process automation and predictive maintenance. For the latter use case, DXC's business intelligence know-how is also leveraged accordingly. Such complex system set-ups can often be found within large enterprises, and DXC is therefore well positioned as a competent partner for this technology and for this target group accordingly.



Caution

As of to date, experience with SCP is relatively limited.

The provider should work to involve SCP for mobile applications and within the IoT context more strongly.

DXC should have a stronger focus on using SCP to run non-standard system extensions, rather than storing them within the respective core applications.



2019 ISG Provider Lens™ Leader

DXC's positioning of SCP within their portfolio accounts for SCP's strategic relevance and the provider is continuously developing more use cases accordingly.

FUJITSU



Overview

Fujitsu is a global full IT service provider and enjoys a strong and long-standing position in the segment for infrastructure services and related hardware. A key focus is on SAP, specifically, on HANA, including core components such as Business Suite and S/4HANA as well as supporting products such as the SAP Cloud Platform (SCP). The provider has also strengthened their presence in the DACH region significantly and has evolved into an important player within this segment.



Strengths

When defining customer-specific roadmaps for the system landscape, Fujitsu also accounts for SCP and the related functionality to integrate heterogeneous system landscapes. SCP also plays a key role within concrete projects to develop the required new software components.

SCP is also envisaged as central platform for integrating IoT use cases such as manufacturing execution or machine learning, which is becoming increasingly important for large accounts, and Fujitsu's respective competencies constitute a key feature of the provider's portfolio.

SCP is also the key component used for integrating SAP cloud solutions (Ariba, Concur, SuccessFactors etc.).



Caution

As of to date, experience with SCP is limited.

The provider should include the option of running system extensions on SCP rather than in the core applications to maintain the standard.

Fujitsu is currently still working on using SCP for developing and operating mobile apps and should drive such developments more strongly.



2019 ISG Provider Lens™ Leader

Fujitsu positions SCP according to SAP's strategic intention as a central integration platform for SAP HANA environments.

INFOSYS



Overview

Infosys is a global provider whose portfolio includes application management as well as the cross-industry digital transformation of their customers' core business processes. The SAP product portfolio, specifically, HANA-based applications, are a core component of the provider's offering, and SCP is already used as central integration platform for many use cases.



Strengths

Infosys provides specific SAP-certified Business Suite add-ons, based on SCP, including a mobile "Approval Center" or the "Smart Supply Chain IoT". The provider is cooperating with SAP to develop additional co-innovations. Due to these activities, Infosys has already gained relatively comprehensive SCP experience.

Infosys leverages SCP consistently as platform for integrating IoT applications, based on SAP's Leonardo framework, following SAP's strategic positioning of the SCP platform.

Infosys is driving agile methods for project development purposes.

Compared to other providers, the share of managed projects is relatively high, and Infosys often takes over responsibility for related projects and results.



Caution

Due to their global delivery structure local availability of experienced SCP resources for projects in Germany may be a challenge.



2019 ISG Provider Lens™ Leader

Infosys is a powerful partner for using SCP for HANA-based applications; the provider has extensive experience and also provides SAP-certified solutions based on SCP.

Methodology

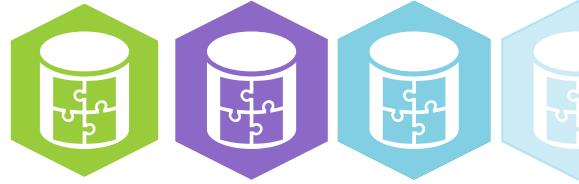


METHODOLOGY

The ISG Provider Lens™ 2019 – SAP HANA® Services & Solutions research study analyses the relevant software vendors and service providers in the Germany 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® Services 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



Author



Rainer Suletzki, Author

Senior Advisor

Mr. Suletzki relies on a deep understanding of core business processes and in-depth know-how of IT management. He has more than 30 years of experience as Senior IT Manager, Senior Project Manager and – at the beginning of his career – as IT consultant. His main areas of expertise comprise IT application management, IT architecture, data modelling as well as IT sourcing strategy and execution

Rainer acts as independent consultant with a focus upon application management for SAP and specifically for SAP HANA. On behalf of ISG he conducts studies within the framework of ISG Provider Lens and takes on client projects with definition of IT strategy and the resulting sourcing decisions.

Before becoming an independent consultant, Rainer worked more than 30 years for a global German Life Science corporation.

Rainer holds graduate degrees in Economics and Computer Sciences.

Editor



Heiko Henkes, Editor

Director Advisor

Herr Henkes ist als Director Advisor bei der ISG für die strategische Unternehmens- und Advisor-Führung tätig. Er leitet darüber hinaus die Zusammenführung von IT Trendthemen im Kontext der digitalen Transformation und tritt als Keynote Speaker zu aktuellen und künftigen IT-Trends auf.

Seit 2013 berät Herr Henkes sowohl ICT-Anbieter- als auch -Anwender in aktuellen Fokus Themen der digitalen Transformation wie Social Business, Cloud-Computing und Mobile Enterprise.

Hierbei liegt sein Schwerpunkt bei den ICT-Anbietern vorwiegend beim Go-to-Market bzw. der strategischen Portfolio-Entwicklung sowie in der Ausrichtung von Marketing und Vertrieb.

Zusätzlich analysiert und bewertet Herr Henkes Unternehmensprozesse, produktsspezifische Zielmärkte sowie ICT-Anbieter über klassische Wettbewerbsanalysen. In diesem Kontext begleitet Herr Henkes Unternehmen generell in ihrem anhaltenden Transformationsprozess und verbindet dabei IT-Kompetenzen mit nachhaltigen Geschäftsstrategien sowie dem Change Management.

Sein Verantwortungsbereich liegt im Wesentlichen in dem Business Development, der Weiterentwicklung und Internationalisierung der ISG Provider Lens™ Prozesse sowie der Themenführung und -synchronisation angestellter Advisors.

Vor seinem Wechsel zu ISG (Experton Group) war Herr Henkes als Analyst Manager für die techconsult GmbH beschäftigt.

Herr Henkes hat einen Abschluss als Diplom-Ökonom (UNIV) mit Schwerpunkt auf Wirtschaftsinformatik und Marketing der Universität Kassel.

ISG Provider Lens™ | Quadrant Report

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