ISG Provider Lens™

SAP HANA Ecosystem Services

SAP S/4HANA System Transformation – Large Accounts

A research report comparing provider strengths, challenges and competitive differentiators

Germany 2021

Quadrant Report

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Atos

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About this Report

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The market research and data analysis in this report, including research information from the ISG Provider Lens™ program, ongoing ISG research programs, discussions with ISG advisors, briefings with service providers and analysis of publicly available market information from various sources. The data compiled in this report is based on information last updated in May 2021. Interim mergers and acquisitions, including the related changes, are not taken into consideration in this report.

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ISG Provider Lens™

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EXECUTIVE SUMMARY

The SAP HANA in-memory database and its base applications have been well established in the business software market for several years and are continuously being expanded. Service providers and customers have gained knowledge regarding the main implementation of these applications. In addition, SAP will continue servicing its predecessor products until the end of 2027 to give its existing customers a considerable time to adapt to upcoming changes. SAP indicates that its products are successful, many customers are purchasing the licenses.

The rapid advancements in SAP HANA's offerings on cloud-based infrastructure have significantly impacted the framework. With the hyperscalers' presence expanding, there will be many transitions to a cloud-based operating model in the upcoming SAP projects. It should also be noted that the use of public cloud requires a higher degree of standardization. The migration to the infrastructure offerings progressed significantly in development systems, test systems and sandboxes. Many customers in the German market are still reluctant to change their production systems. Therefore, in 2021, SAP launched the RISE with SAP program to support cloud transformation in the future. RISE offers bundled licenses and cloud migration and operation services. Since this offering has been in the market only for a short time, there are no success stories and reliable evidence for its acceptance. However, this program appears to be an interesting offer specifically for the midmarket, which is in Germany a rather important segment of the economy. Many service providers who are present in the German market already qualify as SAP partners for the RISE program.

The customers' migration rate toward new products has failed to meet SAP's expectations. In Germany this holds true specifically for the transformation of the productive SAP systems ERP (versions ECC 6.0 and older) to S/4HANA. The onset of COVID-19 pandemic in 2020 significantly impacted a large number of companies; many major projects were ceased or temporarily delayed. However, this does not justify the slow changeover, as this phenomenon was witnessed even before the pandemic. To improve the situation, SAP initiated the MOVE program, which provides its customers with better support and guidance in their conversion projects. ISG observed that the transformation process is complex, especially among large companies. In addition, the rapid development of S/4HANA products and the change in the framework lead to significant uncertainty in transformation. As a result, many companies are developing a preliminary project for strategy finding and program planning to address these uncertainties. The following questions are being asked to guide these efforts:

- Should the existing systems be upgraded, or should HANA's ability be leveraged by completely changing the system architecture? For SAP, the focus should be on the recognition of digital core through S/4HANA implementation.
- Should the transition to a cloud-based infrastructure be part of S/4HANA transformation? If yes, should either the application conversion or the migration to the cloud infrastructure take place first, or should both the steps be carried out together through reimplementation?

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In these cases, system strategy development and business case differentiation require significant effort, and the implementation that follows requires massive changes in the company's business processes. Therefore, the providers should be able to provide technical support and have strong expertise in developing system strategy and roadmaps that are suitable for each company. In this study, the providers are chosen and evaluated based on the following quadrants:

- **S/4HANA System Transformation – Large Accounts**

This quadrant evaluates consulting and system integration service providers for testing enterprise applications using SAP S/4HANA and SAP Business Suite with SAP Fiori as the user interface. The key focus is on service providers that can manage the complexity and scale of large enterprises. Participating companies are expected to have the frameworks, tools and accelerators to support the needs of system transformations and global rollouts.

Accenture, Atos, Camelot ITLab, Capgemini, Infosys, T-Systems and **TCS** are the Leaders in this quadrant. **Cognizant** has been chosen as the Rising Star.

- **S/4HANA System Transformation – Midmarket**

This quadrant evaluates consulting and system integration service providers for developing, deploying and testing enterprise applications using SAP S/4HANA and SAP Business Suite with SAP Fiori as the user interface. These providers mainly focus on midsized companies that are usually active internationally, but mainly operate in one region, in this case the Germany, Austria and Switzerland (DACH) region, and often have less complex system landscapes compared to large enterprises.

All For One Group, Arvato Systems, DATAGROUP, Devoteam, Fujitsu, Innovabee, NTT DATA, Scheer and **Syntax** are the Leaders in this quadrant.

- **Managed Application Services for SAP ERP**

This quadrant evaluates a service provider's capability to offer managed services, including maintenance and support functions that comprise monitoring, remote support and centralized management of applications for SAP S/4HANA and legacy SAP Business Suites such as ECC 6.0. The evaluation considers the service provider's ability to offer functional competence and high-performance delivery models, clear service structures, and transparent pricing models.

Accenture, All For One Group, Atos, Capgemini, DXC, Infosys, NTT DATA, TCS and **T-Systems** are the Leaders in this quadrant. **Wipro** has been chosen as the Rising Star.

- **Managed Cloud Services for SAP HANA**

This quadrant evaluates service providers that manage hybrid cloud environments, security access, monitoring, system availability, interface performance, disaster recovery, backup, restoration, data compliance, and other infrastructure and cloud operations.

Accenture, All For One Group, Atos, CANCOM, Capgemini, Fujitsu, NTT DATA, T-Systems and **Wipro** are the Leaders in this quadrant.

- **SAP Business Technology Platform (BTP) and Intelligent Technologies**

This segment examines the capabilities of providers in the design, development, change, integration and support of enterprise applications on SAP BTP. These providers offer lab

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facilities for client experimentation with emerging technologies to develop new processes and business models. They provide workshops, design thinking and other methods to drive innovation for SAP S/4HANA.

Accenture, All For One Group, Atos, Camelot ITLab, Capgemini, Infosys, Scheer and **T-Systems** are the Leaders in this quadrant. **Wipro** has been chosen as the Rising Star.

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Introduction

Simplified illustration

SAP HANA Ecosystem Services - 2021	
SAP S/4HANA System Transformation – Large Accounts	SAP S/4HANA System Transformation – Midmarket
Managed Application Services for SAP ERP	Managed Cloud Services for SAP HANA
SAP Business Technology Platform and Intelligent Technologies	

Source: ISG 2021

Definition

Market Overview

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

In recent years, many database providers have developed in-memory technology. Unlike conventional technologies, a large part or all the relevant application data is stored in the hardware's main memory. This results in improved access to data and, in turn, faster application.

HANA technology has significantly changed the enterprise applications market landscape. In addition to infrastructure aspects, it addresses the broad SAP application portfolio. The technology can be combined with data management optimization approaches (data aging) and improves

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Definition (cont.)

the integration of data analytics into transactional systems. SAP's S/4HANA simplifies database structures within the SAP Business Suite (Run Simple), and its BW/4HANA is a business warehouse version that is optimized for the HANA database. In 2018, SAP also launched a new CRM solution, namely C/4HANA. SaaS is playing a more important role, which is further emphasized by SAP with its Cloud First strategy.

Another major trend is the rapidly increasing share of public cloud service providers for infrastructure services for SAP HANA-based applications. The demand for on-premises support will remain high in the foreseeable future. However, cloud-based applications are expected to dominate in the future. SAP responded to this with the recently launched RISE with SAP program, which aims to transform existing applications into S/4HANA Cloud.

Scope of Study

The market for services related to the SAP product range, particularly HANA, is complex, due to the implementation of applications and their operation, their infrastructure, and the respective platform, including many innovative topics. The complexity of the topic is discussed in this study in a total of six quadrants, which cover the current focus areas. For the whole of SAP HANA, having knowledge on the related SAP products and general skills such as delivery model or project experience is not enough for a service provider to take the leading position in the respective quadrant. The providers should also demonstrate better understanding of HANA's strategic dimension, competently support customers with strategy development, offer complete optimization of an application system landscape, and provide a balance between standardization and individual developments for critical processes.

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Definition (cont.)

The following quadrants are discussed in detail:

- SAP S/4HANA System Transformation – Large Accounts
- SAP S/4HANA System Transformation – Midmarket
- Managed Application Services for SAP ERP
- Managed Cloud Services for SAP HANA
- SAP Business Technology Platform (BTP) and Intelligent Technologies

ISG Provider Lens ™ study offers IT decision-makers the following:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers based on competitive strength and portfolio attractiveness
- Perspective on different markets, including global, the U.S., Germany, Switzerland, the U.K., France, Nordics and Brazil

The study serves as an important decision-making basis for positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients use information from these reports to evaluate their current vendor relationships and identify potential new engagements.

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Provider Classifications

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

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between US$20 million and US$999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with 5,000 or more employees or revenue above US$1 billion, with activities worldwide and globally distributed decision-making structures.

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Provider Classifications (cont.)

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

Leader

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

Product Challenger

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

Market Challenger

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

Contender

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

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Provider Classifications (cont.)

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

Rising Star

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

Not In

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

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SAP HANA Ecosystem Services - Quadrant Provider Listing 1 of 3

	SAP S/4 HANA System Transformation – Large Accounts	SAP S/4 HANA System Transformation – Midmarket	Managed Application Services for SAP ERP	SAP Business Technology Platform and Intelligent Technologies	Managed Cloud Services for SAP HANA
abat	Not In	Product Challenger	Product Challenger	Not In	Not In
Accenture	Leader	Not In	Leader	Leader	Leader
All For One Group	Not In	Leader	Leader	Leader	Leader
Allgeier	Not In	Market Challenger	Market Challenger	Contender	Not In
Arvato Systems	Not In	Leader	Product Challenger	Product Challenger	Product Challenger
Atos	Leader	Not In	Leader	Leader	Leader
Axians	Contender	Not In	Not In	Not In	Not In
Birlasoft	Not In	Contender	Product Challenger	Not In	Not In
Camelot ITLab	Leader	Not In	Not In	Leader	Not In
CANCOM	Not In	Not In	Not In	Not In	Leader
Capgemini	Leader	Not In	Leader	Leader	Leader
cbs	Product Challenger	Product Challenger	Not In	Not In	Not In
Cognizant	Rising Star	Not In	Product Challenger	Product Challenger	Product Challenger

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SAP HANA Ecosystem Services - Quadrant Provider Listing 2 of 3

	SAP S/4 HANA System Transformation – Large Accounts	SAP S/4 HANA System Transformation – Midmarket	Managed Application Services for SAP ERP	SAP Business Technology Platform and Intelligent Technologies	Managed Cloud Services for SAP HANA
DATAGROUP	Not In	Leader	Product Challenger	Product Challenger	Product Challenger
Deloitte	Market Challenger	Not In	Not In	Market Challenger	Not In
Devoteam	Not In	Leader	Contender	Not In	Not In
DXC	Product Challenger	Not In	Leader	Product Challenger	Product Challenger
EPI-USE	Not In	Product Challenger	Not In	Contender	Not In
FIS	Not In	Product Challenger	Product Challenger	Not In	Not In
Fujitsu	Product Challenger	Leader	Product Challenger	Contender	Leader
GISA	Not In	Contender	Not In	Not In	Not In
HCL	Product Challenger	Not In	Product Challenger	Product Challenger	Product Challenger
IBM	Not In	Not In	Not In	Not In	Market Challenger
Infosys	Leader	Not In	Leader	Leader	Product Challenger
Innovabee	Not In	Leader	Not In	Not In	Not In
Metafinanz	Not In	Contender	Not In	Not In	Not In

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SAP HANA Ecosystem Services - Quadrant Provider Listing 3 of 3

	SAP S/4 HANA System Transformation – Large Accounts	SAP S/4 HANA System Transformation – Midmarket	Managed Application Services for SAP ERP	SAP Business Technology Platform and Intelligent Technologies	Managed Cloud Services for SAP HANA
MHP	Product Challenger	Not In	Not In	Not In	Not In
Mindtree	Product Challenger	Product Challenger	Not In	Product Challenger	Contender
Mphasis	Contender	Contender	Contender	Not In	Contender
NTT DATA	Product Challenger	Leader	Leader	Market Challenger	Leader
PwC	Market Challenger	Not In	Not In	Not In	Not In
Scheer	Product Challenger	Leader	Product Challenger	Leader	Not In
Sopra Steria	Contender	Product Challenger	Market Challenger	Not In	Not In
Syntax	Not In	Leader	Product Challenger	Product Challenger	Product Challenger
Syskoplan	Not In	Contender	Not In	Not In	Not In
TCS	Leader	Not In	Leader	Product Challenger	Product Challenger
Tech Mahindra	Product Challenger	Not In	Product Challenger	Product Challenger	Contender
T-Systems	Leader	Not In	Leader	Leader	Leader
Wipro	Product Challenger	Not In	Rising Star	Rising Star	Leader

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SAP HANA Ecosystem Services Quadrants

ENTERPRISE CONTEXT

SAP S/4HANA System Transformation – Large Accounts

This report is relevant to enterprises across industries in Germany for evaluating providers of SAP S/4HANA consulting and implementation services for large system transformations.

In this quadrant report, ISG highlights the current market positioning of SAP S/4HANA consulting and implementation services providers for large clients in Germany, based on the depth of their service offering and market presence.

Enterprises in Germany are leading in adopting S/4HANA in their business processes. Owing to the challenging and changing work environments, many enterprises have started to move operations to the cloud. ISG notes that many of these implementations take place in different cloud environments (public, private or hybrid) based on the criticality of the data. Hence, enterprise clients are seeking providers that can help implement cloud-based SAP solutions, including S/4HANA.

S/4HANA transformation across industries has been influenced by the pandemic, with most enterprise clients focusing on developing automation-led processes rather than people-intensive processes. To cater to enterprise needs, service providers have incorporated automation-led approaches to achieve better project synchronization and to help enterprises in complex transformations. DevOps and continuous integration/continuous delivery (CI/CD) processes have reduced the risk for S/4HANA transformation and accelerated the deployment for many enterprise clients.

The complexities of an SAP S/4HANA implementation are directly proportional to the size of an enterprise. Because most large enterprise implementations occur at a global level involving multiple regions, the projects become very complex. Therefore, large enterprise clients prefer service providers with a skilled workforce, high integration capabilities and a global presence. Enterprises should not only look at the depth of offering of a service provider's offering, but also the provider's regional presence and local expertise.

Who should read the report:

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

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

Line-of-business, industry leaders and finance leaders should read this report to understand the relative positioning of the partners that can help them effectively procure SAP S/4HANA services with respect to their business/industry and to ensure return on investment.

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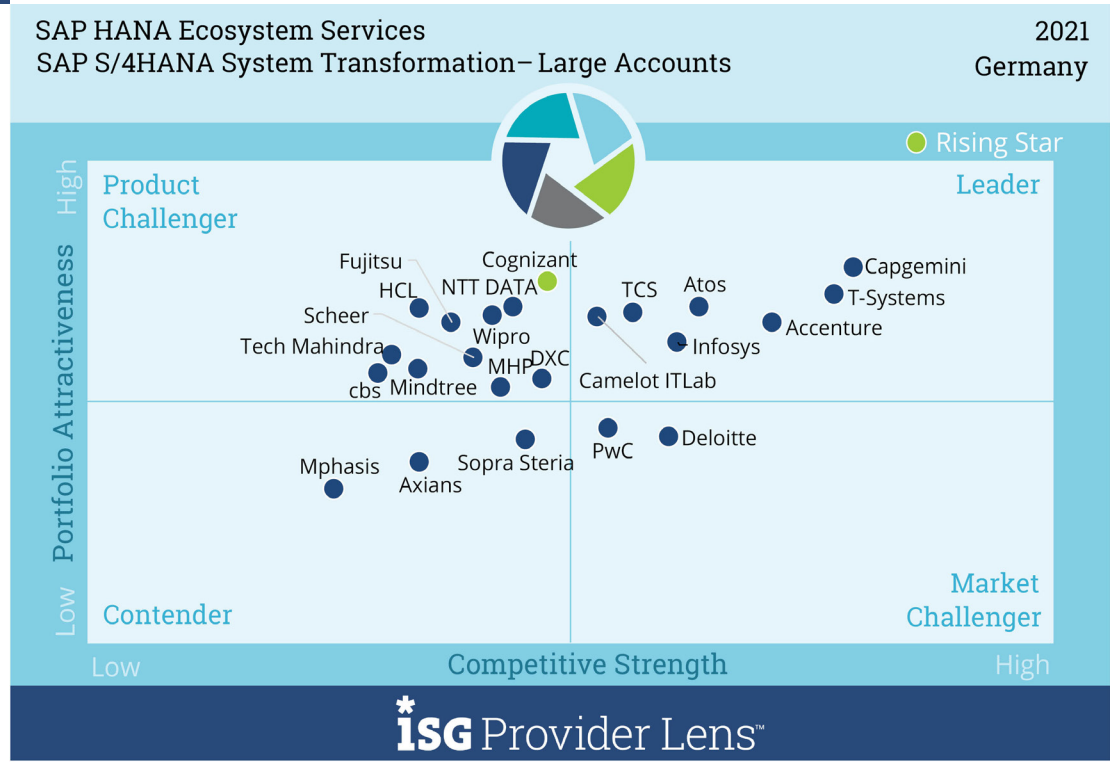
SAP S/4HANA SYSTEM TRANSFORMATION – LARGE ACCOUNTS

Definition

This quadrant evaluates the consulting and system integration service providers for the development, usage, and testing of corporate applications using SAP S/4HANA and SAP Business Suite with SAP Fiori as the user interface. The evaluation includes planning, design, and applications modeling, and also the ability of the respective service provider to deal with the complexity and scope of large customer companies. Participating companies are expected to have frameworks, tools, and accelerators to support large system transformations.



Source: ISG Research 2021

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SAP S/4HANA SYSTEM TRANSFORMATION – LARGE ACCOUNTS

Eligibility Criteria

- Comprehensive service portfolio including development, integration, and testing of SAP S/4HANA; the service provider can verify at least one implementation of S/4HANA or SAP Business Suite on HANA
- Proof of S/4HANA consulting competence and implementation experience in Greenfield or Brownfield implementations
- Provision of on-premises and cloud-based implementations
- Cross-regional availability for SAP-certified consultants and experts to support cross-border and multilingual implementations
- Optimal onshore-offshore delivery models to handle the complexity and scale

Observations

Some observations on the Leaders and Rising Star for this quadrant are included below:

- **Accenture**, with its extensive technological competence and in-depth industry knowledge, provides technology and process expertise.
- **Atos** has a well-structured portfolio with many preconfigured solutions and has been continuously expanding its position in the DACH region in recent years.
- **Capgemini** is an extremely competent partner with a global delivery model. It has a strong methodological competence and powerful tools to support transformations. The company is moving toward a digital core. With the acquisition of Altran, its portfolio is significantly expanded.
- **Camelot ITLab** mainly focuses on value chain optimization, especially in the supply chain and logistics space. Together with SAP, it offers various innovative solutions.
- **Infosys** has expertise in template-based global rollouts and transformation methods. It applies a data-oriented approach using SAP standard tools such as DMLT.
- **T-Systems** has recently strengthened its longstanding market position through significant investments. It offers an attractive solution portfolio that supports the entire lifecycle phases of S/4HANA applications for all deployment options.

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SAP S/4HANA SYSTEM TRANSFORMATION – LARGE ACCOUNTS

Observations (cont.)

- **TCS** offers various powerful industry solutions and a strong delivery model, along with comprehensive methods and tools, to support S/4HANA transformation projects.
- **Cognizant** (Rising Star) offers many preconfigured solutions and tools and frameworks to manage project transformation. It is also investing heavily to strengthen its position in the DACH region.

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ATOS

Overview

Atos is a global IT service provider on the infrastructure and the application level. The company was founded in 1982 and is headquartered in Bezons, France. Atos currently employs approximately 105,000 people and generated annual sales of more than €11 billion in 2020. The company has many delivery centers and competence centers for SAP HANA in Europe.

Strengths

Well-structured portfolio: Under the name Atos SAP Solution and Services Map, the company provides its customers with a clear description of its portfolio. As an end-to-end provider, Atos has a broad portfolio with its own process models, tools and assessments, hardware products. It also offers a wide range of cloud services. The RISE initiative from SAP is Atos' future investment focus and is supported by its security solutions.

Preconfigured solutions: Atos' portfolio offers powerful preconfigured solutions, which focus on automotive, life sciences and manufacturing industries. Furthermore, the company offers solutions for the public sector. Atos expands its partnership with Siemens and SAP with a focus on production. It integrates machine data with SAP ERP functionality at a shop floor level through MindSphere.

Strong market position in the DACH region: Atos has had a strong presence in the Germany, Austria and Switzerland (DACH) region for a long time due to its large local resources that enable close customer relationships. Atos also has a steady and strong sales growth of more than 15 percent per year in the S/4HANA division. In addition, the company has recently expanded through a series of acquisitions, both in terms of scope covered and capacities.

Caution

The use of S/4HANA for the provision of operational reporting functions should be emphasized more in the portfolio.

2021 ISG Provider Lens™ Leader

Atos is a leading service provider for the transformation to S/4HANA and has been continuously expanding its position in the DACH region.

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Methodology

METHODOLOGY

The research study "ISG Provider Lens™ 2021 SAP HANA Ecosystem Services, Germany" analyzes the relevant software vendors/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 2021 SAP HANA Ecosystem Services, Germany 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

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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.

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Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor. Now as a research director, principal analyst and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

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