

***ISG** Provider Lens™

SAP HANA® Services

U.S. 2018

Quadrant
Report



A research report
comparing provider
strengths, challenges
and competitive
differentiators

Customized report courtesy of:



June 2018

About this Report

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This report includes research from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that was current as of April 20th, 2018. ISG recognizes that mergers and acquisitions may have taken place since that time; those changes are not reflected in this report.

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EXECUTIVE SUMMARY

SAP continues to undergo an ecosystem transformation as cloud computing is now a major component of HANA services and migration conversations. Organizations must now consider cloud options for their SAP infrastructure, including hybrid cloud environments and consider a complete transformation of all their SAP services to public cloud providers.

As cloud services are now a core part of HANA migration scenarios, service providers of all sizes are gaining key HANA industry specializations to assist organizations with transformation advisory, workshops, tooling, implementation, go-live support, infrastructure and application management services.

SAP has announced 2025 as the end-of-life date for the Business Suite powered by earlier versions of SAP HANA®. With a sunset date on the horizon, enterprises require skilled S/4HANA expertise to perform transformation services with S/4HANA and other HANA services from SAP. We are now observing that the field of SAP service providers that offer transformation services is crowded and simultaneously becoming more specialized.

Key trends driving the transformation of HANA-oriented services are:

Accelerated, preconfigured solutions improve speed of migrations: Providers are concentrating on their competitive HANA specialization, including industry-specific solutions for business outcomes, proprietary tooling, accelerators, scripts and software stacks. Because the speed of transformation is key to how clients evaluate service providers, previous industry experience and proven methodologies are major factors in the selection process.

Organizations are bogged down by migration complexity, but service providers are helping to remove barriers: The long march to HANA services is slow, as large organizations are challenged with internal and external complexities. Consequently, organizations that are planning their transformations require provider migration frameworks to navigate technological and organizational complexities.

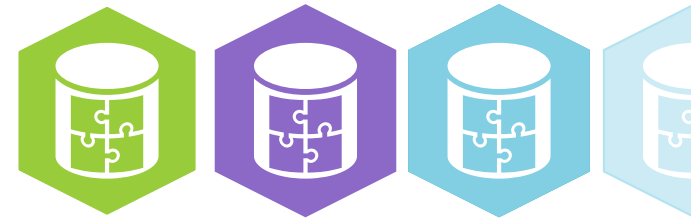
Public cloud SAP implementations are gaining momentum: The field of leading public cloud hyperscale infrastructure-as-a-service (IaaS) providers supplying HANA services is condensing. The largest public cloud providers (AWS, Microsoft, IBM and Google) have quickly moved up from providing commodity compute and storage services to offering higher level, enterprise-certified infrastructure for SAP.

Managed cloud providers are specializing in public cloud: SAP-managed service providers supply implementation, integration, support, monitoring, professional services, automation and SAP software management. Service providers are increasing the depth of their public cloud partnerships and staff certifications with their hyperscale partners.

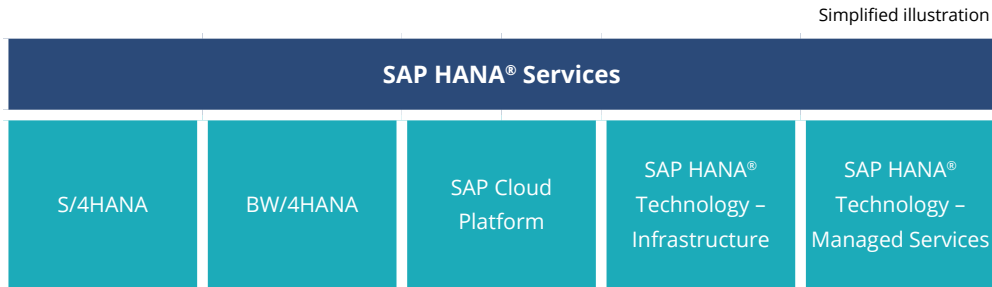
Centers of excellence (CoE) are key to assisting local customers with migration transformations: Service providers are developing innovative and industry-specific SAP HANA® solutions, proofs of concept and product demonstrations for competitive differentiation. Service provider centers of excellence (CoEs) play a critical role in accelerating return on investment (ROI) for clients.

SAP Cloud Platform (SCP) is key to enterprise innovation: The leading providers covered in this study are placing a high emphasis on SAP Cloud Platform capabilities, including Leonardo development and advisory specialization. Their technology focus includes Internet of Things, analytics, machine learning, blockchain and big data.

Capabilities for enterprise workloads, including SAP services, are evolving rapidly: ISG is seeing significant investments by services providers to improve their SAP services competencies on public cloud infrastructure, including specialized hardware innovations. This shift is fueling public cloud alliances, certifications, acquisitions and partnerships.



Introduction



Source: ISG 2018

Definition

SAP products allow organizations to track customer and business interactions. SAP is especially well known for its enterprise resource planning (ERP) and data management products. This report compares SAP service providers and their capabilities to migrate, host or manage SAP services. Questionnaires supplied to SAP service providers covered their capabilities and geographies served. This report features service provider portfolio attractiveness and competitive strength specifically for the United States. The SAP HANA® report covers providers that enable services for five areas of specialization: S/4HANA, BW/4HANA, SAP Cloud Platform (SCP), HANA infrastructure and HANA managed services.

We also evaluate SAP service providers that have extensive development experience, tooling, certifications and compliance working directly with SAP applications. SAP service providers deliver managed services for SAP on specialized infrastructure, including cloud-based and on-premise. At a broad level, these services also include implementation, integration, support, monitoring, professional services, automation and management of a customer's SAP software. The service provider's objectives are maximizing the performance of the SAP service, providing certified expertise and ensuring ongoing training, innovation and delivery.

Definition (cont.)

SAP and other database providers have developed in-memory technologies to store relevant application data. Benefits for enterprises include faster data access, helping accelerate applications dramatically. SAP's enterprise resource planning (ERP) software is essential for today's complex customer data management requirements. Within this context, SAP's HANA® technology is strongly aligned with infrastructure aspects, but also with SAP's broad application portfolio and can be combined with data management optimization approaches, improving interaction between data analytics and transactional systems.

SAP's latest Business Suite product, S/4HANA, is designed to accelerate innovation by connecting services, devices and networks in real time. S/4HANA, as the latest innovation flagship product from SAP, is also intended to help accelerate the on-ramp to Internet of Things (IoT), mobile services and big data. Additionally, S/4HANA helps organizations to achieve lower costs and deliver IT more efficiently.

ISG's SAP HANA® Provider Lens report assists with the investigation and selection efforts of typical enterprise clients. When contemplating a significant strategy transformation, buyers will benefit through the examination and service provider evaluation of certain service lines. Our research outlines provider capabilities for several service lines, including service consulting, managed services and HANA cloud infrastructure.

ISG studies are comprised of multiple quadrants covering a spectrum of services that an enterprise client would require. Descriptions for the five quadrant areas covered in this report include:

- **S4/HANA:** This category examines services that provide design support to modify or develop new business processes in transactional systems to allow for HANA usage. S/4HANA services providers must have in-depth process and industry-specific know-how and must be able to quickly understand the customer's requirements, including S/4HANA migration in many variations. Service capabilities include planning, design and business modeling.
- **BW/4HANA:** The SAP BW/4HANA (data analytics) category refers to services targeted at using the HANA database for data analytics applications, with a focus on SAP Business Warehouse (BW). Such services include consulting on available options for in-memory technology for data analytics purposes and their impact on the system landscape. Support for common data analytics and specific in-memory methodologies and approaches, including data structure definition and implementation, is also key to successfully use this technology. To ensure comprehensive competencies, service providers must also offer support for the implementation, go-live and operations stages through suitable operations concepts.

Definition (cont.)

- **SAP Cloud Platform:** This category examines services that provide design support to modify or develop new business processes in transactional systems to allow for HANA usage. Services are based on the SAP Cloud Platform, formerly known as the HANA Cloud Platform (HCP), an in-memory-based platform for application development and integration.
- **SAP HANA® Technology – Infrastructure:** Leading infrastructure and cloud providers of HANA services in this segment must keep up with the fast-paced market developments, including cloud service capabilities. Providers in this category supply clearly structured and competitive infrastructure and cloud offering for HANA-based services. Relevant services include infrastructure specific to SAP offerings, cost analyses and related operations concepts, technical infrastructure provisioning and set-up and go-live and operations support. Such services normally require intense cooperation with SAP (to comply with related standards) and respective certification.
- **SAP HANA® Technology – Managed Services:** This category includes service providers that cover the technological aspects of HANA. Relevant services include strategy consulting, support for selecting the hardware to be used (in case of in-house operations), provisioning of a HANA-PaaS (if requested), cost analyses and related operations concepts plus go-live and operations support. This category covers services that are potentially managed within the partner infrastructure, customer infrastructure, SAP infrastructure or with leading public cloud infrastructure providers.

Provider Classifications

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

Leader

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

Product Challenger

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

Market Challenger

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

Contender

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

Provider Classifications (cont.)

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

Rising Star

Rising Stars are mostly product challengers with high future potential. When receiving the "Rising 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® Cross-Quadrant Provider Listing 1 of 3

	S/4HANA	BW/4HANA	SAP Cloud Platform	SAP HANA® Technology - Infrastructure	SAP HANA® Technology - Managed Services
Accenture	● Leader	● Leader	● Leader	● Not in	● Leader
Amazon Web Services	● Not in	● Not in	● Not in	● Leader	● Not in
Atos	● Product Challenger	● Contender	● Market Challenger	● Leader	● Rising Star
Capgemini	● Leader	● Leader	● Leader	● Product Challenger	● Leader
Cognizant	● Leader	● Product Challenger	● Contender	● Product Challenger	● Leader
Clarkson Consulting	● Contender	● Contender	● Not in	● Product Challenger	● Product Challenger
Deloitte	● Leader	● Product Challenger	● Leader	● Not in	● Product Challenger
DXC	● Product Challenger	● Product Challenger	● Not in	● Leader	● Leader
EPAM	● Contender	● Contender	● Contender	● Not in	● Not in

SAP HANA® Cross-Quadrant Provider Listing 2 of 3

	S/4HANA	BW/4HANA	SAP Cloud Platform	SAP HANA® Technology - Infrastructure	SAP HANA® Technology - Managed Services
Fujitsu	● Contender	● Contender	● Product Challenger	● Product Challenger	● Product Challenger
Google	● Not in	● Not in	● Not in	● Rising Star	● Not in
Hexaware	● Contender	● Not in	● Rising Star	● Not in	● Not in
HCL	● Leader	● Leader	● Leader	● Not in	● Product Challenger
IBM	● Leader	● Leader	● Leader	● Leader	● Leader
Infosys	● Leader	● Leader	● Leader	● Contender	● Product Challenger
ITC Infotech	● Product Challenger	● Market Challenger	● Contender	● Not in	● Not in
KPIT	● Leader	● Rising Star	● Contender	● Not in	● Contender
LTI	● Product Challenger	● Contender	● Rising Star	● Not in	● Not in

SAP HANA® Cross-Quadrant Provider Listing 3 of 3

	S/4HANA	BW/4HANA	SAP Cloud Platform	SAP HANA® Technology - Infrastructure	SAP HANA® Technology - Managed Services
Microsoft	● Not in	● Not in	● Not in	● Leader	● Not in
Mindtree	● Rising Star	● Rising Star	● Leader	● Product Challenger	● Market Challenger
Mphasis	● Contender	● Contender	● Contender	● Not in	● Contender
NTT Communications	● Rising Star	● Product Challenger	● Product Challenger	● Leader	● Leader
NTT DATA	● Leader	● Contender	● Not in	● Not in	● Not in
Tech Mahindra	● Market Challenger	● Leader	● Contender	● Not in	● Not in
Virtustream	● Not in	● Not in	● Not in	● Leader	● Not in
Virtusa	● Not in	● Product Challenger	● Not in	● Contender	● Leader
Wipro	● Product Challenger	● Leader	● Product Challenger	● Contender	● Leader



SAP HANA[®] Services Quadrants



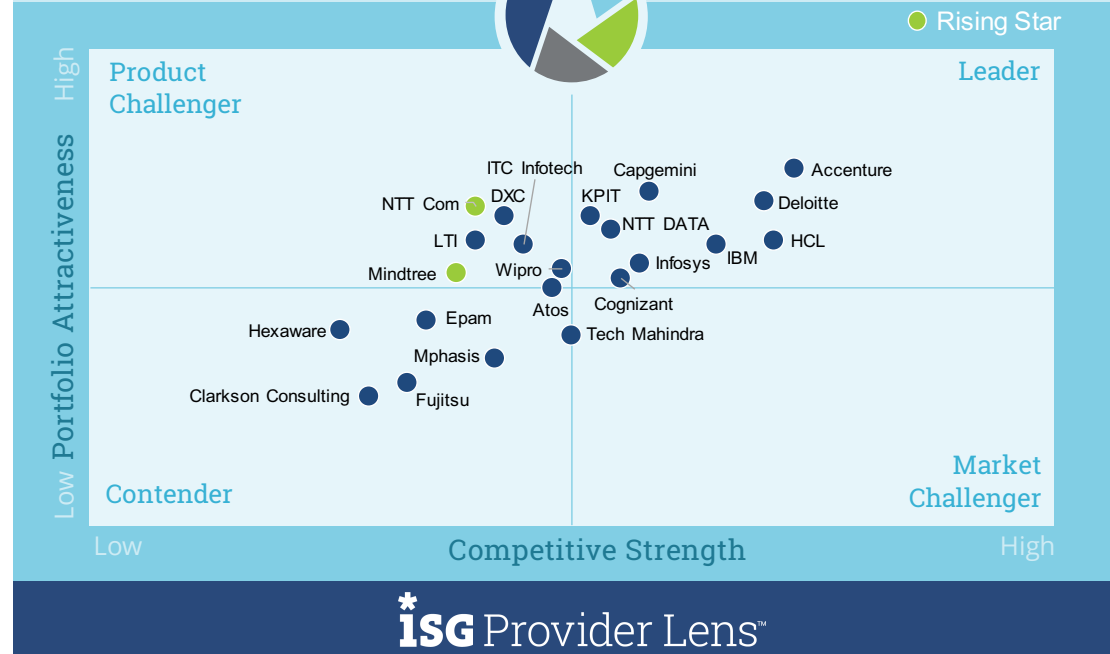
S/4HANA

Definition

Built upon SAP's unique in-memory platform, SAP's refreshed Business Suite of services was launched as S4/HANA in 2015. This significant update to SAP's offering allows organizations to manage products such as Supplier Relationship Management (SRM), Customer Relationship Management (CRM) and Supply Chain Management (SCM). Since the launch, many enterprise customers entrenched within existing SAP services and complex customizations have been weighing their options for ERP migration in favor of S/4HANA. Business case adoption strategies must include pricing, contracts, service compatibility and other business benefits. SAP announced 2025 as the end-of-life date for Business Suites powered by earlier versions of SAP HANA®, fueling the need for HANA and S/4HANA migrations and provider expertise. There are numerous highly skilled service providers within the S/4HANA space.

SAP HANA® Services
S/4HANA

2018
U.S. Quadrant



Source: ISG Research 2018

S/4HANA

Definition (cont.)

The S/4HANA Provider Lens Quadrant Report examines providers that supply support services to modify or develop new business processes in transactional systems for HANA usage. Service providers in this category must have in-depth processes, industry-specific knowledge and understand customer-specific requirements.

Such tasks include the planning and design of business processes, business models, procedure models, tooling, innovation and proprietary solutions. We also evaluated SAP service providers that have extensive SAP HANA® and S/4HANA development experience, large, full-time equivalent (FTE) pools, centers of excellence (CoE), certifications and compliance experience working with SAP applications.

SAP HANA® and S/4HANA service providers deliver planning concept advisory, workshops, implementation, go-live support and application management services. The service providers' objectives are maximizing the performance of the SAP service, providing certified expertise and ensuring ongoing training, innovation and delivery.

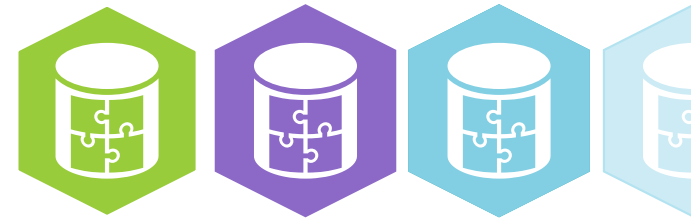
Observations

- Accenture, Deloitte and Capgemini continue their S/4HANA service provider leadership. Their extremely mature and capable delivery structures and advisory capabilities place them at the top of the Leader category. Their long histories with SAP and leadership in SAP implementations, managed services and supporting technologies help them stand apart for their full-service offerings and innovation.
- IBM, Infosys, Cognizant, NTT DATA and HCL are all respected leaders for SAP providing comprehensive service portfolios along with many specialized resources with diverse SAP certifications.
- KPIT continues to grow in the U.S. market through a heavy focus on innovative services including IoT, big data, automation and diagnostic tools for the financial services industry and mergers and acquisitions as well as detailed training and onboarding programs for new customers.

S/4HANA

Observations (cont.)

- NTT Communications is a Rising Star in the category. It has a distinctive assortment of global network and infrastructure services, combined with a newly acquired U.S. HANA services provider, Secure24. The acquisition bolsters their U.S. SAP technical capabilities and digital transformation services.
- Mindtree, a cloud-native service provider, is also a Rising Star for its SAP partnership. Mindtree has considerable experience on SAP product development, toolsets, HANA co-innovation with SAP and public cloud services (AWS, Azure and Google).



RISING STAR: MINDTREE

Overview

Mindtree's U.S. SAP services continued their growth path in 2017. Mindtree's SAP practice operates under its Bluefin Solutions brand, with 1,700 FTEs dedicated to SAP services globally. Mindtree's SAP focus is on its Intelligent ERP digital core offerings, including S/4HANA transactional core, BW/4HANA analytics core and big data services. With Mindtree's innovative approach to emerging technologies, it is focused on SAP Leonardo offerings and industry-specific accelerators for CPG, retail and manufacturing.

Strengths

Hyperscale collaboration: As an SAP Lighthouse Partner with a history of innovative SAP development, Mindtree works with hyperscale providers to supply consulting services for SAP infrastructure product development, tuning and configuration. Mindtree's S/4HANA offerings are hosted completely on third-party public cloud infrastructures including AWS, Azure, Google, Virtustream and SAP. Mindtree's cloud-native approach to hosting no infrastructure allows the organization to focus on SAP-related migration tools, security processes, customer delivery and management.

SAP public cloud migration services: Mindtree has improved its migration services and offerings to increase flexibility and migration methodologies. Mindtree offers migrations from on-premise infrastructure to the hyperscale cloud vendors of choice. Mindtree's advanced tooling (MWatch) and framework offerings assist organizations with migration speed, monitoring and transformation.

S/4HANA business case and roadmap services: Mindtree has enhanced its S/4HANA roadmap and business case services using in-house IP along with strategic partner tools to zoom-in on pain points for S/4HANA implementations.

S/4HANA support innovation: Mindtree uses its unique machine learning (ML) application service, part of their proprietary ATLAS Toolkit to intelligently route support tickets or suggest known fixes learned from previous SAP issues.

Caution

In comparison to larger SAP providers, Mindtree has limited capability for enterprises that require full service in conjunction with S/4HANA migrations. Mindtree's main focus is on analytics, ERP consulting and SAP HANA deployments.



2018 ISG Provider Lens™ Rising Star

Mindtree is a strong match for organizations looking for a midsize organization with considerable experience on SAP product development, innovation and public cloud services. Mindtree provides extreme flexibility, toolsets and managed service capabilities for a partnership-based approach to client engagements.

BW/4HANA

Definition

For enterprise organizations, there are numerous challenges and strategic trends driving innovations for enterprise data warehousing in the market. Providers that supply SAP BW/4HANA services must have extensive capability and experience with integrating structured transactional data from traditional systems. The large data volumes may include massive amounts of data from financial, transactional, social, machine learning, IoT, sensors and other systems. Service providers must understand the complexities of how BW/4HANA fits into the digital enterprise and other solutions available from SAP and others, including SAP Analytics S/4HANA, SAP Leonardo and customized services.

Similar to the capabilities evaluated in the S/4HANA Provider Lens Quadrant Report, the BW/4HANA report examines service providers that supply support services to modify or develop new business processes, set up dynamic tiering and enable advanced analytical capabilities for their customers. Service providers in this category must have in-depth processes, industry-specific

SAP HANA® Services
BW/4HANA

2018

U.S. Quadrant



Source: ISG Research 2018

BW/4HANA

Definition (cont.)

knowledge and an understanding of customer-specific requirements. Service providers also must have strong analytics and CoE focus, tooling and industry accelerators for Business Warehouse services.

Key capabilities for BW/4HANA providers include the planning and design of business processes, business models, procedure models, tooling, SAP product integrations, innovation and proprietary solutions.

We also evaluated BW/4HANA service providers and the case studies they submitted to understand the types of services they have implemented, their industry specialization and the size of customers they have serviced.

Additional areas of review include the size of the service provider's full time equivalent (FTE) pool, its centers of excellence (CoE), certifications and compliance experience working with SAP applications and go-live support.

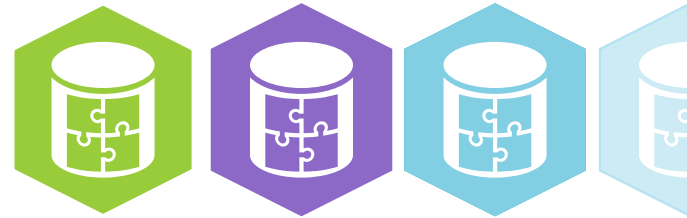
Observations

- Accenture, IBM and Infosys were identified as leading providers for BW/4HANA services. Their capabilities and number of engagements help set them apart within SAP's data warehouse and analytics category.
- Wipro, Capgemini and HCL are respected leaders for BW/4HANA services that have solid SAP data management and analytics advisory capabilities.
- Tech Mahindra has advanced its capabilities in the U.S. market. Its leadership position comes from the progress in its SAP partnership and its BW/4HANA and analytics focus within the manufacturing, telecom, oil and gas, utilities and automotive industries.

BW/4HANA

Observations (cont.)

- KPIT is identified as a Rising Star for its enterprise data warehouse (EDW) services with BW on HANA and BW/4HANA implementations. KPIT has more than 2,000 SAP consultants for SAP services in large-scale deals.
- Mindtree is also a Rising Star for BW/4HANA, including the BW/4HANA analytics core and big data services. Mindtree is focused on its industry-specific analytics accelerators for CPG, retail and manufacturing.



RISING STAR: MINDTREE

Overview

Mindtree's SAP analytics practice operates under its Bluefin Solutions brand and the company has 1,700 FTEs dedicated to SAP services globally. Mindtree is a "cloud native" organization and performed the first BW/4HANA migration to the cloud. Mindtree's SAP focus is on its Intelligent ERP digital core offerings, including BW/4HANA analytics core and big data services. With Mindtree's innovative approach to emerging technologies, it is focused on SAP Leonardo offerings and industry-specific accelerators for CPG, retail and manufacturing.

Strengths

Strong business warehouse migration services: Mindtree is focused on rapid transformation and migration services to BW/4HANA and BW on HANA. Mindtree uses SAP's reporting tools such as Lumira and SAP Analytics Cloud along with their own in-house tools to assist customers with self-service reporting and dashboards. Mindtree's analytics migration projects are also compliant with SAP's Analytics Roadmap.

Hyperscale collaboration: As an SAP Lighthouse Partner with a history of innovative SAP development, Mindtree works with hyperscale providers to supply consulting services for SAP infrastructure product development, tuning and configuration. BW/4HANA offerings from Mindtree are hosted completely on third-party public cloud infrastructure including with AWS, Azure, Google, Virtustream and SAP. Mindtree's cloud-native approach to hosting no infrastructure allows the organization to focus on SAP-related migration tools, security processes, customer delivery and management.

Numerous BW case studies: Mindtree has documented several successful case studies for its performance analytics practice. The case studies show its expertise in data warehouse migration, tooling and configuration for mid-sized to large enterprises.

Caution

In comparison to larger SAP providers, Mindtree has limited capability to accommodate enterprise organizations that require full analytics services in conjunction with BW/4HANA migrations.



2018 ISG Provider Lens™ Rising Star

Mindtree is a strong match for organizations looking for a midsize organization with considerable experience on SAP product development, innovation and public cloud services. Mindtree provides extreme flexibility for a company of its size and is gaining ground as a Rising Star for its analytics, big data, IoT and machine learning capabilities.

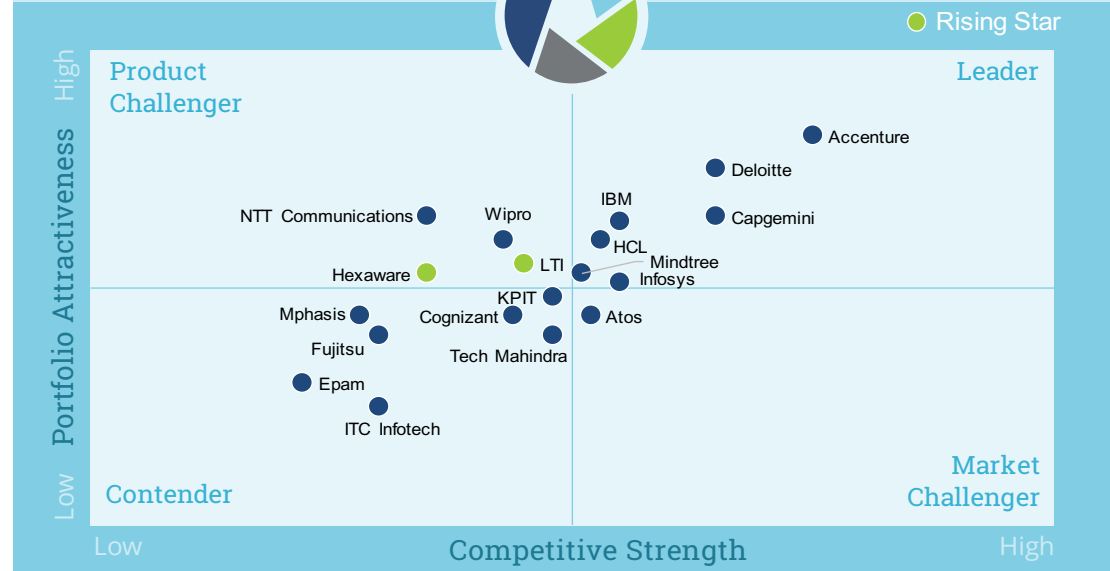
SAP CLOUD PLATFORM

Definition

SAP Cloud Platform (SCP) is SAP's platform as a service (PaaS) offering. The platform enables service providers to offer customized applications on top of infrastructure from SAP they don't have to maintain. SCP is an open standards platform, which allows for flexibility and integration with multiple clouds, frameworks and applications. In addition to its own SCP offering, SAP has extended SCP availability to several major hyperscale cloud providers.

SAP HANA® Services
SAP Cloud Platform

2018
U.S. Quadrant



ISG Provider Lens™

Source: ISG Research 2018

SAP CLOUD PLATFORM

Definition (cont.)

SCP is the underlying foundation for SAP Leonardo, SAP's application platform for innovative services including IoT, analytics, machine learning, blockchain and big data.

- **Analytics:** includes enterprise performance, predictive analytics and business intelligence.
- **Blockchain:** is SAP's enablement for secure asset transfer via a large chain of systems.
- **Big data:** includes services to structure, store and analyze corporate data in a singular environment.
- **Machine learning:** is the services that drive decision making from large data pools.
- **IoT:** includes services to store beacon and sensor data for the enterprise.

The SCP report examines companies that supply methods and tools for SCP application design and implementation processes, frameworks and solutions advisory. Key capabilities for SCP providers include business models, procedure models, unique industry tooling, SAP product integrations, innovation and proprietary solutions.

The report also specifically examines the provider innovations and capabilities for IoT, analytics, machine learning, blockchain and big data. Developments and evaluation factors within these categories include co-innovation with SAP for industry-specific accelerators, investments in SCP centers of excellence (CoE), the number of FTEs the service provider has dedicated to SCP enablement, and strong case studies with a large and industry diverse customer base.

SAP CLOUD PLATFORM

Observations

- Accenture, Deloitte, and Capgemini are identified as leading providers in the U.S. for SAP Cloud Platform (SCP). These organizations are also recognized by SAP as SCP capability leaders.
- IBM, Mindtree and Infosys are placing a high emphasis on their internal capabilities for IoT, analytics, machine learning, blockchain and big data.
- HCL stresses its deep industry and Leonardo expertise. HCL is an implementation partner for Leonardo services, including IoT products, connected goods and digital manufacturing. HCL has built many industry IoT services and design frameworks.
- LTI is a Rising Star for SCP-related services. Its industry specializations include CPG (consumer goods, food and beverage), EC&O (engineering, construction and operations), automotive, manufacturing and oil and gas verticals.
- Hexaware's U.S. market share is growing. As a Rising Star, Hexaware's focus on innovative technologies is helping it land larger deals with significant customers.

MINDTREE

 Overview

Mindtree is focused on blockchain, artificial intelligence, machine learning and IoT within its SAP Leonardo area. As part of its main service lines, Mindtree's U.S. SAP offerings include SAP Leonardo application design, rapid prototyping and industry innovations. Mindtree's SAP practice operates under its Bluefin Solutions brand with 1,700 FTEs dedicated to SAP services globally. With Mindtree's innovative approach to emerging technologies, it is focused on SAP Cloud Platform and Leonardo offerings, including industry-specific accelerators for CPG, retail and manufacturing verticals.

 Strengths

Deep SCP cloud integration experience: As an early adopter of SCP in 2012 (starting with Neo/NetWeaver Cloud), Mindtree has extensive experience with SCP development. The company's specializations include application consulting and integration services for connecting on-premise SAP systems to SCP, SAP Hybris Cloud and third-party cloud services.

Industry-focused Leonardo solutions: Mindtree has developed a series of applications for business optimization and cost reduction in numerous industries. Mindtree created the on-time and in full order fulfillment suite to assist CPG companies with supply chain optimization and visibility. This is one of the first certified industry accelerators on SAP Leonardo.

Public cloud SCP specialization: As an SAP Lighthouse Partner with a history of innovative SAP development, Mindtree works with hyperscale providers to supply consulting services for SAP infrastructure product development, tuning and configuration. Mindtree also offers migrations from on-premise infrastructure to hyperscale cloud vendors of choice. Mindtree works with SAP, AWS, Google Cloud Platform and Azure to set up SCP application services on behalf of its customers.

 Caution

In comparison to larger SAP providers, Mindtree has limited resource capability for enterprises that require full service for its SCP services. Mindtree's main focus is on analytics, ERP consulting and SAP HANA deployments.



2018 ISG Provider Lens™ Leader

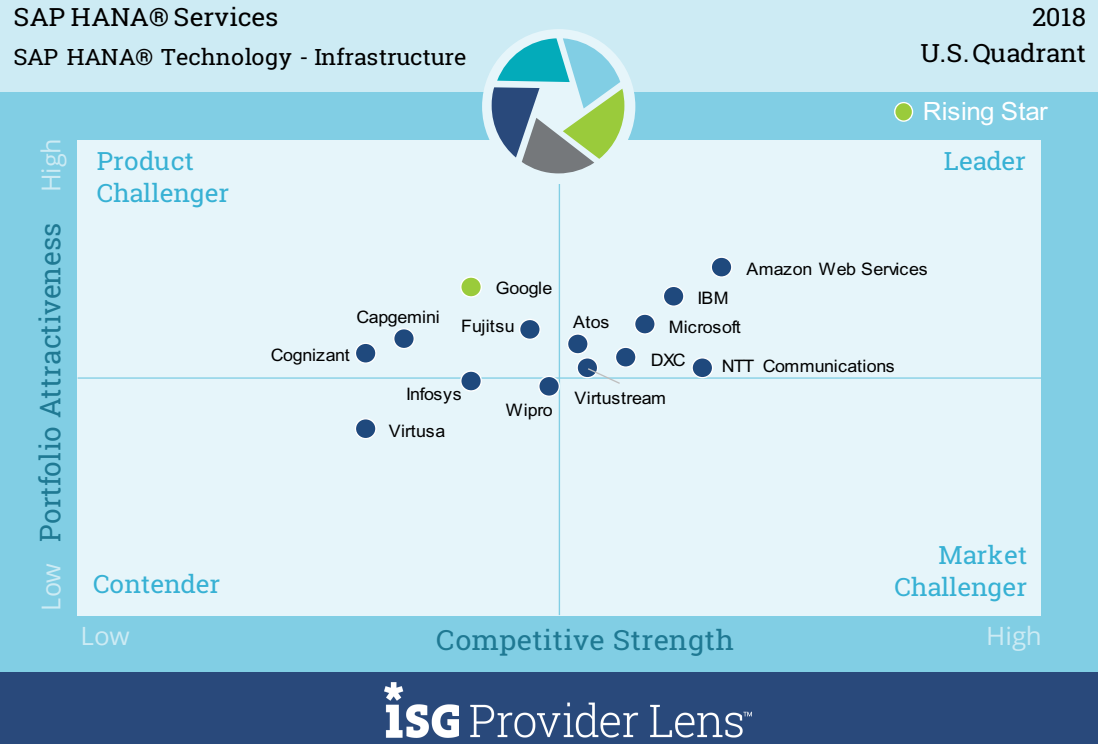
Mindtree is a strong match for organizations looking for a midsize organization with considerable Leonardo and SCP experience with SAP product development, innovation and public cloud services. Mindtree provides extreme flexibility, toolsets and managed service capabilities for a partnership-based approach to client engagements.

SAP HANA® TECHNOLOGY – INFRASTRUCTURE

Definition

Leading cloud infrastructure providers of HANA services must keep up with the fast-paced market developments, including a massive array of complimentary cloud service capabilities. The leading competitors in this category supply a clearly structured and competitive infrastructure for HANA-based services. Relevant services include infrastructure specific to SAP offerings, cost analyses and related operations concepts, provisioning and set-up for the technical infrastructure and go-live and operations support. Such services normally require intense cooperation with SAP to comply with related standards and respective certifications.

The HANA Technology Infrastructure Provider Lens Quadrant Report examines service providers that supply infrastructure for a wide variety of SAP offerings including SAP HANA®, S/4HANA, BW/4HANA, SAP Cloud Platform (SCP), HANA Enterprise Cloud (SAP Managed Cloud), SAP Hybris, SAP Analytics, SAP Leonardo, SAP SuccessFactors, SAP HCM, SAP SCM and other SAP products.



Source: ISG Research 2018

SAP HANA® TECHNOLOGY – INFRASTRUCTURE

Definition (cont.)

Providers were evaluated on the global scale of their infrastructure platform, number of data centers, infrastructure certifications, support, innovations, service-level agreements, security, innovations, pricing, partner ecosystems and case studies.

Besides the SAP offerings available for their infrastructure, providers were evaluated on compute, storage and networking infrastructure from ISG's previous cloud studies for U.S. IaaS providers. Services include day-to-day management for data center infrastructure, monitoring, server management, storage, databases and networks.

Questionnaires supplied to SAP infrastructure service providers covered their global capabilities and innovation road map so we could evaluate provider portfolio attractiveness and competitive strength. Infrastructure revenue, innovation, scale, case studies and quality of services delivered were major factors in the evaluation.

Observations

- AWS, Microsoft and IBM are global leaders in cloud infrastructure and U.S. leaders for SAP HANA® infrastructure services. Top leaders in this category have enormous scale for SAP customers to provision services in numerous geographic regions.
- NTT Communications, DXC and Virtustream have deep SAP infrastructure specialization. Additionally, these leading providers also have large partner networks responsible for provisioning new SAP services on their infrastructure.
- Atos continues to grow within the U.S. market in major infrastructure segments. The company is focused on using specialized extensible infrastructure and hardware products designed for memory intensive workloads.
- Google, which partnered with SAP in 2017, is a new entrant in the SAP infrastructure marketplace and is the Rising Star. Numerous service integrators and partners are now focusing their multi-cloud partner strategies to include Google to meet specific customer requirements.

SAP HANA® TECHNOLOGY – MANAGED SERVICES

Definition

SAP service providers supply managed services for SAP on specialized infrastructure, including cloud-based and on-premise assets. At a broad level, these services also include implementation, integration, support, monitoring, professional services, automation and SAP software management. The service provider's objectives are to maximize the performance of the SAP service, provide certified expertise and ensure ongoing training, innovation and delivery.

Providers were evaluated on the number of managed service offerings, managed specializations (IoT, machine learning and mobile), unique industry specializations, tooling, certifications, partnership designations, support, SLAs and the diversity of their SAP support offerings.

SAP HANA® Services

SAP HANA® Technology - Managed Services

2018

U.S. Quadrant



ISG Provider Lens™

Source: ISG Research 2018

SAP HANA® TECHNOLOGY – MANAGED SERVICES

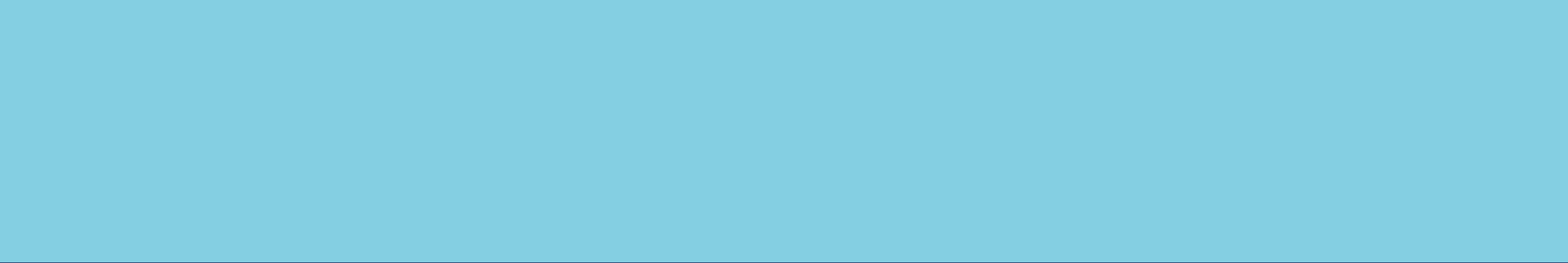
Definition (Cont.)

Besides their SAP managed services offerings, service providers also were evaluated on their operations with hyperscale cloud service providers. Reviewed submissions included partnership levels with cloud providers, FTEs certified on public cloud platforms, ticketing integration and unique value propositions. Select providers were evaluated using data from ISG's previous studies for U.S. managed cloud service providers.

Questionnaires supplied to SAP service providers covered their global capabilities and related geographies. This report features provider portfolio attractiveness and competitive strength specifically for the United States.

Observations

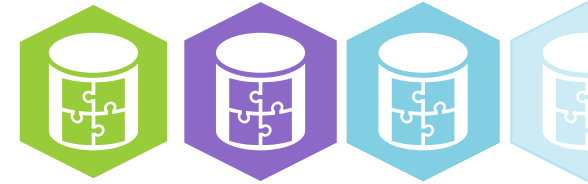
- Accenture, a leader in all SAP categories it participates in, provides extensive managed services offerings for SAP HANA®. Accenture can augment its own global SAP resources with its Avanade partnership.
- DXC, Wipro, Capgemini and Cognizant and are respected for their SAP abilities and have comprehensive managed service capabilities across numerous industries.
- NTT Communications and IBM are differentiated because they offer global infrastructure for SAP in conjunction with their managed technology services and application management for SAP HANA® products.
- Atos, the 2018 Rising Star in SAP managed services, has specialized in a diverse range of industries in the U.S., including manufacturing, automotive, hospitality and CPG verticals. Customer sizes range from 2,000 to 170,000 employees.



Methodology

METHODOLOGY

The research study “ISG Provider Lens™ 2018 SAP HANA®” Quadrant Report analyzes the relevant software vendors/service providers in the U.S. market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology. The study was divided into the following steps:



1. Definition of the SAP HANA® target market
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities and use cases
4. Leverage ISG's internal databases and advisor knowledge and experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts and figures received from providers and other sources.
6. Use of the following key evaluation criteria:
 - Strategy & vision
 - Technology expertise
 - Scale of operations
 - Growth momentum
 - Compliance & security
 - Breadth of portfolio of services
 - Partnership strength
 - Alignment with industry trends
 - Revenue
 - Industry expertise
 - Geographic footprint
 - Pricing models
 - Marketing strength
 - Innovation potential

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Douglas Pollei is part of the ISG Provider Lens team with responsibilities for research and technology advisory services. He has previous senior management and vice president experience with a background in alliances, business development, corporate decisions and governance, as well as experience managing cross-functional international teams, external partner relationships, P&L and budgets. Douglas has a strong consultative background in cloud services and a focus on international enterprises. He was instrumental in driving strategic planning to optimize new business initiatives, product development and collaborative partnerships.



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Jan Erik Aase is a director and principal analyst for ISG. He has more than 35 years of collective experience as an enterprise client, a services provider, an ISG advisor and analyst. Jan Erik has overall accountability for the ISG Provider Lens™ reports, including both the buyer-centric archetype reports and the worldwide quadrant reports focused on provider strengths and portfolio attractiveness. He sets the research agenda and ensures the quality and consistency of the Provider Lens™ team.

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