ISG Provider Lens™

SAP HANA and Leonardo Ecosystem Partners

SAP S/4HANA System Transformation – Midmarket

UK 2020

Quadrant Report

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

HEXAWARE

July 2020

About this Report

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The research and analysis presented in this report includes research from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of May 2020, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

All revenue references are in U.S. dollars ($US) unless noted.

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ISG Provider Lens™

ISG Provider Lens™

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

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EXECUTIVE SUMMARY

Very minimal or negative growth expected for S/4HANA amidst covid crisis and brexit. With high focus on lowering the cost and manual effort, there is an accelerated increase in the adoption of digital transformation

The outlook for new SAP adoption in the U.K. market looks bleak. Enterprises are facing an uncertain business environment due to the dual impacts of Brexit and COVID-19. Firms are unsure of the tangible benefits that could be realized from any initiative during these times. In this uncertain scenario, the complexity, cost and change management required for SAP S/4HANA transformation adds to the enterprises' reluctance to move to S/4HANA. The firms that have not started their migrations have postponed their plans to move to S/4HANA. Enterprises are also exploring options with their service providers for price reduction or payment deferment across various SAP outsourcing deals.

SAP's extension until 2027 to continue supporting ECC has not turned the tide for SAP users to adopt S/4HANA, even among enterprises that are anticipating sustainable return of investment (ROI) from making the move to S/4HANA. However, cloud adoption is anticipated to increase, as is the use of automation to mitigate the non-availability of skilled workers in the region. The midmarket segment is expected to benefit from cloud adoption. Enterprises in that segment are focusing on implementing S/4HANA Cloud because they have less customization and maintenance requirements than larger firms. There will be an overall increase in digital projects across the region, with enterprises looking for enabling mobile apps for customers and employees using SAP Cloud Platform (SCP).

The majority of service providers have been able to support their clients during the COVID-19 crisis by enforcing business continuity plans and finding ways to deliver essential services. With minimal or negative growth anticipated in the U.K. for SAP S/4HANA, specifically among large accounts, it will be prudent for service providers to focus on S/4HANA Cloud. Some service providers have already shifted their focus toward the healthcare, manufacturing, and utilities industries in addition to delivering COVID-specific offerings for specific niche segments. Since cost reduction will be a primary enterprise focus, the service providers that offer competitive pricing (at less cost) or an innovative pricing model (such as consumption-based) will have an extra edge over their competitors. Managed services will increase for SAP applications because the client enterprises will want to optimize their cost model and service delivery efficiency for managing their SAP architecture.

Service providers are focusing on meeting their employees' remote working needs to ensure business continuity and will use data analytics for faster and efficient decision making. There is a change in the workplace culture that has changed the dynamics of work because of the increased work-from-home enablement by the service providers. With increased digital adoption and high focus on low-cost/effort requirements, service providers are focusing on design thinking tools to deliver digital technologies and applications on SAP Cloud Platform. Before embarking on a transformation journey, it will be an imperative for service providers to help their clients to envision the benefits the transformation will bring, using in-house or third-party tools and accelerators. While ensuring this, the providers will need to offer clients an outcome-based partnership model to ensure a win-win scenario.

Some of the key trends in the U.K. market are presented below.

- **Outcome-based services to increase:** As enterprises are navigating through the uncertainty of COVID-19 and bracing for alignment across regulations defined for Brexit completion, they are demanding different types of outcome-based pricing and services from their service providers. Some of the pricing models explored are consumption-based, gainsharing, risk-sharing and shared fixed reward. Shared fixed reward includes a fixed fee amount decided by both the provider and the client, with any delay in execution resulting in a reduction of the amount and any increase in execution cost will add to it.
- **Providers are expanding relationships with their existing clients:** Service providers are helping their clients with the challenges that have arisen due to the pandemic. Service providers also are proposing digital-based transformations for their clients to handle scenarios such as lack of resources, growth sustainability and enabling process continuity.
- **Increased traction across healthcare, manufacturing and utilities:** As enterprises are adjusting to the new future, there is a strong focus on improving the IT infrastructure across the healthcare sector to deliver seamless services while considering the social distancing norms in the U.K. Hence, S/4HANA adoption is anticipated to increase there. Manufacturing and utilities have been the major industries to adopt in the U.K. Workforce shortages and employees' inability to be physically present at the workplace have driven these industries to increase digital technology adoption for supporting operational continuity and services delivery to those they serve.
- **Change in the work culture across service providers:** With the majority of staff working from home, service providers' work culture has undergone a drastic transformation. Providers are trying to enable their employees to deliver S/4HANA implementations seamlessly. The workforce has been empowered with the necessary tools to develop and deliver the transformation to clients. Productivity measurement is changing along with the changing workforce dynamics. The service providers are focusing on tasks completed over a specific period of time instead of measuring the login/logout time of the employees.
- **Increased cloud deployments for S/4HANA:** In the U.K., ISG observes that enterprises are adopting cloud deployments for S/4HANA. These adopters are nimble to IT changes and do not have architectural constraints. There will be increased S/4HANA Cloud adoption resulting from the overall increase in cloud adoption and as a way to handle post-Brexit, post-COVID situations.

- **Bots, automation, artificial intelligence (AI), machine learning (ML) are reducing resolution time across managed services:** Automating Level 1 and Level 2 support and resolving incidents in less time have been focus areas for most SAP managed services providers. The providers are using bots to respond to basic tasks such as logging a ticket, providing ticket status, reducing time to resolution, and preventing any possible delays in resolution. Providers also are automating other services related to L1/L2 support and projects. Tools used across managed services are being infused with AI and machine learning to learn tasks, resolve incidents and optimize the IT and business processes.

- **AI and ML tools and accelerators are aiding SAP transformation services:** Providers also are building tools and accelerators that include automation, machine learning and AI to help provide transformation services. These tools and accelerators may apply to the entire development lifecycle or to any portion of it. Some of these resources have been certified by SAP and are available in SAP App Center, while others are only available through the service provider, which integrates them in the services contract. Most of tooling helps assess the existing IT landscape, strategize transformation roadmaps, improve code management, and automate support services.

- **Enabling SAP Leonardo by building proof of concepts:** Providers are building and showcasing proof of concepts (PoCs) for an SAP Leonardo solution that helps address a specific industry issue or empowers enterprises with emerging technologies. Service providers demonstrate these solutions to their clients to showcase their capabilities before the client decides to go ahead with the PoC project. This approach helps develop an understanding of how SAP Leonardo can be used within the client's enterprise, and allows the service provider to demonstrate its ability to implement the solution for the client.

- **Managed cloud platform services integrated with end-to-end managed services:** Most enterprises are opting for managed cloud services (including platform and software) as part of a unified contract for end-to-end managed services, including infrastructure, cloud, application or security services. The providers are leveraging their cloud platforms and managed PaaS to deliver the managed platform services along with the tools and accelerators used for managed application services.

Introduction

SAP – HANA & Leonardo Ecosystem Partners 2020

SAP S/4 HANA System Transformation – Large Accounts

SAP S/4 HANA System Transformation – Mid Market

Managed Application Services for SAP ERP

SAP Cloud Platform and SAP Leonardo Services

Managed Platform Services for SAP HANA

Source: ISG 2020

Definition

SAP has 13,800 licensed customers in more than 180 countries, covering all continents. With more than 100,000 employees and over 18,000 partner companies, SAP has a significant impact on the IT market, in terms of both innovation and the global IT spending share. This research study identifies the top SAP partner companies that can provide differentiated enterprise client services and deliver the best results from S/4HANA investments. By working with the best partners to meet their requirements, enterprise clients can optimize their operating expenses and achieve a superior return on their technology investments.

Although SAP is continuously growing in revenue, the company faces resistance from current clients to upgrade to S/4HANA — its most modern enterprise resource planning (ERP) offering. The solution offers superior performance by using in-memory technology, but transformation projects could involve steep costs. Clients should thus refine their partner selection process and criteria to find the best performers that can provide higher business value at a lower cost of transformation.

Definition (cont.)

To benefit clients that are new to SAP ERP or are hesitant to upgrade to S/4HANA, this study references case studies and success stories. In 2019, ISG identified the viability of tools and frameworks for large SAP transformations and greenfield S/4HANA implementations that have been delivered in record time. The perfect partner can support clients and allay fears arising from the end of support for the legacy SAP ERP, which is now scheduled for 2027.

In 2019, ISG studies identified that the major benefits of adopting S/4HANA are its innovation backbone that is offered through SAP Cloud Platform (SCP) and SAP Leonardo, as well as the novel ways of leveraging APIs and microservices. SAP partners have demonstrated innovations using artificial intelligence (AI), analytics, Internet of Things (IoT), mobile apps, robotic process automation (RPA) and blockchain to disrupt markets and transform businesses.

For clients that have adopted S/4HANA, this study assesses managed service providers that can contribute to superior application performance, including stability, availability and security. Cloud migrations and technology innovation are also assessed.

For support services, AI and machine learning have been incorporated into application maintenance and operations to predict incidents and automate troubleshooting, ticketing processes and provisioning, allowing for gains of scale that lower support costs. This study identifies service providers that effectively apply new technologies to support S/4HANA and HANA database.

The ISG Provider Lens™ study offers IT-decision makers:

- Transparency on the strengths and weaknesses of relevant providers.
- A differentiated positioning of providers by segments.
- Focus on different markets, including the U.S., the U.K., Germany, the Nordics and Brazil.

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

Definition (cont.)

Scope of Report

ISG studies are intended to anticipate the investigation efforts and buying decisions of typical enterprise clients. When contemplating a significant strategy transformation, making purchase-versus-rent decisions for infrastructure, implementing agile practices or incorporating automation into their environments, enterprise clients will benefit from a study that examines an entire ecosystem for a certain service line.

Therefore, ISG studies comprise multiple quadrants covering the spectrum of services that an enterprise client requires.

SAP S/4HANA Transformation – Large Accounts

ISG assesses 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. The transformation includes planning, design and modeling of applications, while considering the service provider's ability to manage complexity and scale that are common characteristics across large enterprise clients. The participating companies are expected to have the frameworks, tools and accelerators to support the needs of large system transformations.

SAP S/4HANA Transformation – Midmarket

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

Managed Application Services For SAP ERP

This assessment considers a provider's capability to offer managed services, including maintenance and support functions that comprise monitoring, remote support and centralized application management for SAP S/4HANA and legacy SAP Business Suites such as ECC 6.0.

Definition (cont.)

Managed application services for incidents include troubleshooting, Level 2 and Level 3 application support, user support, ticket lifecycle management, incident resolution, problem management, root cause analysis and interface with SAP product support (upon client authorization). Service requests typically include user management (add, change of user profile and disablement of users' access), performance reports, database services, security (access) monitoring and license compliance. Providers that have center of expertise (CoE) certifications receive higher evaluations, but the certifications are not a requisite for participating in this quadrant.

Managed Platform Services For SAP HANA

The initial technical barriers and client resistance to moving ERP to the cloud are gradually disappearing, forcing clients to decide among in-house hosting, traditional outsourcing, cloud IaaS and PaaS. The hosting decision follows the hardware obsolescence lifecycle, and HANA in-memory technology imposes a new dynamic to hardware choices, operations and tooling. This quadrant assesses providers of infrastructure services comprising hardware installs and maintenance routines, hybrid cloud management, access security, monitoring, system availability, interface performance, disaster recovery management, backup, restore, data compliance (retention and access), data breach protective measures at the data center level, job scheduling, batch processing, file transfers, archiving and all infrastructure and operations services that are required to run SAP ERP or SAP HANA applications. This quadrant analysis privileges providers that demonstrate expertise in maintaining smooth S/4HANA operations, which requires deep knowledge about the underlying in-memory database technology. Furthermore, strong capabilities in optimizing this type of application, including data volume management, are preferred assets. However, the provider should retain the capacity to support SAP HANA and legacy SAP ERP versions for clients that have old instances running simultaneously with S/4HANA.

SAP Cloud Platform and SAP Leonardo Services

This segment examines the capabilities of providers to design, develop, modify, integrate and support applications for enterprise systems on SAP Cloud Platform (SCP) and deliver services for digital transformation using SAP Leonardo. SAP Cloud Platform services include platform-as-a-service and application development platform-as- a-service for data-based mobile-enabled services, analytics, application development and deployment across multi-cloud platforms. SAP Leonardo services comprise AI, ML, blockchain and IoT technologies, packaged as a platform-as-a-service that is integrated in the HANA database.

Provider Classifications

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

Leader

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

Product Challenger

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

Market Challenger

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

Contender

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

Provider Classifications (cont.)

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

Rising Star

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

Not In

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

SAP HANA and Leonardo Ecosystem Partners - Quadrant Provider Listing 1 of 3

	SAP S/4HANA System Transformation – Large Accounts	SAP S/4HANA System Transformation – Midmarket	Managed Application Services for SAP ERP	Managed Platform Services for SAP HANA	SAP Cloud Platform and SAP Leonardo Services
Absoft	Not In	Contender	Not In	Contender	Not In
Accenture	Leader	Not In	Leader	Leader	Leader
Atos	Leader	Not In	Leader	Product Challenger	Market Challenger
BearingPoint	Not In	Product Challenger	Not In	Not In	Contender
Birlasoft	Not In	Leader	Market Challenger	Contender	Market Challenger
Capgemini	Leader	Not In	Leader	Leader	Leader
Centiq	Not In	Market Challenger	Contender	Contender	Not In
CGI	Contender	Not In	Contender	Not In	Contender
Cognizant	Product Challenger	Not In	Product Challenger	Leader	Product Challenger
Delaware	Not In	Not In	Not In	Not In	Contender
Deloitte	Market Challenger	Not In	Not In	Not In	Not In
DXC	Product Challenger	Not In	Market Challenger	Product Challenger	Contender

SAP HANA and Leonardo Ecosystem Partners - Quadrant Provider Listing 2 of 3

	SAP S/4HANA System Transformation – Large Accounts	SAP S/4HANA System Transformation – Midmarket	Managed Application Services for SAP ERP	Managed Platform Services for SAP HANA	SAP Cloud Platform and SAP Leonardo Services
Ensono	Not In	Not In	Not In	Contender	Not In
EY	Market Challenger	Not In	Not In	Not In	Not In
Fujitsu	Contender	Not In	Product Challenger	Product Challenger	Product Challenger
HCL	Leader	Not In	Leader	Leader	Leader
Hexaware	Not In	Leader	Leader	Not In	Not In
IBM	Leader	Not In	Leader	Leader	Leader
Infosys	Leader	Not In	Rising Star	Product Challenger	Rising Star
Keytree	Not In	Leader	Market Challenger	Not In	Leader
LTI	Not In	Leader	Not In	Not In	Not In
Mindtree	Not In	Leader	Leader	Product Challenger	Leader
Mphasis	Not In	Contender	Contender	Not In	Not In

SAP HANA and Leonardo Ecosystem Partners - Quadrant Provider Listing 3 of 3

	SAP S/4HANA System Transformation – Large Accounts	SAP S/4HANA System Transformation – Midmarket	Managed Application Services for SAP ERP	Managed Platform Services for SAP HANA	SAP Cloud Platform and SAP Leonardo Services
NTT DATA	Product Challenger	Leader	Leader	Leader	Leader
PwC	Market Challenger	Not In	Not In	Not In	Not In
Sopra Steria	Not In	Product Challenger	Not In	Not In	Not In
Stefanini	Not In	Product Challenger	Product Challenger	Not In	Not In
Syskoplan Reply	Not In	Contender	Not In	Not In	Contender
TCS	Rising Star	Not In	Product Challenger	Leader	Product Challenger
Tech Mahindra	Leader	Not In	Leader	Product Challenger	Leader
T-Systems	Product Challenger	Not In	Product Challenger	Rising Star	Product Challenger
Virtustream	Not In	Not In	Not In	Product Challenger	Not In
Wipro	Leader	Not In	Leader	Leader	Leader
Zensar	Not In	Rising Star	Product Challenger	Not In	Not In

SAP HANA and Leonardo Ecosystem Partners Quadrants

ENTERPRISE CONTEXT

SAP S/4HAHA System Transformation - Midmarket

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

In this quadrant report, ISG lays out the current market positioning of service providers in the S/4 HANA consulting and implementation space for midmarket companies in the U.K. based on the depth of the service offering and their market presence.

Some enterprises are reluctant to migrate to S/4 HANA because of factors such as the high costs involved, data management, change management, custom code management, a talent or skill gap and uncertainty about integrating their legacy enterprise resource planning (ERP) in S/4 HANA solutions. However, there are many enterprises that have already adopted or are in the process of implementing S/4 HANA as part of their digital transformation by choosing the right provider to overcome challenges and provide training to address the talent skill gap.

ISG has observed that most mid-sized enterprises choose S/4 HANA cloud as it offers less customization and can be easily maintained. These enterprises have few complex requirements and a smaller project scale when compared to large companies. They prefer providers with a strong onshore and nearshore delivery approach and high integration capabilities. As most mid-sized enterprises may have non-SAP ERP as an existing solution, they should also look into the service provider's migration capabilities and implement ready-to-use templates or solutions for specific micro-segments.

This report is relevant for:

Marketing and sales leaders to understand the relative positioning and capabilities of service partners that can help them effectively consume SAP S/4 HANA services with their day-to-day analysis and dashboarding.

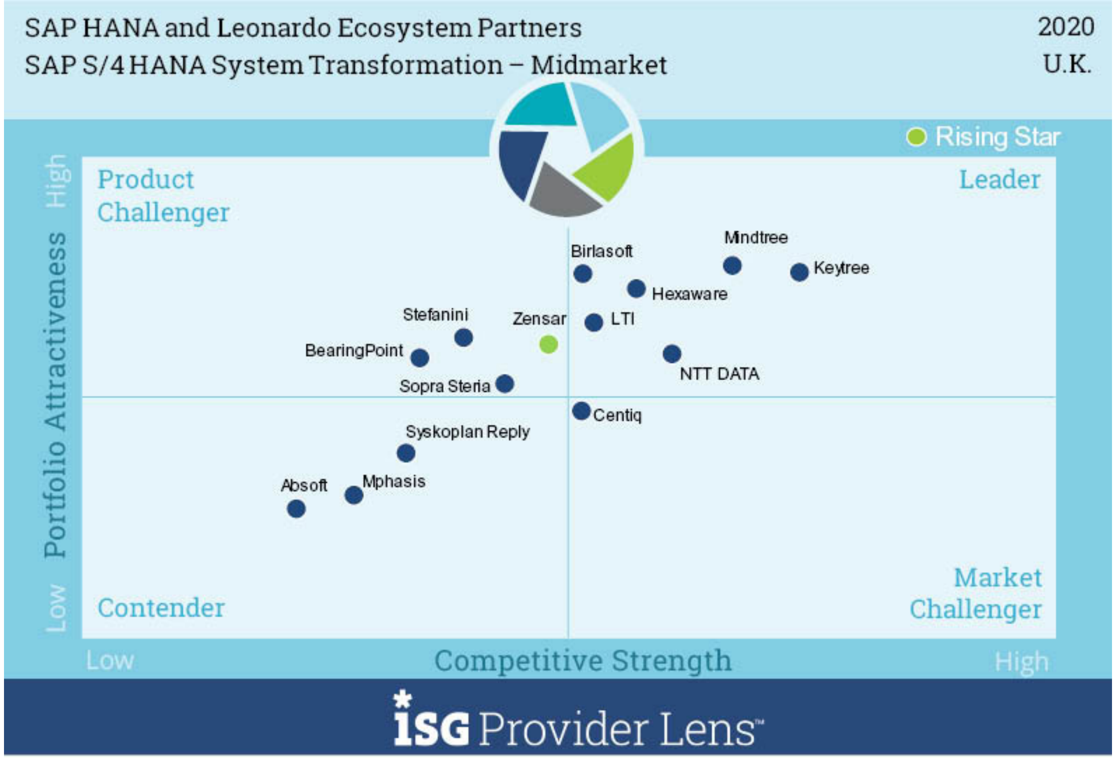
IT and technology leaders to get insights into the strengths and weaknesses of service providers in the SAP S/4 HANA ecosystem and how they integrate the latest technologies or capabilities into their S/4 HANA offerings to stand out in the market.

Sourcing and procurement managers to gain a better understanding of the market and the service provider's landscape of S/4 HANA offerings and to identify or distinguish a player based on their needs.

SAP S/4 HANA SYSTEM TRANSFORMATION – MIDMARKET

Definition

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



Source: ISG Research 2020

SAP S/4 HANA SYSTEM TRANSFORMATION – MIDMARKET

Eligibility Criteria

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

Observations

Midmarket companies in the U.K. are affected by the COVID-19 pandemic and are looking for opportunities to reduce costs. This segment was looking at S/4HANA Cloud before the pandemic, and enterprises with a well-defined cloud strategy will focus on this SaaS version of S/4HANA. Whilst the adoption of S/4HANA Cloud is low as of now, with the overall increase of cloud adoption, it is expected that U.K. midmarket enterprises will opt for S/4HANA Cloud. There have been S/4HANA on-premise implementations in the midmarket segment but the number will reduce this year due to the pandemic.

The leading service providers that are focused on midmarket clients have strong frameworks for S/4HANA implementations and prepackaged solutions specific to industries. Some providers are specifically targeting the healthcare sector, which is anticipated to grow in next two years. With cost reduction as a priority for many enterprises, providers are helping the clients with process optimization and change management. Most enterprises are asking their service providers for cost deferrals. With workforce reductions happening or planned, enterprises are opting to use automation, cloud and digital technologies to optimize service delivery. Most providers are taking a data-driven approach to deliver these transformations.

Some providers are building COVID-19 specific product offerings to offer services to niche areas. Most service providers have enabled most of their staff to work from home, which has led to a major cultural shift in their ways of working.

SAP S/4 HANA SYSTEM TRANSFORMATION – MIDMARKET

Observations (cont.)

Some observations on the Leaders for this quadrant include are summarized below.

- **Birlasoft's** Accelerated Enterprise Model is a factory approach with building blocks that helps leverage best practices for a greenfield deployment. The framework helps evaluate the most current release state and provides a fit/gap analysis.
- **Hexaware's** TRIADIC framework analyses a customer's requirements from three major dimensions of landscape complexity, business model, target architecture for cloudification and digitization needs, and considers the transition and transformation efforts needed.
- **NTT DATA** (itelligence) has a strong portfolio of SAP S/4HANA offerings. It takes a systematic data-driven approach to guide its customers through their digital journey using S/4HANA. NTT DATA provides services to multiple industries and has implemented S/4HANA across more than 20 functional areas, which showcases its breadth of services provided for the product.
- **Keytree** has developed SAP-qualified packaged solutions for clients in the retail, professional services and consumer packaged goods industries. These solutions all use S/4HANA and a combination of other SAP products. Bridge for Retail is an extension for including a simplified finance/back office solution on S/4HANA Cloud.
- **LTI** has created the CFIN Transformation Platform, which analyses complex SAP and non-SAP platforms and automatically creates a technical blueprint for Central Finance transformations. This digital discovery spans multiple source systems across three dimensions – process, data and organization elements.
- **Mindtree** leverages its industry-specific templates, which include a fully-fledged CFIN 1809 proof of concept, plus fashion and consumer packaged goods templates. It also has a focus on S/4HANA deployments for finance, sales and distribution, procurement, warehouse management, inventory management, plant maintenance, production planning and control, product lifecycle management and project systems.
- **Zensar** (rising star) has ZenLife, a life sciences-specific, SAP-qualified, end-to-end solution using S/4HANA and SAP Fiori. The solution includes preconfigured business scenarios with industry best practices. This plug-and-play solution provides 40 to 50 percent delta customizations, and 50 to 60 percent of life sciences business process are included.

HEXAWARE

Overview

Hexaware, an SAP services partner, specializes in providing services for business-led engagements by leveraging the company's larger ACT framework to deliver business modernization and landscape transformations. Hexaware has strategic relationships with SAP, Microsoft (Azure), Amazon (AWS) and Google (GCP) to offer multiple cloud deployment options for S/4 HANA and SaaS solutions. The provider is a Gold level partner with Microsoft and co-sells Azure. With its deep cloud migration understanding and experience, Hexaware outlines strategies and approaches to best suit the customer requirements. Hexaware provides profound SAP transformation services in the U.K. and 28 percent of S/4HANA transformation revenue is generated from the region. The provider has five S/4HANA clients.

Strengths

TRIADIC framework helps the migration journey: Hexaware's Triadic framework analyses customer's requirements from the major dimensions of landscape complexity, business model, target architecture for cloudification and digitization needs, and considers the needed transition and transformation efforts. The Triadic framework analyses organization's landscape and informs the optimal migration path for the application landscape in the organization's SAP architecture.

Strong fit for enterprises with cloud-based SAP architecture: Hexaware offers flexible SAP on Cloud packages to fit customer needs throughout their cloudification journeys. Services include a basic migration offering starting with an infrastructure service in addition to Silver, Gold and Platinum packages focused on environment services, application modernization and a complete business-aligned solution respectively. Hexaware's strong Azure partnership enables it to plan the best approach for cloud migration.

Co-development with SAP: Hexaware and SAP co-developed a team and talent management software called FluidOrg. It is a cloud-based enterprise-wide intelligent team assistant solution designed to engage employees and leaders thereby improving productivity and creativity. This software enables team members to work together on a single platform. It also helps in identifying talent, while simplifying team formation and resource allocation.

Caution

Hexaware should prioritize expanding its clientele in industries other than manufacturing, utilities and consumer packaged goods in the U.K.

2020 ISG Provider Lens™ Leader

Hexaware delivers business driven, outcome-based cloud migration with minimized risks delivering future-state architecture aligned with business solutions. They leverage their robust set of framework, platform and tools to support entire landscape transformation journey like FITRITE, EZCOPY, COMFORMIQ etc.

Methodology

METHODOLOGY

The research study "ISG Provider Lens™ 2020 SAP – HANA & Leonardo Ecosystem" analyzes the relevant software vendors/service providers in the U.K. 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 UK SAP – HANA & Leonardo Ecosystem market
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities and use cases
4. Leverage ISG's internal databases and advisor knowledge and experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts and figures received from providers and other sources.
6. Use of the following key evaluation criteria:
   - Strategy & vision
   - Innovation
   - Brand awareness and presence in the market
   - Sales and partner landscape
   - Breadth and depth of portfolio of services offered
   - Technology advancements

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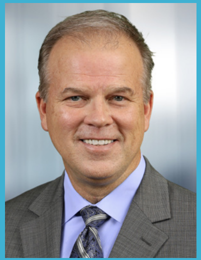
ArulManoj M is a senior analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on Next-gen Application Development & Maintenance, SAP HANA & Leonardo Ecosystem and Automation Solutions and Services. His area of expertise lies in Application Development & Maintenance. He has developed content for Provider Lens™ in the areas of Next-gen Application Development & Maintenance, SAP HANA and Leonardo Ecosystem and Data Analytics Services & Solutions. Along with this, Arul develops content from an enterprise perspective and authors the global summary report. He also collaborates with advisors and enterprise clients on ad-hoc research assignments and writes articles about niche technologies, market trends and insights.

Authors and Editors



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Director

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

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