

***ISG** Provider Lens™

SAP HANA and Leonardo Ecosystem Partners

USA 2019

Quadrant
Report



A research report
comparing provider
strengths, challenges
and competitive
differentiators

Customized report courtesy of:

Infosys®

June 2019

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 was current as of February 25, 2019 – March 25, 2019. ISG recognizes that many mergers and acquisitions have taken place since that time but those changes are not reflected in this report.

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EXECUTIVE SUMMARY

SAP's S/4HANA portfolio continues to march ahead on its progression path and gain the confidence of enterprises in the U.S. This shift in momentum is evidenced in the company's S/4HANA customer base, which has grown close to 30 percent in the first quarter of 2019. S/4HANA now forms a large and essential part of the core SAP offering, and the company is looking at S/4HANA to strike a chord with enterprise customers looking for efficiencies and automation by automating their business processes and reducing complexity in their ERP landscape.

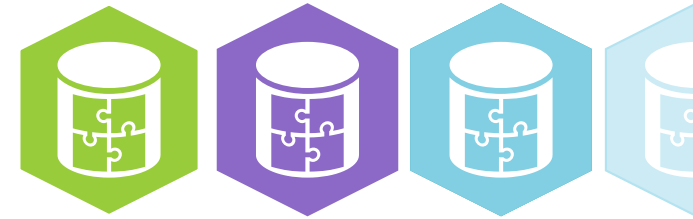
We observe that enterprises are taking a customized, thoroughly evaluated, and business need-driven approach toward S/4HANA adoption. Drivers range from landscape transformation to conversions (using the greenfield, brownfield or bluefield approach) based on the complexity of their existing SAP ERP architectures. There has also been a gradual change in the posture and outlook of enterprise customers toward S/4HANA, and the initial inertia for this portfolio of SAP is being replaced with optimism and positivity.

SAP has been introducing regular version updates to S/4HANA that incorporate features to keep pace with the changing requirements of enterprise clients, and to go beyond remaining relevant to becoming an integral stakeholder in its customers' growth story. Service providers are increasing their base of architects and professionals certified on SAP services. They are doing this with an eye on increasing their business resource footprint in the U.S. and improving their preparedness to meet the 2025 deadline of support sunset for Business Suite and other SAP services.

The key trends are summarized below.

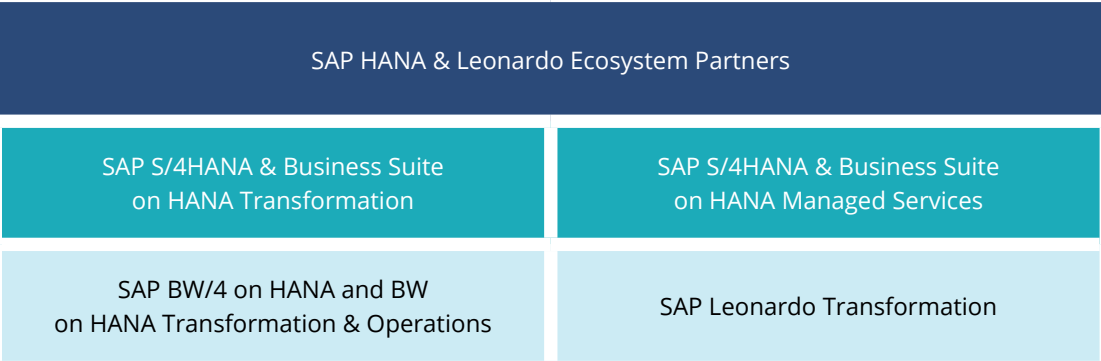
- **Increased uptake of on-premises S/4HANA solutions among large enterprises:** Customers that are looking for core process transformation, and face complexity in geographic scale and application customization, are preferring on-premises deployment models compared to cloud hosting, which is finding traction among relatively smaller enterprises with limited scale.
- **Increasing use of frameworks for efficient S/4HANA services delivery:** Providers are using proprietary frameworks with standardized templates and methods to address different technical and process areas of the value chain in S/4HANA and other SAP services implementations.
- **Industry-specific solutions for accelerated transformation:** Providers are building industry-specific solutions and accelerators for S/4HANA and SAP Leonardo for the manufacturing, retail, consumer packaged goods (CPG) and utilities industries to help customers that are seeking implementation expertise and business agility. Enterprises are looking for such solutions in the provider's offering portfolio as a differentiator to help them in their journey to becoming an intelligent enterprise and to achieve faster time-to-market.

- **Application of bots to automate processes and reduce resolution time in managed services:** Service providers are using or planning to use bots in application management services to perform tasks such as logging the ticket, providing the ticket status, reducing the time to resolution and preventing possible delays in resolution. Providers also are further automating services related to L1 and L2 support and project reporting and have realigned the workforce to reassign staff that were working on these tasks to higher value and complex functions.
- **AI and machine learning tools and accelerators being used to provide SAP services:** Providers are building tools and accelerators leveraging emerging technologies such as automation, artificial intelligence and machine learning to aid customers in their transformation. Some of the tools and accelerators that service providers built are certified by SAP and available in its App Center, while some companies provide these services integrated with the contract. Most of these tools and accelerators help assess the existing IT landscape, strategize transformation roadmaps, improve code management and automate support services.
- **Providers are enabling SAP Leonardo adoption by building proof of concepts:** There is an ambiguity in the enterprises' mindset about implementing SAP Leonardo for their IT infrastructure, which has slowed SAP Leonardo adoption. In response, service providers are using SAP Leonardo to build proof-of-concepts (PoC) to help address a specific industry issue or empower enterprises with emerging technologies.



Introduction

Simplified illustration



Source: ISG 2019

Definition

SAP is well known for its enterprise resource planning (ERP) software, data management products and digital focused offerings. This report compares SAP service providers and their capabilities to implement, migrate, host or manage SAP S/4HANA, Business Suite on HANA, Business Warehouse (BW) on HANA and SAP Leonardo services.

Definition (cont.)

Scope of the Report

The SAP HANA & Leonardo Ecosystem Partners 2019 report is a comprehensive, objective analysis and evaluation of the service providers. The report focuses on trends associated with SAP HANA and its market. As part of this U.S report, ISG classified 23 providers for SAP study as either leaders, market challengers, product challengers or contenders in four areas of specialization: SAP S/4HANA & Business Suite on HANA Transformation, SAP S/4HANA & Business Suite on HANA Managed Services; SAP BW/4 on HANA and BW on HANA Transformation & Operations; SAP Leonardo Transformation.

- **SAP S/4HANA & Business Suite on HANA Transformation:** ISG assesses consulting and system integration provider services for developing, deploying and testing enterprise applications, using SAP S/4HANA and SAP Business Suite on HANA with SAP Fiori as the user interface.
- **SAP S/4HANA & Business Suite on HANA Managed Services:** This quadrant assesses a providers' capability to deliver managed services for maintenance, operations and support functions comprising monitoring, remote support and centralized management of applications across SAP S/4HANA and SAP Business Suite.
- **SAP BW/4 on HANA and BW on HANA Transformation & Operations:** This quadrant assesses a service provider's ability to strategize, develop, modify and implement analytics on SAP Business Warehouse (SAP BW) on HANA (BW on HANA) using SAP HANA platform using public, on-premises or hybrid cloud models.
- **SAP Leonardo Transformation:** An assessment of providers on services for digital transformation using SAP Leonardo to build intelligent business functionalities leveraging the HANA database. SAP Leonardo includes a suite of artificial intelligence (AI), machine learning (ML), blockchain and Internet of Things (IoT) technologies, packaged as Platform-as-a-Service deployed on the HANA database and using SAP Cloud Platform (SCP) for development.

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 2

	SAP S/4HANA & Business Suite on HANA Transformation	SAP S/4HANA & Business Suite on HANA Managed Services	SAP BW/4 on HANA and BW on HANA Transformation & Operations	SAP Leonardo Transformation
Accenture	● Leader	● Leader	● Leader	● Leader
Atos	● Product Challenger	● Product Challenger	● Product Challenger	● Product Challenger
Birlasoft	● Product Challenger	● Product Challenger	● Product Challenger	● Product Challenger
Capgemini	● Leader	● Leader	● Leader	● Leader
Century Link	● Not In	● Contender	● Contender	● Contender
Cognizant	● Leader	● Product Challenger	● Product Challenger	● Rising Star
Deloitte	● Leader	● Not In	● Not In	● Not In
DXC	● Product Challenger	● Leader	● Not In	● Contender
EPAM	● Contender	● Not In	● Contender	● Not In
Fujitsu	● Contender	● Contender	● Contender	● Contender
HCL	● Leader	● Leader	● Leader	● Leader
IBM	● Leader	● Leader	● Leader	● Not In

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

	SAP S/4HANA & Business Suite on HANA Transformation	SAP S/4HANA & Business Suite on HANA Managed Services	SAP BW/4 on HANA and BW on HANA Transformation & Operations	SAP Leonardo Transformation
Infosys	● Leader	● Product Challenger	● Leader	● Product Challenger
ITC Infotech	● Product Challenger	● Not In	● Not In	● Not In
LTI	● Product Challenger	● Contender	● Not In	● Not In
Mindtree	● Product Challenger	● Product Challenger	● Rising Star	● Product Challenger
Mphasis	● Contender	● Contender	● Not In	● Not In
NTT DATA	● Leader	● Product Challenger	● Product Challenger	● Market Challenger
T - Systems	● Contender	● Contender	● Contender	● Product Challenger
TCS	● Not In	● Not In	● Not In	● Not In
Tech Mahindra	● Rising Star	● Market Challenger	● Leader	● Market Challenger
Wipro	● Product Challenger	● Leader	● Leader	● Leader
Yash Technologies	● Contender	● Contender	● Not In	● Contender



SAP HANA and Leonardo Ecosystem Partners Quadrants



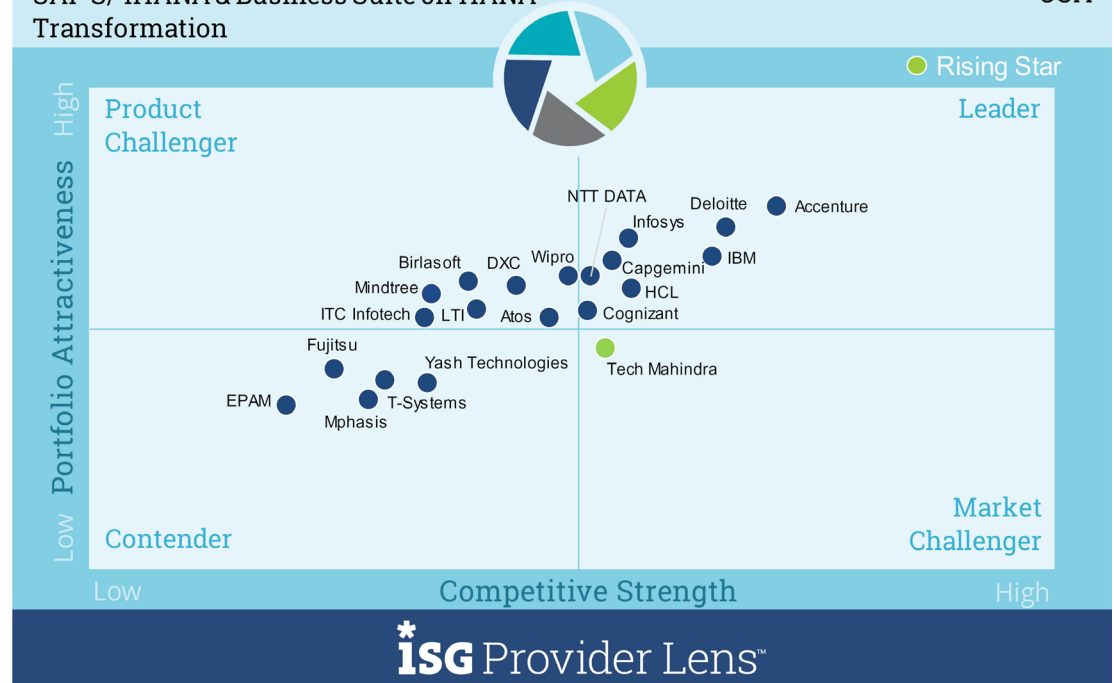
SAP S/4HANA & BUSINESS SUITE ON HANA TRANSFORMATION

Definition

ISG assesses consulting and system integration provider services for developing, deploying and testing enterprise applications using SAP S/4HANA and SAP Business Suite with SAP Fiori as the user interface. The providers abilities in planning, design and modelling applications across the enterprises' operating model are also assessed.

SAP HANA and Leonardo Ecosystem Partners
SAP S/4HANA & Business Suite on HANA
Transformation

2019
USA



Source: ISG Research 2019

SAP S/4HANA & BUSINESS SUITE ON HANA TRANSFORMATION

Eligibility Criteria

The minimum eligibility criteria for assessment in this quadrant is providing ERP services development, integration and testing using SAP S/4HANA with the HANA in-memory computing platform for at least one implementation of S/4HANA or SAP Business Suite by the service provider.

Observations

- Accenture, with its workforce of more than 11,000 SAP FTEs, frameworks and platforms such as myConcerto and strong partnership with SAP, is a leader in the S/4HANA domain.
- A combination of methodologies and frameworks such as iCaptivate, industry-focused, preconfigured template solutions that can be integrated with SAP Model Company and a network of delivery centers make Capgemini a leader in SAP S/4HANA services.
- Deloitte's leadership position results from its unique combination of extensive consulting capabilities along with rich industry expertise it has translated into focused offerings for a variety of verticals.
- Cognizant's strong network of SAP professionals, delivery centers and its intelligent c-iERP framework make the company a leader in the SAP S/4HANA segment.

SAP S/4HANA & BUSINESS SUITE ON HANA TRANSFORMATION

Observations (cont.)

- HCL has a focused go-to-market strategy along with BASE90 industry-facing solutions. The company has made focused investments in DRYICE for DevOps tooling and established several centers of excellence.
- IBM is a leader that has new product-related enhancements in Rapid Move for S/4HANA and its new BLUEFIELDTM approach for implementation.
- Infosys offers a combination of frameworks, methodologies, a focused go-to-market approach and training initiatives for S/4HANA, making the company stand out from others in the market.
- NTT DATA, with its massive resource base, proprietary Playback approach and Accelerate tool and steady inorganic growth has emerged as a leader in S/4HANA.
- Tech Mahindra's value-added services for business transformation, proprietary tools such as Epselon and robust roadmap for S/4HANA migration makes it a Rising Star.

INFOSYS

Overview

Infosys is one of the leading IT services providers, with a broad SAP services base. Its SAP S/4HANA offerings enable landscape and business transformation through solution tools, accelerators and frameworks. Infosys has more than 2,350 SAP practitioners in the U.S. and more than 100 SAP S/4 certified professionals in the country. The company is investing in Design Thinking, Digital Studios, leading S/4HANA solutions, Leonardo-based solutions and Agile Labs.

Strengths

S/4HANA frameworks and methodologies: Infosys's S/4HANA services are delivered through three frameworks and methodologies: IDEA Activate Methodology (for greenfield implementations), Safe Passage Methodology (for conversion projects) and Value Realisation Method (for S/4HANA Assessments and Business Case assignments). These assets help reduce implementation time, deliver services in an agile way and enable value realization.

Multipronged go-to-market: Infosys uses three broad go-to-market strategies – reactive, channel based and proactive – to help the company focus on existing accounts, relationship building, its channel sales team and conduct S/4HANA and industry-specific campaigns.

S/4HANA focused re-skilling: Infosys launched its S/4HANA Quarterly Enablement program in 2017, which has enabled more than 4,700 SAP consultants in S/4HANA. As a part of this effort, SAP consultants go through rigorous training from experts and have hands-on assignments in an S/4HANA system, followed by an assessment and internal certification.

Caution

Infosys could look to add more technology partners and extend its ambit beyond partnerships with leading hyperscalers in the U.S.



2019 ISG Provider Lens™ Leader

Infosys has a balanced S/4HANA offering comprising strong frameworks, a well laid out go-to-market strategy and a focused S/4HANA skills development program for SAP professionals.

SAP S/4 HANA & BUSINESS SUITE ON HANA MANAGED SERVICES

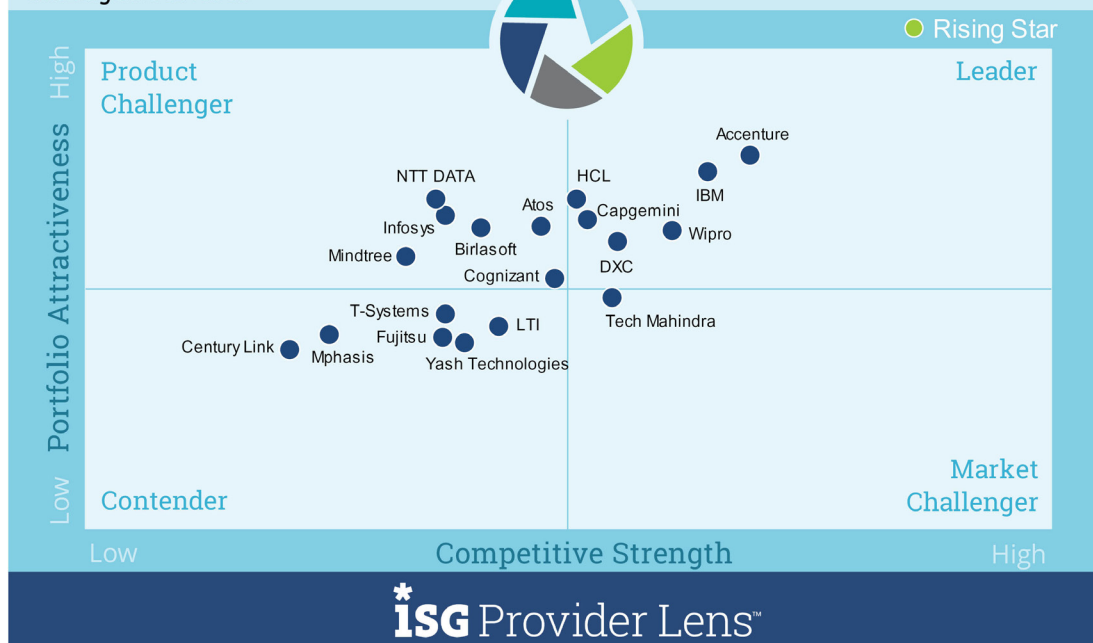
Definition

The assessment of this quadrant includes a providers' capability to deliver managed services (operations) for maintenance and support functions comprising monitoring, remote support and centralized management for applications across SAP S/4HANA and SAP Business Suite. The qualified participants demonstrate maintenance and support services specifically for SAP HANA and related platforms across applications, data or security.

Typical SAP managed services providers can support multiple clients remotely, from delivery centers that leverage resource sharing and apply advanced tools to automate support processes. These providers have robust ITIL processes and possibly ISO20000 accreditation on incident management, problem management and release management. Application lifecycle management is necessary expertise for requirement management, version control and quality assurance. CMMI accreditation is expected, however it is not mandatory. Leaders typically have robust application change management, governance and change approval processes.

SAP HANA and Leonardo Ecosystem Partners
SAP S/4HANA & Business Suite on HANA
Managed Services

2019
USA



Source: ISG Research 2019

SAP S/4 HANA & BUSINESS SUITE ON HANA MANAGED SERVICES

Definition (cont.)

A client solution documentation is typically updated in SAP Solution Manager (SM). Leading providers have SM-certified staff and advanced integration to ticketing platforms such as ServiceNow and Atlassian Jira, although other tools can also be integrated.

Eligibility Criteria

- Participants offer maintenance and support services with SAP HANA and related platforms specialization and/or certification.
- The managed services for SAP HANA applications include data and security

SAP S/4 HANA & BUSINESS SUITE ON HANA MANAGED SERVICES

Observations

- Accenture is a leader in managed services owing to its deep application management experience, large network of delivery centers and array of tools and proprietary IP for SAP migration and cloud management.
- Capgemini's continuous improvement program based on the ITIL v3 framework, its proprietary ADMnext framework and a large base of more than 18,000 SAP resources make the company a leader in the managed services market.
- DXC is a leading player based on its SAP Basis professionals, Value Framework for AMS (which includes automation and self-healing capabilities) and strong partnership with SAP.
- HCL provides a rounded portfolio with an SAP Basis support team, proprietary Digital AMS framework and chatbots for process automation, making the company a managed services leader.
- IBM's market leadership results from its strong industry expertise, domain leadership and large skilled workforce.
- Wipro's standards-based Service NXT framework, series of dedicated centers of excellence (CoEs) and strong SAP Basis competency help the company differentiate itself from others in managed services.

INFOSYS

Overview

Infosys offers SAP managed services for the cloud, applications and databases. Some of the areas served by the managed services offering include HANA installation, database migration, upgrades, High Availability and disaster recovery. The company delivers SAP managed services through its Digital AMS (ValuePLUS2.0) framework. Managed services are offered through on-shore, off-shore managed and dedicated Centers of Excellence (CoEs) spread across the U.S.

Strengths

Tools and accelerators for managed services: Infosys offers a host of tools and intellectual property to help its customers with automation during the SAP managed services delivery. Some of these tools include SAP-certified KPI dashboards, chatbot and digital assistants, VED (SAP based chatbot assistant), NIA (an AI platform) and an RPA platform called ASSISTEDGE.

Dedication ValuePLUS CoEs: Along with its framework for managed services, Infosys also has established an SAP ValuePlus center of excellence for all AMS (application management service) projects and an SAP transformation CoE for all SAP cloud, new technologies, SoH (Suite on HANA) and S4/HANA-related transformations.

Support for SAP Basis: The company is a part of SAP Basis support services such as HANA installation, OS/DB migration, downtime, upgrade and execution. Infosys also provides HA (High Availability) or HADR (Disaster Recovery Setup), which involves tight collaboration among multiple teams (including the customer's third-party service providers, customer teams, and the SAP services and operations teams.)

Caution

Infosys has a good partner base with multiple technology in niche skills areas. However, an increase in sales partners would provide an impetus to sales in the region.



2019 ISG Provider Lens™ Product Challenger

Infosys offers a framework led delivery approach for SAP managed services, which is well complimented with proprietary solutions, a design thinking approach, tools and accelerators. This offers differentiation to the company and makes it a suitable fit for varying enterprise clients.

SAP BW/4 ON HANA AND BW ON HANA TRANSFORMATION & OPERATIONS

Definition

The quadrant assesses the service provider capabilities on their ability to strategize, develop, modify and implement real-time analytics using SAP HANA platform using public, on-premise or hybrid cloud models. The consulting services are assessed across data management strategy and process optimization resulting in strategic benefits such as cost optimization, improved customer/user experience and integration services, including the ability to extract and process data from other platforms. The assessment also includes provider's industry knowledge, innovation and the ability to operationalize applications using BW/4HANA.

SAP HANA and Leonardo Ecosystem Partners
SAP BW/4 on HANA and BW on HANA Transformation & Operations

2019
USA



Source: ISG Research 2019

SAP BW/4 ON HANA AND BW ON HANA TRANSFORMATION & OPERATIONS

Eligibility Criteria

The providers that develop, migrate, integrate and test SAP BW platform using multi-cloud models for data warehousing are considered in this quadrant.

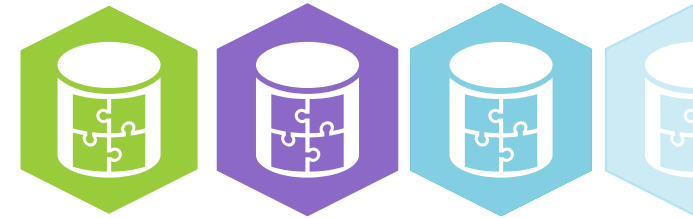
Observations

- Accenture is a leading player in the BW market due to its strong SAP partnership, robust BW HANA practice with dedicated team in its Delivery Network Centers, and industry leadership in financial services.
- Capgemini takes a domain-focused approach to BW through initiatives such as SAP Digital Control Room, industry-focused solutions and a network of centers of excellence (CoEs) that make it a leader in the BW market.
- HCL has developed a host of core business analytic services, has focused efforts to reskilling its talent since 2017, has accelerated BW adoption for its customers using proprietary frameworks and became a leader in the BW market.
- IBM's has a strong SAP BW practice, which focuses on BW modernization and a unique migration approach to BW/4HANA and puts the company in a leading position in the market.

SAP BW/4 ON HANA AND BW ON HANA TRANSFORMATION & OPERATIONS

Observations (cont.)

- Infosys offers a combination of a strong multi-dimensional team, acquisitions in emerging domains and a reskilled workforce, which makes the company stand apart from competition.
- Tech Mahindra's innovation-led approach, strategic investments in reskilling associates and a well-defined RaaS framework make it a leader in this segment.
- Wipro extends data science and machine learning (ML) capabilities BW/HANA , leverages its strong SAP partnership and has a good catalog of more than 120 data science solutions.
- Mindtree is a Rising Star with a good mix of tools to support BW/4 on HANA in a variety of environments.



INFOSYS

Overview

Infosys, one of the leading IT service providers, offers a large bouquet of SAP services across S/4HANA, BW, managed services and Leonardo. Its BW/4HANA and BW on HANA portfolio includes simplification and migration services, embedded analytics, big data engineering, data visualization and advanced analytics. Infosys has more than 400 SAP certified consultants in BW, BI and Big Data and more than 50 BW certified professionals in the U.S.

Strengths

Multi-dimensional BW teams: Infosys's SAP BW teams offer customers a unique combination of deep technical and functional knowledge customers apart from BW HANA product knowledge, which includes flavors of data warehousing and analytics expertise from outside the SAP stack.

Acquisitions in digital, information management and analytics: Infosys acquired WONGDOODY, Brilliant Basics, Skytree, Noah and Lodestone Holding to enhance its capabilities and increase its customer value proposition in the areas of digital innovation, information management consulting and machine learning.

BW focused re-skilling: Infosys' skills development efforts are focused on BW4/HANA, big data, embedded analytics and visualization delivered through a combination of internal and external trainings with additional training efforts in big data cloud offerings as they interact with SAP BW4/HANA.

Caution

Infosys must expand its base of partners in the BW and analytics domains to include promising regional startups to support its regional expansion.



2019 ISG Provider Lens™ Leader

Infosys offers BW services to leading Fortune 500 companies as well as government and not-for-profit organizations and serves as a good fit for enterprises seeking a mix of technical, domain and product expertise in the data warehousing domain.

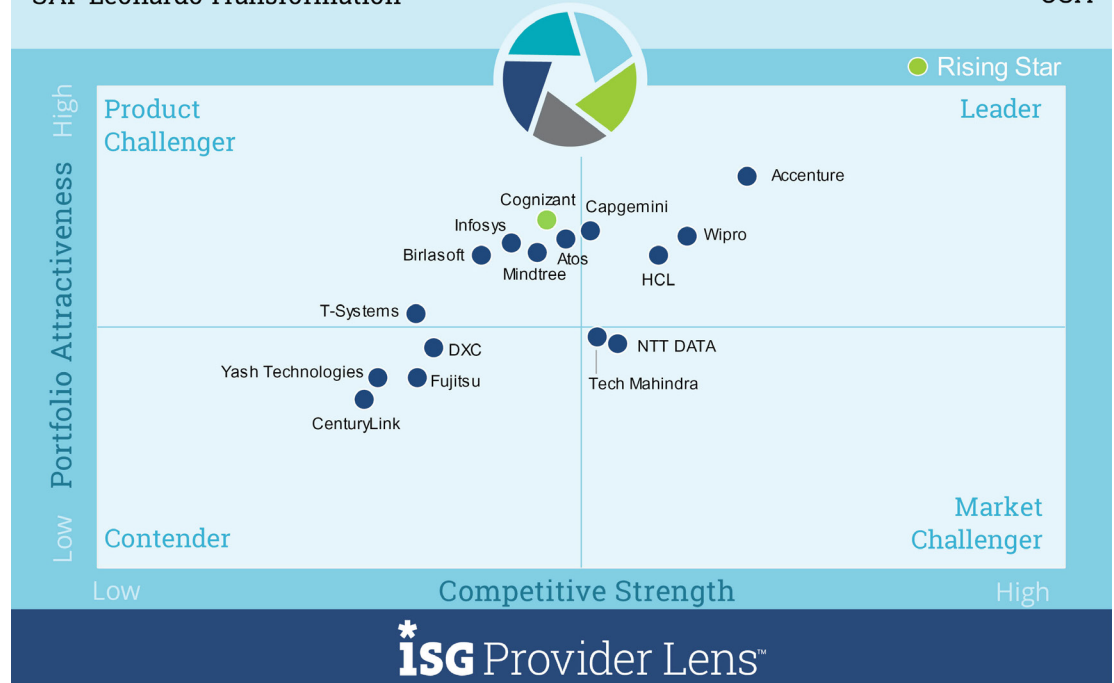
SAP LEONARDO TRANSFORMATION

Definition

The quadrant assesses providers on services for digital transformation using SAP Leonardo to build intelligent business functionalities leveraging HANA database. SAP Leonardo includes a suite of artificial intelligence (AI), machine learning (ML), blockchain and IoT technologies, packaged as platform-as-a-service deployed on HANA database and utilizing SAP Cloud Platform for development. The assessed capabilities also include business transition, industry-specific implementations and deployment on public, hybrid and on-premise cloud.

SAP HANA and Leonardo Ecosystem Partners
SAP Leonardo Transformation

2019
USA



Source: ISG Research 2019

SAP LEONARDO TRANSFORMATION

Eligibility Criteria

The providers should have delivered projects either AI, machine learning, blockchain or IoT using SAP Leonardo as a standalone platform or included design thinking in the offering.

Observations

- Accenture's SAP Leonardo practice is built on the pillars of strong innovation and research-led focus, which coupled with its large network of delivery centers and strong SAP partnership, makes the company a pioneer in the SAP Leonardo market.
- Capgemini offers a network of innovation labs, dedicated centers of excellence (CoEs) and industry-based accelerators for manufacturing and supply chain that help the company stand out in the SAP Leonardo market.
- HCL offers four preconfigured accelerators and has made heavy investments in technical readiness for its professionals through focused training. These initiatives help propel the company to market leadership.
- Wipro's market leadership comes from its preconfigured accelerators, training initiatives and strong synergies with SAP.
- Cognizant, the Rising Star, offers Digital Collaboratories, 28 preconfigured solutions and an operations-focused network to provide efficient and cost-effective SAP operations to its customers.

INFOSYS



Overview

Infosys's Leonardo practitioners are part of its SAP New Technology Services. As a part of its SAP Leonardo offering, the company provides customer enablement, assessment, use case analysis and proofs of concept, which are followed by full-fledged implementation. The implementations are carried out in agile mode, which leverages Infosys accelerators and toolsets and follow SAP best practices and guidelines.



Strengths

Focus on innovation: Infosys's overall organization strategy is focused on AI, wearables, extreme automation, machine-to-machine communication and other technologies. The company's R&D organization iCETS (Center for Emerging Technology solutions) helps in converting ideas into game-changing innovations for enterprise customers.

Well-defined implementation architecture: Infosys has developed architecture, design and blueprints for various landscape scenarios of enterprise customers, which can be leveraged across different customer implementations to help them in their digital transformation journey.

Consulting expertise: Infosys leverages its strong consulting background, which is spread across areas such as evaluation, strategy, architecture, integration, security, digitization for SAP Leonardo offering.



Caution

Infosys has a broad SAP Leonardo portfolio with a focus on innovation and architecture, but the company has limited non-SAP platforms that can be integrated with its SAP Leonardo capabilities.



2019 ISG Provider Lens™ Product Challenger

Infosys has a strong focus on innovation, architecture for SAP Leonardo and development focused around emerging technologies such as ML, AI, neuro-linguistic processing and blockchain. Apart from these, the company also leverages its consulting expertise to deliver value in SAP Leonardo implementations.

The image features a dark blue background with a light blue horizontal band at the top. On the left side, there are several circular icons resembling camera apertures, arranged in a diagonal line from the bottom left towards the center. These icons are in various shades of blue and white. The word "Methodology" is written in a white, serif font on the right side of the image.

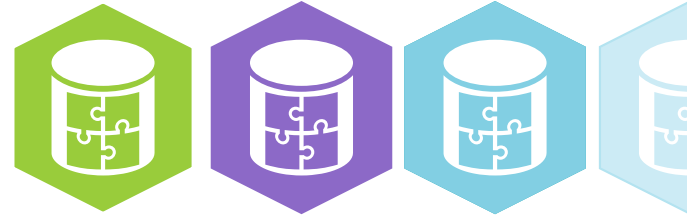
Methodology

METHODOLOGY

The ISG Provider Lens™ 2019 – "SAP HANA and Leonardo Ecosystem Partners" research study analyses the relevant software vendors and service providers in the USA market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

The study was divided into the following steps:

1. Definition of SAP HANA and Leonardo Ecosystem Partners
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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Kartik Subramaniam is the Lead Analyst for SAP HANA and Application Development and Maintenance (ADM). He brings in close to 10 years of experience in primary as well as Secondary Research, Advisory and Consulting experience from leading IT companies such as Accenture, IBM, IDC and TNS. Kartik has worked on many Research and Advisory assignments in the areas of offering in application development and maintenance, multi layered/pace layered IT/applications, cybersecurity and infrastructure services. Apart from research, Kartik also worked closely with the strategy and sales teams providing insights on strategic planning for offerings and creating seller enablement deliverable through analytics at Accenture and IBM respectively.



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