

# SAP HANA Ecosystem Services

U.K. 2021

## Quadrant Report



A research report  
comparing provider  
strengths, challenges  
and competitive  
differentiators

Customized report courtesy of:



June 2021

## 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 2021, 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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- 1** Executive Summary
- 3** Introduction
- 15** SAP S/4HANA System Transformation – Large Accounts
- 19** SAP S/4HANA System Transformation – Midmarket
- 23** Managed Application Services for SAP ERP
- 27** Managed Cloud Services for SAP HANA
- 31** SAP Business Technology Platform and Intelligent Technologies
- 34** Methodology

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## EXECUTIVE SUMMARY

### Stalled Projects Taking Momentum And Enterprises Re-Aligning Processes Impacted Due To Brexit

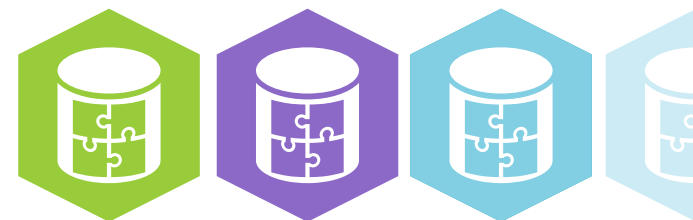
The U.K. has been affected by dual impact of COVID-19 and Brexit. While Brexit is a done deal now, the world is coming to terms to manage the businesses while coping with the COVID-19 situation. In the early 2020, the SAP projects at cash crunched enterprises were put to hold as they needed to manage the operations and remain profitable/sustainable. The large enterprises continued implementation of SAP projects, but at a slower pace. Those enterprises for which SAP was a part of their larger innovation roadmap continued their progression, as these initiatives are spanned across longer time periods.

In the second half of 2020 and in the early 2021, many stalled SAP projects took momentum and were implemented. Cloud implementations have gained significant traction for SAP implementations, and service providers' partnership with hyperscalers has proven beneficial for enterprise clients. With the Brexit deal sealed, organisations that had operations in European Union are re-aligning their processes to abide by the new regulations. As a result, these processes need to be aligned in their SAP systems as well. Enterprises that had S/4HANA transformation plans are combining these initiatives together to implement S/4HANA and reach SAP's deadline on the ECC support. The outlook for this region on SAP paradigm is reasonably progressive with resumption of S/4HANA transformations as well as cloud implementations.

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

- **Increase in cloud-based implementations:** With increase in the adoption of digital solutions, enterprises are focussing on quickly turning around their applications to enable new channels of business aligned to the regional lockdown constraints and delivering customer experience. To enable this, SAP implementations have gained traction on cloud. The service providers are helping their clients to implement cloud-based SAP solutions and quickly turn around to deploy solutions and run the businesses.
- **Changing onshore-offshore mix:** With employees working from home due to COVID-19 restrictions, most of the work is delivered through remote channels, and in-person meetings have reduced to almost zero. Service providers are re-thinking their onshore-offshore talent strategy and delivery model to focus on employee safety and cost optimisation. For SAP services, most of the work is being delivered remotely, including showcasing proofs-of-concept and managed services.

- **High focus on automation:** Many service providers have focused on automation, AI and ML for SAP services delivery, specifically in managed services. With high focus on cost optimization and unavailability of resources for specific skills, the service providers have focused on these technologies to improve their solutions and yet provide a beneficial solution for their clients.
- **Focus on improving SAP tools and accelerators:** Some of the service providers focus on improving the tools and accelerators used for SAP implementations to better assess the SAP landscape, impact analysis and managed services, as well as build transformation roadmap.
- **Low adoption of SAP Business Technology Platform (BTP):** While there are many proofs-of-concepts built using SAP BTP, the adoption of these solutions is significantly low in the U.K. There is a strong focus on co-innovation with SAP in this area; however, the implementation of these solutions requires robust integration with other applications in IT landscape, which is a difficult proposition. Ease of interoperability with other applications also needs to be solved to gain traction in this segment.
- **RISE with SAP proposition:** With SAP launching the RISE proposition and focussing on preferred partners, many service providers have re-positioned their SAP offerings to include the RISE proposition in their portfolio. While some service providers focus on cloud propositions and partnership with hyperscalers, others focus on providing business transformation services with RISE.



# Introduction

Simplified illustration

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

Source: ISG 2021

## Definition

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

SAP S/4HANA offers superior performance using in-memory technology. As transformation projects require detailed planning and business participation, clients should refine their selection process and criteria to find the right partner for providing higher business value at a lower cost of transformation. For clients that are new to SAP ERP or are hesitant to upgrade to SAP S/4HANA, this study will include case studies and success stories. ISG has identified viable tools and frameworks for large SAP transformations and greenfield SAP S/4HANA implementations that are delivered in record time for midmarket clients. The right partner can support clients and allay fears arising from the end of support for legacy SAP ERP, which is due in 2027.

## Definition (cont.)

With the introduction of the SAP Business Technology Platform (BTP), it has become evident that major benefits of adopting SAP S/4HANA are its innovation backbone that is offered through BTP as well as the novel ways of leveraging application programming interfaces (APIs) and microservices. In this context, SAP partners have demonstrated innovation using AI, analytics, IoT, mobile apps, robotic process automation (RPA) and blockchain to disrupt markets and transform businesses.

For clients that have adopted SAP S/4HANA, this study assesses managed service providers that can contribute to superior application performance, including higher stability, availability and security. In addition, AI and ML have recently been incorporated into application maintenance and operations to predict incidents and automate troubleshooting, ticketing processes, and provisioning. This allows for increased scale, which can lower support costs. This study will identify service providers that effectively apply new technologies to support SAP S/4HANA and HANA databases.

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

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

For IT providers and vendors, 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 identify potential new engagements.

## Definition (cont.)

### Scope of the 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 System 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 evaluation includes planning, design and modelling of applications, considering the service provider's ability to manage the complexity and scale that are common characteristics of 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 System Transformation – Midmarket

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

### Managed Application Services For SAP ERP

This quadrant assessment considers a service provider's capability to offer managed services, including maintenance and support functions that comprise monitoring, remote support and centralised management of applications 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 authorisation). Service requests typically include user management (adding and changing user profiles and disabling user access), performance reports, database services, security (access) monitoring and license compliance. Providers that have the Center of Expertise certification are better evaluated, but this is not a pre-requisite for participating in this quadrant.

### Managed Cloud Services For SAP HANA

This quadrant assesses service providers that manage hybrid cloud environments, security access, monitoring, system availability, interface performance, disaster recovery, backup, restoration, data compliance and other infrastructure and cloud operations. The initial technical barriers and client resistance to moving ERP to the cloud are gradually disappearing, enabling these providers to support clients in migrating from a private cloud to a public cloud in exceptional cases.

This quadrant privileges providers that demonstrate expertise in maintaining smooth SAP S/4HANA operations, which requires deep knowledge about the

underlying in-memory database technology. Furthermore, strong capabilities to optimise this type of application include data volume management, application code management and cloud cost optimisation. 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 SAP S/4HANA.

### SAP Business Technology Platform (BTP) And Intelligent Technologies

This segment examines the capabilities of providers in the design, development, change, integration and support of enterprise applications on BTP. These providers offer lab facilities for client experimentation with emerging technologies. They provide workshops, design thinking and other methods to drive innovation around SAP S/4HANA. Alternatively, the company may have developed use cases and frameworks to accelerate innovation or extend SAP S/4HANA functionality. These include ready-to-use apps for fraud prevention and analytics dashboards that were presented to ISG in previous studies.

BTP services include Platform-as-a-Service and application development for data integration, mobile-enabled services, analytics and application development, and deployment across multi-cloud platforms.

## Provider Classifications

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

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

## Provider Classifications

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

### Leader

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 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 fall 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 therefore have some potential to optimize their portfolio and increase their attractiveness.

### Contender

Contenders still lack mature products and services or sufficient depth and breadth in their offering, but also show some strengths and improvement potential 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) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star. Number of providers in each quadrant: ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

### Rising Star

Companies that receive the Rising Star award have a promising portfolio or the market experience to become a leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market. This award is only given to vendors or service providers that have made significant progress toward their goals in the last 12 months and are expected to reach the Leader quadrant within the next 12-24 months due to their above-average impact and strength for innovation.

### Not In

The service provider or vendor was not included in this quadrant. There might be one or several reasons why this designation is applied: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not qualify due to market share, revenue, delivery capacity, number of customers or other metrics of scale to be directly compared with other providers in the quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer this service or solution, or confer any other meaning.

## SAP HANA Ecosystem Services - Quadrant Provider Listing 1 of 3


|               | SAP S/4 HANA<br>System Transformation –<br>Large Accounts | SAP S/4 HANA System<br>Transformation – Midmarket | Managed Application<br>Services for SAP ERP | SAP Business Technology<br>Platform and Intelligent<br>Technologies | Managed Cloud Services<br>for SAP HANA |
|---------------|---|---|---|---|--|
| Absoft        | ● Not In  | ● Market Challenger                               | ● Market Challenger                         | ● Contender   | ● Market Challenger                    |
| Accenture     | ● Leader  | ● Not In  | ● Leader                                    | ● Leader  | ● Leader                               |
| Atos          | ● Leader  | ● Not In  | ● Leader                                    | ● Market Challenger   | ● Leader                               |
| Bearing Point | ● Not In  | ● Product Challenger                              | ● Not In                                    | ● Contender   | ● Not In                               |
| Birlasoft     | ● Not In  | ● Product Challenger                              | ● Product Challenger                        | ● Contender   | ● Contender                            |
| Capgemini     | ● Leader  | ● Not In  | ● Leader                                    | ● Leader  | ● Leader                               |
| Centiq        | ● Not In  | ● Market Challenger                               | ● Contender                                 | ● Not In  | ● Contender                            |
| CGI           | ● Contender   | ● Not In  | ● Contender                                 | ● Contender   | ● Not In                               |
| Cognizant     | ● Product Challenger                                      | ● Not In  | ● Rising Star                               | ● Rising Star   | ● Product Challenger                   |
| Deloitte      | ● Rising Star   | ● Not In  | ● Not In                                    | ● Market Challenger   | ● Not In                               |

## SAP HANA Ecosystem Services - Quadrant Provider Listing 2 of 3

|          | SAP S/4 HANA<br>System Transformation –<br>Large Accounts | SAP S/4 HANA System<br>Transformation – Midmarket | Managed Application<br>Services for SAP ERP | SAP Business Technology<br>Platform and Intelligent<br>Technologies | Managed Cloud Services<br>for SAP HANA |
|----------|---|---|---|---|--|
| DXC      | ● Product Challenger                                      | ● Not In  | ● Contender                                 | ● Contender   | ● Contender                            |
| EY       | ● Market Challenger                                       | ● Not In  | ● Not In                                    | ● Not In  | ● Not In                               |
| Fujitsu  | ● Contender   | ● Not In  | ● Not In                                    | ● Not In  | ● Product Challenger                   |
| HCL      | ● Leader  | ● Not In  | ● Leader                                    | ● Leader  | ● Leader                               |
| Hexaware | ● Not In  | ● Leader  | ● Product Challenger                        | ● Not In  | ● Not In                               |
| IBM      | ● Leader  | ● Not In  | ● Leader                                    | ● Leader  | ● Leader                               |
| Infosys  | ● Leader  | ● Not In  | ● Product Challenger                        | ● Leader  | ● Product Challenger                   |
| LTI      | ● Not In  | ● Leader  | ● Not In                                    | ● Not In  | ● Not In                               |
| Mindtree | ● Not In  | ● Leader  | ● Product Challenger                        | ● Product Challenger  | ● Contender                            |
| Mphasis  | ● Not In  | ● Contender                                       | ● Contender                                 | ● Not In  | ● Contender                            |

## SAP HANA Ecosystem Services - Quadrant Provider Listing 3 of 3

|               | SAP S/4 HANA System Transformation – Large Accounts | SAP S/4 HANA System Transformation – Midmarket | Managed Application Services for SAP ERP | SAP Business Technology Platform and Intelligent Technologies | Managed Cloud Services for SAP HANA |
|---------------|---|--|--|---|-------------------------------------|
| NTT DATA      | ● Product Challenger                                | ● Leader                                       | ● Product Challenger                     | ● Product Challenger  | ● Not In                            |
| oXya          | ● Not In  | ● Not In                                       | ● Not In                                 | ● Not In  | ● Contender                         |
| PwC           | ● Market Challenger                                 | ● Not In                                       | ● Not In                                 | ● Not In  | ● Not In                            |
| Sopra Steria  | ● Not In  | ● Contender                                    | ● Not In                                 | ● Not In  | ● Not In                            |
| Syskoplan     | ● Not In  | ● Contender                                    | ● Not In                                 | ● Not In  | ● Not In                            |
| T-Systems     | ● Product Challenger                                | ● Not In                                       | ● Product Challenger                     | ● Product Challenger  | ● Leader                            |
| TCS           | ● Leader  | ● Not In                                       | ● Leader                                 | ● Leader  | ● Leader                            |
| Tech Mahindra | ● Product Challenger                                | ● Not In                                       | ● Leader                                 | ● Leader  | ● Product Challenger                |
| Wipro         | ● Leader  | ● Not In                                       | ● Leader                                 | ● Leader  | ● Leader                            |
| Zensar        | ● Not In  | ● Product Challenger                           | ● Not In                                 | ● Not In  | ● Not In                            |



# SAP HANA Ecosystem Services Quadrants



## ENTERPRISE CONTEXT

### SAP S/4HANA System Transformation – Large Accounts

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

In this quadrant report, ISG highlights the current market positioning of providers of SAP S/4 HANA consulting and implementation services to large accounts in the U.K., based on the depth of service offering and market presence.

S/4HANA transformation across industries has been influenced by the pandemic situation, with most enterprise clients focusing on automated-led process than people-intensive process. To cater the need of the enterprises, service providers have incorporated automation-led approach to achieve better synchronization of the projects and helps enterprises in several complex transformation. Additionally, DevOps and Continuous Integration/Continuous Delivery (CI/CD) processes have reduced the risk and accelerated the S/4HANA transformation for many enterprise clients.

In the U.K., several industries were severely affected by COVID-19 and Brexit. Many businesses have foreseen the complications related to Brexit and had taken steps in advance to reduce the issues. However, COVID-19 remains a major threat in the region. Large enterprises continued with the S/4HANA implementation, as most of these

implementations were spanned across long time periods and SAP was part of a larger innovation map.

Who should read the report:

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

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

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

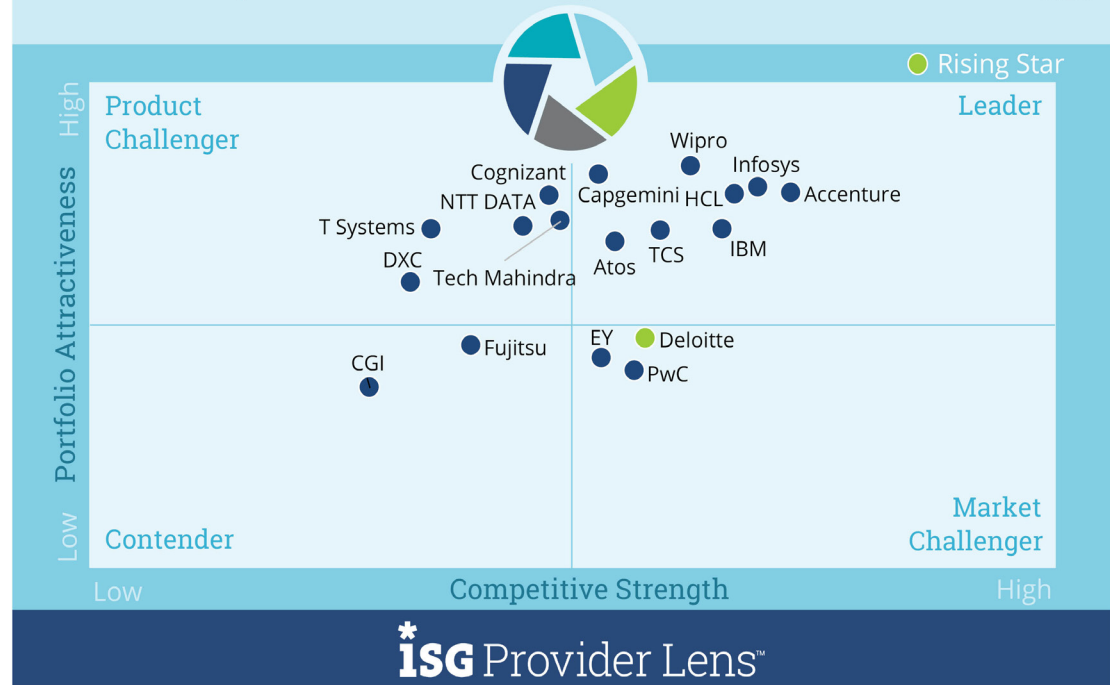
## SAP S/4HANA SYSTEM TRANSFORMATION – LARGE ACCOUNTS

### Definition

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

### SAP HANA Ecosystem Services SAP S/4HANA System Transformation – Large Accounts

2021  
U.K.



Source: ISG Research 2021

## SAP S/4HANA SYSTEM TRANSFORMATION – LARGE ACCOUNTS

### Eligibility Criteria

- Participant's service portfolio must include development, integration and testing of SAP S/4HANA with at least one implementation of S/4HANA or SAP Business Suite on HANA
- Demonstrate S/4HANA advisory capabilities and implementation experience on greenfield or brownfield deployments
- Provision to offer on-premises and cloud-based implementations
- Availability of SAP-certified consultants and practitioners across regions to support multicountry and multilanguage implementations
- Ability to handle complexity and scale through optimal onshore-offshore delivery models

### Observations

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

- **Accenture's** myConcerto tool allows the company to set up the client's transformation program environment and provision preconfigured solutions for agile, continuous delivery. In addition, myConcerto helps measure the value and continuously innovate to stay future proof.
- **Atos** goes to market with its Intelligent Enterprise proposition that enables organisations to adopt new business models, roll out tailored business processes through high-velocity innovation, deliver enhanced business insights, reduce costs, and simplify their IT environments.
- **Capgemini** has a targeted market approach called Renewable Enterprise to help its clients with digital transformation using S/4HANA. This approach entails assessing the client's business ambitions and devising a roadmap for transforming the business by revisiting the business models, focussing on customer experiences and uncovering new opportunities, along with enabling the client's organisation to adjust to the new working culture.
- **HCL** has a comprehensive S/4HANA assessment offering consisting of a set of tools, templates and guidelines, which its SAP consultants use to deliver a holistic roadmap to customers. The framework elements include custom code evaluation, functional assessment using design thinking and problem-solving techniques, instance consolidation strategy, UX/UI and Fiori assessment, data strategy, and many others.

## SAP S/4HANA SYSTEM TRANSFORMATION – LARGE ACCOUNTS

### Observations (cont.)

- **IBM** offers initial assessment services for building the business case for S/4HANA transformation. IBM's SAP S/4HANA assessment tool helps identify the end-to-end impact of migration on data, custom code, interfaces, level four business processes, etc., resulting in a plan that anticipates obstacles and reduces delays.
- **Infosys** S/4 Assist provides an analysis of critical business processes to determine the impact of S/4HANA adoption. S/4 Assist is useful for assessing how S/4 will impact interfaces, transaction codes and applicable new innovations.
- **Wipro** uses its preconfigured industry solutions for utilities, oil and gas, mining, manufacturing, retail, consumer goods, technology and real estate to ensure rapid implementations. These solutions include Agile Mining, ExpressERP for Chemicals, Fashion Management, Safe Utilities, Intelligent Real Estate, Model Company for Utilities, Energy Reach, ExpressERP for HiTech, AutoSol and Retail in a Box.
- **TCS** has specific offerings for SAP S/4HANA across three industries, which include agriculture, aerospace and chemical. These offerings leverage TCS' Accelerated Solution Deployed in SAP S/4HANA (ASDS) to deliver faster time-to-market, cost reduction and increased return on investment.
- **Deloitte** (Rising Star) has acquired Keytree in the U.K., which has expanded its product portfolio and delivery capability to a significant level. It strongly focusses on expanding its client base in the region.

## ENTERPRISE CONTEXT

### SAP S/4HANA System Transformation – Midmarket

This report is relevant to enterprises across industries in the U.K. for evaluating the 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 US\$1 billion).

In this quadrant report, ISG highlights the current market positioning of providers of S/4 HANA consulting and implementation services to the midmarket in the U.K. based on the depth of service offerings and market presence.

Midmarket clients have few complex requirements, with smaller scale of projects, compared with large enterprises. Therefore, mid-sized enterprises prefer providers with strong onshore and nearshore delivery capabilities and high integration capabilities. Most mid-size enterprise clients may have non-SAP ERP systems. Hence, the mid-size clients should particularly look for service providers with migration capabilities and the ability to offer ready-to-use templates or solutions for specific micro-segments.

In the U.K., mid-market enterprise clients were severely affected by the COVID-19 pandemic, especially in early 2020, and many S/4HANA implementation processes were stalled. However, by the second half of 2020 and early 2021, the market started witnessing an increased momentum in S/4HANA implementations among the mid-market enterprise clients.

Who should read the report:

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

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

**Sourcing and procurement managers** should read this report for a clear understanding of the market and the service provider landscape of S/4 HANA offerings and to help them identify or distinguish players based on their respective needs.

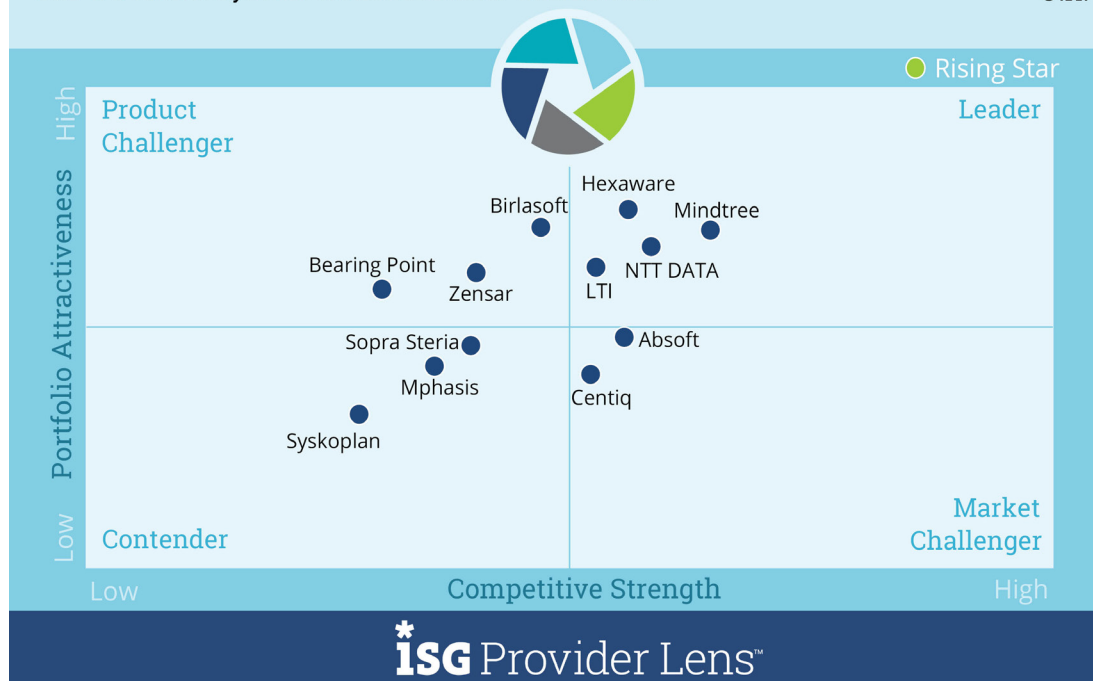
## SAP S/4HANA SYSTEM TRANSFORMATION – MIDMARKET

### Definition

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

SAP HANA Ecosystem Services  
SAP S4/HANA System Transformation- Mid Market

2021  
U.K.



Source: ISG Research 2021

## SAP S/4HANA SYSTEM TRANSFORMATION – MIDMARKET

### Eligibility Criteria

- Ability to leverage SAP accelerators and templates for agile SAP S/4HANA implementations
- Capability to deliver advisory and implementation services for midsize enterprise clients
- Availability of ready-to-use templates or solutions for specific microsegments
- Ability to offer onshore or nearshore delivery for local clients; offshore delivery is accepted but not restrictive for participation in this quadrant

### Observations

Some observations on the Leaders for this quadrant are summarised below.

- **Hexaware's** TRIADIC platform analyses a customer's requirements from three major dimensions of landscape complexity, business model, and target architecture for cloudification and digitization needs. It also considers the transition and transformation efforts needed.
- **LTI** has created the CFIN Transformation Platform, which analyses complex SAP and non-SAP platforms and automatically creates a technical blueprint for CFIN transformations. This digital discovery spans multiple source systems across three dimensions, which include process, data and organisation elements.
- **Mindtree** leverages its industry-specific templates, which include a fully-fledged CFIN 1809 proof of concept, along with fashion and consumer packaged goods templates. It also focusses 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.
- **NTT DATA** 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. The company 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.

## HEXAWARE

### Overview

Hexaware, an SAP services partner, specialises in providing services for business-led engagements by leveraging its TRIADIC platform to deliver business modernisation and landscape transformations. The company has strategic relationships with SAP, Microsoft (Azure), Amazon (AWS) and Google (GCP) to offer multiple cloud deployment options for S/4 HANA and SAP SaaS solutions. Hexaware is also a Microsoft Azure Gold Partner. With its deep cloud migration understanding and experience, the company outlines strategies and approaches to best suit the customer requirements. Hexaware has four S/4HANA midmarket clients in the UK.

### Strengths

**TRIADIC platform helps in migration journey:** Hexaware's TRIADIC platform analyses customer requirements from the major dimensions of landscape complexity, business model, target architecture for cloudification and digitization needs, to determine the needed transition and transformation efforts. It also analyses and informs the optimal migration path for the application landscape in the company's SAP architecture.

**Co-development with SAP:** Hexaware and SAP are co-developing 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.

**Strong focus on improving tools and accelerators:** Hexaware has developed industry solutions for plant maintenance. Its plant maintenance mobile app, built on Fiori, helps asset owners place maintenance orders, after which the field engineers will receive order notifications. Hexaware has also developed condition-based predictive plant maintenance solution helps in reading and monitoring various machine parameters using IoT, resulting in operational efficiency.

### Caution

Hexaware should focus on expanding its client footprint in the U.K.



## 2021 ISG Provider Lens™ Leader

Hexaware has a strong set of platforms, frameworks, tools, accelerators and industry-focussed templates, which help accelerate the S/4HANA business modernization and landscape transformation for the clients.



## ENTERPRISE CONTEXT

### Managed Application Services for SAP ERP

This report is relevant to enterprises across industries in the U.K. for evaluating providers of managed application services for SAP ERP.

In this quadrant report, ISG highlights the current market positioning of providers of managed application services for SAP ERP in the U.K., and how each provider addresses the key challenges faced in the country. These providers focus on helping enterprise clients to effectively manage SAP ERP, which includes SAP S/4 HANA, SAP Enterprise Central Component (ECC) and legacy R3.

Like large enterprises, small and medium-sized enterprises seek managed application services for their existing SAP ERP solutions such as level 2 and level 3 application support, incident resolution, maintenance, security, and user support. This is because these enterprises face challenges in maintaining the applications. Enterprises need these services fine-tuned to their business objectives with reduced risk and high agility to align with dynamic business environments. Hence, they are looking for a rapid solution design and optimized service delivery across their businesses from the service providers.

Due to the unavailability of skilled resources and rising need for cost optimization, enterprises in the U.K. are increasingly focusing on AI, ML, and automation in managed application services and are seeking service providers that can provide these solutions.

Who should read the report:

**IT and technology leaders** should read this report for a clear understanding of the strengths and weaknesses of providers offering SAP ERP managed services, and their competency in developing frameworks and tools to effectively manage their applications.

**Sourcing and procurement managers** should read this report for a clear understanding of the service provider ecosystem for SAP ERP managed services in the U.K., and how various providers can be compared with each other.

## MANAGED APPLICATION SERVICES FOR SAP ERP

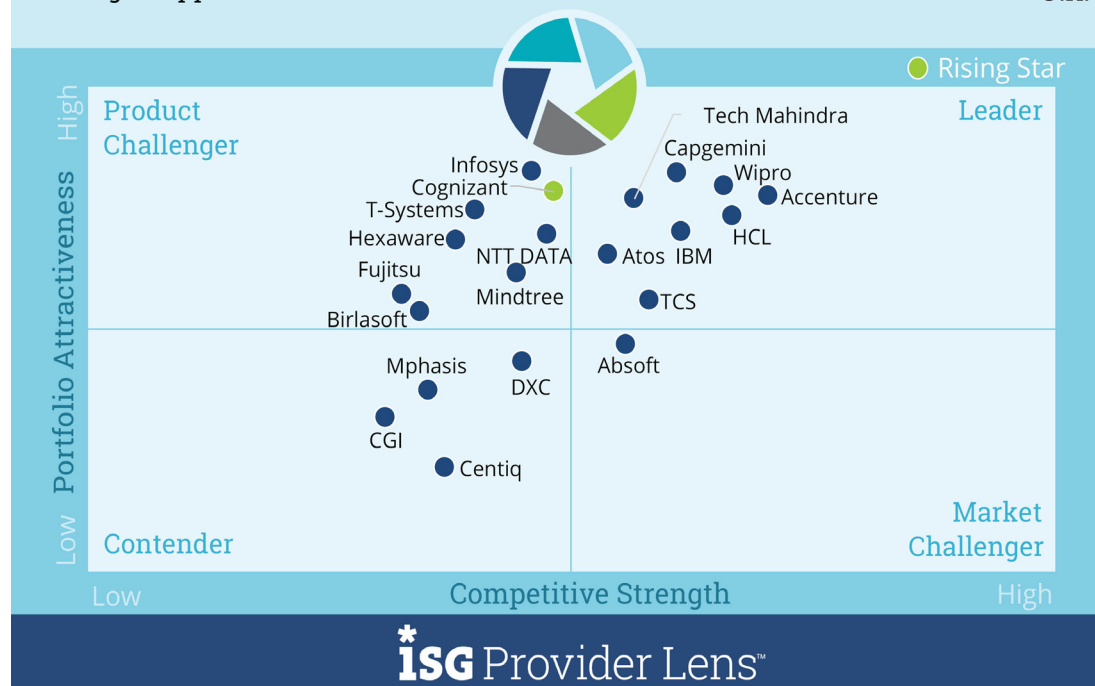
### Definition

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

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 (adding and changing user profiles and disabling user access), performance reports, database services, security (access) monitoring, and license compliance. Providers that have the Center of Expertise certification are better evaluated, but this is not a prerequisite for participating in this quadrant.

### SAP HANA Ecosystem Services Managed Application Services for SAP ERP

2021  
U.K.



Source: ISG Research 2021

## MANAGED APPLICATION SERVICES FOR SAP ERP

### Eligibility Criteria

- Ability to offer application optimisation, application support and testing
- Ability to offer enhancements and changes pertaining to applications, apply SAP Service Pack Stacks (SPS) if required, and predict the business impact of such updates
- Capability to stabilise applications and offer SAP BASIS support
- Demonstrate expertise in incident management, variety of ticket system tools, SAP Solution Manager and additional application documentation solutions

### Observations

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

- **Accenture's** myWizard tools include analytics for application management services to analyse and reduce ticket inflow. Accenture's Ticket Resolver automatically resolves incidents by using AI and SAP Basis process monitoring that combines Solution Manager monitoring with other logs to create a correlation and alerting engine that provides digital dashboards for visualisation.
- **Atos'** SyntBots uses intelligent automation to transform IT operations and processes across the entire enterprise. Bots manage repetitive tasks and business processes, learn and replicate user actions such as mouse clicks, and automatically scale agents, underlying applications and infrastructure to dynamically respond to changing needs.
- **Capgemini** has invested heavily in automation, AI and ML to create solutions that can address recurring gaps across managed services. The company's automation framework uses RPA solutions for tickets where a permanent fix is not possible. Bots are developed for those repeatable incidents to increase resolution speed and quality.

## MANAGED APPLICATION SERVICES FOR SAP ERP

### Observations (cont.)

- **HCL's** Lucy chatbot is a virtual assistant and an automated interactive solution powered by AI that enables omnichannel user interaction and service automation on the SAP platform to improve user experience.
- **IBM's** Watson Assistant is a virtual agent that interacts with customers by connecting to a remote SAP service located in IBM Services for Managed Applications. This add-on drives SAP data processing, implements code in an API to orchestrate the solution via a chatbot, and interacts with the Watson Assistant service and SAP operational data.
- **Tech Mahindra's** TACTiX framework automatically triggers its AI component [which includes natural language processing (NLP) algorithms and ML] when an incident is logged in the system. It categorises incidents based on inputs from its knowledge repository, presents the top-matching resolutions and provides recommendations about the root cause and standard operating procedures.
- **TCS** is a Premier Partner for AWS for consulting and managed services. TCS has achieved AWS competencies on SAP, Migration and Industrial Software technologies. This enables the company to offer services for cloud-based applications and manage these applications.
- **Wipro** leverages SAP technologies such as SAP iRPA and SAP Conversational AI, along with its HOLMES™ AI platform. Wipro HOLMES provides intelligent automation capabilities across business processes, administration and technology.
- **Cognizant** (Rising Star) offers cAdapt, which is a proprietary configuration analyzer solution for accelerating knowledge transition (KT) of customer's legacy SAP system configurations. The solution helps reduce KT time by 20 percent, simplifies analysis and information on system customisation, and enables faster understanding of business processes.

## ENTERPRISE CONTEXT

### Managed Cloud Services for SAP HANA

This report is relevant to enterprises across industries in the U.K. for evaluating providers of managed cloud services for SAP HANA.

In this quadrant report, ISG highlights the current market positioning of providers of managed cloud service providers in the U.K., and how each provider addresses the key challenges faced in the country. These providers focus on helping enterprise clients to effectively migrate or maintain the applications in the cloud or in their own data center.

Enterprises in the U.K. have now started to follow cloud-first approach for the existing and new applications owing to the challenging and changing work environments due to the COVID-19 pandemic. Also, to be successful in their transformation digitally, the enterprises are taking a unified approach to maintain their technical infrastructure across clouds (private, public and hybrid).

Managed cloud service providers can help these enterprises unburden the responsibility of day-to-day operations by keeping their IT infrastructure updated to optimally run, maintain and migrate SAP applications without errors or downtime. Additionally, enterprises can also benefit from a managed cloud service provider's expertise in volume management, application code management and cloud cost optimization.

Enterprise clients that are procuring managed cloud services should consider the credentials of the service provider in terms of its capabilities in operating in the cloud and level of certifications.

In the U.K., enterprise clients focus on moving their SAP systems to cloud, mainly due to the challenges that arose from the lockdown constraints of COVID-19 pandemic. Cloud implementations, especially with hyperscalers, are gaining more traction in the region.

Who should read the report:

**IT and infrastructure leaders** should read this report to better understand the relative strengths and weaknesses of managed cloud service providers and to ascertain how their approaches to the market can impact enterprise cloud strategies.

**Marketing, sales and field services leaders** should read this report to understand the relative positioning and capabilities of partners that can help them procure managed cloud services. The report also highlights the capabilities of service providers in maintaining or migrating data in data centers and the cloud.

**Sourcing and procurement professionals** should read this report to have a better understanding of the current landscape of managed cloud service providers.

## MANAGED CLOUD SERVICES FOR SAP HANA

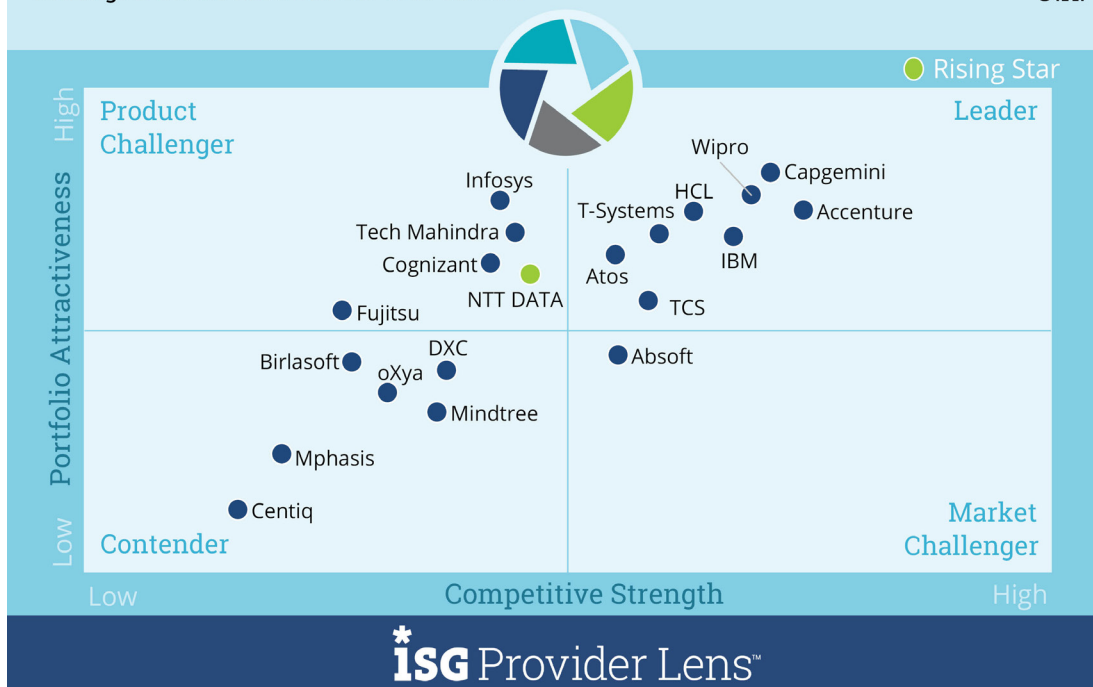
### Definition

This quadrant assesses service providers that manage hybrid cloud environments, security access, monitoring, system availability, interface performance, disaster recovery, backup, restoration, data compliance and other infrastructure and cloud operations. The initial technical barriers and client resistance to moving ERP to the cloud are gradually disappearing, enabling these providers to support clients in migrating from a private cloud to a public cloud in exceptional cases.

This quadrant privileges providers that demonstrate expertise in maintaining smooth SAP S/4HANA operations, which requires deep knowledge about the underlying in-memory database technology. Furthermore, strong capabilities to optimise this type of application include data volume management, application code management and cloud cost optimisation. 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 SAP S/4HANA.

### SAP HANA Ecosystem Services Managed Cloud Services for SAP HANA

2021  
U.K.



Source: ISG Research 2021

## MANAGED CLOUD SERVICES FOR SAP HANA

### Eligibility Criteria

- Ability to provision, manage and operate SAP in the cloud, including, but not limited to, hyperscale public clouds, AWS, Azure and Google
- Demonstrate the capacity to support clients in their hybrid cloud implementations of SAP systems and databases, providing infrastructure design support at a minimum
- Offer Tier-3 data centre choices to host SAP S/4HANA or be a certified cloud partner with SAP S/4HANA specialisation
- Certified on data centre security, data privacy and IT processes; minimum accreditations include ISO27001 (security) and IT Infrastructure Library (ITIL) incident management
- Have SAP-certified staff to support HANA and other SAP technologies

### Observations

Some observations on quadrant Leaders and Rising Star are below.

- **Accenture's** myNav is a cloud platform designed to assess, architect and simulate cloud solutions at scale to determine the best fit for enterprises' business requirements. Accenture offers a variety of tools for SAP migration and cloud management, which include CloudShaper, SAP CloudRunner, SAP CloudSecurity and SAP CloudAdmin.
- **Atos'** multi-cloud application platform, namely Atos Cloud Foundry, is part of a complete portfolio of application transformation and development services. Atos enables a simplified cloud deployment and managed services on public or private cloud infrastructures selected by the client.
- **Capgemini** developed a cloud management platform (Capgemini Cloud Platform) that currently supports the multi-cloud approach and covers all types of IT workloads. The company has also developed Cloud Automation for SAP (CCAS) to migrate as well as run and operate SAP in the cloud.
- **HCL's** ElasticOps is a proposition to build mature solutions on hyperscaler platforms to optimise costs and provide improved business agility. HCL provides cloud enablement and management services by investing significantly in training and certifying cloud architects, associates and 24/7 global delivery resources.

## MANAGED CLOUD SERVICES FOR SAP HANA

### Observations (cont.)

- **IBM's** cloud-based management platform uses Watson and enables the enterprises to autonomously manage their IT operations. The platform is built on hybrid cloud infrastructure and can pre-empt and proactively resolve problems and prevent them from occurring in the future. It also gives IT teams real-time visibility over their hybrid IT environment.
- **TCS** Cloud Exponence is a comprehensive, centralised delivery platform for public and hybrid cloud environments. The Cloud Exponence operations service model is designed to deliver managed services for all prevalent cloud architecture patterns, including public and private clouds for SAP.
- **T-Systems** is an end-to-end global service provider with a multi-cloud offering for SAP managed cloud services. The company extends its portfolio with hyperscaler platforms and services and has strong partnerships with Azure, AWS and GCP for SAP managed services.
- **Wipro** offers Partner Managed Cloud (PMC) that covers licenses and gives customers end-to-end subscription pricing. It also offers SAP as a platform service and SaaS along with its prepackaged S/4HANA implementation.
- **NTT DATA** (Rising Star) offers a wide variety of SAP cloud services, including its SAP Migration and Management Services, Managed Cloud Services (public and private cloud), Cloud Advisory Services, Cloud Migration Services and Cloud Infrastructure Services. These cloud services enable clients to choose the best approach for their necessities.



## ENTERPRISE CONTEXT

### SAP Business Technology Platform and Intelligent Technologies

This report is relevant to enterprises across industries in the U.K. for evaluating service providers offering SAP BTP and Intelligent Technologies.

In this quadrant report, ISG highlights the current market positioning of providers of SAP BTP and Intelligent Technologies in the U.K. and their capabilities in designing, developing, modifying, integrating and supporting applications for enterprise systems and in delivering services for digital transformation using SAP BTP.

Enterprises as a part of their digital transformation are looking to transform their processes and business operations, making progress on their intelligent enterprise journeys. The focus on using high-end technologies such as analytics, AI and ML for processing SAP data has also increased among the enterprises.

Enterprises also want to integrate their existing applications (both SAP and non-SAP) under one unified platform to enhance the user experience and increase process efficiency using technologies such as AI and ML. Service providers can integrate the solutions into one and help enterprises achieve agility, business value, data to value, and extensibility of SAP and non-SAP applications.

Despite strong focus on co-innovation with SAP, the adoption of BTP solutions among the enterprise clients in the U.K. is considerably low. This is mainly due to the challenges associated with the integration of other applications in their IT landscape.

**Marketing, sales and field services leaders** should read this report to understand the relative positioning and capabilities of service partners that can help implement SAP BTP effectively. The report also highlights the advanced capabilities of service providers, including application development, and use of application programming interfaces (APIs) and new methodologies.

**IT and technology leaders** should read this report for a clear understanding of the strengths and weaknesses of service providers and to comprehend how they integrate the latest technologies/capabilities into their offerings to gain a competitive edge in the market.

## SAP BUSINESS TECHNOLOGY PLATFORM AND INTELLIGENT TECHNOLOGIES

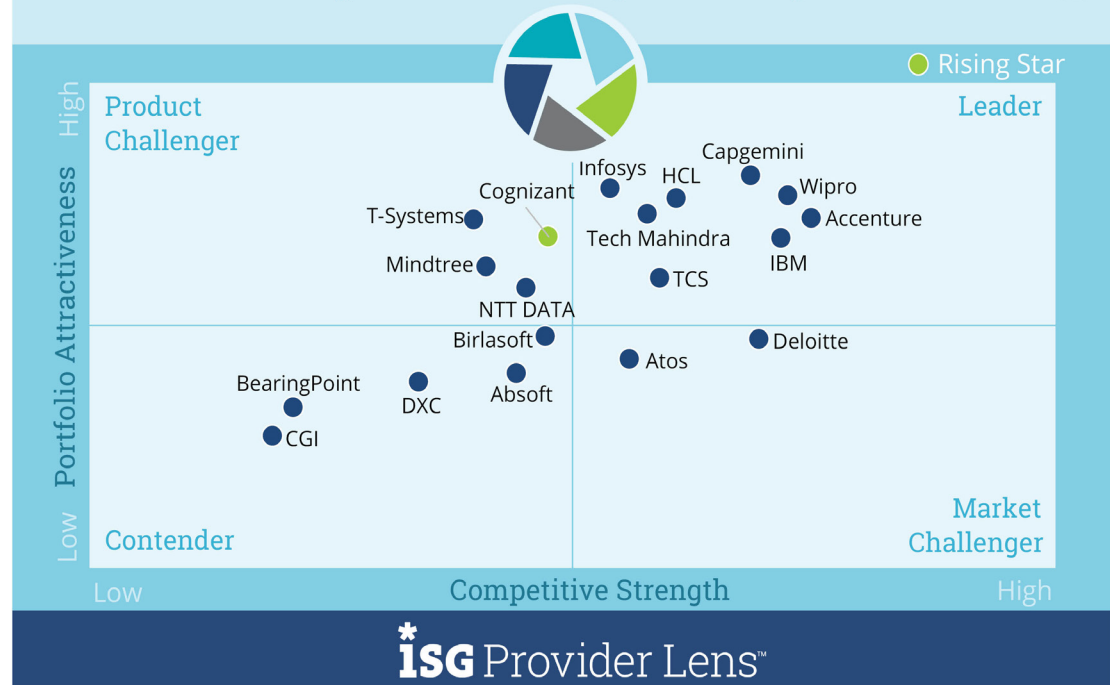
### Definition

This segment examines the capabilities of providers in the design, development, change, integration and support of enterprise applications on BTP. These providers offer lab facilities for client experimentation with emerging technologies. They provide workshops, design thinking and other methods to drive innovation around SAP S/4HANA. Alternatively, the company may have developed use cases and frameworks to accelerate innovation or extend SAP S/4HANA functionality. These include ready-to-use apps for fraud prevention and analytics dashboards that were presented to ISG in previous studies.

BTP services include Platform-as-a-Service and application development for data integration, mobile-enabled services, analytics and application development and deployment across multi-cloud platforms.

SAP HANA Ecosystem Services  
SAP Business Technology Platform and Intelligent Technologies

2021  
U.K.



Source: ISG Research 2021

## SAP BUSINESS TECHNOLOGY PLATFORM AND INTELLIGENT TECHNOLOGIES

### Eligibility Criteria

- Capability to deliver consulting and implementation services for BTP
- Expertise in AI, ML, blockchain and IoT technologies
- Demonstrate support of BTP applications with case studies
- Appropriate SAP certifications across SAP-certified applications, as well as certified engineers or partner-level certifications
- Leading BTP service partners are ideally expected to provide case presentations through large events and SAP awards and gain client recognition

### Observations

Some observations on the Leaders and Rising Star for this quadrant are presented below.

- **Accenture's** major investment in SAP services is the Accenture Intelligent Enterprise Platform, a unified, digital, intelligent and extensible platform for supporting sales, delivery and engineering. It integrates industry and functional content and assets, along with accelerators and tools from across Accenture on a common data layer to allow increased automation and intelligence through ML.
- **Capgemini** has a strong focus on the manufacturing sector and has developed SAP Digital Manufacturing Cloud to provide insights and an operational overview across manufacturing processes and the supply chain. Another manufacturing-specific offering from Capgemini that leverages SAP Leonardo is SAP Connected Asset for maintenance operations, which uses IoT across industrial machinery.
- **HCL** has many pre-built solutions based on the Leonardo platform. Its packaged solutions make implementation easier. The company's blockchain-based solutions include Drug Traceability Co-Innovation with SAP, Asset Lifetime Retirement, Smart Logistics for High Value Assets, Connected Worker, Inventory Tracking and Moving Assets.

## SAP BUSINESS TECHNOLOGY PLATFORM AND INTELLIGENT TECHNOLOGIES

### Observations (cont.)

- **IBM** is a co-innovation partner with SAP. It has co-created new solutions such as Cognitive Demand Forecasting, Cognitive Field Services and Blockchain for Oil and Gas.
- **Infosys** offers Innov8, a new strategic program to accelerate enterprise digital transformation journeys using SAP digital solutions. Innov8 helps clients transform their business model to one that relies on predictable operating expense costs and offers flexible points of entry to the SAP environment for both existing and new cloud users.
- **TCS** has developed investment insights platform for capital markets using SAP BTP. This solution uses AI and TCS' IP such as Automated Data Discovery and ML-based Data Quality Management tools to help investment management firms enhance their portfolio decisioning.
- **Tech Mahindra** has created a string of platform solutions, including FEEDS, SPRINT, ReLoAD, CAMS, AMRO, IEVCS, Pharmachain and others for the retail and consumer packaged goods, communication and media, manufacturing, energy and utilities, healthcare, and transportation verticals.
- **Wipro** has eight accelerators that have been certified by SAP and listed in SAP App Center. These accelerators are based on IoT, ML and blockchain and address a variety of industries and use cases. The solutions include Intelligent Pipeline, Connected Supply, Trusted Logistics, Smart Home, Quality Insights, Greenhouse Management, Pellucid Reverse Logistics and Planogram Compliance.
- **Cognizant** (Rising Star) conducts Digital Maker session for its clients using proprietary 4i framework to identify performance under-supply in products, customer satisfaction and business operations. The framework uses human-centric, design-based approach in four phases, which include inspire, ideate, innovate and illustrate.



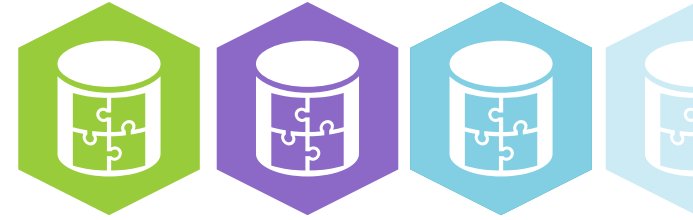
# Methodology



## METHODOLOGY

The research study “ISG Provider Lens™ 2021 – SAP HANA Ecosystem 2021” 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 SAP HANA Ecosystem 2021 market
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & use cases
4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)
5. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
6. Use of the following key evaluation criteria:
  - Strategy & vision
  - Innovation
  - Brand awareness and presence in the market
  - Sales and partner landscape
  - Breadth and depth of portfolio of services offered
  - Technology advancements



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# ISG Provider Lens™ | Quadrant Report

## June 2021

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