¡SG Provider Lens™

Multi Public Cloud Services

A discussion on AWS' global leadership and strengths
in SAP HANA Infrastructure Services quadrant of the
Multi Public Cloud Services ISG Provider Lens™ reports.

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AWS - Global Leader in
SAP HANA Infrastructure Services

SAP HANA Infrastructure Services

Definition

This quadrant assesses cloud infrastructures best suited to host SAP's software portfolio, emphasizing SAP S/4HANA workloads and large-scale HANA databases. Participating providers offer IaaS, including infrastructure operations, facilities, provisioning and scaling capacity for SAP workloads.

Key criteria for assessment include the IaaS providers' offering of data migration tools, technical support, system imaging, backup and restore capabilities, disaster recovery solutions, resource usage monitoring and dashboard management solutions. These tools required can be a part of the standard IaaS offerings or provided by partners in a marketplace.

Infrastructure providers that participate in the RISE with SAP program receive a higher rating. However, RISE participation is not a mandatory requirement for inclusion in this quadrant. Ideally, the infrastructure provider should have a broad ecosystem, including SAP partners, enabling them to support clients in automating and operating their SAP instances in the cloud.

The cloud infrastructure provider should also offer pre-sales support to help clients with migration planning, cloud architecture design, sizing and performance optimization, licensing considerations, system and database configuration, virtual private network configuration and third-party vendor solutions (toolsets). The support analysis focuses on the vendor's service partner ecosystem and their expertise in conducting related migrations and operations.

Eligibility Criteria

1. IaaS to include **SAP-certified servers** with storage and connectivity for SAP products. Availability of SAP HANA instances in multiple memory sizes, enabling **on-demand upscaling** to accommodate instance growth and upgrades with minimum service interruptions

2. Memory capacity exceeding **6 TBs per virtual machine**

3. Easy access, **transparent prices**, consumption-based, reserved instance and dedicated instance billing models

4. Recognized **quality standards** and **service certifications**, with a strong focus on **data protection** and cybersecurity

5. **Low-cost storage** for backups and archiving

6. **Multi-region** disaster recovery capabilities

7. Automated **backup and restore functionality** (platform-based, proprietary or partner solutions)

8. Frameworks and **tools for application** and **data migration**

9. An ecosystem of **certified partners** with SAP specialization

AWS

Leader

> "AWS leads the market with its wide range of services to host SAP HANA workloads on its platform. It offers an excellent cost-to-performance ratio and has heavily invested in increasing its SAP-specific infrastructure footprint and portfolio."
>
> *Shashank Rajmane*

Overview

AWS is headquartered in Washington, U.S. and operates in 32 regions. In FY22 the company generated $80.1 billion in revenue, with Compute, Storage and Database as its largest segment. The company has the largest SAP on the AWS partner ecosystem and offers tailored infrastructure services for seamless SAP application migration and modernization. It provides automation and professional services through ProServe to support migrations and deliver enterprises with faster time-to-value and scalable infrastructure resources via 102 availability zones across the globe.

Strengths

Advanced AI and ML solutions: AWS is a leader in AI and ML technologies, offering custom silicon chips for training (Trainium), inferencing (Inferentia) and powering large language models (LLMs) in production. CodeWhisperer boosts developer productivity, and Amazon Bedrock provides access to various LLMs while maintaining robust security. SAP users can seamlessly access AI and ML models via the AWS SDK for SAP ABAP.

Wide portfolio of scalable infrastructure: AWS offers a large variety of instances to run SAP workloads on its platform. AWS' SAP on Graviton3 instances are up to 60 percent more energy efficient and contribute to lower carbon emissions. Its AWS Nitro System is the hypervisor for high-memory SAP instances and offers close to zero CPU overhead, comparable to bare-metal server performance. Clients can start on small instances and grow at their own pace without spending on unused capacity.

Strong SAP ecosystem: AWS' SAP partner competency program ensures clients access to top experts for migrating, running and transforming SAP workloads. AWS recently launched SDK for SAP ABAP with more than 200 AWS services to facilitate application modernization and transformation. AWS' ProServe practice for SAP supports clients and partners to achieve the needed results by implementing the best practices and experience gained from many SAP migrations.

Caution

AWS offers a plethora of services that come with an intricate and challenging-to-navigate pricing model. Prospective clients may encounter difficulties when exploring the pricing options for migrating and running their SAP workloads. Analyzing the cost implications across scenarios can be complex, potentially posing challenges in the procurement process.

AWS leads the global market by offering a robust, secure, resilient and diverse infrastructure for hosting SAP workloads of all sizes and complexities. It enables seamless migration of clients' SAP workloads and provides a flexible and cost-effective model.

Shashank Rajmane – Lead Analyst – U.S.

AWS excels in SAP migrations, enhancing business resilience for enterprises. Its automation-driven operations provide faster time-to-value and scalable infrastructure resources, ensuring efficient and adaptable solutions.

Pedro L. Bicudo Maschio – Lead Analyst – France

AWS delivers a comprehensive suite of secure infrastructure services with low-latency connectivity. Clients leverage their robust partner network of industry-leading experts for migrating, operating and transforming SAP workloads.

Pedro L. Bicudo Maschio – Lead Analyst – Brazil

AWS has over 15 years of experience in SAP and helps enterprises reduce costs and become more agile. Thousands of customers worldwide value its comprehensive offering. Its security offering is unique, delivering comprehensive protection through more than 300 services and functions.

Wolfgang Heinhaus – Lead Analyst – Germany and Switzerland

Nordic enterprises prefer AWS for its innovative and cost-effective IaaS, renowned for enhanced data sovereignty and energy efficiency. The company offers comprehensive SAP HANA services, implemented by rigorously trained, certified partners, driving technology transformation.

Rohan Thomas – Lead Analyst – Nordics

AWS provides U.K. enterprises with a comprehensive range of cloud infrastructure services, including compute, storage, AI and IoT, along with specialized SAP HANA services. These offerings are supported by a strong partner network trained rigorously through a stringent certification program.

Rohan Thomas – Lead Analyst – U.K.

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