



Services for Cloud ERP – PEAK Matrix™ Assessment 2020: The Market is Growing but Not Fast Enough

Enterprise Platform Services (EPS)

Market Report – November 2019: Complimentary Abstract / Table of Contents

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Membership information

- This report is included in the following research program(s)
 - [Enterprise Platform Services \(EPS\)](#)
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Custom research capabilities

- Benchmarking | Pricing, delivery model, skill portfolio
- Peer analysis | Scope, sourcing models, locations
- Locations | Cost, skills, sustainability, portfolio – plus a tracking tool
- Tracking services | Service providers, locations, risk
- Other | Market intelligence, service provider capabilities, technologies, contract assessment

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Background of the research

Globally, ERP modernization is part of almost half of all digital transformation projects initiatives. Increased Total Cost of Ownership (TCO), enterprise agility, and scalability are driving enterprises to switch from traditional on-premise ERP platforms to cloud ERP. However, organizations face multiple challenges in adopting cloud ERP, including legacy ERP burden, cloud unreadiness, business disruption risk, lack of sufficient evidence in the market, frequency of updates, and limited functionality.

Enterprises can achieve significant business impact if they follow the five key steps to successfully adopt cloud ERP – prioritize change management early, take a process-centric approach, adopt the right-fit product and deployment options, evaluate cloud readiness, and build a Proof of Concept (PoC) to identify the challenges of scaled adoption.

In this research, we present an assessment and detailed profiles of 12 leading service providers featured on the Services for Cloud ERP PEAK Matrix. Each profile provides a comprehensive picture of the service provider's service focus, key partnerships, domain investments, and relevant case studies. The assessment is based on Everest Group's annual RFI process for calendar year 2019, interactions with leading services for cloud ERP providers, client reference checks, and an analysis of the cloud ERP market.

Scope of this report

- **Services:** Services for cloud ERP
- **Geography:** Global
- **Service providers:** 12 leading cloud ERP service providers

This report includes the profiles of the following 12 leading cloud ERP service providers featured on the services for cloud ERP PEAK Matrix™:

- **Leaders:** Accenture and Deloitte
- **Major Contenders:** Capgemini, Cognizant, DXC Technology, Infosys, PwC, TCS, Tech Mahindra, and Wipro
- **Aspirants:** Mphasis and Zensar

Overview and abbreviated summary of key messages

This report examines the cloud ERP service provider landscape and its impact on the cloud ERP services market. It focuses on service provider position and growth in the cloud ERP services market, changing market dynamics and emerging service provider trends, assessment of service provider delivery capabilities, and key service provider profiles. It also identifies the key implications of the research findings for buyers and service providers.

Some of the findings in this report, among others, are:

Changing market dynamics

- Enterprises face multiple challenges in adopting cloud ERP, including legacy ERP burden, cloud unreadiness, business disruption risk, lack of sufficient evidence in the market, frequency of updates, and limited functionality
- Enterprises can achieve significant business impact if they follow the five key steps to successfully adopt cloud ERP

Emerging service provider trends

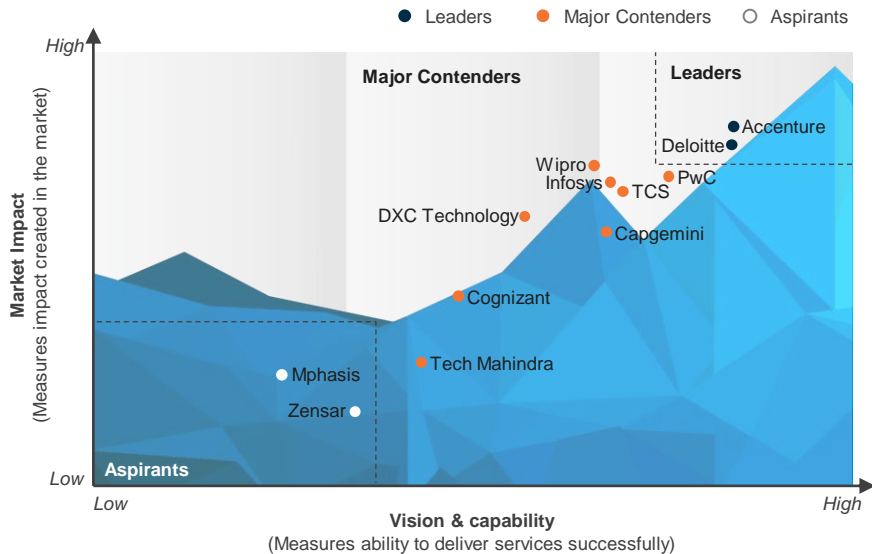
- Large service providers are trying to differentiate themselves in the cloud ERP services market by building strong capabilities in upstream activities of the cloud ERP value chain
- Service providers also place client-centricity at the core and go beyond the scope of engagements to add value and differentiate in the market

Service provider delivery capability

- Cloud ERP service providers can be categorized into leaders, major contenders, and Aspirants on a capability-market-share matrix
- Accenture and Deloitte are the current leaders in the global cloud ERP services market. However, several service providers are emerging as major contenders

This study offers an assessment of leading providers of cloud ERP services and provides a deep dive into key aspects of cloud ERP market; below are four charts to illustrate the depth of the report

Services for Cloud ERP – PEAK Matrix™ Assessment 2020



Note Assessments for Capgemini, Deloitte, Infosys, and PwC excludes service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, service provider public disclosures, and Everest Group's interactions with buyers. For these companies, Everest Group's data for assessment may be less complete

Confidentiality: Everest Group takes its confidentiality pledge very seriously. Any information we collect that is contract specific will only be presented back to the industry in an aggregated fashion

Capability assessment

Illustrative example

Measure of capability: ● High ○ Low

Service provider	Market impact				Vision & capability				
	Market adoption	Portfolio mix	Value delivered	Overall	Scope of services offered	Innovation and investments	Delivery footprint	Vision and strategy	Overall
Service provider 1	●	○	●	●	●	○	●	●	○
Service provider 2	○	○	○	○	○	○	○	○	○
Service provider 3	○	○	○	○	○	○	○	○	○
Service provider 4	○	○	○	○	●	○	○	○	○
Service provider 5	○	○	○	○	○	○	○	○	○
Service provider 6	○	○	○	○	○	○	○	○	○
Service provider 7	○	○	○	○	○	○	○	○	○
Service provider 8	○	○	○	○	○	○	○	○	○
Service provider 9	○	○	○	○	○	○	○	○	○

Everest Group's remarks on service providers

Illustrative example

Measure of capability: ● High ○ Low

Market impact				Vision & capability				
Market adoption	Portfolio mix	Value delivered	Overall	Scope of services offered	Innovation and investments	Delivery footprint	Vision and strategy	Overall
●	●	●	●	●	○	○	○	○

Strengths

- Service provider 1, has a robust delivery presence in Asia Pacific with multiple delivery centers in India, Australia, the Philippines, and China, enabling it to service client requirements efficiently
- It has a good number of multi-country as well as single-country clients across the world

Areas of improvement

- Service provider 1 should increase offerings of value-added services such as employer branding, talent communities and workforce planning
- It should try to expand into larger multi-country deals and also scout for engagements in other Asia Pacific markets to strengthen its presence in the region

Research calendar – Enterprise Platform Services

Published
 Planned
 Current release

Flagship Enterprise Platform Services reports

Release date

SuccessFactors-based Human Resources Business Process Services (HR BPS) – Services PEAK Matrix™ Assessment 2018	June 2018
Duck Creek Services: Modernization Strategies to Prevent Core Commoditization – Services PEAK Matrix™ Assessment 2018	June 2018
Guidewire Services: Core Modernization to Set the Stage for Digital Transformation – Services PEAK Matrix™ Assessment 2018	June 2019
Life Sciences Clinical Trials Products PEAK Matrix™ Assessment 2019: Integrated Platforms Rise to the Challenge	May 2019
Enterprise Platform IT Services in BFS PEAK Matrix™ Assessment 2019: Modernization at Speed and Scale	June 2019
Workday Human Capital Management (HCM) IT Services – PEAK Matrix™ Assessment and Market Trends 2019	July 2019
Services for Cloud ERP – PEAK Matrix™ Assessment 2020: The Market is Growing but Not Fast Enough	November 2019
Payer Digital Platforms: Evolution of Core Admin PEAK Matrix Assessment 2020 for Solutions	Q4 2019

Thematic Enterprise Platform Services reports

Workday-based Human Resources Business Process Services (HR BPS) Market Report 2017 – Opportunities Abound in Employee-centric HR Services	June 2017
BigTech Battle: Leading Internet of Things (IoT) Platforms Assessment – A Selection Guide	October 2018
BigTech Battle: Digital Experience Platforms (DXP) Assessment – Rise of the Digital Experience Platform	June 2019
Big Tech in Healthcare: What it Means for CIOs?	Q4 2019
BigTech Wars – Digital Experience Platforms (DXP) in Insurance	Q4 2019
BigTech Wars – Risk Management Platforms in BFS	Q4 2019

Note: For a list of all our published EPS reports, please refer to our [website page](#)

Additional Enterprise Platform Services research references

The following documents are recommended for additional insight on the topic covered in this report. The recommended documents either provide additional details or complementary content that may be of interest

- 1. Workday HCM IT Services – PEAK Matrix™ Assessment and Market Trends 2019: HCM on Cloud the New Paradigm – Workday Leads the Way** ([EGR-2019-32-R-3235](#)); 2019. Workday has led market growth with its consistently high user satisfaction scores and is continuously investing in the development of analytics capabilities and building a platform for extending and customizing its HCM suite. However, with competitors' growth catching up to Workday's, enterprises must carefully consider an HCM suite's functionality, experience, and overall cost while making their selection. In this research, we present the assessment and detailed profiles of 12 IT service providers featured on the Workday HCM IT services PEAK Matrix
- 2. Enterprise Platform IT Services in BFS PEAK Matrix™ Assessment 2019: Modernization at Speed and Scale** ([EGR-2019-31-R-3210](#)); 2019. Global banking and capital markets firms are modernizing their IT systems by adopting enterprise platforms to create superior customer experience, reduce latency, improve efficiency and Straight Through Processing (STP), manage regulations, and adopt next-generation technologies. These firms face significant challenges in adopting platform-based technologies such as burden of legacy, talent shortages, and resistance to change. In this research, we studied the vision and capability of 20 IT service providers for enterprise platform IT services specific to the Banking and Financial Services (BFS) industry. We also evaluated the market impact generated by each IT service provider

For more information on this and other research published by Everest Group, please contact us:

Yugal Joshi, Vice President:

yugal.joshi@everestgrp.com

Alisha Mittal, Practice Director:

alisha.mittal@everestgrp.com

Abhishek Mundra, Senior Analyst:

abhishek.mundra@everestgrp.com

AS Yamohiadeen, Senior Analyst:

as.yamohiadeen@everestgrp.com

Website: www.everestgrp.com | Phone: +1-214-451-3000 | Email: info@everestgrp.com



About Everest Group

Everest Group is a consulting and research firm focused on strategic IT, business services, and sourcing. We are trusted advisors to senior executives of leading enterprises, providers, and investors. Our firm helps clients improve operational and financial performance through a hands-on process that supports them in making well-informed decisions that deliver high-impact results and achieve sustained value. Our insight and guidance empower clients to improve organizational efficiency, effectiveness, agility, and responsiveness. What sets Everest Group apart is the integration of deep sourcing knowledge, problem-solving skills and original research. Details and in-depth content are available at www.everestgrp.com.

Dallas (Headquarters)

info@everestgrp.com
+1-214-451-3000

Bangalore

india@everestgrp.com
+91-80-61463500

Delhi

india@everestgrp.com
+91-124-496-1000

London

unitedkingdom@everestgrp.com
+44-207-129-1318

New York

info@everestgrp.com
+1-646-805-4000

Toronto

canada@everestgrp.com
+1-416-388-6765

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