SAP S/4HANA Services PEAK Matrix® Assessment 2021

May 2021: Complimentary Abstract / Table of Contents

EGR-2021-50-CA-4344

Our research offerings for global services

This report is included in the following research program(s):
Enterprise Platform Services

- ▶ Application Services
- ▶ Banking & Financial Services BPS
- ▶ Banking & Financial Services ITS
- ▶ Catalyst™
- ▶ Clinical Development Technology
- ▶ Cloud & Infrastructure
- ▶ Conversational AI
- ▶ Contingent Workforce Management
- ▶ Cost Excellence
- ▶ Customer Experience Management Services
- ▶ Cybersecurity
- ▶ Data & Analytics
- ▶ Digital Adoption Platforms (DAP)
- ▶ Digital Services
- ▶ Engineering Services
- ▶ Enterprise Platform Services

- ▶ Finance & Accounting
- ▶ Financial Services Technology (FinTech)
- ▶ Global Business Services
- ▶ Healthcare BPS
- ▶ Healthcare ITS
- ▶ Human Resources
- ▶ Insurance BPS
- ▶ Insurance ITS
- ▶ Insurance Technology (InsurTech)
- ▶ Insurance Third-Party Administration (TPA) Services
- ▶ Intelligent Document Processing (IDP)
- ▶ Interactive Experience (IX) Services
- ▶ IT Services Executive Insights™
- ▶ Life Sciences BPS
- ▶ Life Sciences ITS
- ▶ Locations Insider™

- ▶ Market Vista™
- ▶ Mortgage Operations
- ▶ Multi-country Payroll
- ▶ Network Services & 5G
- ▶ Outsourcing Excellence
- ▶ Pricing-as-a-Service
- ▶ Process Mining
- ▶ Procurement
- ▶ Recruitment Process Outsourcing
- ▶ Rewards & Recognition
- ▶ Service Optimization Technologies
- ▶ Supply Chain Management (SCM) Services
- ▶ Talent Excellence GBS
- ▶ Talent Excellence ITS
- ▶ Workplace Services
- ▶ Work at Home Agent (WAHA) Customer Experience Management (CXM)

If you want to learn whether your organization has a membership agreement or request information on pricing and membership options, please contact us at **info@everestgrp.com**

Everest Group®
RESEARCH

Contents

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

Yugal Joshi, Vice President

Abhishek Mundra, Practice Director

AS Yamohiadeen, Senior Analyst

Sangamesh Kadagad, Senior Analyst

Contents

Background of the research

- Enterprises are adopting SAP S/4HANA to modernize their finance and accounting operations, enable end-to-end visibility across the supply chain, better forecast demand and sales, optimize inventory management, and streamline procurement operations

- However, enterprise expectations are evolving beyond the lift and shift of workloads and process reimagination to ecosystem orchestration using SAP S/4HANA to better orchestrate their enterprise application landscape to reap incremental value

- To address changing client expectations and accelerate the migration of its on-premise client base to the cloud, SAP is investing in augmenting its SAP product portfolio including SAP S/4HANA Cloud capabilities

- In this research, we present an assessment of 21 service providers featured on the SAP S/4HANA services PEAK Matrix®

- The assessment is based on Everest Group's annual RFI process for calendar year 2020, interactions with leading services providers, client reference checks, and an ongoing analysis of the SAP S/4HANA services market

This report includes the profiles of the following 21 leading service providers featured on the SAP S/4HANA services PEAK Matrix:

- **Leaders:** Accenture, Deloitte, EY, IBM, Infosys, NTT DATA, and TCS

- **Major Contenders:** Atos, Capgemini, Cognizant, DXC Technology, HCL Technologies, LTI, PwC, Tech Mahindra, T-Systems, and Wipro

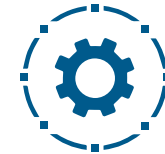- **Aspirants:** Birlasoft, Mphasis, Stefanini, and UST

Scope of this report:

Geography
Global

Service providers
21

Services
SAP S/4HANA services

Everest Group's definition of scope of SAP S/4HANA services

NOT EXHAUSTIVE

[ ] **Key functions**

Advisory/consulting services

SAP S/4HANA platform strategy and roadmap formulation, mapping of existing technology landscape, product(s) selection, feasibility and readiness assessments, security assessment, integration strategy, governance, program management, change management, and CoE set-up advisory

Implementation services

Requirements gathering, technical and functional design, configuration design, workload migration, platform setup, customizations, application development and testing, integration, and deployment. Includes three types of implementation – greenfield, brownfield, and bluefield

Maintenance and support services

Helpdesk management, monitoring, incident management, issue resolution, emergency fixes, environment management, ongoing customizations and integrations, compliance and regulatory support, new feature addition, minor and major usability enhancements, and ongoing application reengineering

SAP S/4HANA

SAP S/4HANA on-premise

SAP S/4HANA Enterprise Management products, SAP S/4HANA LOB products, SAP S/4HANA LOB products for specific industries, and other compatibility packs; includes deployment on hyperscalers
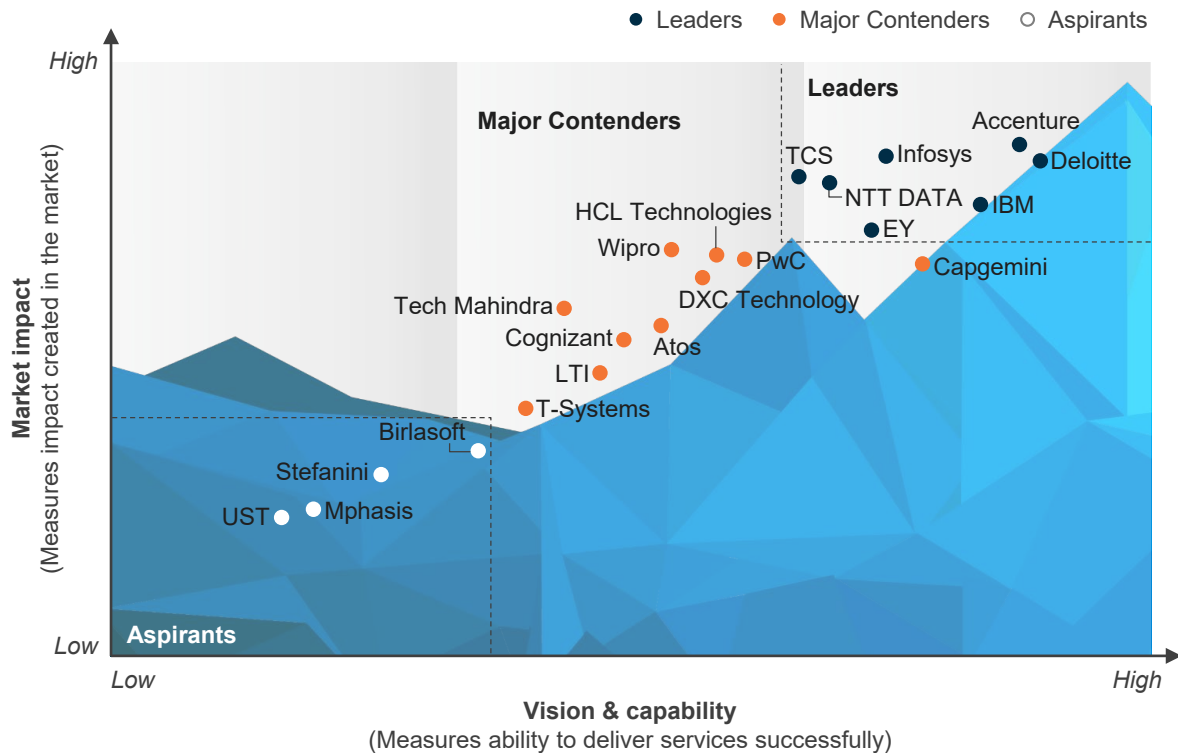
SAP S/4HANA Cloud

Includes all the capabilities/functionalities of SAP S/4HANA private cloud and public cloud offerings, including multi-tenant and single-tenant versions

Finance	Human resources	Manufacturing	R&D/engineering	Sales	Service	Sourcing and procurement	Supply Chain	Analytics

Everest Group®
RESEARCH

This study offers three distinct chapters providing a deep dive into key aspects of SAP S/4HANA services market; below are three charts to illustrate the depth of the report

Everest Group SAP S/4HANA Services PEAK Matrix® Assessment 2021[1]

Illustrative example

- Leaders
- Major Contenders
- Aspirants

Market impact (Measures impact created in the market) — vertical axis, Low to High

Vision & capability (Measures ability to deliver services successfully) — horizontal axis, Low to High

Leaders: Accenture, TCS, Infosys, Deloitte, NTT DATA, IBM, EY

Major Contenders: HCL Technologies, Wipro, PwC, DXC Technology, Capgemini, Tech Mahindra, Cognizant, Atos, LTI, T-Systems

Aspirants: Birlasoft, Stefanini, UST, Mphasis

1 Assessments for Deloitte, EY, IBM, PwC, and T-Systems exclude 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

Source: Everest Group (2021)

Capability assessment

Illustrative example

Measure of capability: ● High ◖ Low

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

Strengths

- Service Provider 1 is a good fit for SMBs looking for smaller vendors to drive application/database migration and cost-effective maintenance & support services for SAP S/4HANA
- It has meaningful capabilities to effectively support enterprises around core SAP S/4HANA functionalities such as supply chain, sourcing, procurement, and asset management

Areas of improvement

- Its portfolio is skewed toward the North American and Asia Pacific regions; it needs to further augment its delivery capabilities beyond these regions to better position itself as a transformation partner for global enterprises
- Needs to build credible proof points and capabilities in delivering scaled SAP S/4HANA Public Cloud transformations

Research calendar
Enterprise Platform Services (EPS)

Flagship EPS reports	Release date
Pega Service Provider Compendium 2021	February 2021
ServiceNow Services – the Uberization of IT, HR, and Employee Workflows	February 2021
Enterprise Platform Services – Renewal Opportunity for Service Providers	February 2021
Salesforce Healthcare services – State of the market 2021	March 2021
SAP S/4HANA Services PEAK Matrix® Assessment 2021	**May 2021**
SAP S/4HANA Service Provider Compendium 2021	Q2 2021
SAP S/4HANA Services – State of the Market Report 2021	Q2 2021
Microsoft Dynamics Services PEAK Matrix® Assessment 2021	Q2 2021
Supply Chain Management (SCM) platforms PEAK Matrix® Assessment 2021	Q3 2021
Oracle Cloud Application Services / Oracle SaaS Services PEAK Matrix® Assessment 2021	Q4 2021

Thematic EPS reports	Release date
Cloud Management Platform Trailblazers: Top 10 Start-ups Creating Buzz in the Market	October 2020
Assessment of the Niche ServiceNow Services Partner Ecosystem	May 2021
Rise of the Disruptive SaaS	Q2 2021
Customer Experience (CX) – What Clients Expect from Adobe, Salesforce, SAP, and Oracle?	Q3 2021
SaaS Management Platform Trailblazer	Q3 2021

Note: For a list of all of our published EPS reports, please refer to our website page

Everest Group®

With you on the journey

Everest Group is a research firm focused on strategic IT, business services, engineering services, and sourcing. Our clients include leading global companies, service providers, and investors. Clients use our services to guide their journeys to achieve heightened operational and financial performance, accelerated value delivery, and high-impact business outcomes. Details and in-depth content are available at **www.everestgrp.com**.

Stay connected

Website
everestgrp.com

Social Media

🐦 @EverestGroup

in @Everest Group

f @Everest Group

▶ @Everest Group

Blog
everestgrp.com/blog

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

Toronto
canada@everestgrp.com
+1-647-557-3475