Everest Group®

SAP S/4HANA Service Provider Compendium 2021

June 2021: Complimentary Abstract / Table of Contents

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Benchmarking

Contract assessment

Peer analysis

Market intelligence

Tracking: service providers, locations, risk, technologies

Locations: costs, skills, sustainability, portfolios

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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

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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

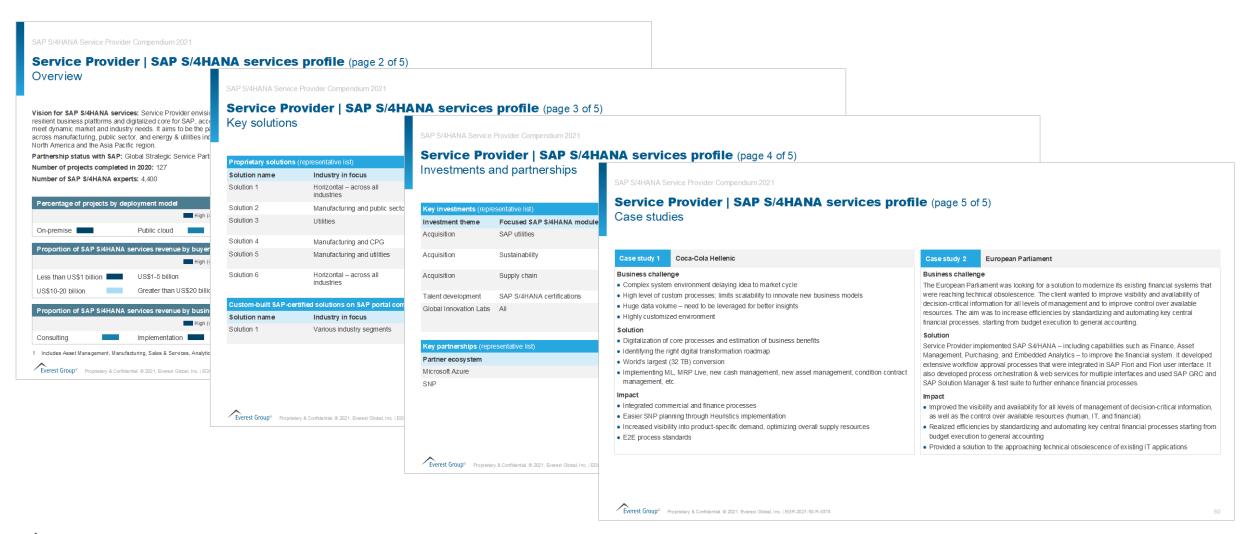| Finance	Human resources	Manufacturing	R&D/engineering	Sales	Service	Sourcing and procurement	Supply Chain	Analytics

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The report includes detailed profiles and buyer case studies for 21 leading service providers

Service Provider | SAP S/4HANA services profile (page 2 of 5)
Overview

Vision for SAP S/4HANA services: Service Provider envisi... resilient business platforms and digitalized core for SAP, acc... meet dynamic market and industry needs. It aims to be the p... across manufacturing, public sector, and energy & utilities ind... North America and the Asia Pacific region.

Partnership status with SAP: Global Strategic Service Part...

Number of projects completed in 2020: 127

Number of SAP S/4HANA experts: 4,400

Percentage of projects by deployment model

High (≥
On-premise | Public cloud

Proportion of SAP S/4HANA services revenue by buyer

High (≥
Less than US$1 billion | US$1-5 billion
US$10-20 billion | Greater than US$20 billio...

Proportion of SAP S/4HANA services revenue by busin...

High (≥
Consulting | Implementation

1 Includes Asset Management, Manufacturing, Sales & Services, Analytic...

Service Provider | SAP S/4HANA services profile (page 3 of 5)
Key solutions

Proprietary solutions (representative list)

Solution name	Industry in focus
Solution 1	Horizontal – across all industries
Solution 2	Manufacturing and public secto
Solution 3	Utilities
Solution 4	Manufacturing and CPG
Solution 5	Manufacturing and utilities
Solution 6	Horizontal – across all industries

Custom-built SAP-certified solutions on SAP portal com...

Solution name	Industry in focus
Solution 1	Various industry segments

Service Provider | SAP S/4HANA services profile (page 4 of 5)
Investments and partnerships

Key investments (representative list)

Investment theme	Focused SAP S/4HANA module
Acquisition	SAP utilities
Acquisition	Sustainability
Acquisition	Supply chain
Talent development	SAP S/4HANA certifications
Global Innovation Labs	All

Key partnerships (representative list)

Partner ecosystem
Microsoft Azure
SNP

Service Provider | SAP S/4HANA services profile (page 5 of 5)
Case studies

Case study 1   Coca-Cola Hellenic

Business challenge
- Complex system environment delaying idea to market cycle
- High level of custom processes; limits scalability to innovate new business models
- Huge data volume – need to be leveraged for better insights
- Highly customized environment

Solution
- Digitalization of core processes and estimation of business benefits
- Identifying the right digital transformation roadmap
- World's largest (32 TB) conversion
- Implementing ML, MRP Live, new cash management, new asset management, condition contract management, etc.

Impact
- Integrated commercial and finance processes
- Easier SNP planning through Heuristics implementation
- Increased visibility into product-specific demand, optimizing overall supply resources
- E2E process standards

Case study 2   European Parliament

Business challenge
The European Parliament was looking for a solution to modernize its existing financial systems that were reaching technical obsolescence. The client wanted to improve visibility and availability of decision-critical information for all levels of management and to improve control over available resources. The aim was to increase efficiencies by standardizing and automating key central financial processes, starting from budget execution to general accounting.

Solution
Service Provider implemented SAP S4/HANA – including capabilities such as Finance, Asset Management, Purchasing, and Embedded Analytics – to improve the financial system. It developed extensive workflow approval processes that were integrated in SAP Fiori and Fiori user interface. It also developed process orchestration & web services for multiple interfaces and used SAP GRC and SAP Solution Manager & test suite to further enhance financial processes.

Impact
- Improved the visibility and availability for all levels of management of decision-critical information, as well as the control over available resources (human, IT, and financial)
- Realized efficiencies by standardizing and automating key central financial processes starting from budget execution to general accounting
- Provided a solution to the approaching technical obsolescence of existing IT applications

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	**June 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

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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