

SAP Business Application Services PEAK Matrix® Assessment 2023 – Global

November 2022: Complimentary Abstract / Table of Contents



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- ▶ Technology Skills and Talent
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sustainability, portfolios

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Introduction

- Enterprises have been leveraging SAP for a decade to effectively manage and streamline their day-to-day core business operations. In the recent past, SAP has invested meaningfully to further its predominantly on-premise enterprise products toward cloud-based ones; noticeably launching RISE with SAP. SAP service providers have also mirrored this vision and have invested in tools and accelerators that will help enterprises switch to cloud with minimal issues and delays
- Also, enterprise expectations have shifted beyond traditional ERP modernizations to drive domain-specific innovations around customer and employee experience and to help enterprises adopt SAP Business applications effectively. To address the evolving enterprise expectations, service providers are skilling talent across products and furthering partnerships with SAP, leading cloud vendors, and specialist technology partners to develop innovative client-centric solutions

In this research, we present an assessment and detailed profiles of 25 service providers featured on the SAP Business Application services PEAK Matrix®. Each provider profile provides a comprehensive picture of its service focus, key Intellectual Property (IP) / solutions, domain investments, and case studies. The assessment is based on Everest Group's annual RFI process for calendar year 2022, interactions with leading service providers, client reference checks, and an ongoing analysis of the enterprise platform services market.

This report includes the profiles of the following 25 leading service providers featured on the SAP Business Application services PEAK Matrix®:

- **Leaders:** Accenture, Capgemini, Deloitte, EY, IBM, and NTT DATA
- **Major Contenders:** Atos, Birlasoft, Bosch Software and Digital Solutions, Cognizant, DXC Technology, HCLTech, Hitachi Vantara, Infosys, Mindtree, PwC, Reply, TCS, Tech Mahindra, and Wipro
- **Aspirants:** Applexus Technologies, Fujitsu, Mphasis, Stefanini, and Zensar

Scope of this report



Geography
Global



Providers
25 leading SAP
service providers



Services
SAP business
applications

Everest Group's definition of scope of SAP business application services

NOT EXHAUSTIVE

SAP business application services

Consulting/assessment services

SAP platform/ecosystem strategy and roadmap formulation, mapping of existing technology landscape, product(s) selection, feasibility and readiness assessments, security assessment, integration strategy, change management, and CoE setup advisory

Design and implementation

Requirements gathering, technical/functional design, configuration design, workload migration, platform setup, SAP modernization, customizations, development, testing, integration, and deployment. Includes all implementations – greenfield, brownfield, and bluefield/hybrid

Management and monitoring services

Help desk management, monitoring, incident management, issue resolution, emergency fixes, ongoing customizations and integrations, compliances, update support, new feature addition, minor and major usability enhancements, and product enhancements

Scope of the assessment

- IT services delivered for all SAP-owned and acquired business applications (both on premises and cloud)
- This includes applications, databases, middleware, analytics, SI built solutions, and emerging technologies such as AI/ML, and IoT for ERP (including finance & accounting), customer experience, SCM and procurement, human capital management, industry-specific applications, and technology
- Activities including business/technology consulting, design & implementation, integration, and support services for SAP business applications (as per the above services definition)

Exclusions

The scope of this PEAK Matrix® assessment does not include the below

- IT infrastructure related services
- Resale of licenses related to SAP business applications
- Activities around business process outsourcing

Overview and abbreviated summary of key messages

This report examines the global 2022 SAP business application services provider landscape and its impact on the SAP services market. It focuses on provider position and growth in the SAP business application services market, changing market dynamics and emerging provider trends, assessment of provider delivery capabilities, and key SAP service provider profiles. It also identifies the key implications of the research findings for buyers and providers.

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

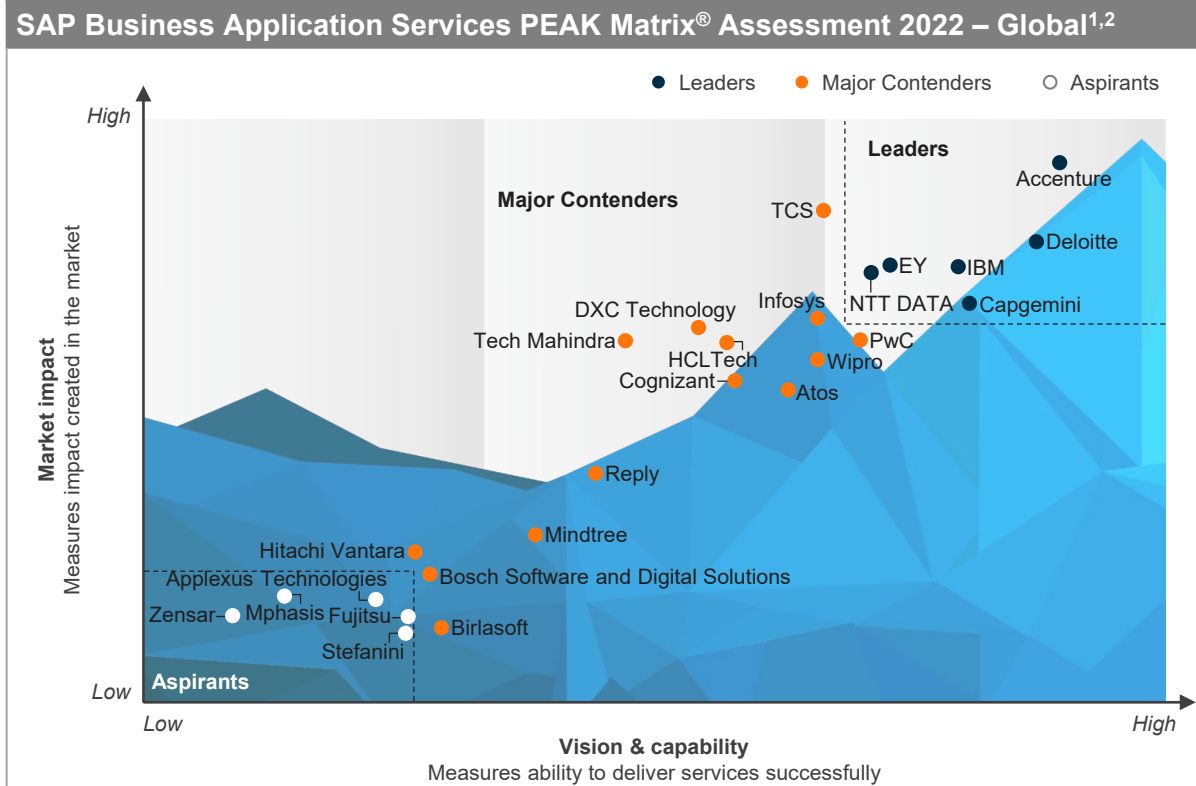
SAP business application service provider capability

- SAP business application service providers can be classified into Leaders, Major Contenders, and Aspirants on a capability-market-share matrix
- Accenture, Capgemini, Deloitte, EY, IBM and NTT DATA are the Leaders in this SAP Business Application Services PEAK Matrix assessment with several IT service providers emerging as Major Contenders

Service provider characteristics

- Leaders are characterized by their ability to successfully execute complex, multi-continent, multi-product, advisory-led SAP business application transformations, underpinned by their strong global delivery network
- The Leaders have strong partnerships with SAP and all the leading cloud vendors and specialist technology partners to build and innovate client-specific solutions
- Major Contenders are making continued investments in building horizontal proprietary tools, solutions, and accelerators that can be used across industries to enhance their services delivery capabilities
- Major Contenders take a balanced organic and inorganic approach to fill gaps across their SAP business application services portfolio and further improve their global delivery footprint
- Aspirants have good proof points in delivering implementation and maintenance of SAP business application services of low to medium complexity for Small and Mid-sized Buyers (SMBs)
- Clients acknowledge Aspirants' client-centric approach, pricing, and commercial flexibility as well as account management flexibility as their key differentiators

This study offers three distinct chapters providing a deep dive into key aspects of SAP business applications market; below are three charts to illustrate the depth of the report



1 Assessments for Capgemini, Deloitte, Fujitsu, IBM, and PwC 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
2 Analysis for Mindtree are based on capabilities before its merger with LTI
Source: Everest Group (2022)

Capability assessment Illustrative example

Measure of capability: 🕒 Low ● High

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

Everest Group's remarks on providers Illustrative example

Measure of capability: 🕒 Low ● High

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

- Provider 1 is a relevant service provider for large enterprises (annual revenue >US\$XYZ billion) seeking end-to-end services for complex, multi-continent SAP business application engagements
- It has continuously acquired firms to strengthen its global delivery footprint and enhance its SAP business application services capabilities

Limitations

- Provider 1 is positioned as a premium-priced partner in SAP business application engagements. It becomes a deterrent for cost-conscious clients
- As its market focus is centered mostly around North America, Europe, and the APAC regions, enterprises in the LATAM and the Middle East regions should evaluate Provider 1's delivery capabilities with caution

Research calendar

Enterprise Platform Services (EPS)

■ Published
 ■ Planned
 ■ Current release

Reports title	Release date
Microsoft Dynamics 365 – Digitizing Customer Experience	November 2021
Collapsing the Supply Chain: Top 14 Start-ups Redefining Real-time Transportation Visibility	January 2022
Oracle Cloud Application (OCA) Services PEAK Matrix® Assessment 2022 – Global	March 2022
Sustaining Client Satisfaction: Pivot from Implementation to Transformation Partner	March 2022
Oracle Cloud Applications – Systemize Innovation to Drive Business Value	July 2022
ServiceNow Services PEAK Matrix® Assessment 2022	August 2022
ServiceNow Services Provider Compendium 2022	September 2022
The Future of Field Service Management (FSM) – Driving Business Growth by Leveraging Emerging Technologies	October 2022
ServiceNow Services – Delivering Next Frontier of Digital Transformation	November 2022
Salesforce Industry Cloud Services PEAK Matrix® Assessment 2022	November 2022
Salesforce Industry Cloud Services Provider Compendium 2022	November 2022
SAP Business Application Services PEAK Matrix® Assessment 2023 – Global	November 2022
SAP Business Application Services Provider Compendium 2023 – Global	Q4 2022
SAP Business Application Services PEAK Matrix® Assessment 2023 – Europe	Q4 2022

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