

SAP Business Applications Services PEAK Matrix® Assessment 2023 – Europe

November 2022: Complimentary Abstract / Table of Contents



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- ▶ Recruitment
- ▶ Retirement Technologies
- ▶ Revenue Cycle Management
- ▶ Rewards and Recognition
- ▶ Service Optimization Technologies
- ▶ Software Product Engineering Services
- ▶ Supply Chain Management (SCM) Services
- ▶ Sustainability Technology and Services
- ▶ Talent Excellence GBS
- ▶ Talent Excellence ITS
- ▶ Technology Skills and Talent
- ▶ Trust and Safety
- ▶ Work at Home Agent (WAHA) Customer Experience Management (CXM)

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Benchmarking

Contract assessment

Peer analysis

Market intelligence

Tracking: providers, locations,
risk, technologies

Locations: costs, skills,
sustainability, portfolios

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This report is based on the below sources of proprietary information

- Proprietary database of IT services contracts of major IT providers with workplace services in scope of work (updated annually)
- The database tracks the following elements of each contract:
 - Buyer details including size and signing region
 - Contract details including provider, contract type, TCV & ACV, provider FTEs, start & end dates, duration, and delivery locations
 - Scope details including share of individual buyer locations being served in each contract, Line of Business (LoB) served, and pricing model employed
- Proprietary database of IT providers (updated annually)
- The database tracks the following for each provider:
 - Revenue and number of FTEs
 - Number of clients
 - FTE split by different LoBs
 - Revenue split by region
 - Location and size of delivery centers
 - Technology solutions developed
- Provider briefings
 - Vision and strategy
 - Annual performance and future outlook
 - Key strengths and improvement areas
 - Emerging areas of investment
- Buyer reference interviews, ongoing buyer surveys, and interactions
 - Drivers and challenges for adopting workplace services
 - Assessment of provider performance
 - Emerging priorities
 - Lessons learnt and best practices adopted

Providers assessed¹

 accenture

 all for one
Group

 Atos

 Capgemini

 Deloitte.

 Infosys

 Mindtree

 Mphasis
The Next Applied

 T-Systems

 tietoevry

 REPLY

 zensar

¹ Assessments for All for One Group, Capgemini, Deloitte, and Reply 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

Note: **The source of all content is Everest Group unless otherwise specified**

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

Introduction

- Enterprises have been leveraging SAP for decades 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, which 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 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 12 service providers featured on the SAP Business Applications Services PEAK Matrix®. Each provider profile presents 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 12 leading service providers featured on the SAP Business Applications Services PEAK Matrix® Assessment 2023 – Europe:

- **Leaders:** Accenture, Capgemini, and Deloitte
- **Major Contenders:** All for One Group, Atos, Infosys, Mindtree, Reply, T-Systems, and Tietoevry
- **Aspirants:** Mphasis and Zensar

Scope of this report



Geography
Europe



Providers
12 leading SAP service providers



Services
SAP business application

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)

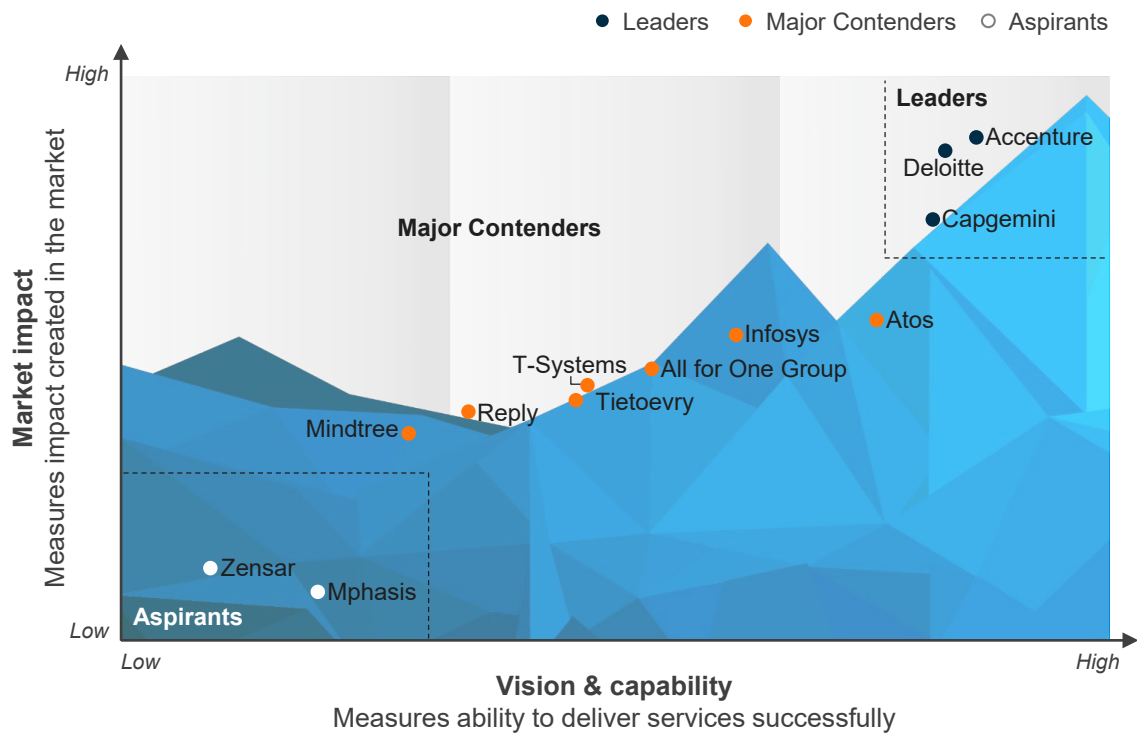
Exclusions

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

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

Everest Group SAP Business Applications Services PEAK Matrix® Assessment 2022 – Europe¹



¹ Assessments for All for One Group, Capgemini, Deloitte, and Reply 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 (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 good fit for enterprises in Europe looking for an SAP partner with domain expertise in BFSI, manufacturing, and travel & transport
- Provider 1 has made meaningful investments in industry-specific IP to expedite implementation and maintenance timelines for client

Limitations

- Provider 1 needs to focus on and invest in upskilling and cross-skilling its talent base as the ratio of SAP certifications per FTE is relatively lower compared with similar peers
- Provider 1 needs to further enhance its consulting and change management capabilities to effectively position itself as an end-to-end partner for SAP business applications services

Research calendar

Enterprise Platform Services (EPS)

Published Planned Current release

Reports title	Release date
SAP S/4HANA Services – Rise with Industry Transformations	November 2021
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 2023	November 2022
Salesforce Industry Cloud Services Provider Compendium 2023	November 2022
SAP Business Applications Services PEAK Matrix® Assessment 2023 – Europe	November 2022
SAP Business Applications Services PEAK Matrix® Assessment 2023 – Global	Q4 2022
SAP Business Applications Services Provider Compendium 2023	Q4 2022

Note: [Click](#) to see a list of all of our published Enterprise Platform Services (EPS) reports



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