

SAP Business Application Services Provider Compendium 2023 – Global

December 2022: Complimentary Abstract / Table of Contents



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- ▶ Talent Excellence GBS
- ▶ Talent Excellence ITS
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- ▶ Value and Quality Assurance (VQA)
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Peer analysis

Market intelligence

Tracking: providers, locations, risk, technologies

Locations: costs, skills, sustainability, portfolios

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Introduction

- Enterprises have been leveraging SAP for a 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 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

The SAP Business Application Services Provider Compendium report has 25 provider profiles which covers their service focus, key IPs / solutions, domain investments, and case studies

SAP Business Application Services Provider Compendium 2023 – Global

Provider | SAP Business Application services profile (page 1 of 5)

Overview

Vision for SAP business application services: Provider's vision founded on leveraging SAP technologies to drive new and meaningful business outcomes

Partnership status with SAP: XXX

Number of projects completed in 2021 and H1-2022: XXX

Number of SAP business applications certified FTEs: XXX

Proportion of SAP business application services revenue by industry

Industry	Proportion
Banking, Financial Services, and Insurance (BFSI)	Low
Electronics, hi-tech and technology	Low
Energy and utilities	Low
Manufacturing	Low
Retail, distribution, and CPG	Low
Telecom, media and entertainment	Low
Others	Low

SAP Business Application Services Provider Compendium 2023 – Global

Provider | SAP Business Application services profile (page 2 of 5)

Key Solutions

Proprietary solutions (representative list)		
Solution name	Focused industries	Focused SAP
XXX	All	All
XXX	All	All
XXX	All	All

SAP-certified solutions on SAP marketplace compatible (representative list)		
Solution name	Focused industries	Focused SAP
XXX	X-Industry focused for the HR function for customers of SAP SuccessFactors Central and o	Extension for SuccessFactors
XXX	X-Industry focused	SAP Extension SAP Integrati
XXX	CPG	SAP Industry Consumer Pr Industry Cloud, SAP E and/or SAP In

SAP Business Application Services Provider Compendium 2023 – Global

Provider | SAP Business Application services profile (page 3 of 5)

Investments and partnerships

Key investments (representative list)		
Investment theme	Focused SAP product(s)	Focused business function(s) / m
Acquisition – XXX	SAP S/4HANA	All
Acquisition – XXX	n/a	All
Acquisition – XXX	n/a	All

Key partnerships (representative list)	
Partner ecosystem	Partners
SAP	UPath
ServiceNow	

SAP Business Application Services Provider Compendium 2023 – Global

Provider | SAP Business Application services profile (page 4 of 5)

Case studies

Case study 1: XXX – a cosmetics, skincare, and perfumery company in London

Business challenge

XXX wanted to capitalize on its nearly 50 years of experience and competitive edge in the market. However, its legacy IT infrastruc

Solution

- Created an order management portal for franchisees along with resource planning system as the new digital core
- Migrated 6TB of data to Microsoft Azure cloud, by leveraging SAP
- Transformed XXX's IT operations in only 18 months

Impact

- XXX now has a centralized, agile cloud platform to enable it to thrive in a changing market
- The switchover of 50 applications and 200 integration points to set the ground for this, 100+ people worked together for
- Enabled easier ordering and product visibility for franchisees
- More accurate stock forecasts and better sourcing efficient customers, whether in-store or online
- Expanded omnichannel capabilities that offer customers m

SAP Business Application Services Provider Compendium 2023 – Global

Provider | SAP Business Application services profile (page 5 of 5)

Everest Group assessment – XXX

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 is a relevant service provider for large enterprises (annual revenue >US\$5 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
- It has a strong global footprint with an optimized split between onshore, offshore, and nearshore resources

Limitations

- Provider 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's delivery capabilities in depth
- Clients believe that it can further enhance its talent management capabilities – specifically by bringing in resources with relevant experience to replace outgoing talent on SAP engagements

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Research calendar

Enterprise Platform Services (EPS)

Published
 Planned
 Current release

Reports title	Release date
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
Salesforce Industry Cloud Services PEAK Matrix® Assessment 2022	November 2022
Salesforce Industry Cloud Services Provider Compendium 2022	November 2022
ServiceNow Services – Delivering the Next Frontier of Digital Transformation	November 2022
SAP Business Application Services PEAK Matrix® Assessment 2023 – Global	November 2022
SAP Business Application Services PEAK Matrix® Assessment 2023 – Europe	November 2022
SAP Business Application Services Provider Compendium 2023 – Global	December 2022
SAP Business Application Services Provider Compendium 2023 – Europe	Q4 2022

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