

SAP Business Application Services Provider Compendium 2023 – Europe

December 2022: Complimentary Abstract / Table of Contents



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- ▶ Process Mining
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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
- ▶ Value and Quality Assurance (VQA)
- ▶ 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



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 Teitoevry
- **Aspirants:** Mphasis and Zensar

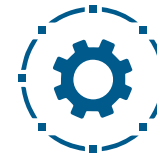
Scope of this report



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

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 – Europe

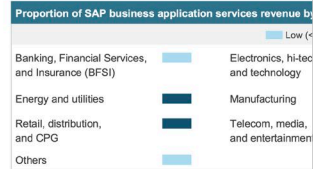
Provider A | SAP Business Application services profile (page 1 of 5) Overview

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

Partnership status with SAP: Partner

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

Number of SAP business applications certified FTEs: XY



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SAP Business Application Services Provider Compendium 2023 – Europe

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

Proprietary solutions (representative list)

Solution name	Focused industries	Focused SAP
Solution A	All	All
Solution B	All	All
Solution C	All	All

SAP-certified solutions on SAP marketplace compatible (representative list)

Solution name	Focused industries	Focused SAP
Solution D	X-Industry focused for the HR function for customers of SAP SuccessFactors Central and oth	Extension for S SuccessFactors Central and oth
Solution E	X-Industry focused	SAP Extension SAP Integration
Solution F	CPG	SAP Industry C Consumer Proc Industry Cloud, Cloud, SAP Ext and/or SAP Int

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SAP Business Application Services Provider Compendium 2023 – Europe

Provider A | SAP Business Application services profile (page 3 of 5) Investments and partnerships

Key investments (representative list)

Investment theme	Focused SAP product(s)
Acquisition – A	SAP S/4HANA
Acquisition – B	N/A
Acquisition – C	N/A

Key partnerships (representative list)

Partner ecosystem
SAP
UIPath
ServiceNow

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SAP Business Application Services Provider Compendium 2023 – Europe

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

Case study 1 XYZ – a multinational telecommunications company, headquartered in Berkshire, England

Business challenge
Provider A aims to be the connectivity and services provider of choice, with innovatively providing digital experiences. For this purpose, provider wanted to modernize its core.

Solution

- Provider transitioned the full SAP Estate to SAP S/4HANA on Google Cloud, with the EVO Edge next
- Helped revamp Provider A's global finance organization by understanding pain point solutions. They deployed a customer-grade UX and ran virtual and classroom train employees

Impact

- The cloud transition involved four migration waves to move 34 systems on 430 server terabytes of data in 22 markets, to the Google Cloud
- The project helped Provider A become faster with business agility and acceleration, release slots, elimination of manual processes, and reduced testing duration
- Transformed the clients' system for the better with a modern, scalable, future-ready core (S/4HANA) with SaaS flexibility, touchless business operations, and Google Cloud
- Helped them with cost rationalization which includes reducing hardware and energy pipelines for automation, and reducing project timescales and cost

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SAP Business Application Services Provider Compendium 2023 – Europe

Provider A | SAP Business Application services profile (page 5 of 5) Everest Group assessment – Leader

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

- It is a good fit for enterprises in Europe looking for an SAP partner with domain expertise in manufacturing, energy & utilities, and retail & CPG
- Provider has the highest number of SAP-certified resources in Europe, and its total workforce of cross-certified SAP professionals is relatively higher than its key peers
- Provider has credible proof points of delivering advisory-led SAP transformations across Europe

Limitations

- Provider is positioned as a premium-priced partner in SAP business applications engagements. It becomes a deterrent for cost-conscious clients
- Some clients have opined that Provider can further enhance its implementation capabilities of auxiliary SAP offerings such as SAP Global Trade Services (GTS) and SAP Extended Warehouse Management (EWM)

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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 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 – Europe	December 2022
SAP Business Application Services Provider Compendium 2023 – Global	Q1 2023

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



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