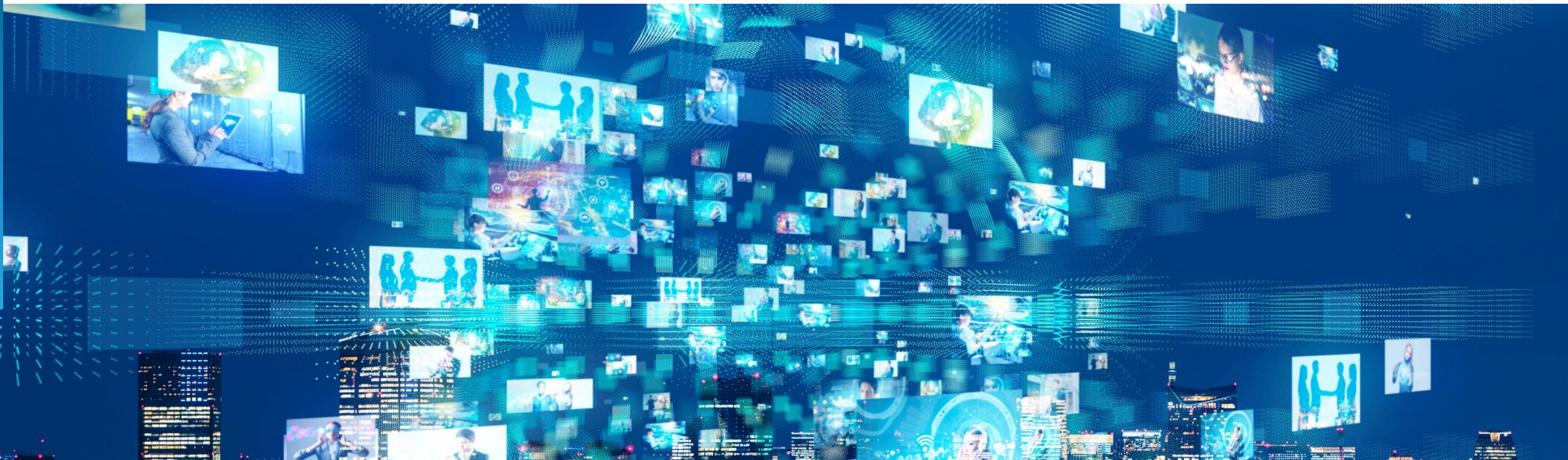


Platform Services Enterprise Pulse 2023: Top Five Service Providers Delivering Superior Value

August 2023: Complimentary Abstract / Table of Contents



Our research offerings

This report is included in the following research program(s):

Enterprise Platform Services

- ▶ Amazon Web Services (AWS)
- ▶ Application Services
- ▶ Artificial Intelligence (AI)
- ▶ Asset and Wealth Management
- ▶ Banking and Financial Services Business Process
- ▶ Banking and Financial Services Information Technology
- ▶ Catalyst™
- ▶ Clinical Development Technology
- ▶ Cloud and Infrastructure
- ▶ Contingent Staffing
- ▶ Contingent Workforce Management
- ▶ Customer Experience Management Services
- ▶ CX Excellence
- ▶ CXM Technology
- ▶ Cybersecurity
- ▶ Data and Analytics
- ▶ Digital Adoption Platforms
- ▶ Digital Services
- ▶ Digital Workplace
- ▶ Employee Experience Management (EXM) Platforms
- ▶ Employer of Record (EOR)
- ▶ Engineering Research and Development
- ▶ Enterprise Platform Services
- ▶ Exponential Technologies
- ▶ Finance and Accounting
- ▶ Financial Services Technology (FinTech)
- ▶ GBS Talent Excellence
- ▶ Global Business Services
- ▶ Google Cloud
- ▶ Healthcare Business Process
- ▶ Healthcare Information Technology
- ▶ HealthTech
- ▶ Human Resources
- ▶ Insurance Business Process
- ▶ Insurance Information Technology
- ▶ Insurance Technology (InsurTech)
- ▶ Insurance Third-Party Administration (TPA) Services
- ▶ Intelligent Document Processing
- ▶ Interactive Experience (IX) Services
- ▶ IT Services Excellence
- ▶ IT Services Executive Insights™
- ▶ IT Talent Excellence
- ▶ Life Sciences Business Process
- ▶ Life Sciences Commercial Technologies
- ▶ Life Sciences Information Technology
- ▶ Locations Insider™
- ▶ Marketing Services
- ▶ Market Vista™
- ▶ Microsoft Azure
- ▶ Modern Application Development (MAD)
- ▶ Mortgage Operations
- ▶ Multi-country Payroll
- ▶ Network Services and 5G
- ▶ Oracle Services
- ▶ Outsourcing Excellence
- ▶ Pricing Analytics as a Service
- ▶ Process Mining
- ▶ Process Orchestration
- ▶ Procurement and Supply Chain
- ▶ Recruitment
- ▶ Retail and CPG Information Technology
- ▶ Retirement Technologies
- ▶ Revenue Cycle Management
- ▶ Rewards and Recognition
- ▶ SAP Services
- ▶ Service Optimization Technologies
- ▶ Software Product Engineering Services
- ▶ Supply Chain Management (SCM) Services
- ▶ Sustainability Technology and Services
- ▶ Talent Genius™
- ▶ Technology Skills and Talent
- ▶ Trust and Safety
- ▶ Value and Quality Assurance (VQA)

If you want to learn whether your organization has a membership agreement or request information on pricing and membership options, please contact us at info@everestgrp.com

Learn more about our
custom research capabilities

Benchmarking

Contract assessment

Peer analysis

Market intelligence

Tracking: providers, locations,
risk, technologies

Locations: costs, skills,
sustainability, portfolios

Contents

For more information on this and other research published by Everest Group, please contact us:

Yugal Joshi, Partner

Abhishek Mundra, Practice Director

AS Yamohiadeen, Practice Director

Vinisha Choudhary, Senior Analyst

1. Introduction and overview	4
• Research methodology	5
• Background of the research	6
• Scope of the research	8
2. Enterprises' pulse assessment	9
• Executive summary	10
• Enterprises' satisfaction with service providers	11
• Enterprises' satisfaction across key parameters	12
• Service providers' strengths and areas of improvement	13
• Enterprise platform adoption mindset	14
• Enterprise expectations	15
3. Top client-centric service providers	16
• Assessment methodology	17
• Top five service providers across ERP platform areas	19
• What enterprises think of individual service providers	20
4. Appendix	26
• Research methodology – questions asked to enterprises	27
• Glossary	28
• Research calendar	29

Our research methodology is based on four pillars of strength to produce actionable and insightful research for the industry

01

Robust definitions and frameworks

Function specific pyramid, Total Value Equation (TVE), PEAK Matrix®, and market maturity

02

Primary sources of information

Annual contractual and operational RFIs, provider briefings and buyer interviews, web-based surveys

03

Diverse set of market touchpoints

Ongoing interactions across key stakeholders, input from a mix of perspectives and interests, supports both data analysis and thought leadership

04

Fact-based research

Data-driven analysis with expert perspectives, trend-analysis across market adoption, contracting, and providers

Proprietary contractual database of 718 buyer interviews (updated annually)

Year-round tracking of 107 IT technology/service providers

Large repository of existing research in IT services

Over 30 years of experience advising clients on strategic IT, business services, engineering services, and sourcing

Executive-level relationships with buyers, providers, technology providers, and industry associations

Background of the research

- The platform services market continues to evolve with new solutions that are cloud-based, AI-powered, and data-driven, marking a significant transformation in the industry. With changing market trends, the demand for innovative and vertical-specific solutions is on the rise. However, enterprises are facing multiple challenges in building a future proof, composable platform architecture and integrable solutions
- While service providers have been able to enhance satisfaction levels of SMB enterprises leveraging their domain and technical expertise, customer satisfaction for large enterprises continues to decline, especially around talent management and building innovative solutions
- Everest Group believes that it is crucial to gain a comprehensive understanding of enterprises' experiences working with various platforms, ISVs, and service providers
- This research provides insights into the enterprise satisfaction of various service providers, their strengths and areas of improvement, and identifies the top five service providers across platform areas that have delivered superior value
- The assessment is based on over 120 unique interviews conducted in 2022-23 with enterprises globally as part of the enterprise platform services. These enterprises were nominated as reference clients by different service providers and product vendors studied across multiple Everest Group PEAK Matrix® evaluations

Scope of this report



Geography
Global



Industry
Market activity and investments of leading service providers and tech vendors across industries



Services
Enterprise Platform Services (EPS)

Research methodology | enterprise pulse study



Enterprise outreach

Conducted 120+ enterprise interviews in 2022-23 as a part of the PEAK Matrix® assessments across EPS, spanning multiple industries and geographies; the service providers assessed in these reports shared the enterprise references.



Data synthesis and analysis

Assessed performance themes, conducted gap analysis, and analyzed the future market potential of technology vendors.



Data collection

Structured interviews (~15 questions) with each enterprise, capturing quantitative and qualitative insights across technology priorities, digital agendas, outsourcing strategies, and perceptions about technology vendors.

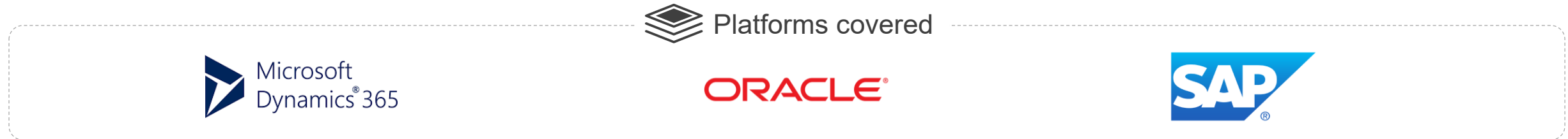
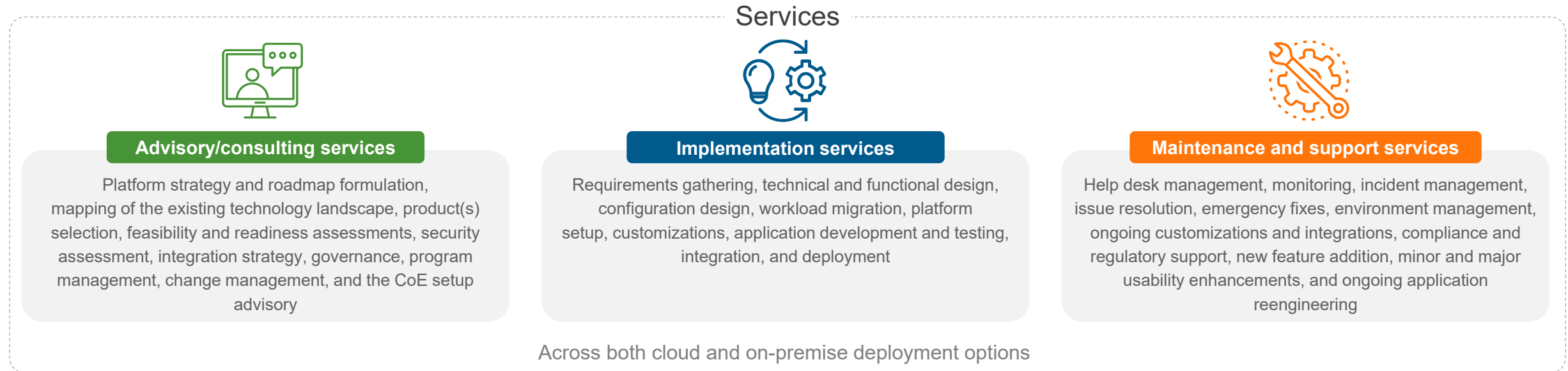
We conducted interviews with enterprises that service providers nominated as reference checks for various PEAK Matrix® assessment projects. Each enterprise was asked multiple questions regarding its experience of working with specific service providers and its investment priorities.

Featured service providers



Note: Eviden is an Atos business

Research methodology | scope of services



The scope of this assessment excludes BPO and IT infrastructure related services.

Executive summary



Enterprises expect service providers to offer balanced onshore and offshore delivery capabilities, pre-configured industry solutions, and propose innovative yet transparent pricing models to cater to their diverse needs.



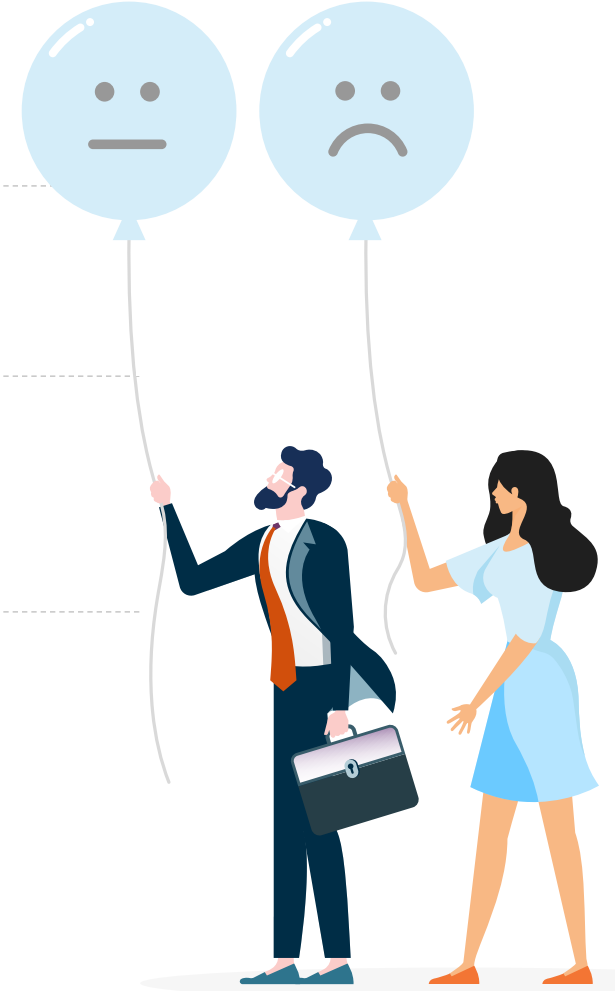
Enterprises are satisfied with the service providers' technical capabilities, solution-driven mindset, solutions demonstrated by them, and their ability to foster a vibrant peer community.



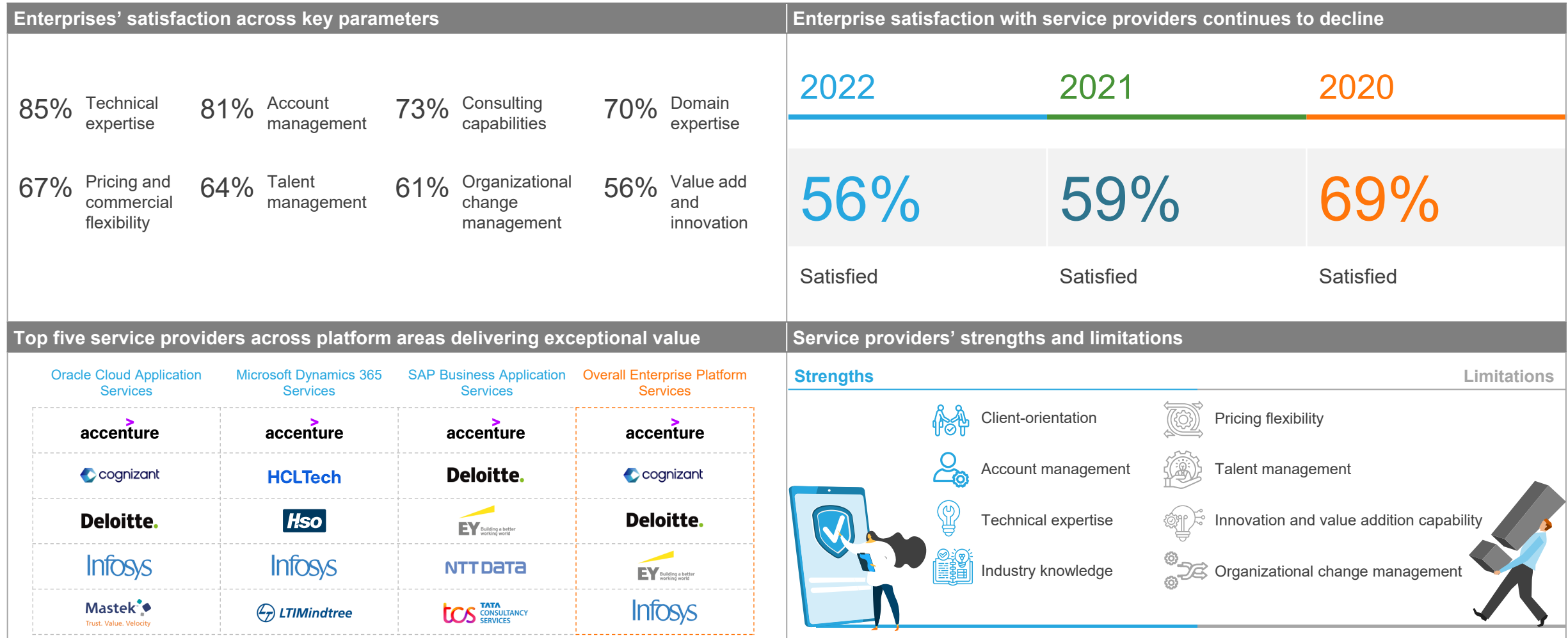
Service providers' high pricing, lack of innovation, and absence of proactiveness in the future roadmap strategy have left enterprises dissatisfied. Also, enterprises feel there is room improvement in their advisory capabilities including change management.



In 2022, the proportion of satisfied customers decreased by 5%, compared to a 15% decrease in 2021. This is primarily attributed to the proactive approach taken by service providers in delivering IT solutions.



This study gives insights into the satisfaction of enterprises with different service providers, their strengths and limitations, and identifies top five service providers delivering superior value



Research calendar

Enterprise Platform Services (EPS)

■ Published
 ■ Planned
 ■ Current release

Reports title	Release date
SAP Business Application Services PEAK Matrix® Assessment 2023 – Global	November 2022
Salesforce Industry Cloud Services Provider Compendium 2023	December 2022
Playbook: Transforming Customer and Partner Experiences in the Retail, Consumer Packed Goods (CPG), and Manufacturing Industries	March 2023
Microsoft Dynamics 365 Services PEAK Matrix® Assessment 2023	June 2023
Oracle Cloud Applications Services PEAK Matrix® Assessment 2023	July 2023
Microsoft Dynamics 365 Services – Provider Compendium 2023	July 2023
Platform Services Enterprise Pulse 2023: Top Five Service Providers Delivering Superior Value	August 2023
SAP Business Application Services – State of the Market 2023	Q3 2023
Microsoft Dynamics 365 Services – State of the Market 2023	Q3 2023
Salesforce Industry Cloud State of the Market 2023	Q3 2023
Oracle Cloud Applications Services – Provider Compendium 2023	Q3 2023
Oracle Cloud Applications – State of the Market 2023	Q3 2023
Pega Services PEAK Matrix® Assessment 2023	Q4 2023
Pega Services – Provider Compendium 2023	Q4 2023
Pega Services – State of the Market 2023	Q4 2023

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



Everest Group is a leading research firm helping business leaders make confident decisions. We guide clients through today's market challenges and strengthen their strategies by applying contextualized problem-solving to their unique situations. This drives maximized operational and financial performance and transformative experiences. Our deep expertise and tenacious research focused on technology, business processes, and engineering through the lenses of talent, sustainability, and sourcing delivers precise and action-oriented guidance. Find further details and in-depth content at www.everestgrp.com.

Stay connected

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

This document is for informational purposes only, and it is being provided "as is" and "as available" without any warranty of any kind, including any warranties of completeness, adequacy, or fitness for a particular purpose. Everest Group is not a legal or investment adviser; the contents of this document should not be construed as legal, tax, or investment advice. This document should not be used as a substitute for consultation with professional advisors, and Everest Group disclaims liability for any actions or decisions not to act that are taken as a result of any material in this publication.

Website
everestgrp.com

Social Media
 @EverestGroup
 @Everest Group
 @Everest Group
 @Everest Group

Blog
everestgrp.com/blog

NOTICE AND DISCLAIMERS

IMPORTANT INFORMATION. PLEASE REVIEW THIS NOTICE CAREFULLY AND IN ITS ENTIRETY. THROUGH YOUR ACCESS, YOU AGREE TO EVEREST GROUP'S TERMS OF USE.

Everest Group's Terms of Use, available at www.everestgrp.com/terms-of-use/, is hereby incorporated by reference as if fully reproduced herein. Parts of these terms are pasted below for convenience; please refer to the link above for the full version of the Terms of Use.

Everest Group is not registered as an investment adviser or research analyst with the U.S. Securities and Exchange Commission, the Financial Industry Regulatory Authority (FINRA), or any state or foreign securities regulatory authority. For the avoidance of doubt, Everest Group is not providing any advice concerning securities as defined by the law or any regulatory entity or an analysis of equity securities as defined by the law or any regulatory entity.

All Everest Group Products and/or Services are for informational purposes only and are provided "as is" without any warranty of any kind. You understand and expressly agree that you assume the entire risk as to your use and any reliance upon any Product or Service. Everest Group is not a legal, tax, financial, or investment advisor, and nothing provided by Everest Group is legal, tax, financial, or investment advice. Nothing Everest Group provides is an offer to sell or a solicitation of an offer to purchase any securities or instruments from any entity. Nothing from Everest Group may be used or relied upon in evaluating the merits of any investment. Do not base any investment decisions, in whole or part, on anything provided by Everest Group.

Products and/or Services represent research opinions or viewpoints, not representations or statements of fact. Accessing, using, or receiving a grant of access to an Everest Group Product and/or Service does not constitute any recommendation by Everest Group that recipient (1) take any action or refrain from taking any action or (2) enter into a particular transaction. Nothing from Everest Group will be relied upon or interpreted as a promise or representation as to past, present, or future performance of a business or a market. The information contained in any Everest Group Product and/or Service is as of the date prepared, and Everest Group has no duty or obligation to update or revise the information or documentation. Everest Group may have obtained information that appears in its Products and/or Services from the parties mentioned therein, public sources, or third-party sources, including information related to financials, estimates, and/or forecasts. Everest Group has not audited such information and assumes no responsibility for independently verifying such information as Everest Group has relied on such information being complete and accurate in all respects. Note, companies mentioned in Products and/or Services may be customers of Everest Group or have interacted with Everest Group in some other way, including, without limitation, participating in Everest Group research activities.