



SAP Business Application Services for Mid-market Enterprises PEAK Matrix® Assessment 2024

April 2024: Complimentary Abstract / Table of Contents

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- ▶ Payer and Provider Information Technology
- ▶ Price Genius – AMS Solution and Pricing Tool
- ▶ Pricing Analytics as a Service
- ▶ Process Intelligence
- ▶ Process Orchestration
- ▶ Procurement and Supply Chain
- ▶ Recruitment
- ▶ Retail and CPG IT Services
- ▶ Retirement Technologies
- ▶ Revenue Cycle Management
- ▶ Rewards and Recognition
- ▶ SAP Services
- ▶ Service Optimization Technologies
- ▶ Software Product Engineering Services
- ▶ Supply Chain Management (SCM) Services
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Introduction

SAP's mid-market services market have already made a significant impact, contributing an impressive US\$ 10+ billion with a double-digit year-over-year growth rate. Since the launch of SAP BTP, RISE with SAP, and GROW with SAP offerings, momentum is growing for Small and Medium-sized Businesses (SMBs) to adopt the SAP suite.

SAP mid-market customers have distinct priorities compared to large clients. Unlike their large counterparts having resources to build complex solutions with extensive customization, majority of the SMBs seek packaged solutions including pre-configured industry solutions to transform their processes and experiences. They are cost efficient and spend staggered on multiple short sprint of engagements.

With distinct enterprise demands and an evolving SAP offerings, service providers are investing in talent indicatives and building differentiated IP assets to help enterprises in their SAP journey.

This research includes an assessment of 15 service providers featured on the SAP Services for Mid-market PEAK Matrix® Assessment 2024. The assessment is based on Everest Group's annual RFI process for the calendar year 2023, interactions with leading providers, client reference checks, and ongoing analysis of the SAP services market.

This report includes the profiles of the following 15 leading SAP business application services providers featured on the SAP Business Application Services for Mid-market Enterprises PEAK Matrix:

- **Leaders:** Genpact, Hitachi Digital Services, Kaar Technologies, and Reply
- **Major Contenders:** Birlasoft, FPT Software, Mphasis, Softtek, Techwave Consulting, , Tietoevry, Tenthpin Management Consultants, and Zensar
- **Aspirants:** Kellton, Quinnox, and Stefanini

Scope of this report

Geography: Global

Providers: Market activity and investments of 15 leading service providers

Services: SAP business application services

Overview and abbreviated summary of key messages

This report examines the global 2024 SAP business application services provider landscape and its impact on the SAP business application 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 business application services 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 services provider capability

- SAP business application services providers can be classified into Leaders, Major Contenders, and Aspirants on a capability-market-share matrix
- Genpact, Hitachi Digital Services, Kaar Technologies, and Reply are the Leaders in this SAP Business Application Services PEAK Matrix assessment with several IT service providers emerging as Major Contenders

Service Provider characteristics

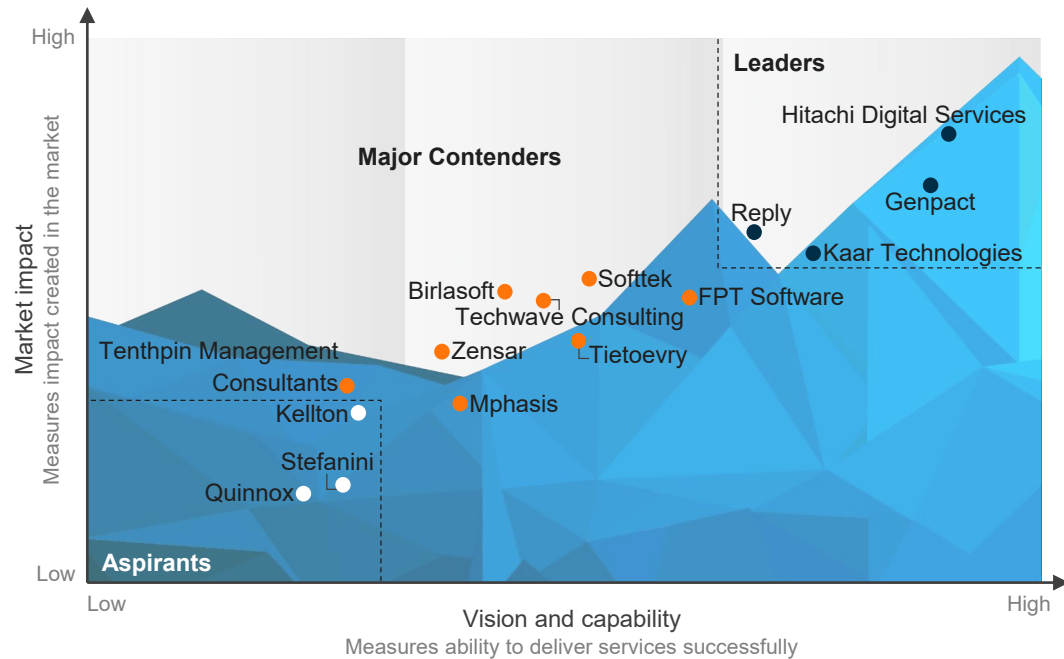
- Leaders have credible proof points of transformational engagements in various industries globally. These engagements are backed by a strong delivery network and a large pool of resources
- Leaders are characterized by their strong advisory capabilities; they have proof points of end-to-end transformation along with change management support
- Major Contenders are distinguished by their focus on pure-play implementation and managed-services engagements. They have capabilities and proof points to support both greenfield and brownfield engagements
- Aspirants offer pricing discounts, exhibit strong account and talent management throughout the engagement

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

Everest Group PEAK Matrix® Assessment 2024

Everest Group SAP Business Application Services for Mid-market Enterprises PEAK Matrix® Assessment 2024¹

● Leaders ● Major Contenders ○ Aspirants



¹ Assessments for Birlasoft and Teitoevry excludes service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group's interactions with buyers
² Analysis for FPT Software and Quinnox is based on partial inputs provided
 Source: Everest Group (2024)

Capability assessment

Illustrative example

Measure of capability: ○ Low ● High

Providers	Market impact				Vision and 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	○	○	●	○	●	○	○	●	○

Everest Group's remarks on providers

Illustrative example

Measure of capability: ○ Low ● High

Market impact				Vision and capability				
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
○	●	●	●	●	○	○	○	●

Strengths

- Provider 1, has a higher client presence in the Middle Eastern region that instills confidence among SMBs in the region that are seeking SAP implementation and managed services
- Enterprises looking for capabilities in the energy and utilities sector will find it to be a relevant service provider

Limitations

- Some clients have opined that Provider 1 needs to improve its quality of resources, and consulting capabilities
- Enterprises seeking capabilities in manufacturing, retail and CPG industries will have to assess its capabilities in depth before partnering

Research calendar

Enterprise Platform Services

	Published	Current release	Planned
Reports title	Release date		
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
Enterprise Platform Services: Voice of the Customer 2023			August 2023
Salesforce Services – Unpacking Salesforce Industry Cloud Growth Momentum			September 2023
Oracle Cloud Applications Services – Provider Compendium 2023			October 2024
Pega Services PEAK Matrix® Assessment 2023			February 2024
SAP Business Application Services for Mid-market Enterprises PEAK Matrix® Assessment 2024			April 2024
Pega Services – Provider Compendium 2024			Q2 2024
Salesforce Services PEAK Matrix® Assessment 2024			Q2 2024
Salesforce Services – Provider Compendium 2024			Q2 2024
SAP Business Application Services – Global PEAK Matrix® Assessment 2024			Q2 2024
Microsoft Dynamics 365 Services PEAK Matrix® Assessment 2024			Q3 2024
Microsoft Dynamics 365 Services – Provider Compendium 2024			Q3 2024
Salesforce Services – State of the Market 2024			Q4 2024

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