IDC MarketScape

IDC MarketScape: Worldwide SAP Implementation Services 2020 Vendor Assessment

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THIS IDC MARKETSCAPE EXCERPT FEATURES ACCENTURE

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide SAP Implementation Services Vendor Assessment

Source: IDC, 2020

Please see the Appendix for detailed methodology, market definition, and scoring criteria.
IN THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: U.S. Systems Integrators Serving the Federal Government 2016 Vendor Assessment (Doc # US44339219). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Essential Guidance, Vendor Summary Profile, Appendix and Learn More. Also included is Figure 1.

IDC OPINION

This IDC study represents a vendor assessment of the 2020 SAP implementation services market through the IDC MarketScape model. This research is a quantitative and qualitative assessment of the characteristics that explain a vendor's success in the marketplace and help anticipate its ascendance. This IDC MarketScape covers a variety of vendors participating in the worldwide SAP implementation services market. This evaluation is based on a comprehensive framework and set of parameters expected to be most conducive to success in providing SAP implementation services in both the short term and the long term. A component of this evaluation is the inclusion of the perception of SAP implementation services buyers of both the key characteristics and the capabilities of these providers. Buyers were surveyed across all three of IDC's macroregions. Key findings from the evaluation include the following:

- On average, customers rated three strategic areas most highly: "portfolio strategy," "financial/funding model strategy," and "client adoption strategy." Likewise, the three areas of key capabilities highly rated on average by customers are "employee management," "customer service delivery," and "delivery model appropriateness and execution."
- Based on IDC's Global SAP Implementation Services Buyer Perception Survey feedback from 102 of the evaluated vendors' customers, the most critical business priority for them was to "reduce cost/improve profitability and/or cashflow," while the most critical vendor attribute for successful SAP implementation services was being "able to achieve desired business outcomes."
- Enterprises are increasingly focusing on business process enhancement/realignment when adopting SAP solutions. IDC's Global SAP Implementation Services Buyer Perception Survey suggests that in over 55% of the SAP implementation projects, customers are undergoing some sort of business process change with the goal to improve their existing processes/create new. At the same time, enterprises seem to focus on tighter integration between their SAP investments with non-SAP assets. In the same survey, buyers indicated that about 46% of SAP implementation services projects involve integration with non-SAP platforms/solutions.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

This research includes an analysis of the 15 SAP applications systems integrators (SIs) with broad portfolios spanning IDC's research coverage and with global scale. This assessment is designed to evaluate the characteristics of each firm — as opposed to its size or the breadth of its services. The inclusion criteria also dictates at least $400 million in revenue coming from a vendor's SAP implementation services practice at a worldwide level as well as a minimum of 4,250 SAP implementation-associated global resources, and at least 10% of the vendor's worldwide SAP revenue and head count should come from each of IDC's macroregions.
ADVICE FOR TECHNOLOGY BUYERS

▪ **Strategic relationships with partners.** Consider a strategic relationship with your SAP implementation services provider. Utilize your partners to help develop use cases that will drive the transformation of your business application portfolio using SAP technology. Look for partners that are willing to build a strategic relationship with you that includes codeveloping use cases, helping achieve up-front stakeholders' alignment, and post-implementation knowledge sharing and training assistance in addition to implementing the right SAP-based solutions for your needs.

▪ **Business process enhancement.** Consider updates to existing business processes while you are undergoing investment in SAP solutions. Investing in enterprisewide technology is essential for your business, and if implemented on subpar processes, it will result in half-baked benefits from your SAP investments. IDC research indicates that customers adopting SAP solutions are increasingly revisiting their existing business processes that the new technology will support. This includes either enhancing/rehauling existing or creating new processes to better support and prepare businesses for the future.

▪ **Vendor selection.** Use this IDC MarketScape in contract negotiations and as a tool to not only short-list vendors for SAP implementation services bids but also evaluate vendors’ proposals and oral presentations. Make sure you understand where these players are truly differentiated and take advantage of their expertise – technical, industry based, or otherwise.

VENDOR SUMMARY PROFILE

This section briefly explains IDC’s key observations resulting in a vendor’s position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of the vendor’s strengths and challenges.

**Accenture**

According to IDC analysis and buyer perception, Accenture is positioned in the Leaders category in the 2020 IDC MarketScape for SAP implementation services worldwide.

Accenture is one of largest and highly experienced systems integrators in the SAP implementation services globally. Accenture delivers consulting-led and industry-driven services in almost all industries to help clients transform their businesses and unlock more value from innovation and new SAP solutions and technologies. Its SAP Business Group combines Accenture services (Strategy & Consulting, Technology, Interactive, and Operations) and partnerships with hyperscalers (Microsoft, Amazon, and Google) with industry, business process, and SAP expertise to help clients envision, shape, build, and run their intelligent enterprise. Accenture has a longstanding partnership with SAP, including the codevelopment of industry-specific and business process solutions on SAP S/4HANA, SAP C/4HANA, and SAP Cloud Platform. Accenture accelerates transformation – from ideation and business case to digital delivery and continuous improvement – using intelligent, data-driven platforms (myConcerto for enterprise transformation, myWizard for enterprise automation, and myNav for cloud) with preconfigured solutions and intelligent assets.
**Strengths**

Buyers rate Accenture highly for its ability to optimize the ratio of onshore-offshore efforts on a project and for its ability to work with ecosystem partners including SAP on a project. Similarly, IDC views Accenture highly in terms of its growth strategy related to IP monetization and its marketing strategy.

**Challenges**

IDC believes that Accenture’s financial/funding model strategy could be improved by increased use of crowdsourcing to augment internal resources. Also, Accenture would benefit from making its SAP practice more prominent on the corporate website.

**APPENDIX**

**Reading an IDC MarketScape Graph**

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor’s current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor’s future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

**IDC MarketScape Methodology**

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor’s characteristics, behavior, and capability.

**Market Definition**

The SAP implementation services market covers the design, build, and integrate functions of the design-build-run function chain (see Figure 2). The design phase includes both IT and business consulting. For a detailed definition of the services markets illustrated in Figure 2, see *IDC’s Worldwide Services Taxonomy, 2019* (IDC #US44916019, March 2019).
Customer Perceptions of SAP Implementation Services Vendors

A significant and unique component of this evaluation is the inclusion of the perceptions of SAP implementation services' buyers of both the key characteristics and the capabilities of the vendors evaluated. The buyers participating in IDC's Global SAP Implementation Services Buyer Perception Survey have partnered with at least one of the participating vendors directly on an SAP implementation project within their company. The survey findings highlight key areas where buyers expect SAP implementation services providers to showcase a range of capabilities. The buyers consider these capabilities a must-have for SAP implementation services to be able to fulfill the requirements of many business and IT issues that challenge the buyers.
Related Research


Synopsis

This IDC study represents a vendor assessment of the SAP implementation services through the IDC MarketScape model. This assessment discusses both quantitative and qualitative characteristics that explain success in the SAP implementation integration services market. This IDC MarketScape covers a variety of vendors participating in the SAP implementation services space. The evaluation is based on a comprehensive and rigorous framework that assesses vendors relative to the criteria and to one another and highlights the factors expected to be the most influential for success in the market in both the short term and the long term.

"Customer focus on digital transformation and the need for faster and more agile innovation for better operational efficiency, enterprise experience, and profitability is driving faster adoption of SAP digital core, intelligent technologies, and related implementation services in the near future," says Ali Zaidi, research director, IT Consulting and Systems Integration Business Strategies at IDC.
About IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications and consumer technology markets. IDC helps IT professionals, business executives, and the investment community make fact-based decisions on technology purchases and business strategy. More than 1,100 IDC analysts provide global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries worldwide. For 50 years, IDC has provided strategic insights to help our clients achieve their key business objectives. IDC is a subsidiary of IDG, the world's leading technology media, research, and events company.

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