**IDC MarketScape**

**IDC MarketScape: Worldwide SAP Next-Generation Implementation Services 2020 Vendor Assessment**

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**THIS IDC MARKETSCAPE EXCERPT FEATURES ACCENTURE**

**IDC MARKETSCAPE FIGURE**

**FIGURE 1**

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**IDC MarketScape Worldwide SAP Next-Generation 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: Worldwide SAP Next-Generation Implementation Services 2020 Vendor Assessment (Doc # US46141520). 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 for SAP next-generation products and solutions 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 ascendancy. This IDC MarketScape covers a variety of vendors participating in the worldwide SAP next-generation 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 next-generation implementation services in both the short term and the long term. Note that IDC has undertaken a comprehensive effort to assess the SAP implementation services market. This IDC MarketScape evaluates participating firms for implementation services related to SAP next-generation products. The first document in this IDC MarketScape series focused on implementation services related to the entire SAP product portfolio. 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:

- S/4HANA adoption is on the rise, and all vendors have dedicated offerings and joint go-to-market strategies with SAP in place to help enterprises transition to S/4HANA. The adoption is up across most S/4HANA modules, with finance leading the way along with procurement.
- 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 cash flow," while the most critical vendor attribute for successful SAP implementation services was being "able to achieve desired business outcomes."
- Vendors are extending their SAP-related technology and business capabilities by combining broader capability across new technologies such as IoT, blockchain, AR/VR, and cloud solutions from other platforms including the hyperscalers to create solutions for their customers. This approach is mostly driven by customer demand for a more comprehensive solution that requires combining SAP with other technologies.

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 $160 million in revenue coming from a vendor's SAP next-generation implementation services practice at a worldwide level as well as a minimum of 2,000 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.

- **Customization of cloud.** Analyze each SAP cloud software release update and decide which innovations are worth implementing and when. Pay attention/keep a tab on the timeline of new functionality coming from SAP on future releases. This will guide you with respect to whether it makes sense to add functionality through customization of your cloud environment or to wait for the next release cycle to make use of the built-in functionality you are looking for. This approach will save time, effort, and money spent on any unnecessary customization.

- **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 each 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 next-generation implementation services worldwide.

Accenture is one of the largest and highly experienced systems integrators in the SAP implementation services ecosystem 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 long-standing partnership with SAP, including the co-development 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 meet the project timeline and handling changes in project scope and for integrating its project team with customers' internal teams. Similarly, IDC values Accenture's innovation/R&D strategy and the company's next-generation tools/IP 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**

SAP next-generation implementation services are a subsegment of SAP implementation services and include implementation services around SAP products/solutions that help enterprises digitally transform their businesses. The list includes products such as S/4HANA, C/4HANA, Cloud platform, Ariba, SuccessFactors, Concur, Hybris, Digital Supply Chain, SAP BusinessObjects Business Intelligence Suite, IoT, blockchain, and AI. Implementation services around SAP on-premises ERP solutions are not included under this IDC MarketScape for next-generation implementation services.
The SAP next-generation 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).

**FIGURE 2**

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**IDC’s Design-Build-Run Function Chain**

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**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 next-generation implementation services through the IDC MarketScape model. This assessment discusses both quantitative and qualitative characteristics that explain success in the SAP next-generation implementation services market. This IDC MarketScape covers a variety of vendors participating in the SAP next-generation 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.

"Services providers that can bring capabilities to integrate a variety of digital platforms/solutions with SAP next-generation products such as SAP digital core and intelligent technologies will succeed in the SAP next-generation implementation services market in the near future," says Ali Zaidi, research director, IT Consulting and Systems Integration Business Strategies at IDC.
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