Everest Group®

Everest Group SAP Business Application Services PEAK Matrix® Assessment 2025

Focus on **NTT DATA**

February 2025

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MATRIX®

Introduction

Over the past few years, the SAP services market has undergone a strategic transformation, evolving from traditional enterprise software to a key driver of digital transformation. The focus has now shifted to cloud adoption, AI integration, and sustainability, with initiatives such as RISE with SAP and GROW with SAP playing a critical role.

With nearly 60-70% of enterprises yet to migrate to S/4HANA, the upcoming migration wave will significantly reshape the market. Scalable migration approaches, such as brownfield and hybrid strategies, will be essential to balance business continuity with techno-business transformation.

With the rising demand for customized solutions, service providers are investing in industry-specific accelerators to reduce migration complexity and fasten the deployment process. To help enterprises move to S/4HANA, service providers are scaling up their S/4HANA expertise and enhancing partnerships with hyperscalers to boost their partner ecosystem. This ecosystem-driven approach will not only support smoother migrations but also help enterprises achieve tangible business outcomes at a lower Total Cost of Ownership (TCO).

As SAP's innovations converge with the urgency of S/4HANA migrations, the next few years will redefine the enterprise ERP landscape. For enterprises, strategic alignment is imperative to capitalize on these opportunities, ensuring successful migrations that accelerate digital transformation and deliver lasting, sustainable value.

The research includes an assessment of 30 service providers featured on the SAP Business Application Services PEAK Matrix® Assessment 2025. The assessment is based on Everest Group's annual RFI process for the calendar year 2024, interactions with leading providers, client reference checks, and ongoing analysis of the SAP services market.

The full report includes the profiles of the following 30 leading SAP Business Application services providers featured on the SAP Business Application Services PEAK Matrix:

- **Leaders:** Accenture, Capgemini, Deloitte, EY, HCLTech, IBM, Infosys, NTT DATA, and Wipro

- **Major Contenders:** All for One, Birlasoft, Bristlecone, Cognizant, DXC Technology, Eviden, Genpact, Hitachi Digital Services, Kyndryl, LTIMindtree, PwC, SD Worx, TCS, Tech Mahindra, T-Systems, and UST

- **Aspirants:** Kaar Technologies, Mphasis, Resolve Tech Solutions, TSP – The Silicon Partners, and Zensar

Scope of this report

Geography: global

Industry: market activity and investments of 30 leading SAP service providers

Services: SAP Business Application Services

SAP Business Application services PEAK Matrix® characteristics

Leaders

Accenture, Capgemini, Deloitte, EY, IBM, Infosys, HCLTech, NTT DATA, and Wipro

- Leaders are characterized by their ability to successfully execute large-scale, complex, and end-to-end SAP Business Application Services, underpinned by their strong global delivery network and robust partner ecosystem

- These providers have strong SAP partnerships and recognitions such as Platinum Partner, RISE with SAP Validated Partner and GROW with SAP Partner, alongside multiple SAP awards. They demonstrate expertise in at least seven competencies, maintain a high certification ratio, and leverage SAP-specific acquisitions to further enhance their offerings and market presence. They also excel in delivering global client engagements with a good spread of onshore and offshore support

- Leaders have helped enterprises with their advisory capabilities to navigate the business transformation and have leveraged a mature suite of in-house and SAP-certified industry solutions to accelerate time-to-market for their clients

Major Contenders

All for One, Birlasoft, Bristlecone, Cognizant, DXC Technology, Eviden, Genpact, Hitachi Digital Services, Kyndryl, LTIMindtree, PwC, SD Worx, TCS, Tech Mahindra, T-Systems, and UST

- These providers have built meaningful capabilities to deliver SAP Business Application Services – advisory, implementation, and managed services; however, their service portfolios are not as balanced and comprehensive as those of Leaders (in terms of coverage across SAP product areas, geographies, or verticals)

- These providers have good partnerships with SAP and often specialize in select verticals in delivering SAP-specific services. They have often been recognized by SAP with multiple partner awards showcasing their credibility in the SAP services market

- Major Contenders are also making continued investments in building proprietary tools and solutions, as well as in scaling their talent for delivering SAP services

Aspirants

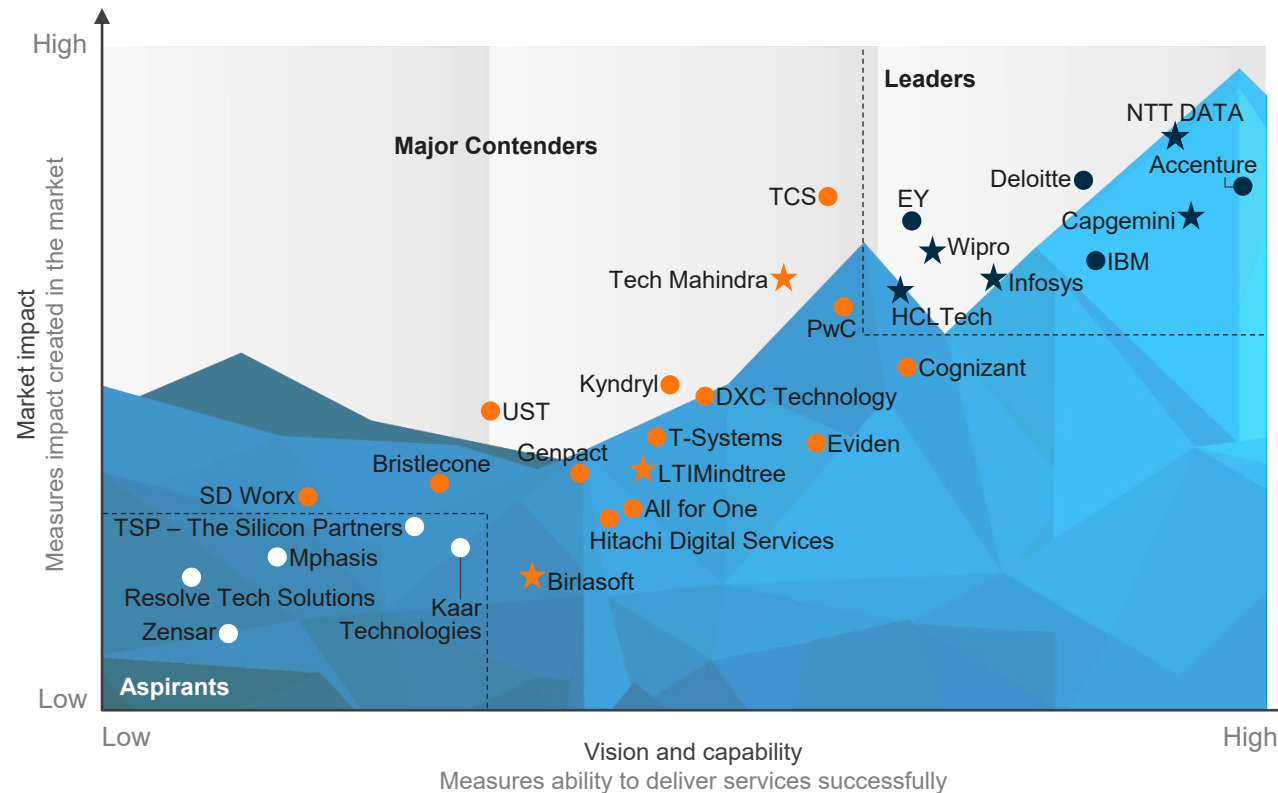Kaar Technologies, Mphasis, Resolve Tech Solutions, TSP – The Silicon Partners, and Zensar

- Aspirants have good proof points in enabling low to medium-complex implementation and maintenance for SAP Business Application Services primarily for Small and Midsize Buyers (SMBs)

- They are either focused on a region(s) or vertical(s) or currently have a relatively small SAP practice

- Clients acknowledge their pricing and commercial flexibility as well as their engagement flexibilities

- Despite their relatively smaller size, they aim to grow faster by scaling their talent base, investing in IP and solutions, and expanding into new markets

Everest Group PEAK Matrix®

SAP Business Application Services PEAK Matrix® Assessment 2025 | NTT DATA is positioned as a Leader and a Star Performer

Everest Group SAP Business Application Services PEAK Matrix® Assessment 2025[1,2]

- ● Leaders
- ● Major Contenders
- ○ Aspirants
- ☆ Star Performers

Market impact
Measures impact created in the market

High

Major Contenders

Leaders

NTT DATA ☆
Accenture ☆
Deloitte ●
Capgemini ☆
TCS ●
EY ●
Wipro ☆
IBM ●
Tech Mahindra ☆
Infosys ☆
HCLTech ☆
PwC ●
Cognizant ●
Kyndryl ●
DXC Technology ●
UST ●
T-Systems ●
Genpact ● Eviden ●
Bristlecone ● LTIMindtree ☆
SD Worx ● All for One ●
Hitachi Digital Services
TSP – The Silicon Partners ○
Mphasis ○
Resolve Tech Solutions ○ Birlasoft ☆
Zensar ○ Kaar Technologies ○

Aspirants

Low

Low — Vision and capability — High
Measures ability to deliver services successfully

1 Assessment for Accenture, All for One, Deloitte, EY, LTIMindtree, PwC, and T-Systems exclude service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group's interactions with buyer
2 Analysis for Capgemini, Eviden, and IBM is based on partial inputs provided
Source: Everest Group (2025)

NTT DATA profile (page 1 of 6)
Overview

Vision for SAP Business Application Services

NTT DATA aims to collaborate with its clients to develop business results by realizing RoI from their SAP investment, develop AI innovation, and create strategies for long-term corporate growth. This strategy enables clients to gain a business advantage. It focuses on leveraging partnerships with SAP to utilize abilities and knowledge to provide solutions that help firms generate more value.

Current partnership status with SAP:	Platinum
Number of projects completed: (From January 01, 2023 till March 31, 2024)	4,700+
Number of SAP business applications-certified FTEs: (till March 31, 2024)	5,490

Proportion of SAP Business Application Services revenue

By geography   ● Low (<10%)   ● Medium (10-25%)   ● High (>25%)

- ● North America
- ● Europe
- ● United Kingdom
- ● South America
- ● Middle East and Africa
- ● Rest of the World

Proportion of SAP Business Application Services revenue

By business function   ● Low (<15%)   ● Medium (15-30%)   ● High (>30%)

- ● Consulting
- ● Implementation
- ● Maintenance and support

By industry   ● Low (<10%)   ● Medium (10-25%)   ● High (>25%)

- ● Banking and financial services
- ● Electronics, hi-tech, and technology
- ● Telecom, media, and entertainment
- ● Retail, distribution, and CPG
- ● Healthcare and life sciences
- ● Travel and transport
- ● Energy and utilities
- ● Manufacturing
- ● Public sector
- ● Others

By buyer size   ● Low (<10%)   ● Medium (10-25%)   ● High (>25%)

- ● Small (annual client revenue <US$1 billion)
- ● Medium (annual client revenue US$1-5 billion)
- ● Large (annual client revenue US$5-10 billion)
- ● Very large (annual client revenue US$10-20 billion)
- ● Mega (annual client revenue >US$20 billion)

By key products   ● Low (<10%)   ● Medium (10-25%)   ● High (>25%)

- ● SAP S/4HANA
- ● SAP Ariba
- ● SAP SuccessFactors
- ● SAP Analytics Cloud
- ● SAP Industry Solutions
- ● Other applications[1]

1 Others include SAP Concur, SAP BTP, RISE with SAP, GROW with SAP, SAP ECC, and SAP Fieldglass

NTT DATA profile (page 2 of 6)
Key solutions

Proprietary solutions

Solution name	Industry in focus	Industry in focus	No. of engagements leveraged in	Details
S/4 Conversion R2R	Horizontal – across all industries	All	200	It is a SAP-certified, pre-packaged solution for migrating a client's existing ERP system to SAP S/4HANA. It enables faster implementation and better time-to-value.
Intelligent Business Suite	Automotive, manufacturing, life sciences, and CPG	All	140	The solution helps NTT DATA develop an approach to accelerate large enterprises' SAP to S/4HANA journeys, reducing implementation costs and risk, and expediting time-to-value.
GLASSWING	Horizontal – across all industries	All	150+	It improves data quality and governance through streamlined and automated data management. It maintains, consolidates, and harmonizes all master data into a centralized, integrated solution. The solution complements and manages client master data and establishes a governance structure. This helps enterprises in limiting manual errors, inconsistencies, and costs.
Uptimizer	Horizontal – across all industries	All	120+	It accelerates the discovery and realization of upgrade initiatives, decreasing analysis and remediation efforts by 30-40%.
Natuvion – data conversion server	Horizontal – across all industries	All	200+	It is an Extract, Transform, and Load (ETL) platform. The Natuvion DCS reads, analyzes, extracts, and transforms data from multiple sources such as systems, databases, files, and online services and publishes it to several destinations.

NTT DATA profile (page 3 of 6)

Key solutions

SAP-certified solutions on SAP marketplace

Solution name	Industry in focus	Industry in focus	No. of engagements leveraged in	Details
It.lifescience	Life sciences / Pharma	All	130	It is a SAP S/4HANA pre-packaged solution that includes business and technical material, as well as solution templates designed for the life sciences industry.
It.manufacturing	Manufacturing	All	110	It is a SAP S/4HANA pre-packaged solution with business and technical content, as well as solution templates designed for the manufacturing industry.
It.cp – durables and food and beverages	CPG	All	180	It is a SAP S/4HANA pre-packaged solution with business and technical content, as well as solution templates created for the consumer products and food industries.
It.conversion R2R	Horizontal – across all industries	All	200	The solution includes an approach for the manufacturing industry, with in-house IP tools to drive the successful transition to SAP S/4HANA.
GUEPARDO	Horizontal – across all industries	All	300	IIt enables businesses to streamline their financial operations through technology scalability, with the goal of increasing revenue and profit margins. It supports tax reporting, the integration of incoming and outgoing electronic bills, banking and payment automation, audits, analytics, and a variety of additional options.

NTT DATA profile (page 4 of 6)

Key investments and partnerships

Key investments

Investment theme	Focused SAP module(s)	Details
Acquisition	SaaS products and SAP S/4HANA-based solutions	It acquired ProvenTech, a specialist in generative AI-driven quality management and manufacturing solutions, to enhance its digital innovation capabilities in the pharma/life sciences industries. The acquisition adds 350 skilled professionals to NTT DATA's pool of resources and enhances its SAP offerings. This investment strengthens its capabilities as an international specialist in the pharmaceutical industry.
Acquisition	All	It acquired Sapphire System to strengthen its capabilities in the mid-market space in the UK and the US, providing enhanced experience and solutions. Its existing partnerships with SAP, ServiceNow, Infor, SunSystems, HxGN, and AWS help in delivering enhanced value and transformative outcomes to its clients. Sapphire's expertise in development and consulting, especially in finance and logistics, complements its capabilities and helps NTT DATA assist its customers' end-to-end life cycle more effectively.
Large Enterprise Acceleration Program (LEAP)	All	It invested in LEAP, sponsored specific client engagements, and created accelerators using its global market focus team framework.
SAP academy	All	It invested to improve the cross-skilling and upskilling of NTT DATA's SAP S/4HANA and LoB personnel. It offered training services of SAP S/4HANA and LoBs to its clients and internal staff.

Key partnerships

Partner ecosystem		
Signavio	IBM	ServiceNow
AWS	Microsoft Azure	Google

NTT DATA profile (page 5 of 6)

Case studies

CASE STUDY 1

Transformed global operations with SAP S/4HANA deployment, standardized processes, and enhanced data accuracy

Business challenge
The client needed a transformation initiative for deploying SAP S/4HANA globally to create a unified digital structure, standardize processes across the enterprise, and create a central structure for data. This project aimed to address approximately 1,000 Level 4 processes, for 100 countries, 200 legal entities, and 100,000 end users in its final phase.

Solution
NTT DATA created a hybrid global delivery approach for simplified transfer of data from the current supplier. The product team took control of the global data template, improving functionality and broadening solution coverage. The global deployment team used an offshore manufacturing model to provide coverage, transformation, and loading services. The engagement led to the development of solutions for supporting future growth and transformation initiatives.

Impact
- Migrated to SAP S/4HANA at 30+ client sites
- Streamlined and standardized global processes
- Initiated deployment across three regions and more than 20 nations
- Enhanced data accuracy and reliability across the enterprise

CASE STUDY 2

Modernized SAP ECC to S/4HANA across 11 locations, enhanced efficiency, and expansion

Business challenge
The client's finance and wholesale supply chain were managed by a modified SAP ECC system that was over a decade old, creating operational challenges. It needed a modernized SAP platform to support its planned staffing increase and continued growth.

Solution
NTT DATA upgraded the outdated SAP ECC system to SAP S/4HANA 2022. The implementation was executed across 11 country branches without disrupting the ongoing business operations. This transition leveraged S/4HANA's advanced UI and reporting capabilities, enhancing operational efficiency and supporting future expansion. The upgraded functionalities supported data-driven operations and business expansion.

Impact
- Completed modernization across 11 locations without affecting business operations
- Increased user efficiency with S/4HANA's UI and reporting experiences

NTT DATA profile (page 6 of 6)

Everest Group assessment – Leader and Star Performer

Measure of capability: ◔ Low ● High

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

Strengths

- NTT DATA has credible proof points in executing end-to-end transformations across key product areas such as SAP S/4HANA, SuccessFactors, Analytics Cloud, and Ariba

- Its ability to consistently be recognized with SAP awards reinforces its credibility as a strategic partner in the SAP services market

- Its technical expertise, domain knowledge, and pricing and commercial flexibility are well perceived in the market

- Clients, especially in the SMB segment, seeking a service provider who offers end-to-end services will benefit from its recent acquisition of mid-market specialist Sapphire, which boosts its digital operations in the UK and the US

Limitations

- As NTT DATA's portfolio is skewed toward the European and APAC regions, clients in North America should evaluate its delivery capabilities in this region in depth before partnering with it

- A few clients have highlighted that it can improve on its talent management capabilities and be more proactive in bringing innovation and deliver value added services
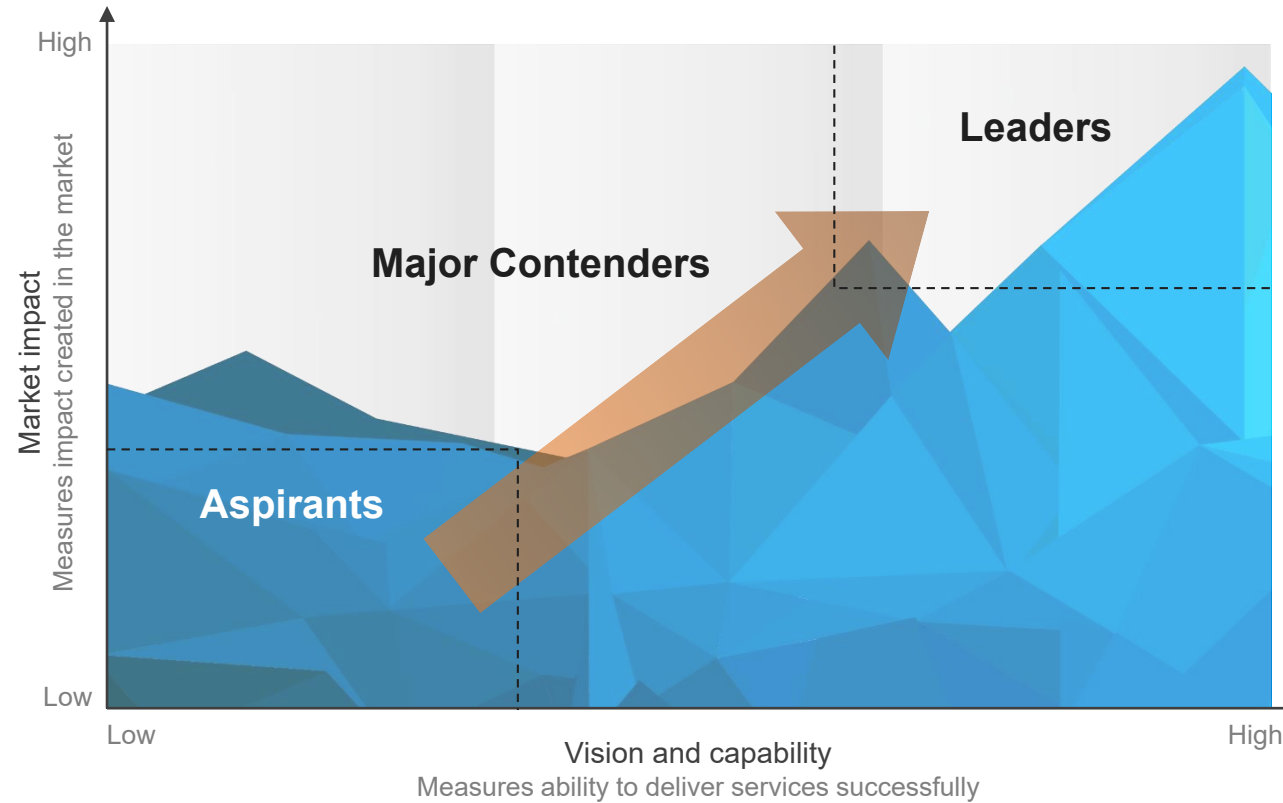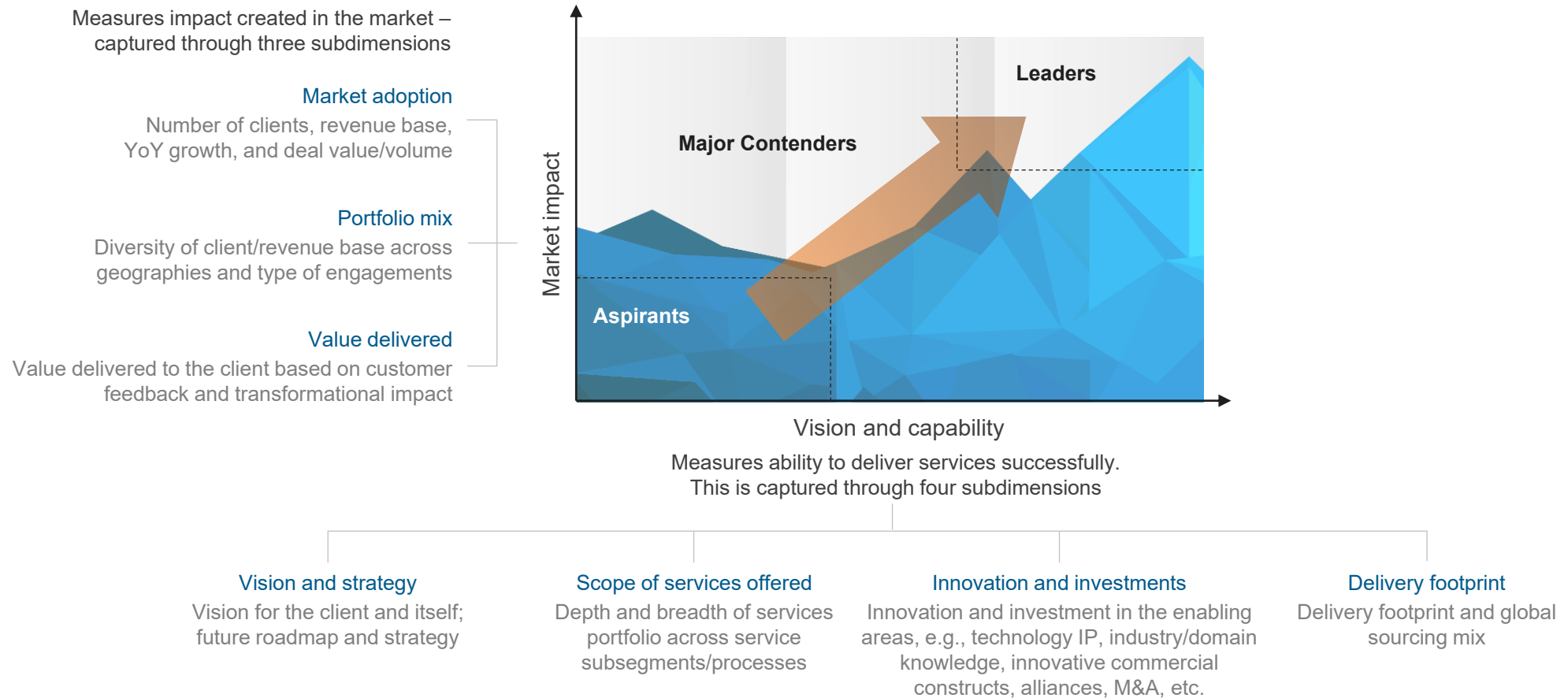
Appendix

PEAK Matrix® framework

FAQs

Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision and capability
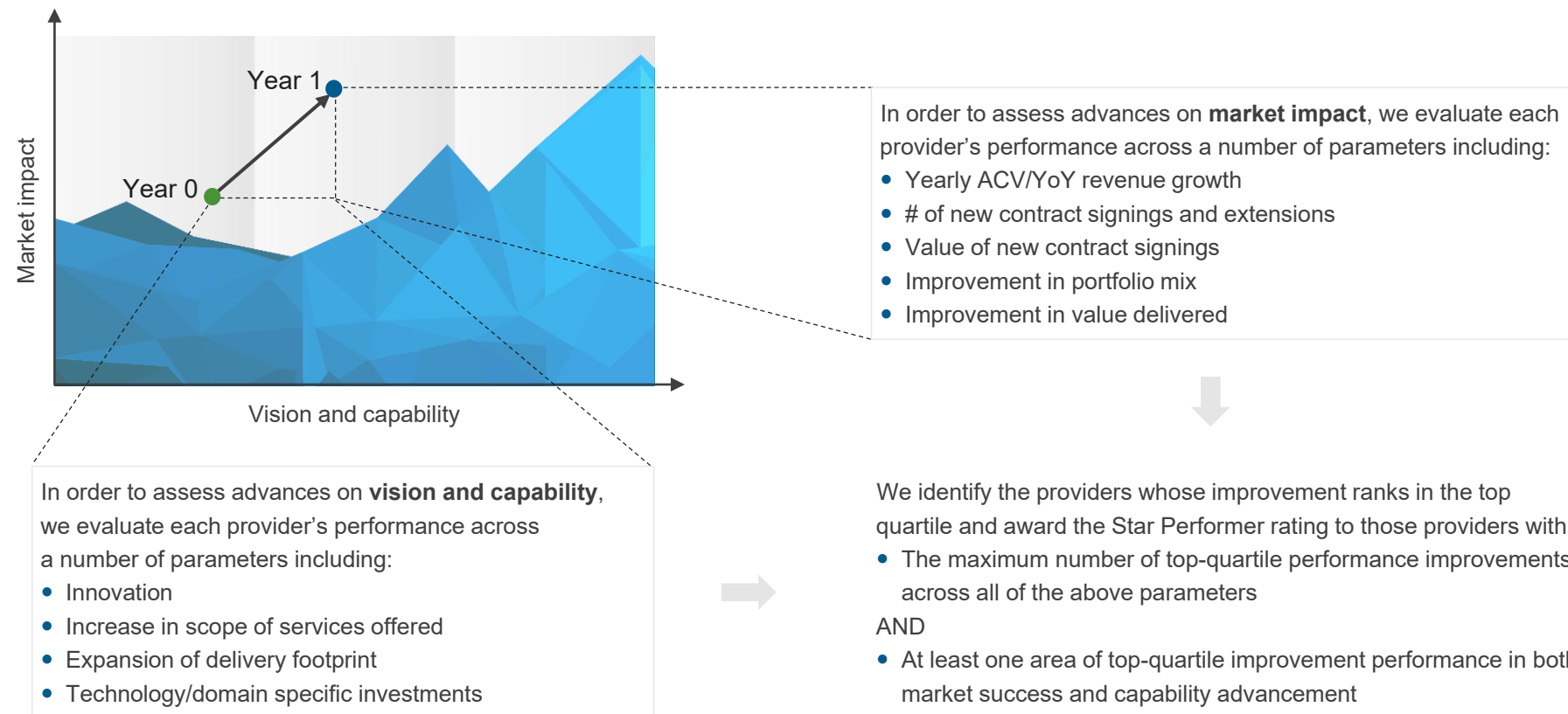
Everest Group PEAK Matrix

Services PEAK Matrix® evaluation dimensions

Measures impact created in the market – captured through three subdimensions

Market adoption
Number of clients, revenue base, YoY growth, and deal value/volume

Portfolio mix
Diversity of client/revenue base across geographies and type of engagements

Value delivered
Value delivered to the client based on customer feedback and transformational impact

Market impact (y-axis)

Vision and capability (x-axis)

Labels: Leaders, Major Contenders, Aspirants

Measures ability to deliver services successfully. This is captured through four subdimensions

Vision and strategy
Vision for the client and itself; future roadmap and strategy

Scope of services offered
Depth and breadth of services portfolio across service subsegments/processes

Innovation and investments
Innovation and investment in the enabling areas, e.g., technology IP, industry/domain knowledge, innovative commercial constructs, alliances, M&A, etc.

Delivery footprint
Delivery footprint and global sourcing mix

Everest Group confers the Star Performer title on providers that demonstrate the most improvement over time on the PEAK Matrix®

Methodology

Everest Group selects Star Performers based on the relative YoY improvement on the PEAK Matrix

In order to assess advances on **market impact**, we evaluate each provider's performance across a number of parameters including:

- Yearly ACV/YoY revenue growth
- # of new contract signings and extensions
- Value of new contract signings
- Improvement in portfolio mix
- Improvement in value delivered

In order to assess advances on **vision and capability**, we evaluate each provider's performance across a number of parameters including:

- Innovation
- Increase in scope of services offered
- Expansion of delivery footprint
- Technology/domain specific investments

We identify the providers whose improvement ranks in the top quartile and award the Star Performer rating to those providers with:

- The maximum number of top-quartile performance improvements across all of the above parameters

AND

- At least one area of top-quartile improvement performance in both market success and capability advancement

The Star Performer title relates to YoY performance for a given provider and does not reflect the overall market leadership position, which is identified as Leader, Major Contender, or Aspirant.

FAQs

Q: Does the PEAK Matrix® assessment incorporate any subjective criteria?

A: Everest Group's PEAK Matrix assessment takes an unbiased and fact-based approach that leverages provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information. In addition, we validate/fine-tune these results based on our market experience, buyer interaction, and provider/vendor briefings.

Q: Is being a Major Contender or Aspirant on the PEAK Matrix, an unfavorable outcome?

A: No. The PEAK Matrix highlights and positions only the best-in-class providers / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition.

Q: What other aspects of the PEAK Matrix assessment are relevant to buyers and providers other than the PEAK Matrix positioning?

A: A PEAK Matrix positioning is only one aspect of Everest Group's overall assessment. In addition to assigning a Leader, Major Contender, or Aspirant label, Everest Group highlights the distinctive capabilities and unique attributes of all the providers assessed on the PEAK Matrix. The detailed metric-level assessment and associated commentary are helpful for buyers in selecting providers/vendors for their specific requirements. They also help providers/vendors demonstrate their strengths in specific areas.

Q: What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?

A: Enterprise participants receive summary of key findings from the PEAK Matrix assessment

For providers

- The RFI process is a vital way to help us keep current on capabilities; it forms the basis for our database – without participation, it is difficult to effectively match capabilities to buyer inquiries

- In addition, it helps the provider/vendor organization gain brand visibility through being in included in our research reports

Q: What is the process for a provider / technology vendor to leverage its PEAK Matrix positioning?

A: Providers/vendors can use their PEAK Matrix positioning or Star Performer rating in multiple ways including:

- Issue a press release declaring positioning; see our citation policies

- Purchase a customized PEAK Matrix profile for circulation with clients, prospects, etc. The package includes the profile as well as quotes from Everest Group analysts, which can be used in PR

- Use PEAK Matrix badges for branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)

The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with Everest Group; please contact your CD or contact us

Q: Does the PEAK Matrix evaluation criteria change over a period of time?

A: PEAK Matrix assessments are designed to serve enterprises' current and future needs. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality and to serve enterprises' future expectations.

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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**.

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With you on the journey