IDC MarketScape

IDC MarketScape: Worldwide SAP Implementation Services 2025 Vendor Assessment
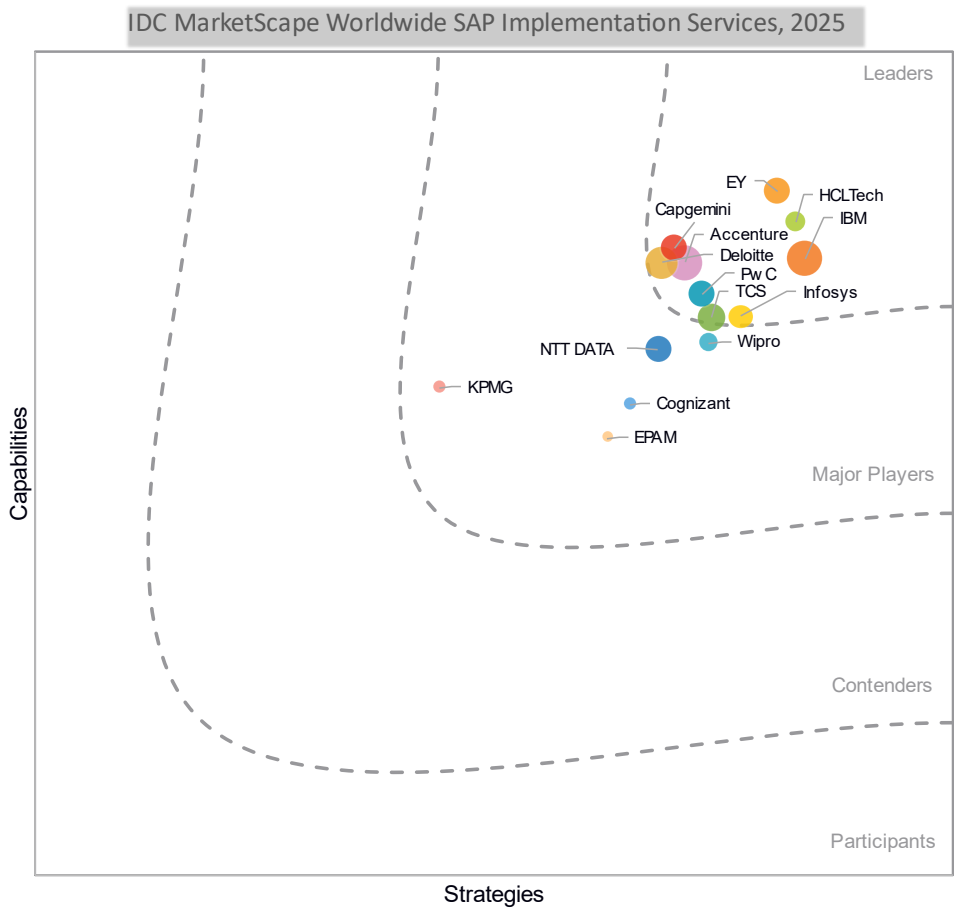
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THIS IDC MARKETSCAPE EXCERPT FEATURES HCLTECH AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide SAP Implementation Services Vendor Assessment

IDC MarketScape Worldwide SAP Implementation Services, 2025

Source: IDC, 2025

See the Appendix for detailed methodology, market definition, and scoring criteria.

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide SAP Implementation Services 2025 Vendor Assessment (Doc #US51272524).

IDC OPINION

This IDC study represents a vendor assessment of the SAP implementation services market through the IDC MarketScape model. This IDC MarketScape covers a variety of vendors competing in the worldwide SAP implementation services market. This evaluation is based on a comprehensive IDC 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:

- In general, the three areas of key capabilities highly rated by customers are "quality of client management/engagement process," "ability to provide technical insights and competency," and "integrate vendor project team with internal team."

- Based on IDC's 2024 *Global SAP Implementation Services Buyer Perception Survey* feedback from 52 of the evaluated vendors' customers, the most critical business priority for them was "increasing revenue," while the most critical vendor attribute for successful SAP implementation services was "ability to achieve desired business outcomes."

- Enterprises remain focused on integrating SAP with other platforms and enhancing/realigning business processes when adopting SAP solutions. IDC's 2024 *Global SAP Implementation Services Buyer Perception Survey* indicates that over 59% of the SAP implementation projects involve integrating SAP products with non-SAP platforms/solutions. At the same time, buyers indicated that in over 59% of SAP implementation services projects, enterprises are undergoing some sort of business process change while consuming SAP solutions.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

This research includes an analysis of the 14 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 dictate at least $450 million in revenue coming from a vendor's SAP implementation services practice at a worldwide level as well as a minimum of 4,500 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

- **Assess fully loaded IT costs for SAP.** The RISE with SAP offering still provides an attractive approach to drive digital transformation (DX) within your enterprise, but your digital transformation initiatives should be dictated by desired outcomes and not technology. Make sure you have the right business case established, desired outcomes lined up, and the impact on business processes and models defined while driving digital transformation agenda, enabled by the RISE with SAP offering. The business case should include fully loaded costs from an IT perspective including costs for resources to support DevOps, SecOps, DataOps, and so forth. This advice is not specific to RISE with SAP, so it is also true for implementations in the GROW with SAP program and outside of these SAP programs.

- **Mind the multiplatform integration gaps.** In 2024, application and infrastructure portfolios of most enterprises are made up of multivendor platforms including SAP products. As enterprises increase adoption of cloud solutions, the heterogeneous nature of IT systems is on the rise. Often integration of disparate application and infrastructure platforms is a necessity to make overall IT systems work. Make sure to pick an SAP implementation services partner that not only understands SAP products but also helps you integrate them with non-SAP systems your enterprise is running. This also helps decisions around supporting a hybrid cloud/multicloud environment. In a recent survey, IDC found that 36% of respondents selected "integration of complex technology portfolio" as a top driver in the organization's digital platform (see *Customer Perceptions of the SAP BTP Platform: A Digital Platform Ecosystem Survey Series Document*, IDC #US52592724, September 2024). Likewise, IDC has noted that many organizations do not have a target architecture designed to provide the performance characteristics most valued and have failed to account for fully loaded costs for these hybrid environments in their business cases (see *Triple*

Hybrid Architecture by Accident, IDC #US52096424, June 2024). This analysis should be included in your solution selection criteria.

- **Include this evaluation in your 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. It is also important to insist on meeting the relationship manager and project manager who will deliver the project, and to build a close and open relationship with them. Many organizations can deliver well-crafted proposals, but it is the team that will deliver the solution and business outcomes.

FEATURED VENDOR PROFILE

This section briefly explains IDC's key observations resulting in HCLTech's position in the IDC MarketScape. The description here provides a summary of the vendor's strengths and challenges.

HCLTech

According to IDC analysis and buyer perception, HCLTech is positioned in the Leaders category in this 2025 IDC MarketScape for worldwide SAP implementation services.

HCLTech, formerly known as HCL Technologies, is a global IT services and consulting company headquartered in Noida, India. Founded in 1976, HCLTech has grown to become a major player in the technology sector, offering a wide range of services including IT consulting, enterprise transformation, remote infrastructure management, engineering and R&D services, and business process outsourcing. The company operates in over 50 countries and employs more than 220,000 professionals, serving clients across various industries such as financial services, healthcare, manufacturing and high tech, CPG and retail, utilities, and telecommunications.

HCLTech's SAP practice is a key component of the company's digital transformation services, offering a comprehensive range of SAP solutions to help organizations optimize their business processes. The practice includes services such as SAP implementation, migration, integration, and managed services, tailored to meet the needs of various industries. HCLTech leverages its deep expertise in SAP technologies to deliver end-to-end solutions, from initial consulting and strategy development to implementation and ongoing support.

HCLTech's SAP practice is distinguished by the company's focus on delivering business outcomes through a combination of consulting, preconfigured industry solutions, and proprietary frameworks like Elevate and Migrate+ and Value Sentinel. HCLTech has invested in automated tools and offerings to accelerate SAP S/4HANA migrations and implementations, reducing risks and time to market. The practice also emphasizes the integration of advanced technologies such as AI, machine learning, and cloud computing with SAP systems, enabling clients to stay ahead in a rapidly evolving digital landscape. With a strong global presence and a commitment to innovation, HCLTech's SAP practice is dedicated to helping organizations achieve their strategic objectives and drive sustainable growth.

HCLTech's delivery process is executed using guidelines prescribed in HCLTech's Activate+ methodology that has been built over the SAP Activate methodology and evolved based on innovation and leading practices to focus on business-first transformation.

Strengths

- Strong ability to create offerings around SAP Business Technology Platform, and other SAP technology solutions, and innovate with customers using the ideaX innovation framework

- Strong breadth and depth of intellectual property (IP)/tools to deliver SAP implementation services

- Strong services delivery platform it utilizes to implement SAP solutions

- Regarded highly for quality of client management/engagement process and resources

Challenges

- HCLTech needs to improve its ability to provide access to vendor labs and resources to co-innovate prototypes for new solutions based around SAP products.

- HCLTech could also benefit from improving its ability to meet the project timeline or handle changes in project scope.

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 the vendor 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, 2022* (IDC #US47769222, July 2022).

FIGURE 2

IDC's Design-Build-Run Function Chain
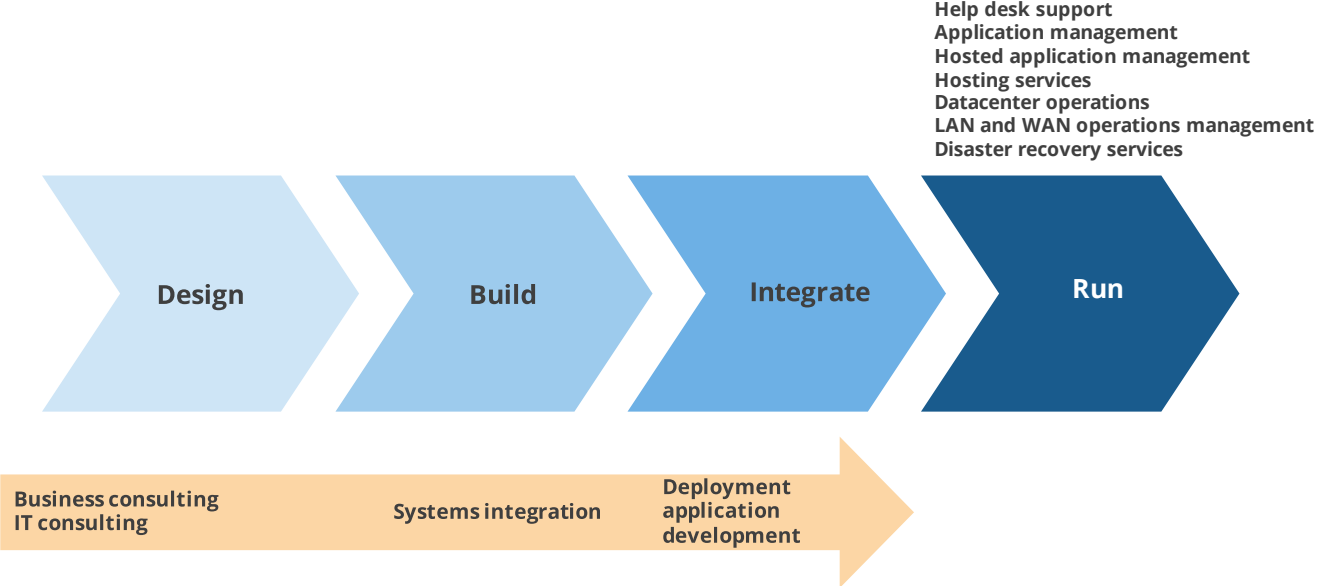
Source: IDC, 2025

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.

Figure 3 illustrates the top 10 business drivers for SAP implementation services projects for the SAP services customers surveyed in 2024. Customer cited increasing revenue and improving customer relationships as the top 2 business drivers for taking on SAP implementation services.

FIGURE 3

Top 10 Business Drivers for SAP Implementation Services Projects, 2024

Q.   How important a business priority do you believe each of the following is currently for your company?

n = 52

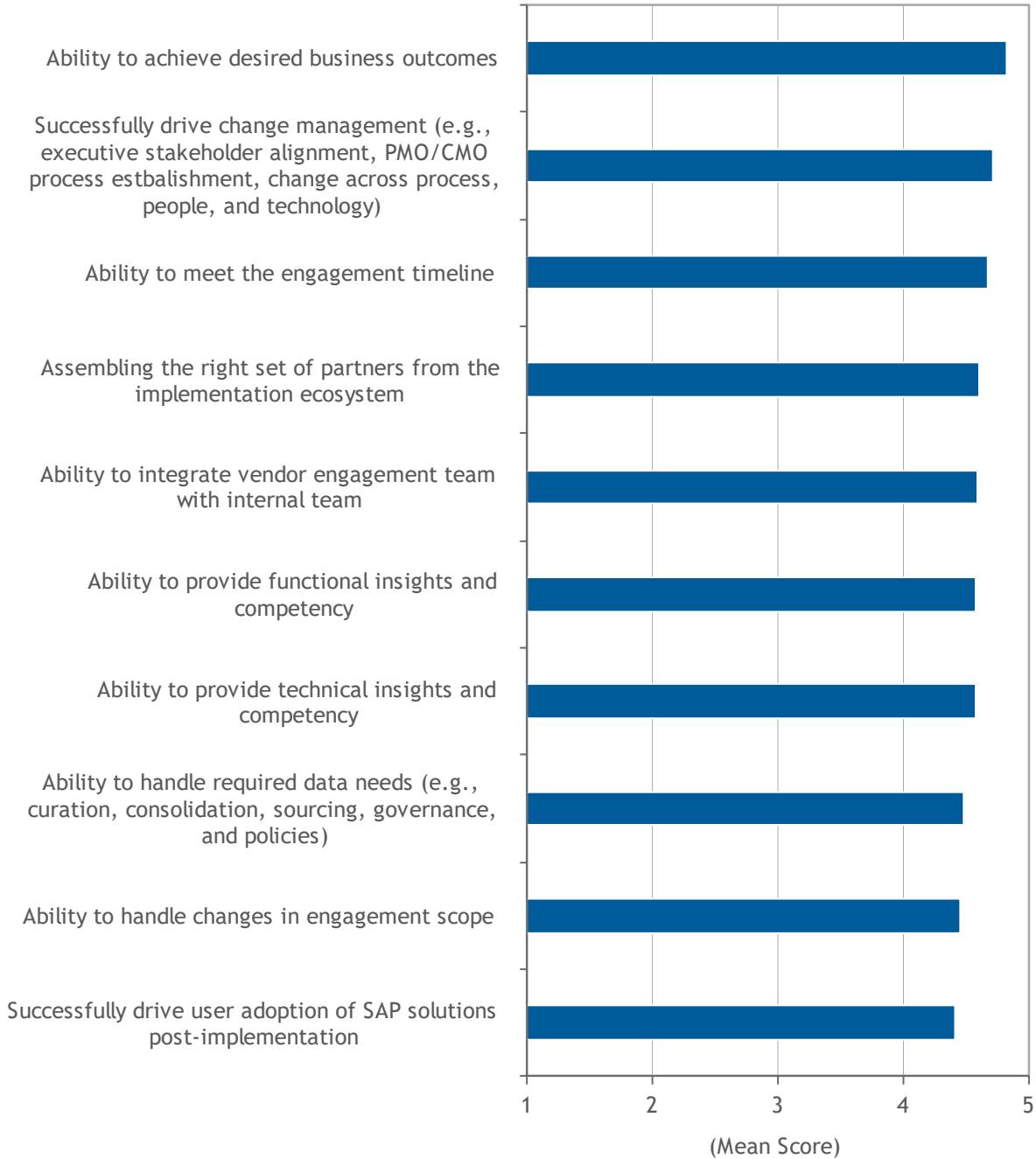Note: Mean scores are based on a scale of 1–5, where 1 = not a priority and 5 = a critical business priority.

Source: IDC's *Global SAP Implementation Services Buyer Perception Survey,* 2024

Figure 4 illustrates the rank order of factors that are important for a successful SAP implementation services project for the SAP services customers surveyed in 2024. Survey findings suggest that the ability to achieve desired business outcomes by the consultants working on an SAP implementation services project is the most critical factor for the successful completion of the project. Customers also indicated a vendor's ability to successfully drive change management to be one of the most critical attributes for a project's success.

FIGURE 4

Top 10 Important Factors for Successful SAP Implementation Services Projects, 2024

Q.   *For an SAP implementation services engagement to be successful, please indicate the importance of each of the following characteristics.*

n = 52

Note: Mean scores are based on a scale of 1–5, where 1 = not essential and 5 = essential to success.

Source: IDC's *Global SAP Implementation Services Buyer Perception Survey,* 2024

Related Research

- *Customer Perceptions of the SAP BTP Platform: A Digital Platform Ecosystem Survey Series Document* (IDC #US52592724, September 2024)
- *IDC MarketScape: Asia/Pacific SAP Implementation Services 2024 Vendor Assessment* (IDC #AP51467624, August 2024)
- *Triple Hybrid Architecture by Accident* (IDC #US52096424, June 2024)
- *IDC MarketScape: Asia/Pacific SAP Implementation Services Vendor Assessment, 2022* (IDC #AP48871022, August 2022)
- *IDC's Worldwide Services Taxonomy, 2022* (IDC #US47769222, July 2022)
- *IDC MarketScape: Worldwide SAP Implementation Services 2022 Vendor Assessment* (IDC #US48395822, June 2022)

Synopsis

The IDC study evaluates the SAP implementation services market, assessing vendors based on their capabilities and strategies. Key findings highlight the importance of pricing models, offering breadth, and alignment with SAP. Top rated capabilities include IP/tools for SAP delivery, ROI models, and industry insights. The document emphasizes the integration of SAP with other platforms and business process changes. Major vendors like Accenture, Deloitte, EY, Cognizant, and IBM are analyzed for their strengths and challenges in delivering SAP implementation services.

"Discover how top vendors are transforming SAP implementation services with innovative strategies and cutting-edge technologies to drive business success in 2025," said Brian Wood, research director, IT Project-Based and AI Services, 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. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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