HFS TOP 10

HFS Top 10: SAP S/4HANA Services, 2022

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Excerpt for Accenture

Legacy SAP ERP clients are building compelling business cases for SAP S/4HANA migration, and we expect to see accelerating SAP S/4HANA migrations in the coming quarters. Enterprises will continue to favor hybrid deployment options with SAP S/4HANA being one of the effective catalysts for the OneOffice and OneEcosystem mindsets.

Don Ryan, Chief Strategy Officer, HFS

SAP legacy mainstream enterprise clients are steadily moving to SAP S/4HANA; however, the growth is gradual, mainly because of the pandemic, support extension, and clients' resistance to change. Also, SAP S/4HANA clients are primarily installed on-premises and considering moving to private cloud or hybrid. SAP S/4HANA has a huge runway, and clients will move quickly once their organization approaches its support deadline. Service providers with SAP S/4HANA expertise that deliver the need of the hour, such as sustainability, have an edge over others.

Martin Gabriel, Associate Practice Leader, HFS

Contents

1 Introduction

Introduction

- The *HFS Top 10: SAP S/4HANA Services, 2022* report is a comprehensive study assessing service providers' ability to consult, migrate, implement, and manage the SAP S/4HANA business suite across industries. We also evaluate the service providers' ability to transform the enterprise's core business system to achieve the desired outcome. The end-to-end study covers strategic planning, building business cases, developing road maps, cost and time analysis, deployment model (on-prem, cloud, hybrid model), database conversion, database and operational support, and maintenance services.
- HFS assessed the completeness and abilities of 11 service providers over parameters HFS defined: innovation, execution, voice of the customer, and HFS OneOffice™ alignment.
- This report also includes a detailed profile of each service provider, outlining overall and subcategory rankings, provider facts, and detailed strength and development opportunities.
- Selected service providers' revenue was more than $500 million in application development and management or application services in the 2020 calendar year.
- Research data was collected between August 2021 and November 2021.
- Data was collected from the RFIs completed by each service provider, individual briefings, case studies, client interviews, surveys, vendor websites, publicly available financial data, existing HFS research, and third-party websites.

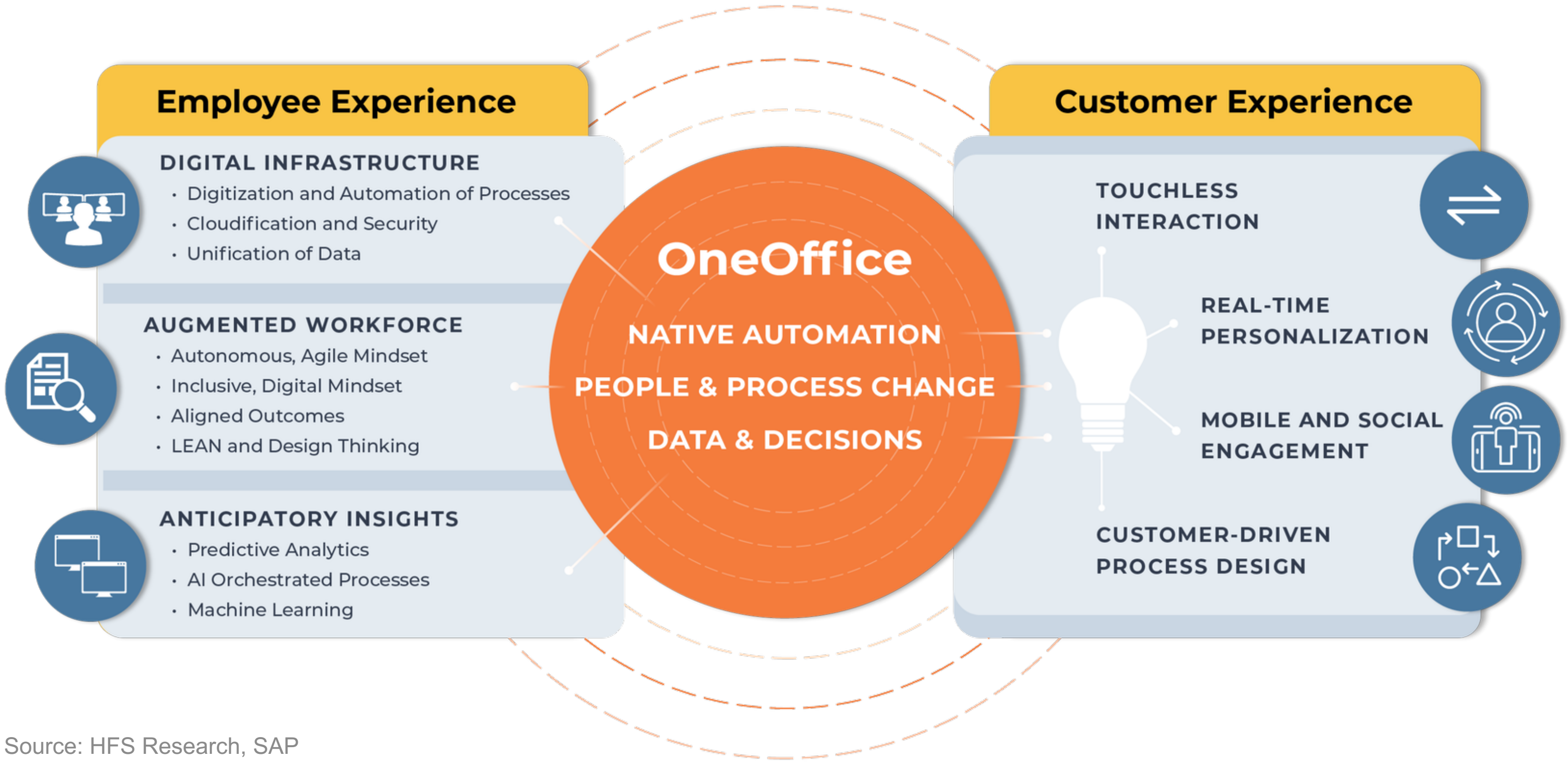
The HFS SAP S/4HANA services value chain

SAP S/4HANA services value chain		
Assessment	**Migration and implementation**	**Managed services**
• Strategic planning, value proposition, and business cases • Trial system and application scoping • Team enablement and project initiation • Transition planning and preparation • Activate solution • Custom code impact • Fit-gap and design • Data migration design	• Configuration • Customization • Product enhancement • Integration validation • Database migration • Going live functional check and support • Implementation, rollout, and testing • Operation readiness • Production cutover • Hypercare	• Operation and application maintenance • Database maintenance and support • Continuous innovation and optimization • UX transformation and training
Enabling technologies		
Artificial intelligence | Cloud | Intelligent automation | Analytics		

Source: HFS Research, SAP

The HFS OneOffice™—digital transformation in action

The HFS OneOffice is our vision for applied digital transformation. At its heart is the core concept that emerging technologies combined with people, process, and data innovation can break down the silos that limit our success, dissolving barriers between the front and back office to create the only office that matters—OneOffice. It represents a mindset shift to collaborative cross-functional enterprise operations powered by an integrated stack of emerging tech that complements your core, natively automates your processes, enables your employees and customers, and powers your decisions—breaking down your legacy silos in the process.

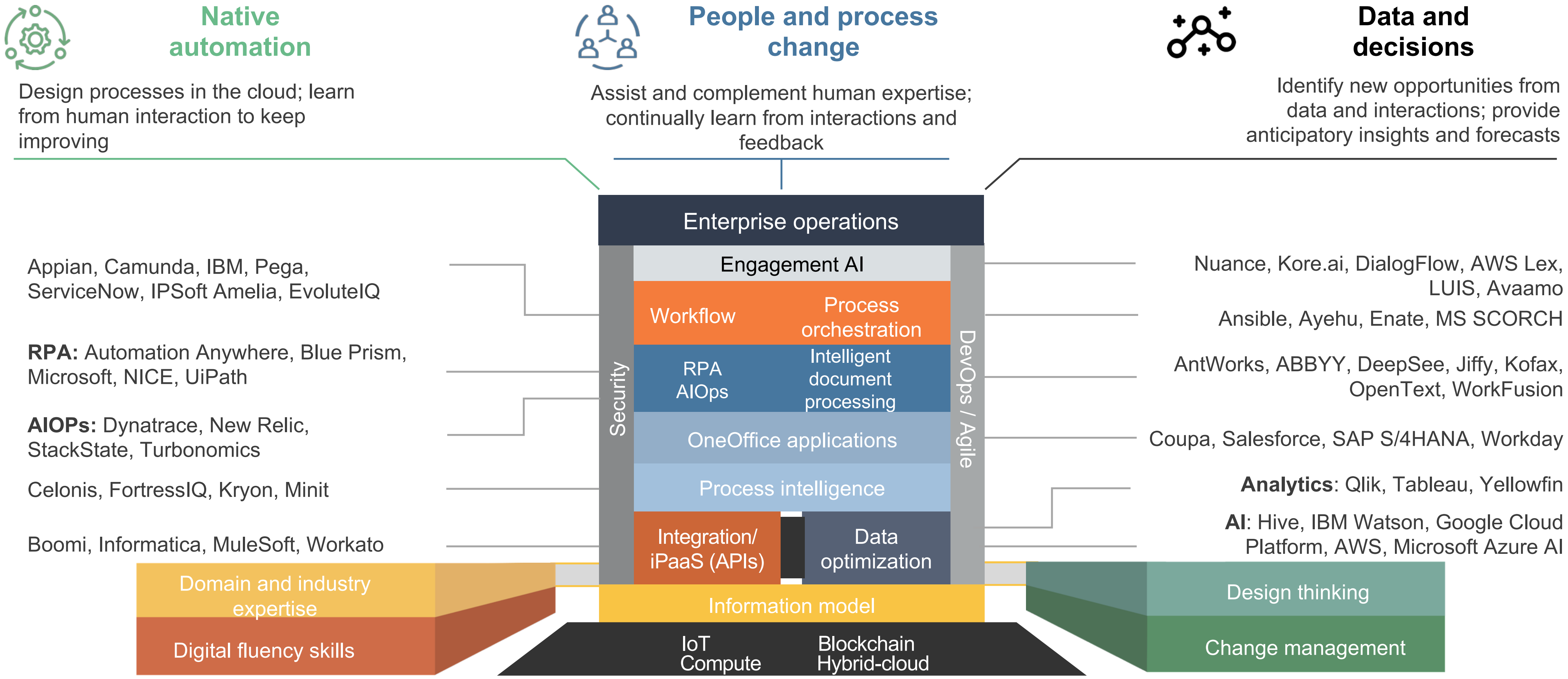


The SAP Intelligent Enterprise approach is a mindset integrating technology, business process, and strategies to deliver business value. It is intrinsically aligned with HFS' OneOffice mindset to overcome organizational boundaries by leveraging a broad set of emerging technologies.

The goal is to deliver on customer and employee experience-centric outcomes. Thus, it is applied transformation.

Source: HFS Research, SAP

The OneOffice Emerging Tech Platform



Source: HFS Research, 2022, examples are representative

2 Executive summary

Executive summary

SAP S/4HANA migration is still nascent: The installed SAP base remains conservative about migrating core SAP capabilities to the cloud. The concerns focus on process customization, master data integrity, and the available talent to manage those complex transformations. As of Q4 2021, 18,800 of SAP's 400,000+ clients had migrated to SAP S/4HANA. SAP S/4HANA capabilities go far beyond monolithic ERP (enterprise resource planning) systems. Clients are looking for the foundational building blocks to transform their core business processes. Beyond the installed base, customers leverage SAP S/4HANA capabilities for specific requirements such as simplified in-memory databases, embedded analytics with increased performance in generating reports, inherent AI, and more. SAP reacted to the sluggish pace of migration by ending the support for ECC 6.0 in 2025 to force their clients' hand. After clients protested, SAP extended the deadline to 2027.

SAP is re-energizing its partner ecosystem: After using the stick of threatening to stop supporting ECC 6.0, SAP added the carrot of a new partner program dubbed "RISE with SAP" to re-energize its partner ecosystem around SAP S/4HANA. In early 2021, SAP launched a new packaged offering for its existing and potential clients considering moving to cloud. However, currently most of the clients we interviewed are in observation mode and looking for strong business use cases. The details and implications remain unclear to most clients. Organizations are wary about vendor lock-in, and they are analyzing how single contracts would benefit cost and other factors.

OneOffice alignment: SAP is championing the notion of the Intelligent Enterprise, providing customers with more flexible solutions to manage their business processes and moving away from the monolithic world of ERP. This approach integrates the business process, technology, data, and strategy to help a business become an intelligent enterprise. SAP's Intelligent Enterprise concept is evolving into a critical enabler to execute the HFS OneOffice organization approach, a silo-breaking mind set, collaborative, cross-functional operation powered by a technology stack powering enterprise leader decisions. It's largely the OneOffice organization mindset that is essential and the SAP S/4HANA migration alone won't help achieve the Intelligent Enterprise. We witnessed the OneOffice approach's importance, which is magnified when combined with SAP and service providers to deliver experience-centric outcomes. On average, 73% of service providers already agreed they incorporated OneOffice organization transformation in their SAP S/4HANA engagements.

Service providers' SAP S/4HANA revenue growth is moderate: The slow-moving SAP S/4HANA customer growth reflects on the service providers' revenue as well. The providers' overall SAP S/4HANA revenue percentage grew 8% on average (collective growth of 11 providers) in 2020. This growth was less than expected because of the pandemic, customization and data challenges, clients' resistance to change, and migration costs. We expect a surge in SAP S/4HANA licenses and services in the coming quarters, mainly because legacy clients are approaching the 2027 deadline and will likely wish to avoid last-minute migration time, cost, and talent challenges.

Voice of the customer: Service providers' standard SAP S/4HANA capabilities and technology partnership ecosystem are insufficient. Clients are looking for service providers delivering process innovation, data standardization, industry solutions, functional business expertise, change management support, and, more importantly, an ability to deliver on time. A provider's ability to deliver an improved user experience stands out.

The state of the SAP S/4HANA services market (1/2)

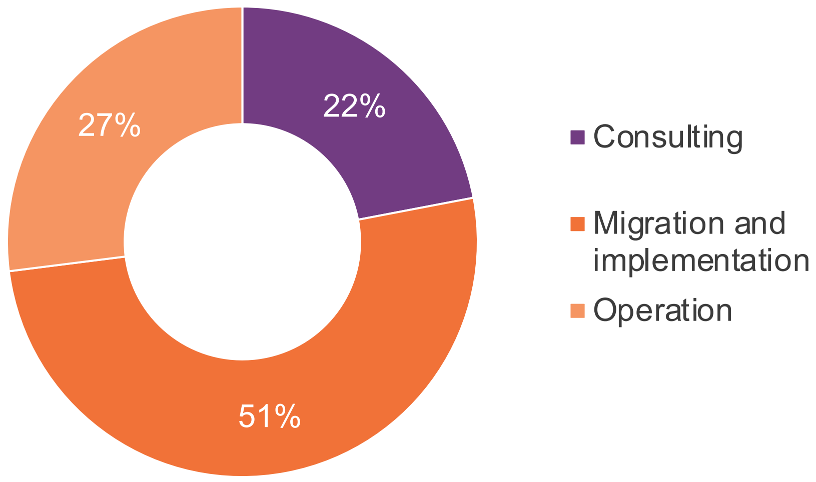
- **On-premise installation remains the preference:** On-premise installation remains a preferred, safe choice for enterprises. Forty-six percent (46%) of SAP S/4HANA clients still use on-premise installations for better control over customization, flexibility in upgrades, and greater security reasons. However, we expect a surge in usage of a hybrid deployment model (private cloud and on-premises) as it provides the right balance of flexibility and security.
- **Leveraging in-house teams:** Enterprises largely involved third-party service providers for advisory and consulting, implementation, and migration engagements. This is evident from the service providers' revenue break down. For operations and management services, enterprises prefer to leverage in-house resources. Providers need to be innovative in this space through tools, pricing, or approaches to enhance managed services revenue.
- **Talent crunch:** Talent crunch remains a significant concern in SAP S/4HANA practices among providers and the buy-side. Largely, enterprises leverage service providers for a talent pool. Providers address requirements by improving hiring quality, training, and retention programs, including compensation factors. Providing dedicated resources in an engagement with the right blend of SAP S/4HANA, consulting, and business functional experience and knowledge helps providers stand out among peers.
- **Industry-specific solutions:** To differentiate, service providers like Accenture, Atos, Capgemini, Cognizant, and others are developing pre-configured industry processes and industry-specific solutions to accelerate the implementation process. Providers are either developing by leveraging the SAP platform, developing in collaboration with SAP, or developing in-house tools to deliver solutions across the SAP S/4HANA program life cycle, such as Capgemini Path solutions (energy path or utilities path, for example), Cognizant's CPGXpress for CPG, and Lifecare 2.0 and MedXpress for LSH sectors.
- **Increased focus on sustainability:** Increased efficiency and sustainability is a top priority for enterprises. SAP and service providers are creating specific sustainability solutions like carbon footprint analytics that enable sustainable business decisions impacting organizations' goals and ensuring environment compliance.

The state of the SAP S/4HANA services market (2/2)

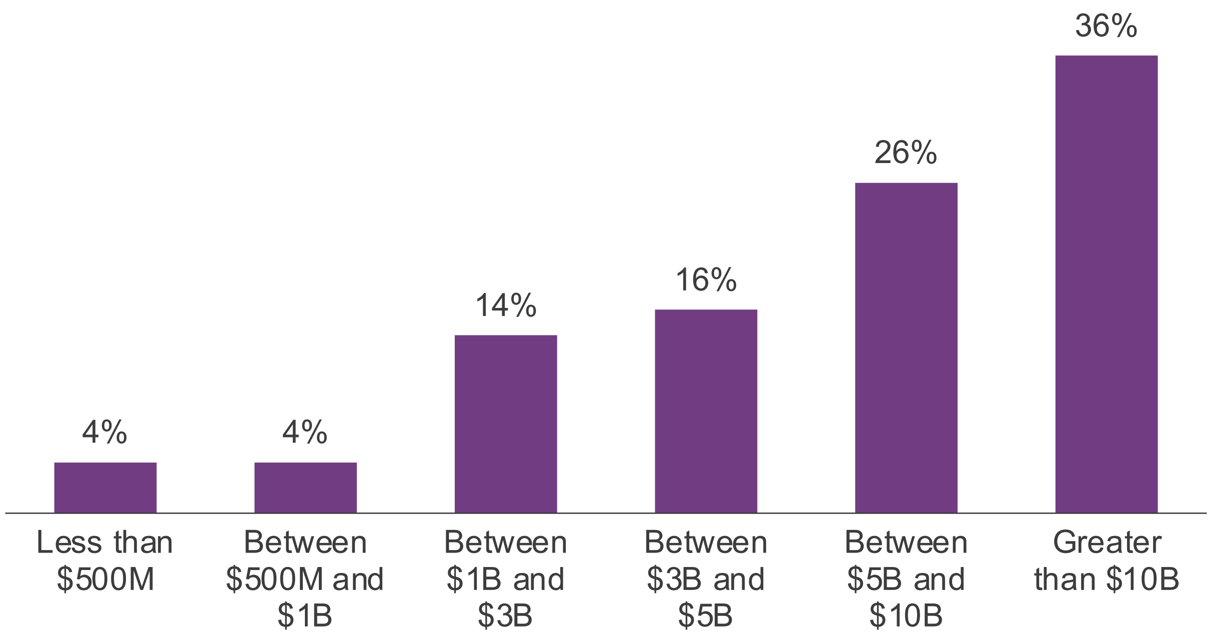
- **Single-vendor approach no longer a panacea:** Enterprises prefer choosing best-in-breed services from different service providers. On average, 70% of engagements are end-to-end SAP S/4HANA engagements, the rest go to different providers or are sometimes managed by in-house IT teams. Enterprises might use consulting, advisory, and implementation services from one vendor and management services from a different provider. Clients are gradually moving toward a multi-vendor approach, largely for the cost benefits.
- **Less focus on mid-tier clients:** Services providers are focusing on large organizations for their transformation journey. Providers are less focused on clients with revenue of less than $5 billion. Eighty percent (80%) of SAP clients are from SMEs. The SME segment has gained traction among service providers, but they still focus primarily on large organizations. A balanced approach toward SME clients would help providers avoid risks. Similarly, most providers focus on Europe and North America markets and very little on other potential markets like ANZ, Japan, Singapore, and the Middle East.
- **Partner ecosystem:** All providers in our study have strong relationships with major hyperscalers like AWS, Azure, GCP, and IBM. Most commonly, providers leverage technology partners such as Signavio and SNP for process mining and SNP for data migration to support their clients' SAP S/4HANA migration and implementation journeys. Investing in a robust partner ecosystem is critical; providers are aware that the right independent software vendor mix is essential to staying competitive.
- **Frequent communication:** Early in engagements, service providers often discuss process improvements and market updates and share their co-innovation with SAP regularly; however, later, the communication frequency often decreases. Clients gave low scores to their service providers' product vision and thought leadership ability. Maintaining frequent communication with clients about overall market progress would help change the perception.

The SAP S/4HANA services landscape (1/3)

Providers' average revenue by service



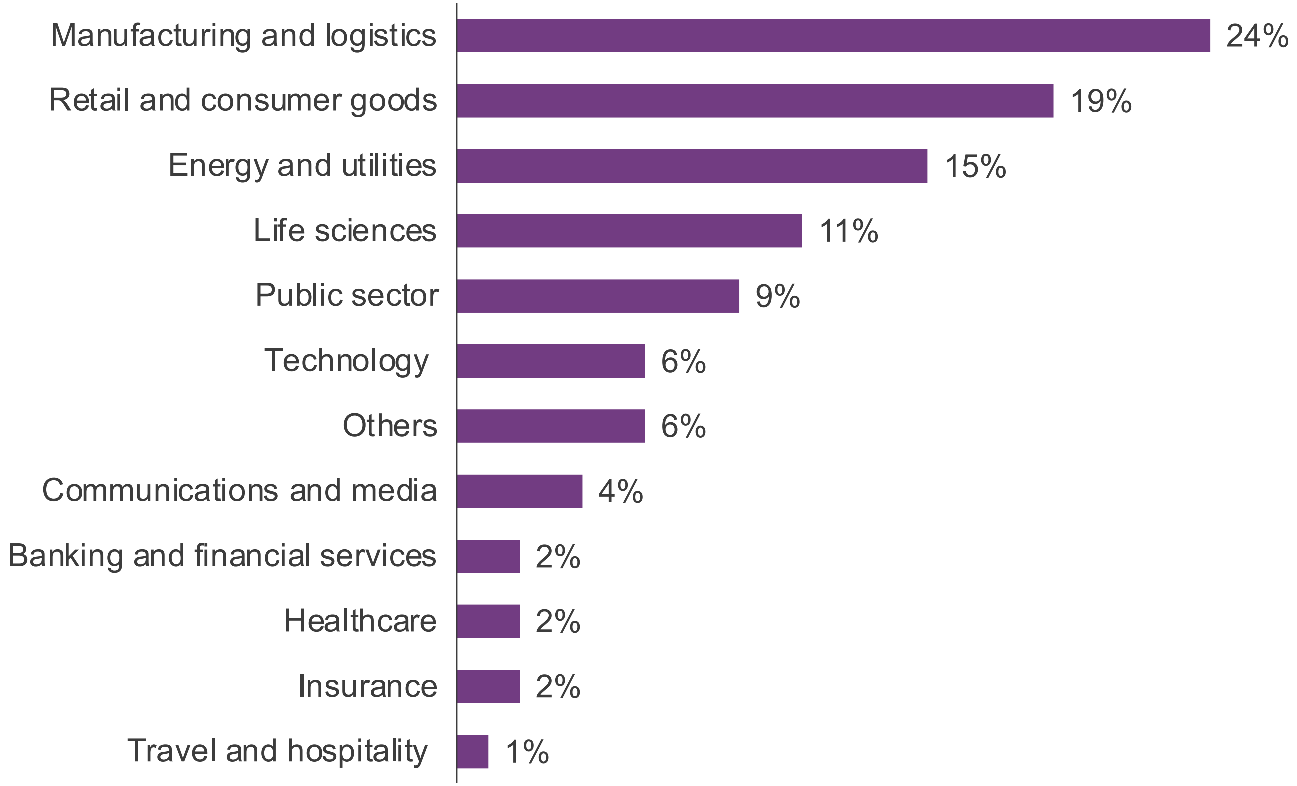
SAP S/4HANA client company size



Sample: 11 Service providers
Source: HFS Research, 2022

The SAP S/4HANA services landscape (2/3)

SAP S/4HANA services engagements by industry
(revenue %)



Sample: 11 Service providers
Source: HFS Research, 2022

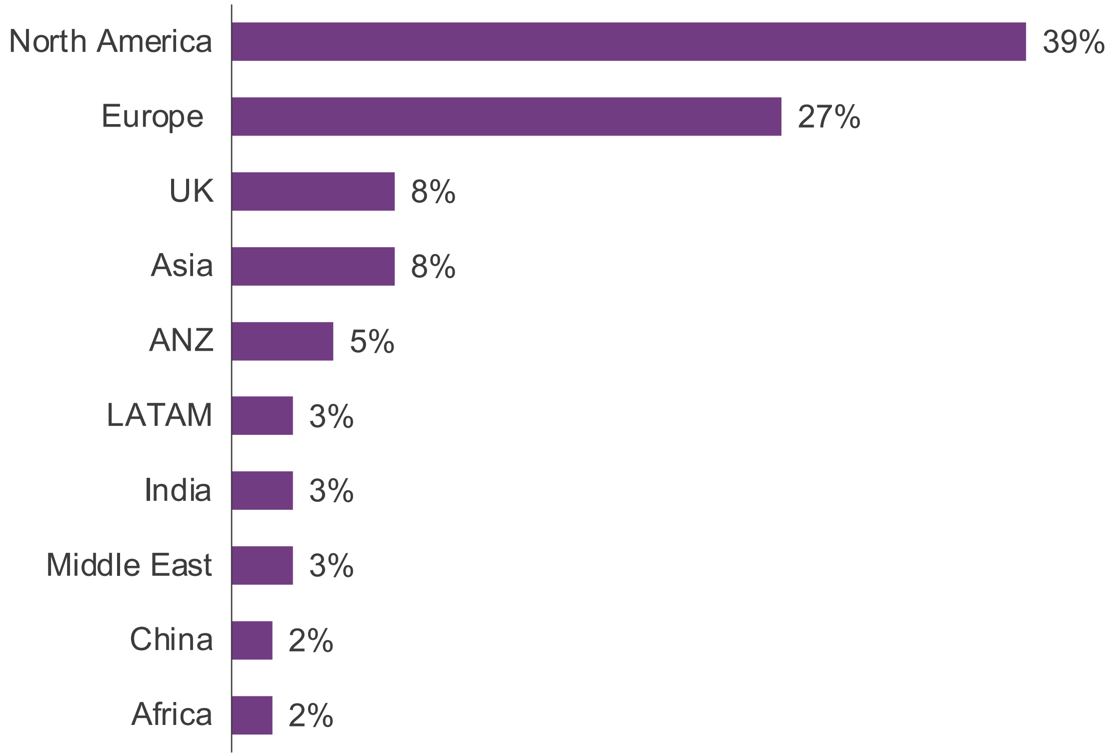
10,625
Average number of SAP S/4HANA FTEs
Largest: 21,000 Smallest: 2,150

2,638
Average number of SAP S/4HANA certifications
Largest: 5,167 Smallest: 750

282
Average number of SAP S/4HANA clients
Largest: 795 Smallest: 35

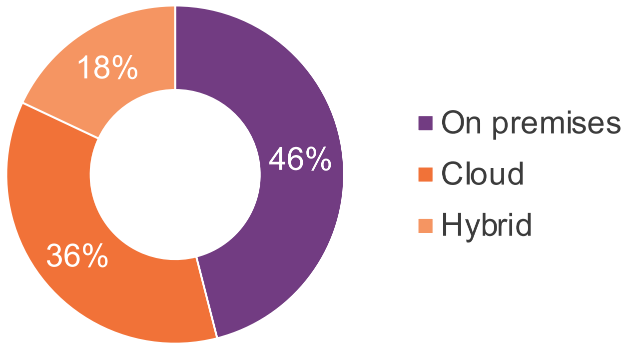
The SAP S/4HANA services landscape (3/3)

Service providers' SAP S/4HANA services by geography (average revenue %)

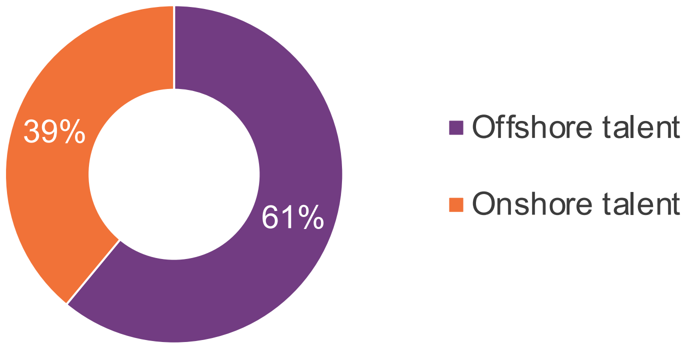


Sample: 11 Service providers
Source: HFS Research, 2022

Service providers' average revenue split on SAP S/4HANA deployment model

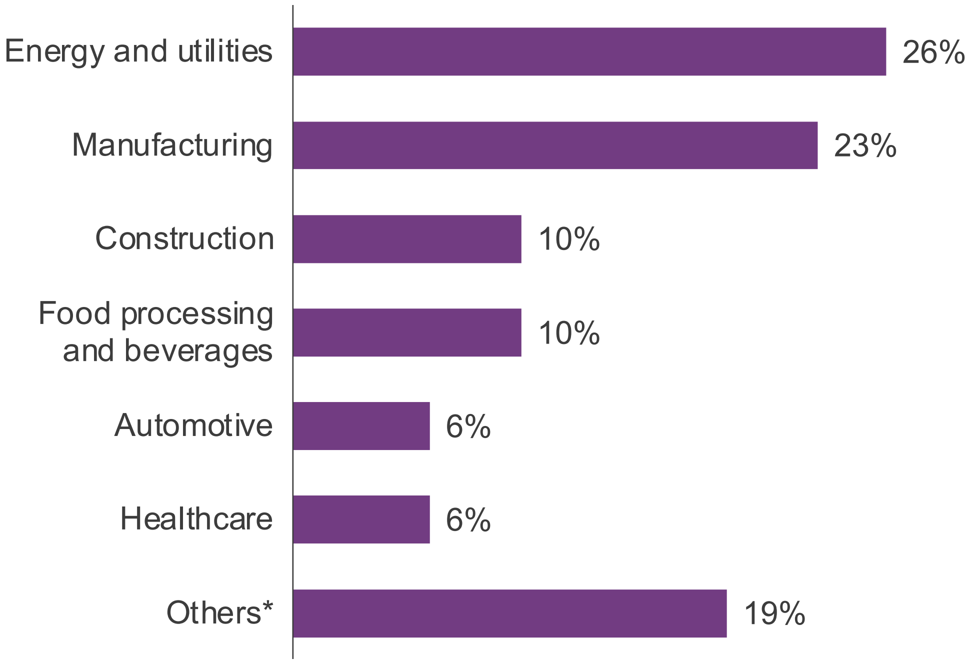


Average delivery FTE distribution



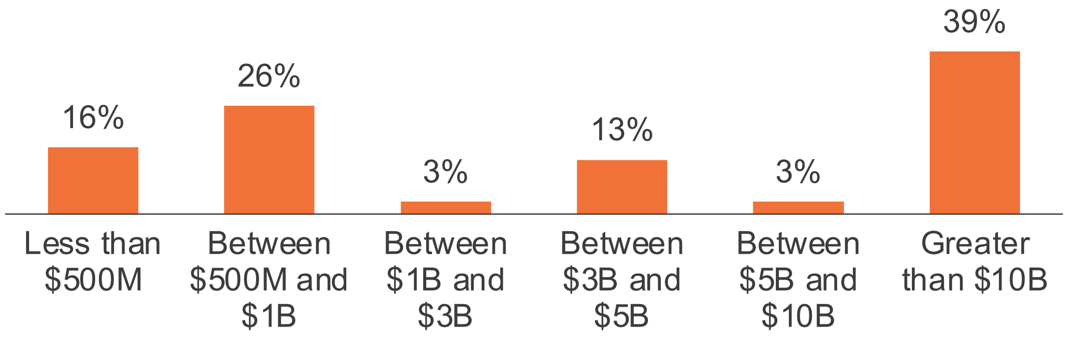
SAP S/4HANA client reference demographics

Client reference by industry sector

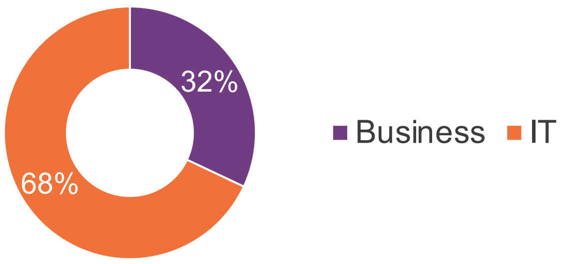


Others*: Transportation, Fashion & apparel, Mining, Public Sector, Computer hardware, Communication
N = 31, Number of client references
Sample: 11 Service providers
Source: HFS Research, 2022

Client reference revenue size



Organizational alignment



3 Research methodology

Service providers covered in this report

accenture

Atos

Capgemini

Cognizant

EY

IBM

Infosys®
Navigate your next

LTI
Let's Solve

tcs TATA CONSULTANCY SERVICES

Tech Mahindra

wipro

Sources of data

This report relied on myriad data sources to support our methodology and help HFS obtain a well-rounded perspective on the SAP S/4HANA service capabilities of the service providers covered in our study. Sources are as follows:

RFIs and briefings

Each participating vendor completed a detailed RFI.

HFS conducted briefings with executives from each vendor.

Reference checks

We conducted reference checks with **23 active clients** of the study participants via detailed surveys and phone-based interviews.

HFS vendor ratings

Each year, HFS fields multiple demand-side surveys in which we include detailed vendor rating questions. For this study, we leveraged our fresh from the field HFS Pulse Study data featuring **approximately 800 vendor ratings from enterprises using application services.**

Other data sources

Public information such as press releases, and websites.

Ongoing interactions, briefings, virtual events, and other events with in-scope vendors and their clients and partners.

How we assessed SAP S/4HANA services for this report

The study evaluates the capabilities of SAP S/4HANA service based on execution, innovation, voice of the customer (VOC), and a new criteria for 2021, alignment with the HFS OneOffice model—our vision for digital transformation.

25%

Execution

- **Revenue and growth:** Includes SAP S/4HANA revenue, resources, certification, clients, SAP S/4HANA YoY growth, and geographic coverage.
- **Consulting and industry specialization:** Includes consulting and operational capabilities and formalized SAP S/4HANA industry coverage and offerings.
- **Partner ecosystems:** Includes SAP partnerships (including co-development and co-innovations), cloud vendor partnerships, and software vendor partners.
- **Talent and account management:** Talent development program and investment and account management, including communication and collaboration.

25%

Innovation

- **Vision and roadmap:** SAP S/4HANA business vision, product strategy, roadmap, identifiable investments, clear articulation, and effective communication with clients.
- **Technology innovation:** Includes cultivation of internal IP, accelerators, SAP S/4HANA solution combos, automation capabilities, and investment in R&D to develop new assets.
- **Pricing:** Includes creative commercial models and innovative engagement models aligned to market trends.
- **Marketing and thought leadership:** Promoting SAP S/4HANA services, clear narrative about offerings, and consistent innovative thought leadership.

25%

OneOffice alignment

- **OneOffice scope:** End-to-end offering connecting front, middle, and back offices.
- **OneOffice skills**: Cultivation of OneOffice skills internally and with clients, such as digital fluency or problem solving.
- **OneOffice competencies:** Formalized approaches to data and change management.
- **OneOffice technology platform:** Enabling capabilities supporting “straight-to-digital.”
- **OneOffice collaboration:** Developing strong relationships across business and IT stakeholders.

25%

Voice of the customer

- **Reference checks:** Direct feedback from enterprise clients via reference check interviews and surveys.
- **Reference ability:** Provision of references and reference responsiveness.
- **HFS voice of the customer vendor rating data:** Ratings by active SAP S/4HANA clients of in-scope service providers.

4

Top 10 results: SAP S/4HANA services

HFS Top 10 SAP S/4HANA services—summary of providers assessed in this report

Service providers (alphabetical order)	**HFS insights**
Accenture	Innovative leader serving a vast number of industries with delivery excellence
Atos	Robust European provider with market leading SAP S/4HANA capabilities in the manufacturing sector
Capgemini	Strategic partner with strong IP portfolio and partner ecosystem
Cognizant	Innovative provider with industry-aligned SAP S/4HANA offering and solutions
EY	Consulting firm delivering extensive complex SAP S/4HANA transformation at scale
IBM	Global provider with value-added intelligent business workflows and industry solutions
Infosys	Strategic partnership approach with strong talent, tools, and industry expertise
LTI	Innovative provider with execution excellence and global delivery capabilities
TCS	Provider with strong execution expertise equipped with tools, a partner ecosystem, and industry capabilities
Tech Mahindra	Provider with a strong engineering background, SAP S/4HANA capabilities, and comprehensive solutions portfolio
Wipro	Trusted industry-specific provider with an extensive platforms and tools portfolio

HFS Top 10 SAP S/4HANA services—2022 rankings

Rank	Overall HFS Top 10 position	Execution					Innovation					OneOffice alignment	Voice of the customer
		Scale, geographic coverage, and growth	Consulting and industry specialization	Partnership ecosystem	Talent development and account management	Overall execution	Strategy and vision	Unique IP and accelerators	Automation and integration capabilities	Marketing and thought leadership	Overall innovation		
#1	Accenture	IBM	Accenture	IBM	Accenture	Accenture	EY	Accenture	IBM	Accenture	Accenture	Accenture	Infosys
#2	IBM	Accenture	EY	Accenture	EY	IBM	Accenture	IBM	Accenture	EY	EY	Capgemini	EY
#3	Capgemini	Capgemini	IBM	EY	Infosys	Capgemini	IBM	EY	EY	IBM	IBM	Cognizant	IBM
#4	EY	TCS	Capgemini	TCS	Capgemini	TCS	Wipro	Capgemini	Wipro	Capgemini	Capgemini	IBM	Wipro
#5	Infosys	Infosys	Infosys	Capgemini	Wipro	EY	Capgemini	Wipro	Capgemini	Infosys	Wipro	Infosys	Cognizant
#6	TCS	EY	Cognizant	Infosys	IBM	Infosys	Infosys	TCS	Infosys	TCS	Infosys	Wipro	Accenture
#7	Wipro	Tech Mahindra	Wipro	Wipro	Tech Mahindra	Wipro	TCS	Infosys	TCS	Wipro	TCS	TCS	Capgemini
#8	Cognizant	Atos	TCS	Cognizant	Atos	Tech Mahindra	Tech Mahindra	Cognizant	Tech Mahindra	Cognizant	Tech Mahindra	Atos	LTI
#9	Tech Mahindra	Wipro	Tech Mahindra	Atos	TCS	Atos	Atos	Tech Mahindra	Cognizant	Tech Mahindra	Cognizant	Tech Mahindra	TCS
#10	Atos	Cognizant	Atos	Tech Mahindra	LTI	Cognizant	Cognizant	Atos	LTI	Atos	Atos	EY	Atos

HFS Top 10 SAP S/4HANA services—2022 podium performances

HFS Winners Circle Top five providers overall across execution, innovation, OneOffice alignment, and voice of the customer criteria				
#1	#2	#3	#4	#5
accenture	IBM	Capgemini	EY	Infosys Navigate your next

Execution expertise Top three providers on execution criteria			**Innovation leaders** Top three providers on innovation criteria			**OneOffice alignment** Top three providers aligned to OneOffice			**Outstanding voice of the customer** Top three providers on voice of the customer criteria		
#1	#2	#3	#1	#2	#3	#1	#2	#3	#1	#2	#3
accenture	IBM	Capgemini	accenture	EY	IBM	accenture	Capgemini	Cognizant	Infosys Navigate your next	EY	IBM

Other notable performances

- Wipro secured its position in the top five on overall innovation and voice of the customer, mainly due to capability in automation, IP, strategy and vision, talent development, and account management.
- TCS is in the top five for scale, partnerships, and overall execution. TCS strikes a balance between execution, innovation, and OneOffice mindset, delivering large SAP S/4HANA migration engagements with the right ingredients.
- Cognizant made its way into the top five on voice of the customer and OneOffice alignment.

5 Accenture profile: SAP S/4HANA services

How to read our summary statements regarding each SAP S/4HANA service provider

Logo

Dimension	Rank
HFS Top 10 position	#
Ability to execute	#
Scale and growth	#
Consulting, industry specialization capabilities	#
Partner ecosystem	#
Talent development and strategy	#
Innovation capability	#
Vision and roadmap	#
Unique IP and accelerators	#
Automation and integration capabilities	#
Marketing and thought leadership	#
Alignment to OneOffice	#
Voice of the customer	#

Strengths	Development opportunities
Strengths of the service provider: qualitative and quantitative	HFS and customer feedback and recommendations for the service provider

Client deployment model	Talent split by services	Delivery resource distribution

SAP S/4HANA acquisitions and partnerships	Key clients	Global operations and resources	SAP S/4HANA in-house platform and tools
• Recent acquisitions that have added to SAP S/4HANA services (2017-2021) • Key partnerships that contribute to SAP S/4HANA services	• Number of clients and key client names	• Headcount dedicated to and available for SAP S/4HANA services • Delivery location breakdown and key centers of excellence	• Intellectual property (IP), platforms, and tools key to SAP S/4HANA services

Innovative leader serving a vast number of industries with delivery excellence

accenture

Dimension	Rank
HFS Top 10 position	**1**
Ability to execute	**1**
Scale and growth	2
Consulting, industry specialization capabilities	1
Partner ecosystem	2
Talent development and strategy	1
Innovation capability	**1**
Vision and roadmap	2
Unique IP and accelerators	1
Automation and integration capabilities	2
Marketing and thought leadership	1
Alignment to OneOffice	**1**
Voice of the customer	**6**

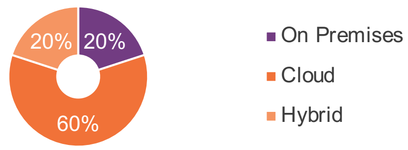
Strengths

- **End-to-end service offering:** Accenture provides advisory-led, asset-powered services and solutions throughout clients' SAP S/4HANA journey. The firm has extensive global reach and the ability to deliver at scale with excellence.
- **Broad range of industry expertise:** Accenture delivers SAP S/4HANA services and solutions across nine business functions and 39 industries. Accenture co-develops and co-innovates with SAP. Additionally, it provides the sector with customized co-go-to-market solutions, apps, tools, and intellectual property for rapid implementation and migration.
- **Partner ecosystem:** Accenture leverages its extensive partner ecosystem (230+) for its SAP S/4HANA engagements. The company invests in partners to deliver unique capabilities. Also, it bolsters its SAP capabilities through acquisitions; Edenhouse and Ethica consulting are some of the recent additions.
- **Accenture's Intelligent Enterprise Vision:** Accenture's approach aligns with the HFS OneOffice, placing the customer at the center, agile, connected, eliminating silos, cross-functional, and bonded to deliver client experience.

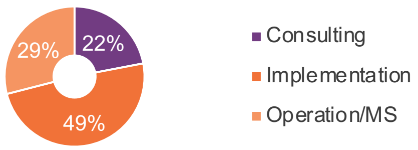
Development opportunities

- **Innovative pricing model:** Accenture provides quality services with standardized approaches and methods with a wide range of commercial models . However, clients mentioned when it comes to pricing discussion, Accenture is less flexible. If Accenture comes with an innovative and flexible pricing model, Accenture may gain competitive advantage.
- **More opportunities in medium size enterprise clients:** Accenture serves primarily upper mid-sized and larger companies, and other sizes to a lesser extent. Accenture has a massive talent pool, so it may consider focusing strategically in key verticals on lower mid-sized enterprises as well.
- **Talent development approach:** Clients are highly appreciative of Accenture's responsiveness to feedback. Accenture could consider emphasizing this approach even more as this quality is lacking in some of its peers.

Client deployment model



Talent split by services



Delivery resource distribution

SAP S/4HANA acquisitions and partnerships

Key acquisitions
- 2018: Intrigo
- 2019: Silveo
- 2020: maihiro, Icon Integration, Salt Solutions, Zag
- 2021: Edenhouse, Ethica Consulting

Key partnerships
- SAP, AWS, Azure, GCP, Signavio, Informatica, Worksoft, Celonis, Onapsis, SNP, Red Hat, Splunk, ServiceNow, Datavard, tableau

Key clients

S/4HANA clients: 805

Key clients
- Astellas Pharma, Astron Energy, Bristol Myers Squibb, Britannia, Cargill, Covéa, EDF, Enexis, Indorama Ventures, Magna International, Mankind Pharma, Merck KGaA, ProRail, Sanofi, Tullow Oil, Vodafone, Walgreens, Zydus Wellness

Global operations and resources

SAP S/4HANA headcount: 29,000
Consulting headcount: Not provided
Implementation and operation headcount: Not provided
SAP S/4HANA certified professionals: 3,100

Delivery and innovation resources
- North America: 9%
- LATAM: 3%
- UK: 1%
- EMEA: 20%
- India: 44%
- Other APAC: 16%

Top technology tools and platforms

- **myConcerto platform:** Brings together the best thought leadership, innovation, and industry expertise from across Accenture into a single, proprietary platform simplifying and accelerating technology-led business transformation.
- **myNav platform:** Helps set the right path to the cloud, assessing, architecting and simulating cloud solutions at scale to determine the best fit.
- **myWizard platform:** Helps clients create, implement, and measure enterprise-wide automation strategies and reimagine their information technology systems for efficiency and performance.
- **Prime Value Chain tool (PVC):** Helps define new, seamless, end-to-end business processes that link front, middle, and back offices as part of S/4HANA transformations.
- **Transformation GPS:** Used to predictive change analytics capabilities that brings insights into what drives business performance and reduces organizational risk on a change journey.

Note: Revenue and headcounts are as of 2020 CY

6 About the authors

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Don Ryan is Chief Strategy Officer at HFS Research. He joined the firm in August 2020 as Senior Vice President of Research and Consulting. Before HFS, Don was as Director for global research and thought leadership for business and outsourcing services, digital technology, and AI deployment at KPMG LLC. Recently, Don collaborated with HFS on the highly publicized white paper, "Enterprise Reboot: Scaling digital technologies in the new reality", a major study to delineate the impact of COVID-19 on technology implementation.

Don brings a broad background in forecasting technology trends, quantifying the market impact of brand experience and customer loyalty, and analyzing the changing nature of business operating models. Don's insights gained through research and analytical roles at TNS, META Group, Current Analysis, and FEDEX, along with his education at the Wharton School, will help HFS clients identify new directions and opportunities.

At HFS, Don will lead large research-based advisory engagements and continue his longstanding coverage of the technology, media, and telecom vertical and enterprise application platforms and ecosystems.

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Tom Reuner is Research Leader at HFS. Tom is responsible for managing the HFS IT Services practice with coverage areas including cloud native, application modernization, and quality assurance. Furthermore, Tom covers the emerging ecosystems of ServiceNow, Salesforce, and Pega. Leveraging his long entrenchment in the automation community, Tom drives HFS' thought leadership on automation. A central theme of his research is the orchestration and increasing interdependency of approaches such as RPA, AIOps, Observability, and AI. He is also managing the Top 10 program to ascertain consistency and thought-leadership.

Prior to HFS, Tom worked as Head of Strategy at Arago. His deep understanding of the market dynamics comes from having held senior positions at analyst firms including Gartner, IDC, and Ovum, where his responsibilities ranged from research and consulting to business development.

Martin Gabriel
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Martin Gabriel is an Associate Practice Leader at HFS, covering IT services, tracking global outsourcing deals in IT/BPO services, and participating in various research writings.

Martin has over 12 years of research, analytics, and market intelligence experience. In his TCS role, he worked on point-of-sale and consumer panel data and on analytical projects, providing business insights to clients. He was responsible for analyzing retailer and consumer behavior for various FMCG/CPG products to address diverse business issues and provide actionable recommendations for the future growth for clients. He performed extensive category reviews, brand management, and trend analysis based on point of sale and homes scan data, along with information from secondary sources. At Xchanging, he was part of the market intelligence team that supports Xchanging's vertical heads, strategy team, and sales and marketing team.

HFS TOP 10

About HFS

Insight. Inspiration. Impact.

HFS is a unique analyst organization that combines deep visionary expertise with rapid demand side analysis of the Global 2000. Its outlook for the future is admired across the global technology and business operations industries. Its analysts are respected for their no-nonsense insights based on demand side data and engagements with industry practitioners.

HFS Research introduced the world to terms such as "RPA" (Robotic Process Automation) in 2012 and more recently, the HFS OneOffice™. The HFS mission is to provide visionary insight into the major innovations impacting business operations such as Automation, Artificial Intelligence, Blockchain, Internet of Things, Digital Business Models and Smart Analytics.

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