

# SAPinsider

BENCHMARK REPORT

## RISE with SAP Innovation and Hyperscalers

Robert Holland

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REPORT SPONSORS



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## Executive Summary

Organizations today are under pressure to innovate. Legacy systems need to be updated or replaced with solutions that meet today's needs and offer improved processes and features. New systems must be agile and provide a platform to support future innovation. SAP is positioning RISE with SAP as the solution to address these needs by introducing new business models, improving efficiency in existing processes, and modernizing mission-critical systems—all without disruption.

To learn more about what SAPinsider member organizations are planning when it comes to RISE with SAP, SAPinsider surveyed 152 members of our community between August and October 2022. The goal was to gain a deeper understanding of their existing ERP environment, learn what factors are having the most impact on their strategy for ERP and innovation, gauge their familiarity of RISE with SAP, and discover where this offering fits into their overall plans.

Over half of the respondents (55%) indicated that they were still using SAP ECC or SAP Business Suite as their current ERP system, while an additional 10% were running SAP BusinessOne or SAP Business ByDesign. Respondents in those groups represent organizations that have yet to make plans for SAP S/4HANA or who may still be on that journey. Another group are those that have already begun the move to SAP S/4HANA. Nearly four in ten respondents (38%) indicated that they are running the on-premise version, while 20% said that their organization is running SAP S/4HANA Cloud.

A significant proportion of respondents from both groups are not only running multiple ERP instances in their environment but are also running multiple ERP systems. For example, nearly a quarter (24%) of those running SAP ECC or SAP Business Suite reported that they are also running SAP S/4HANA. Similarly, 39% of those running SAP S/4HANA Cloud are also running SAP ECC, and 19% have a non-SAP ERP system in their landscape.

These mixed landscapes present a challenge for any transition to SAP S/4HANA, especially if organizations are looking to create a single, centralized ERP instance, as many respondents reported in our recent [Deployment Approaches for SAP S/4HANA](#) research. However, regardless of how the move will work, respondents to this research were split on whether their organization is considering a move to RISE with SAP. For all respondents, 38% said they were considering a move, 35% were undecided, and 27% were not considering RISE with SAP at all. These answers were impacted by their existing ERP environment.

- 62% of those running SAP BusinessOne or SAP Business ByDesign—mostly small to medium-sized enterprises—were considering a move to RISE with SAP.
- 56% of those running SAP S/4HANA Cloud were considering RISE with SAP. They are mostly smaller enterprises, although 37% have revenues over US \$2 billion.
- 46% of those running a traditional SAP S/4HANA implementation said their organization was considering RISE with SAP.

### INSIDER PERSPECTIVE



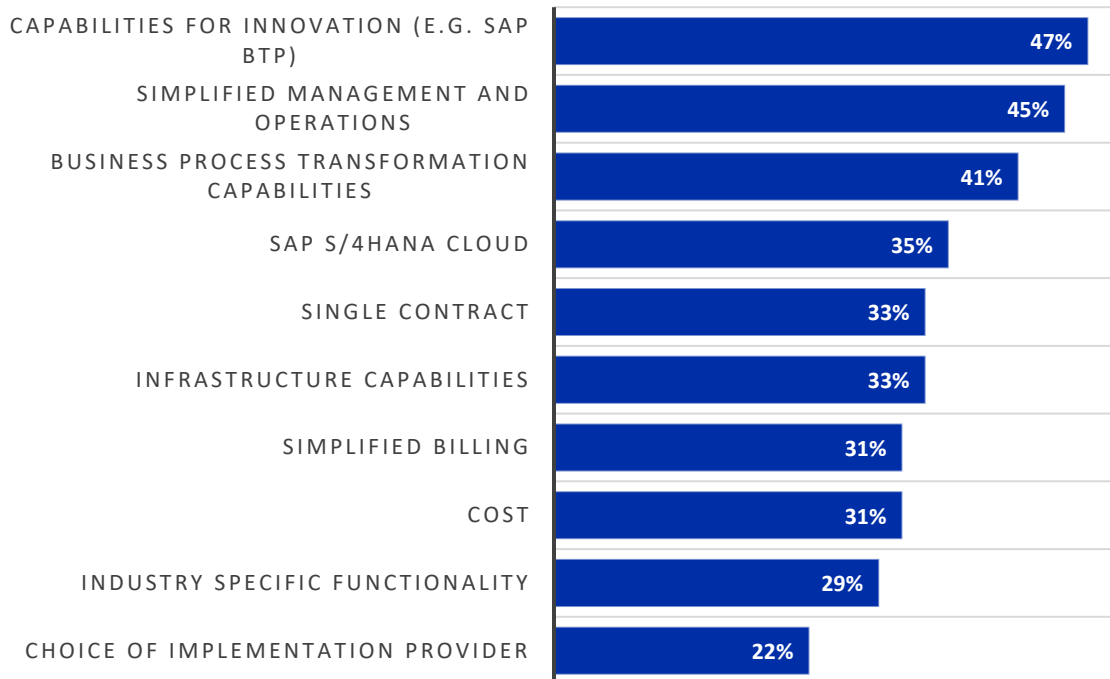
Our organization had grown significantly over the last 10 years and our SAP ECC deployment no longer met our current needs. We needed to transform our business processes and underlying systems and, when we did the transformation, we wanted to be very focused on the business process change. We chose RISE with SAP because, after doing a cost comparison with a new SAP S/4HANA deployment running on an IaaS environment the same as our existing SAP ECC system, we determined that we could save money on the project.

**Dave Scullin**  
Chief Digital Officer  
Zespri International



The most important factors impacting a decision to use RISE with SAP were its capabilities for innovation, as seen in **Figure 1**. This was followed by simplified management and operations, as well as business process transformation capabilities.

**Figure 1: Factors impacting a RISE with SAP decision**



Source: SAPinsider, October 2022

Our research revealed the following trends and insights around RISE with SAP:

- Only 14% of respondents said they were not currently using hyperscalers in their organization. Just 16% of this respondent group said they were considering moving to RISE with SAP, and 50% did not know if they would consider moving.
- Even though 86% of respondents are using hyperscalers in their organization, only 51% are using them for SAP workloads. Those who are using hyperscalers for SAP workloads are much more likely to be considering a move to RISE with SAP (53%) than those who are not (22%).
- Respondents from small and medium enterprises, those with annual revenues below US \$2 billion, were nearly twice as likely to be considering a move to RISE with SAP (52%) than those from large enterprises (27%).
- The timeline for any move to RISE with SAP is at least 12 months out for 57% of respondents with only 15% considering any move within the next 6 months.

## Required Actions

Based on the survey responses, organizations should take the following actions when considering building a platform for innovation and RISE with SAP:

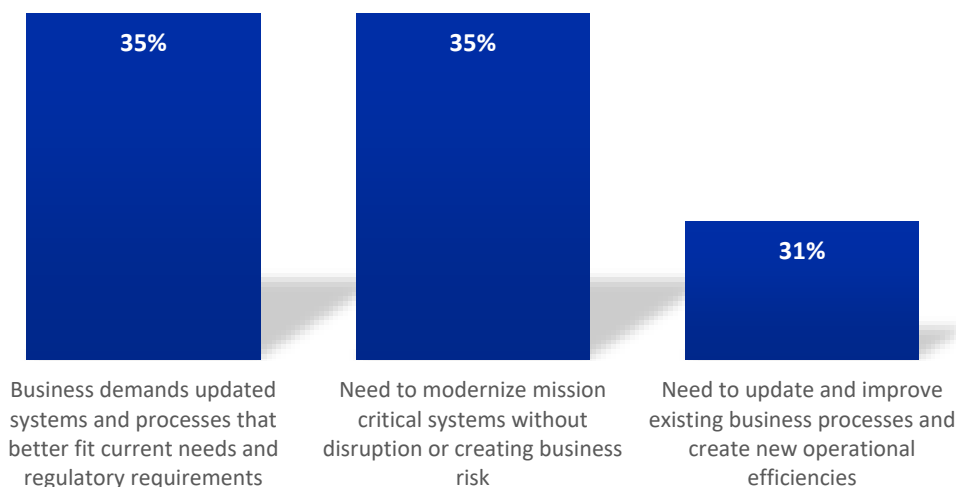
- **Start building your platform for innovation today.** Whether or not your plans include RISE with SAP and no matter what your current SAP environment is, you need to start building your platform for innovation today. What does it need to include? Will it extend beyond just SAP solutions? Successful organizations will ensure that from the start they are building their infrastructures around their platforms for innovation.
- **Dedicate time to understanding how RISE with SAP works and the benefits it can bring.** While RISE with SAP may not be for every organization, it is essential that you understand what SAP is positioning and what makes up the solution. Educate your team members on the solution, what is included, and whether SAP S/4HANA Cloud is a viable option for you. Even though many organizations have said they are not changing their plans for SAP S/4HANA based on RISE with SAP, there may be cost benefits you have not considered. Only by ensuring that your team is educated will you be able to properly evaluate the solution.
- **Determine how you can combine your technology and process transformation plans.** Infrastructure transformation is the most common form of transformation today and as important as business and process transformation. SAP facilitates this process transformation through the SAP Signavio components in RISE with SAP, but the move to SAP S/4HANA is a perfect opportunity to complete an evaluation of your current systems and processes and combine landscape and process transformation that will bring greater success for your organization.
- **Base your ERP and innovation plans on what is best for you.** Every SAP customer is aware of the upcoming end of maintenance deadline in 2027 and the emphasis SAP is putting on customers around RISE with SAP. Even though these are major factors in order for organizations to move to SAP S/4HANA, the most effective implementations are those that are effectively planned. Successful organizations spend time mapping their objectives, evaluating their existing environments, and engaging experts who can help them transition between these points. That may result in a longer preparation phase and a need to start their process earlier, but doing that will only provide positive results for your organization.

## Chapter One: A Foundation for Innovation

We have seen that innovation is important and that the biggest reason for organizations considering RISE with SAP is the capabilities for innovation. That connects RISE with SAP with the innovation challenges that organizations are facing today and the platforms they must create as the foundation for that innovation.

The most important factors for that innovation are a business demand for updated systems and processes that better fit current needs and regulatory requirements, and a need to modernize mission-critical systems without disruption or creating business risk, as seen in **Figure 2**. Both of these are capabilities that SAP positions for RISE with SAP and tie into the reasons that respondents are considering the solution.

**Figure 2: Factors driving strategy for ERP and innovation**



Source: SAPinsider, October 2022

Updating underlying systems is a key part of the move to SAP S/4HANA and particularly of SAP S/4HANA Cloud in RISE with SAP. With the upcoming end of mainstream maintenance for core Business Suite applications at the end of 2027, organizations must be planning for their ERP future. For those staying in the SAP ecosystem, that will mean a move to SAP S/4HANA. But as seen previously, SAP S/4HANA Cloud is one of the key reasons organizations are considering RISE with SAP, and the capabilities for innovation are the most important factor for organizations that are planning to implement RISE with SAP.

But this driver is about more than just updated systems. A major part of the request is updated processes that better fit current needs. For organizations that

### INSIDER PERSPECTIVE



As an existing SAP ERP customer, we already had plans to move to SAP S/4HANA before RISE with SAP was announced. We are planning on evaluating RISE with SAP since it provides capabilities beyond what are provided by SAP S/4HANA alone. If we find that it is beneficial, we will explore using RISE with SAP in our next phase.

~ Architect  
Agriculture Company



have an existing SAP ERP system, that frequently involves significant amounts of customized processes and custom code that have tailored the system to fit the way the company works—one of the biggest benefits of an SAP system. But that customization has also made moving to a new system both complex and expensive. Customers who SAPinsider has interviewed have talked about how difficult it was to upgrade to a new release of SAP ECC since the cost involved wasn't that different from implementing a new ERP system.

SAP is positioning RISE with SAP as a way to introduce new business models and improve efficiency in business processes. These business process transformation capabilities—the third most impactful factor behind the decision to use RISE with SAP, as discussed previously—are provided through SAP Signavio. SAP currently includes Signavio Process Manager, Signavio Collaboration Hub, SAP Process Insights, and a one-time business process discovery report with RISE with SAP.

However, these tools from SAP Signavio are one of the components of the RISE with SAP offering that respondents were least familiar with, and only 29% of respondents indicated that they had moderate (22%) or expert (7%) knowledge of these business process transformation tools. But to provide a platform that is a foundation for innovation, organizations will need to spend time understanding how their systems work and how they can update their processes to better meet current needs.

## Modernization without Disruption

Beyond updated systems and processes, the next major factor driving innovation is modernizing mission-critical systems without disruption or creating business risk. This is a complex challenge because SAP systems today are more important than ever. With the global pandemic closely followed by the supply chain crisis and the current world economic situation, organizations need real-time insight into the business around the clock. This makes even planned downtime difficult to schedule and increases the importance of modernization without disruption.

We can see the importance of this minimization of disruption by looking at the technologies that organizations are using for innovation. The most frequently used technology today is high availability (HA) and disaster recovery (DR) solutions, with 32% of respondents saying these were currently used in their organizations. An additional 38% plan on implementing HA and DR solutions over the next two years, and 21% are evaluating them for use. That means that more than nine in ten respondents see minimizing disruption as key to their organizational success. But how can they realize this modernization without causing disruption?

Achieving this goal is one of the three main challenges that SAP knows organizations face today and is positioning RISE with SAP as a means for them to meet that challenge. SAP sees this goal as being achieved through their vision for

cloud ERP but also with the capabilities that SAP S/4HANA Cloud offers. When we look at the technologies that respondents are currently using, however, only 12% indicate that they are leveraging cloud-based ERP today. That currently makes it one of the technologies least frequently used for innovation. However, 42% plan on implementing a cloud-based ERP solution over the next two years, demonstrating that organizations are looking at the cloud for their ERP futures.

But to be successful in modernizing mission-critical systems, organizations will need to work closely with an implementation partner that has experience with both SAP S/4HANA and RISE with SAP. Conversations with some partners have recently suggested that capacity for most experienced SAP S/4HANA partners is limited over the next two to three years. Part of the benefit SAP offers with RISE with SAP is an implementation partner that will work in the timeline you identify to perform that move.

Regardless of the choices you make about a service provider or implementation partner for RISE with SAP, you must specify the timeline for that deployment when you sign your contract. That includes when you cut over to SAP S/4HANA Cloud and other important milestones on the journey. Ensuring that you are able to minimize disruption will depend on how well prepared your internal team is for the project and how effectively you can work with your implementation partner.

## Building a Platform for Innovation

The strategies that organizations are pursuing in achieving their goals for innovation center on architecting a unified landscape that provides better movement and integration of data, implementing transformed end-to-end processes for core ERP users, and redesigning IT platforms to lower costs and increase flexibility (**Figure 3**).

Taking action to create a unified landscape that provides better movement of data correlates with the types of platforms in which organizations are most likely to invest, according to our recent research on [How Business Leaders Are Scaling Platforms and Innovation](#). In that research, we saw that analytics, integration, and data made up three of the top five platforms in which organizations were most likely to invest. This need for analytics, integration, and data is very much a part of what SAP offers through RISE with SAP, either through the capabilities that are part of SAP S/4HANA Cloud or via SAP Business Technology Platform (BTP), which includes capabilities for analytics in SAP Analytics Cloud, integration through the SAP Integration Suite, and data through SAP HANA.

### INSIDER PERSPECTIVE



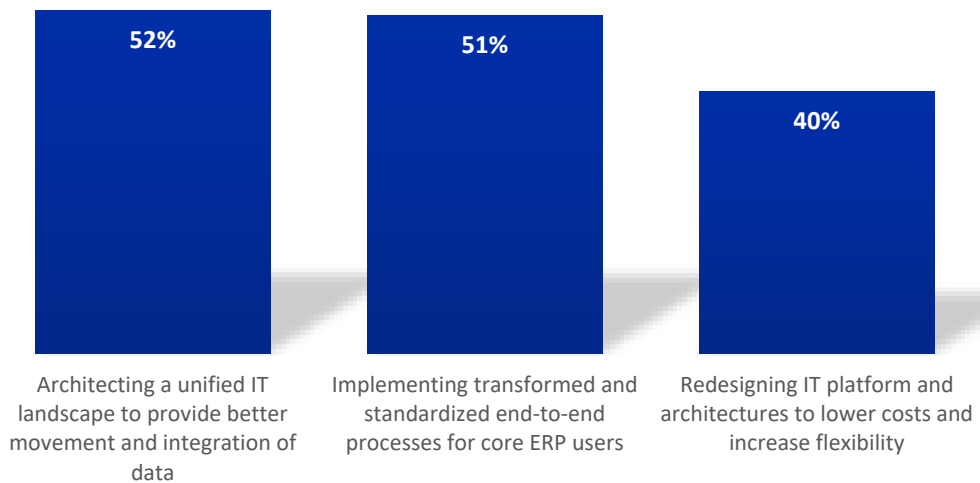
Our emphasis in building a platform for innovation is on providing value to the business, whether that is thru optimized processes or improved decision making or other high value opportunities. We have established a team to pilot certain innovation opportunities, working closely with the business and external partners. Examples include automation (e.g., RPA) and AI/ML opportunities. However, given the business demand, we need to effectively prioritize requests.

**Steve Birgfeld**  
Vice President, IT & Services  
Blue Diamond Growers





**Figure 3: Factors driving strategy for ERP and innovation**



**Source: SAPinsider, October 2022**

The second strategy that organizations are following aligns closely with the topic of updated systems and process that better fit current needs and regulatory requirements, as discussed previously. But this strategy also has a focus on standardization. One of SAP's key goals for RISE with SAP and part of its move to an Intelligent Sustainable Enterprise is creating a clean core. Having this clean core and eliminating unnecessary customizations and focusing instead on extensions that do not prevent updates is a key goal for organizations that are pursuing new or greenfield deployments of SAP S/4HANA. It makes it much easier for organizations to use technologies such as automation and machine learning against the data in their SAP systems.

Lowering costs and increasing flexibility are the biggest drivers for organizations currently pursuing infrastructure change, as seen in our [SAP Infrastructure and Landscape Trends](#) report. All organizations want to reduce the cost of their infrastructures, but at the same time they need additional flexibility, particularly at times such as period close. Organizations are looking at the cloud to provide this landscape, and that is the core of RISE with SAP. Some organizations are initially leveraging the infrastructure capabilities of RISE with SAP for a lift and shift of their existing ERP landscape before the switch to SAP S/4HANA Cloud. Others are looking at the centrality of cloud deployment in the solution as a way of jump-starting many of their SAP workloads from their existing landscapes into a more flexible and scalable environment.

## Key Takeaways

Based on our research with respect to innovation and RISE with SAP, the following takeaways are clear:

- **Business teams must be involved in transformation of systems and processes.** Although tools such as SAP Signavio can help guide business process transformation, business teams must be included in the changes to both systems and processes if they are to be successful. Not including business teams from the beginning means that changes may not meet the needs of business teams, which poses a risk of transformed systems not being adopted.
- **Achieving modernization without disruption involves combining the right technologies with experience.** SAP organizations cannot afford to have systems unavailable for an extended period. But moving to a new ERP system and building a platform for innovation is not necessarily straightforward. Organizations must select the right technologies and combine them with an experienced implementation team to ensure that they are able to effectively achieve the goal of modernization without disruption.
- **Standardization can help provide the platform you need for future innovation.** One of the major strategies being implemented by respondents is implementing transformed and standardized end-to-end processes for core ERP users. While it is possible to perform a system conversion that takes your existing environment into SAP S/4HANA with as few changes as possible, this can result in significant future challenges with process transformation. If organizations want to build a platform for innovation, they must have an environment in place that provides for future needs such as machine learning, artificial intelligence, or changed governmental requirements. The most effective way to make this happen is to standardize processes across your systems.

## Chapter Two: Hyperscalers and RISE with SAP

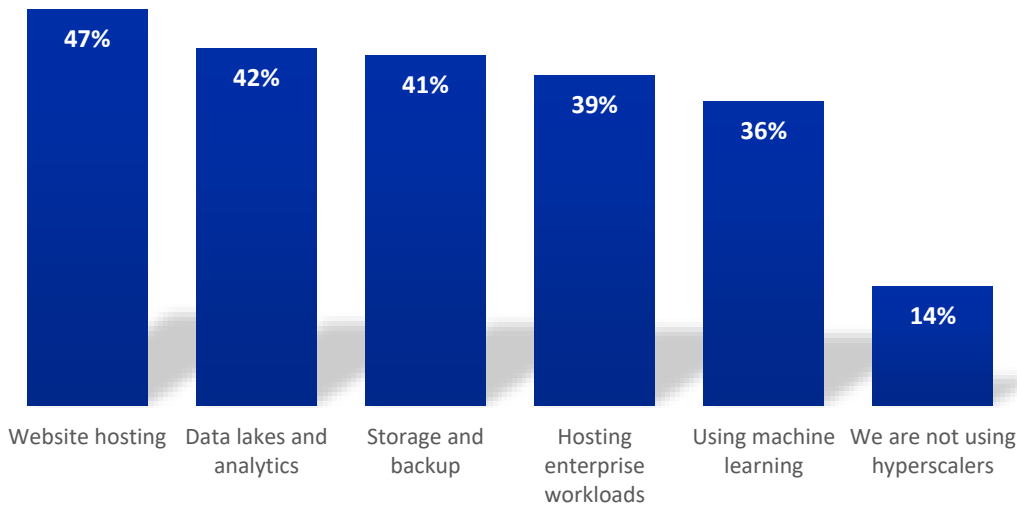
While SAP S/4HANA Cloud is the core of RISE with SAP, the biggest choice an organization will make when moving to the solution is their service provider. While organizations can choose a provider beyond Amazon Web Services (AWS), Google Cloud Platform (GCP), or Microsoft Azure, our research shows that 83% of those who are planning to implement RISE with SAP are considering one of these three vendors as their infrastructure provider, and 84% of those engaging with hyperscalers are also using one of these vendors.

We have already seen that those running SAP workloads on hyperscalers are far more likely (53%) to be considering using RISE with SAP than the survey as a whole (38%). We will further explore the impact of hyperscalers in this chapter.

### The Role of Hyperscalers in SAP Organizations

Only a small proportion of respondents said they are not currently using hyperscalers in their organizations. For those that are, the most likely usage is website hosting. Nearly half the respondents to the survey are using hyperscalers in that facility (**Figure 4**).

**Figure 4: How are organizations using hyperscalers?**



Source: SAPinsider, October 2022

Beyond website hosting, organizations are using hyperscalers for data lakes and analytics, storage and backup, hosting enterprise workloads, and machine

#### INSIDER PERSPECTIVE



RISE creates the platform – the capabilities – to truly transform; but getting into the customers’ business model and being able to make changes along with the upgrade is difficult. Customers need business process planning and change management coaching from someone knowledgeable – and that isn’t always emphasized.

RISE with SAP includes an implementation partner, but a customer needs a combination of 3 skillsets to be successful: (1) knowing SAP on-premise; (2) knowing your business model and the industry you’re in; (3) knowing SAP S/4HANA Cloud and how that differs from on-premise solutions in general and SAP S/4HANA on-premise in particular. It’s this combination of knowledge that is required to make a difference and provide a meaningful ROI.

~ Director  
Professional Services  
Company



learning. Many of these modes of usage connect with their plans for innovation. For example, the main ways organizations are using platforms for innovation involve analytics, integration, and data. Data lakes and analytics are an important way for organizations to gain the insight they need into things happening across the organization. Integration tools and strategies are needed to move that data into the cloud.

Hosting enterprise workloads is often an intermediate step for organizations that are updating infrastructure to provide additional flexibility and scalability before they finalize a move to an updated system that better fits their needs and requirements. It is also one of the primary ways respondents said they are using hyperscalers or cloud service providers, with 62% of those who are running SAP workloads in the cloud saying they use cloud providers for hosting enterprise workloads.

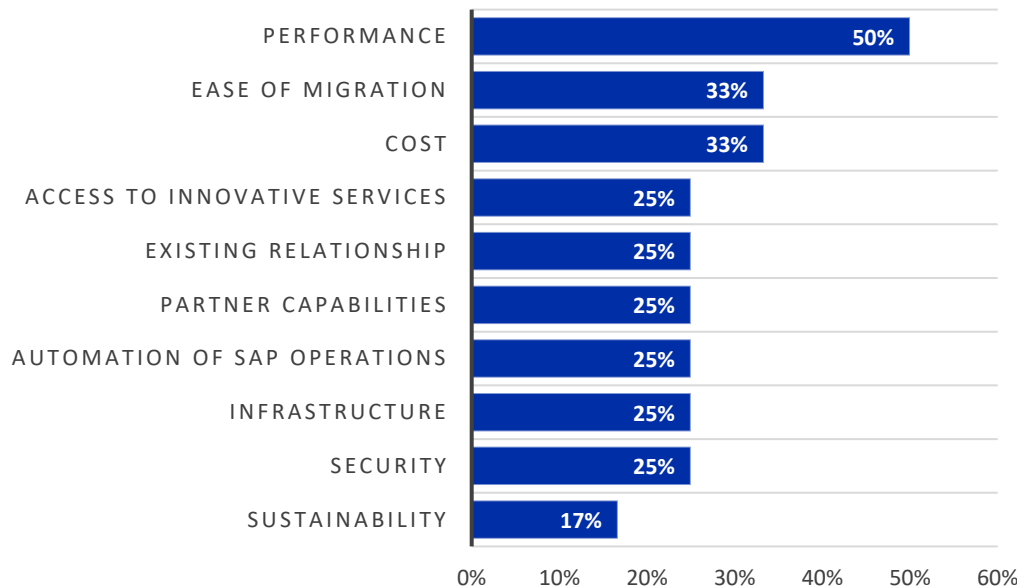
While leveraging hyperscalers for machine learning is currently the least used form of engagement by respondent organizations, this is something that those who are moving to SAP S/4HANA, and particularly those that have been able to establish a clean core, will be looking to leverage in order to learn more about their data and insights. SAP is also hoping that those moving to RISE with SAP will use these capabilities within SAP BTP as they leverage the SAP BTP consumption credits that are part of RISE with SAP.

## Hyperscalers and RISE with SAP

When choosing RISE with SAP, the two major choices an organization must make are the service provider and implementation partner. As previously discussed, 83% of those planning to move to RISE with SAP are considering one of the hyperscalers as their cloud service provider. But how are they making that choice?

The most important factor for organizations when choosing a cloud service provider is performance (**Figure 5**). Any organization that is updating infrastructure is looking to improve the performance of their systems. That is the most predominant reason to modernize infrastructure. RISE with SAP enables this by providing a way for organizations to take their ERP system and move it into an environment that will not only help them kick-start their intelligent enterprise but will provide exceptional performance, flexibility, and scalability through the SAP S/4HANA Cloud offering.

**Figure 5: Factors when selecting a cloud service provider**



Source: SAPinsider, October 2022

Beyond performance, the next two most important factors for selecting a cloud service provider for RISE with SAP are ease of migration and cost. Ease of migration is crucial for organizations that are looking to modernize mission-critical systems without disruption or creating business risk. It must be possible for the organization to rely on the provider offering a methodology that will allow them to smoothly transition to their new environment.

Cost is just as important to respondents as ease of migration but is actually more variable than might be expected when it comes to the cloud service provider. At the time the customer initiates a contract for RISE with SAP, SAP sends the bill of materials to the various cloud service providers that will provide a quote based on the size of the deal, the requirements from a capacity perspective, and any incentives they may choose to include. That way the customer can choose which of the cloud service providers they want to use based on the quotes from those providers.

Organizations should also be aware that each cloud service provider may not offer the same capabilities beyond support for SAP S/4HANA Cloud. For example, organizations leveraging SAP BTP may find that some services are only available on certain providers or in certain regions. Organizations that are considering using RISE with SAP should ensure that the services they may want to consume in the future will be available on the cloud service provider they select.

**INSIDER PERSPECTIVE**



Managed well, a cloud implementation can improve computing and data storage workloads for better performance regardless of the cloud provider.

I believe that, whatever the cloud service provider, migrating data to the cloud can help reduce company costs as well as having greater accessibility to information at any time and from any device.

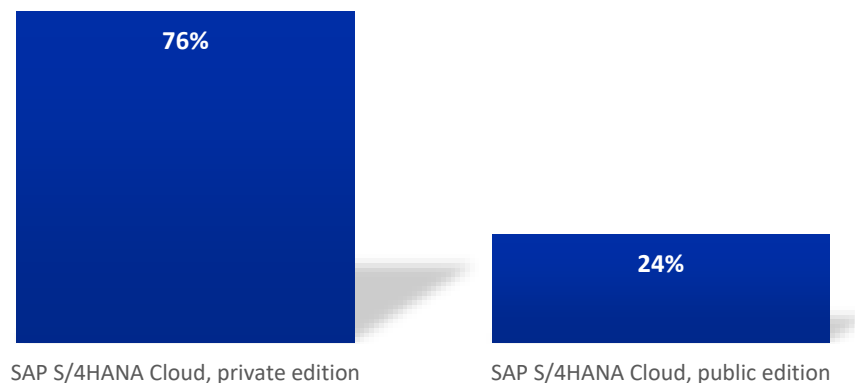
~ **Technology Director**  
**Engineering Company**



## Deployment Models for SAP S/4HANA Cloud

Another consideration for organizations moving to RISE with SAP is the SAP S/4HANA deployment model. RISE with SAP provides three deployment models for SAP S/4HANA Cloud, and only two of them are hosted by a cloud service provider. The two primary choices are SAP S/4HANA Cloud public edition and SAP S/4HANA Cloud private edition. Respondents to this research were most likely to choose SAP S/4HANA Cloud private edition, as shown in **Figure 6**.

**Figure 6: SAP S/4HANA Cloud deployment models**



**Source: SAPinsider, October 2022**

Organizations that choose SAP S/4HANA Cloud public edition will use infrastructure and software that is shared with other customers, although their data will remain separate and distinct. Upgrades are managed by SAP, and their deployments are fixed and mandatory. The only implementation model supported by SAP S/4HANA Cloud public edition is a new implementation, sometimes called a greenfield deployment.

SAP S/4HANA Cloud private edition is different since each organization receives dedicated infrastructure for their deployment. Upgrades are annual, but organizations can choose when they are deployed, although they must stay within mainstream support. The customer manages the upgrade process, unlike SAP S/4HANA Cloud public edition where SAP manages the upgrade process. All implementation models are supported, including a new implementation (greenfield), system conversion (brownfield), or selective data transition.

The last deployment model choice is SAP S/4HANA Cloud private edition, the customer data center option. This is where SAP S/4HANA Cloud private edition is deployed in infrastructure that resides in the customer's data center managed by SAP in conjunction with the hardware provider, utilizes an operational expense model, has flexible capacity, and is managed by SAP.

## Key Takeaways

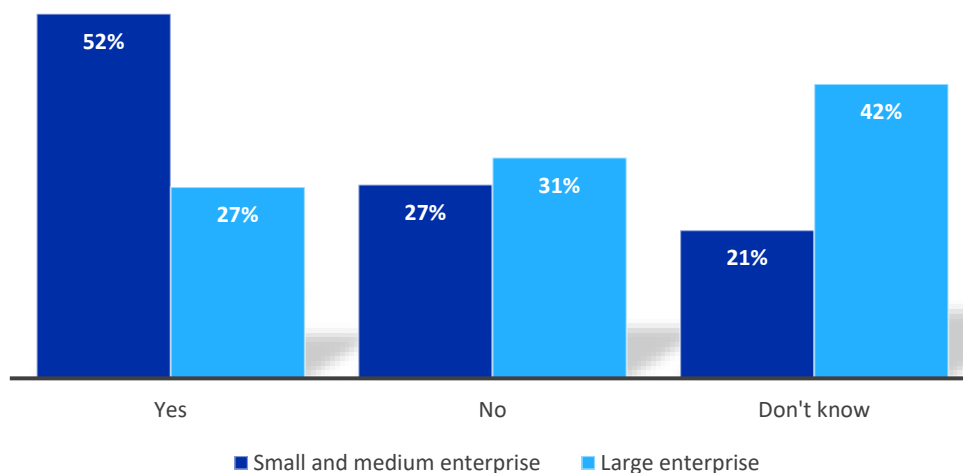
When it comes to the role of hyperscalers and RISE with SAP, consider the following:

- **Explore how hyperscalers can enhance your plans for innovation.** While the most important factors for respondents when selecting a cloud service provider are performance and ease of migration, not far behind is the ability to access innovative services. RISE with SAP is more than just the SAP S/4HANA product. It is also a set of technologies that enables process transformation, migration tools, infrastructure, and credits for SAP BTP. Each of the cloud service providers for your RISE with SAP deployment has capabilities that can complement and enhance your plans for innovation. You should take the time to explore how the vendor you select can help achieve those goals.
- **Selecting a cloud service provider for RISE with SAP is more than just picking a name.** Many organizations have existing relationships with cloud service providers and may think that selecting the cloud service provider for their RISE with SAP implementation is as simple as choosing a name. However, there is much more involved in the process. Various providers can offer different prices depending on when the bill of materials is submitted, but it is also more important to understand whether the provider supports the capabilities beyond SAP S/4HANA Cloud that you require. Make sure the provider you choose can support your future needs in RISE with SAP beyond the ERP component.
- **RISE with SAP supports more than just a greenfield deployment of SAP S/4HANA Cloud public edition.** In last year's RISE with SAP report, one of the biggest gaps that respondents identified in the RISE with SAP offering was deployment models for SAP S/4HANA. That is likely because when SAP S/4HANA Cloud was first released, there were limited deployment choices available in the multi-tenant edition of the software. That situation has changed with the release of SAP S/4HANA Cloud private edition that supports not only a new or greenfield implementation but also a system conversion and a selective data transition. That potentially makes the move to RISE with SAP more attractive to organizations for which a greenfield deployment is not an option.

## Chapter Three: The Future of RISE with SAP

In SAP's most recent quarterly earnings call (October 25, 2022), it mentioned that there were now approximately 2,500 customers that have licensed RISE with SAP. This is a significant increase from the 1,300 that had licensed the solution in 2021 and demonstrates that SAP is putting significant emphasis on the solution with its customer base. However, what is not stated is how organization size is impacting adoption. The data from our research suggests that organizations with annual revenues below US \$2 billion are much more likely to adopt the solution than those with annual revenues above US \$2 billion as seen in **Figure 7**.

**Figure 7: Interest in RISE with SAP by annual revenue of organization**



Source: SAPinsider, October 2022

Although smaller organizations may be more interested in RISE with SAP in the short term, as large enterprises learn more about RISE with SAP, those who do not currently know their plans for RISE with SAP may be more likely to explore the offering. To make this possible, SAP must address concerns that these organizations have about cost, connectivity to other cloud solutions, and a perceived lack of control.

Regardless of which organizations are more likely to consider moving to RISE with SAP, SAP sees the solution as central to its cloud strategy and will continue to push new and existing customers to adopt RISE with SAP as they transition to SAP S/4HANA. SAP continues to tweak the offering to include new services and reposition the messaging to better resonate with its customer base. RISE with SAP is here to stay, and organizations should prepare for it to be part of their SAP S/4HANA future.

### INSIDER PERSPECTIVE



One of the most important factors in our project's success was an experienced internal team of experts that lead and manage the project, though the partners that we are working with do most of the work. This includes having a Basis guy which has been important for us in terms of having someone who knows what they're asking for and can work constructively with the SAP team that is supporting us. This lean, agile team works with a small local partner, a separate security provider, and a specialist local provider that we work with.

**Dave Scullin**  
 Chief Digital Officer  
 Zespri International





## Key Takeaways

Our research reveals that SAP customers should apply the following key steps to ensure their RISE with SAP initiatives have a foundation for success:

- **Use your existing engagement with hyperscalers as a starting point to choose a cloud service provider for RISE with SAP.** Most organizations (86%) are already engaged with hyperscalers in some manner, although only 51% are currently using them for SAP workloads. Use the experience you have with building these relationships and working with hyperscalers as the starting point for the relationship you will build with your cloud service provider for RISE with SAP. Whether that starts with cost and ease of migration or is more about access to additional services, use your experience to help guide the right decision.
- **Understand that RISE with SAP is an option no matter the size of your organization.** Even though respondents from small and medium enterprises were nearly twice as likely to say their organizations were considering a move to RISE with SAP, the difference was primarily that respondents from larger organizations didn't know whether their organizations were considering the move and not that they were not considering the move. Given the various deployment options available via SAP S/4HANA Cloud public edition and SAP S/4HANA Cloud private edition, the same deployment options are available as the on-premise release. That means that no matter the size of your organization, RISE with SAP is an option for you.
- **Ensure you have a strong internal team to support your RISE with SAP project.** Most SAP customers already have strong internal teams they have built over the years. While it may seem as though the move to RISE with SAP is largely handled by an implementation partner, customers we have spoken with have found that a strong internal team has been critical for their success. Ensuring that this team is prepared and ready for your RISE with SAP project will be an important part of making that project successful.
- **Verify the availability of your implementation partner and its experience with RISE with SAP.** Many partners and system integrators with SAP S/4HANA experience will have limited availability over the coming years due to the demand for their services in moving to RISE with SAP. But even if you have an implementation partner that is available, make sure it has experience with the kind of RISE with SAP implementation you want to complete. Verifying that your partner has the experience and availability you need is a key step in the success of your RISE with SAP project.

## Methodology

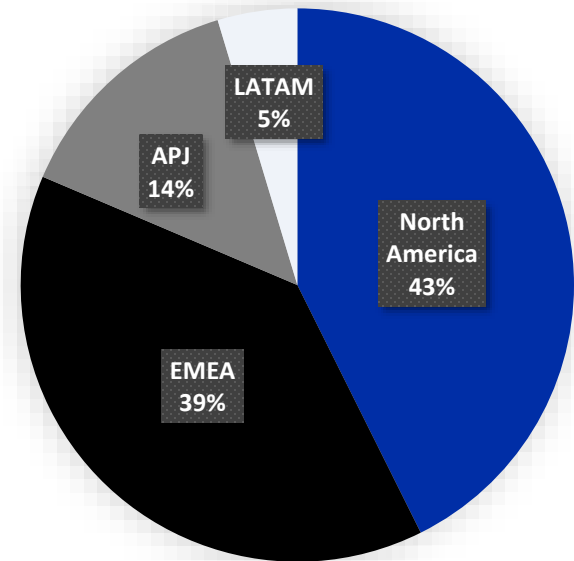
Between August and October 2022, SAPinsider examined the experiences of business and technology professionals about RISE with SAP and their interactions with hyperscalers. Our survey was administered to 152 members of the SAPinsider community and generated responses from across a wide range of geographies, industries, and company sizes. Respondents completed an online survey and provided feedback in customer interviews that questioned them on topics such as the following:

- What ERP system is your organization currently running today?
- In what capacity is your organization engaging with hyperscalers or cloud service providers?
- Are you currently running any SAP workloads on hyperscalers?
- Are you considering moving to RISE with SAP?
- What factors are most impacting your decisions around RISE with SAP?

The demographics of the respondents included the following:

- **Job function:** Functional areas reported by respondents include Information Technology (58%); HR, Benefits, and Administration (9%); Finance (6%); Business Development and Sales (5%); Manufacturing and Production (5%); Customer Experience (3%); Product Development (3%); and Supply Chain (3%).
- **Market sector:** The survey respondents came from every major economic sector, including Industrial (26%); Software and Technology (22%); Public Sector (13%); Retail, Distribution, and CPG (11%); Media and Entertainment (8%); Financial Services and Insurance (8%); Hospitality, Transportation, and Travel (7%); and Healthcare and Life Sciences (6%).
- **Organization size:** Survey respondents came from organizations of all sizes, including those with annual revenue of less than \$10 million (4%); between \$10 million and \$49 million (12%); between \$50 million and \$499 million (17%); between \$500 million and \$2 billion (16%); between \$2 billion and \$10 billion (24%); and greater than \$10 billion (14%).
- **Geography:** Of our survey respondents, 43% were from North America; 39% were from Europe, the Middle East, and Africa (EMEA); 14% were from Asia-Pacific, Japan, and Australia (APJ); and 5% were from Latin America (LATAM).

### PARTICIPANT PROFILE



## Appendix A

### The DART Methodology

SAPinsider has rewritten the rules of research to provide actionable deliverables from its fact-based approach. The DART methodology serves as the very foundation on which SAPinsider educates end users to act, creates market awareness, drives demand, empowers sales forces, and validates return on investments. It is no wonder that organizations worldwide turn to SAPinsider for research with results.

The DART methodology provides practical insights, including the following:

- **Drivers:** These are macro-level events that are affecting an organization. They can be both external and internal and require the implementation of strategic plans, people, processes, and systems.
- **Actions:** These are strategies that companies can implement to address the effects of drivers on the business. These are the integration of people, processes, and technology. These should be business-based actions first, but they should fully leverage technology-enabled solutions to be relevant for our focus.
- **Requirements:** These are business and process-level requirements that support the strategies. These tend to be end-to-end for a business process.
- **Technology:** These are technology and systems-related requirements that enable the business requirements and support the company's overall strategies. The requirements must consider the current technology architecture and provide for the adoption of new and innovative technology-enabled capabilities.

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