

SAPinsider

BENCHMARK REPORT

Low-code, No-code Development for SAP

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Executive Summary

Speed to market with new or updated products, services, and processes offers unparalleled competitive advantage for companies. But for this, businesses need to cultivate agility and resilience. Agile businesses that were able to quickly adapt their supply chains and processes were able to ride out the challenges presented by the pandemic. They were also able to absorb the changing customer needs, regulatory requirements, and competitive pressures.

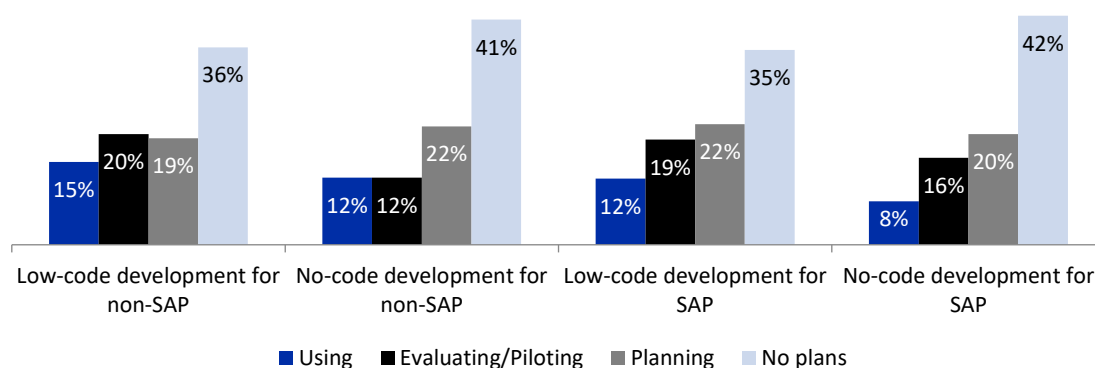
Long development cycles at the mercy of information technology resources are no longer viable. While the demands from businesses for new applications and updates continue to increase, they are often met with reluctance by the IT teams who are constantly under pressure with digital transformation related complexities or IT backlogs.

One way to combat this is with the adoption of low-code, no-code development platforms. If done right, these can be game changers in the way applications are written, deployed, and maintained. There are wild expectations about their ability to deliver applications at radically lower costs, enable business users to develop their own applications, and reduce IT backlog.

SAPinsider surveyed 141 IT professionals worldwide during October and November 2022 on their plans for adopting low-code, no-code platforms, adoption drivers, strategies, and adoption challenges. The research highlighted interesting trends on where and how SAP customers are deploying or planning to deploy low-code, no-code platforms.

The survey findings reveal that low-code, no-code development is steadily becoming mainstream across both SAP and non-SAP landscapes. Overall, almost 60 percent of respondents are considering low-code/no-code development but there is no substantial difference in adoption between SAP and non-SAP systems. No-code development seems to lag slightly behind low-code for both SAP and non-SAP systems and is more likely to be in planning stages than in use or evaluation. **(Figure 1)**

Figure 1: State of low-code, no-code development



Source: SAPinsider, December 2022

While the trend is in favor of low-code, no-code development in both SAP and non-SAP environments, there are several adoption barriers. Limited understanding of low-code and no-code leads to varying levels of misconceptions and expectations for over half of

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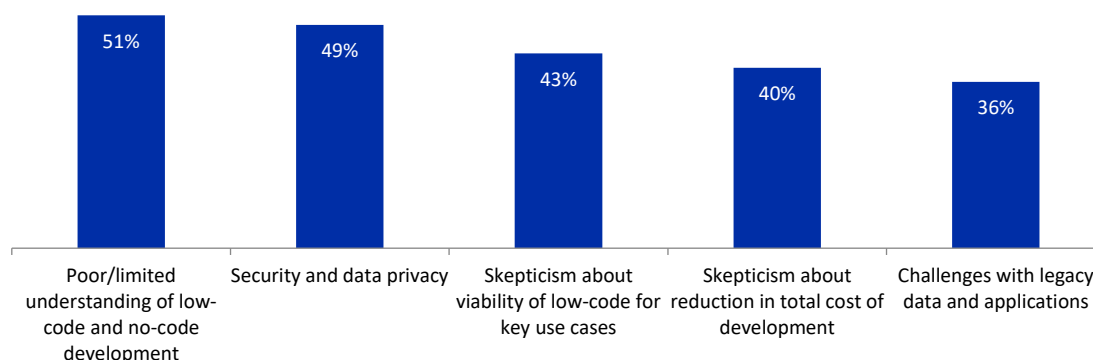
“The innovation pace is a bit too fast at the moment and difficult even for larger companies to keep up. It is all great stuff but following the developments can be a full-time job.”

Dr. Marcus Schiffer
Digital Labs, IT
Evonik Industries, AG

respondents (51 percent). There are also concerns about security and data privacy (49 percent) including skepticism about its viability for key use cases (43 percent) due to the perceived complexity of the application.

Specifically with respect to SAP, there is a concern whether these platforms can handle the legacy data and applications (36 percent). **(Figure 2)**

Figure 2: Concerns about low-code, no-code development



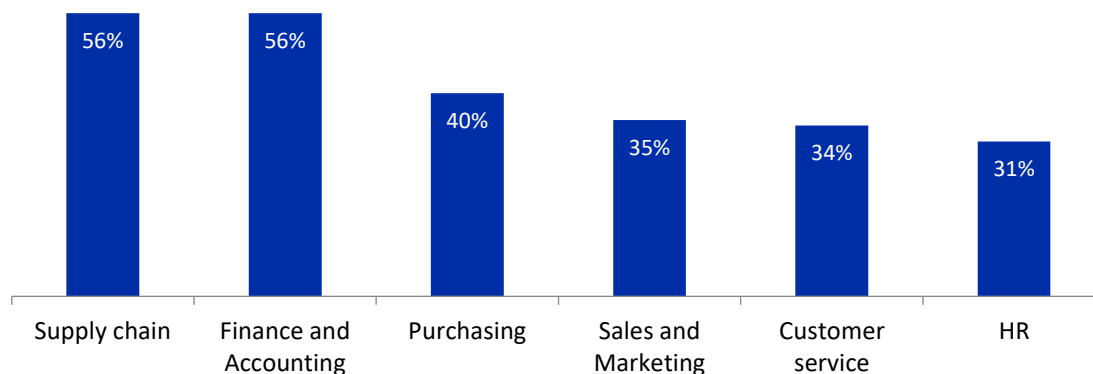
“Low-code, no-code development can be useful for general use cases. It can provide many efficiencies for deployment. But it may not be able to deal with complex scenarios that we need to customize.”

**SAP Application Support Specialist
City Government, Canada**

Source: SAPinsider, December 2022

Despite the concerns, some functions are plowing ahead with low-code development to reduce reliance on IT teams and become agile. Supply chain, and finance and accounting functions dominate when it comes to using low-code development (56 percent), while purchasing (40 percent), sales and marketing (35 percent), customer service (34 percent), and human resources (31 percent) are not far behind. **(Figure 3)**

Figure 3: Top functions using low-code development



Source: SAPinsider, December 2022

This new approach to application development is crucial enough to warrant senior management involvement in the decision-making process. CIOs or CTOs lead the decision for almost half of the respondents (47 percent), followed by IT vice presidents or directors (36 percent). Business stakeholders’ involvement in decision-making is also possible, especially for exploring citizen development.

Several vendors including SAP are rolling out low-code, no-code development platforms that promise to deliver fast return on investment with pre-built use cases, secure access, seamless integrations, and easy interfaces. There are exciting possibilities for this technology, but it remains to be seen how SAP customers sensibly use it to achieve application utopia.

Required Actions

Based on the survey responses, organizations should make the following actions around low-code, no-code development:

- **Assess low-code, no-code development projects within the context of an enterprise-wide application strategy to extract most value.** It is better to evaluate low-code, no-code development as a major component of application strategy than as a stand-alone initiative. Such a strategy can augment adoption and return-on-investment and address long-term goals such as “clean core”, migrations, and citizen development.
- **Identify immediate and high-impact use cases for low-code/no-code deployment which can deliver ROI and kindle interest in this technology.** A lack of knowledge about low-code/no-code can lead to myopic thinking about its use cases. Low-code/no-code development can create radical transformation in unexpected areas such as migration of ABAP code, data migration to the cloud, etc. Setting up appropriate metrics such as ease of use, business need, complexity, and IT costs to assess the impact on use cases can help prioritize them.
- **Create awareness, dispel myths and train both business and IT users on low-code and no-code platforms.** The most common misconception about low-code and no-code development is that they are considered different approaches altogether. Low-code development is primarily an information technology (IT) initiative, while no-code development offers possibilities for citizen development by business users. The usage, challenges, training needs, and use cases are different. Anxieties about job loss due to low-code and no-code also may need to be handled early enough to secure support and adoption.
- **Ensure security and compliance needs are met by involving key stakeholders in the evaluation process.** Since security and data privacy are critical, plans for low-code, no-code platforms can be evaluated by following some established criteria. This may also determine the use cases for early adoption. For example, initial use cases could require lower security needs and can serve as a sandbox for the future.

Chapter One: Low-code, No-code Development Strategy Overview

The demand for rapid IT innovation to support digital transformation has increased across organizations. The frequency and speed of new products roll-out and business processes to meet changes in supply chain and customer demands is also drastically faster paced than before.

In parallel, the number of applications emerging from SAP and its partner base is skyrocketing. Businesses are aware of these options and expect such applications to accelerate growth and lend competitive advantage.

IT leaders need to be at the forefront of the transformation with a robust application roadmap for meeting evolving business demands. Evaluating low-code, no-code development as a viable addition to the application strategy is unavoidable and should involve both IT and business leaders.

This research unpacks the dynamics that impact low-code and no-code strategy and actions.

Best Practices Model — DART

SAPinsider grounds all its research insights in our proprietary DART model. This research model provides practical insights that connect business **D**rivers and **A**ctions to supporting **R**equirements and **T**echnologies. Drivers represent internal and external pressures that shape organizational direction. Organizations take Actions to address those Drivers. They need certain people, processes, and capabilities as Requirements for those strategies to succeed. Finally, they need enabling Technologies to fulfill their Requirements.

Respondents' answers to our survey and interview questions revealed clear trends that are summarized in **Table 1** and will be examined throughout this report.

Table 1: DART model framework for low-code, no-code development for SAP

Drivers	Actions	Requirements	Technologies
<ul style="list-style-type: none"> • High demand for new analytics and automation use cases (30 percent) • Growing IT backlog due to pace of upgrades, updates and business requirements (23 percent) • Interest from business users for citizen development (18 percent) 	<ul style="list-style-type: none"> • Getting educated on low-code and no-code development (45 percent) • Building business case and use cases for low-code/no-code development (38 percent) • Driving IT transformation to increase impact and efficiency (31 percent) 	<ul style="list-style-type: none"> • Security, privacy, and compliance (50 percent) • Seamless integration with multiple SAP and non-SAP applications (35 percent) • Prioritizing IT resources time for critical projects (28 percent) 	<ul style="list-style-type: none"> • SAP Fiori Launchpad (31 percent) • Web and mobile design, development tools (25 percent) • UI/UX design tools (24 percent) • Visual analytics and modeling tools (20 percent)

<ul style="list-style-type: none"> • Urgent demand for applications that connect to SAP (18 percent) • Need to reduce risk of aging or out-of-support technology (17 percent) • Need to reduce dependency on systems integrators (17 percent) 	<ul style="list-style-type: none"> • Training business users for no-code development (citizen developers) (30 percent) • Upskilling development teams for low-code development (30 percent) • Migrating or deploying SAP Fiori based apps that can leverage existing code investments (28 percent) 	<ul style="list-style-type: none"> • “Clean core” to minimize maintenance efforts, risks and costs (24 percent) • Reducing technical debt to stay nimble for future (24 percent) • Protection of code investments made over years (22 percent) • Meeting demand for specialized industry functionality (20 percent) 	<ul style="list-style-type: none"> • Data management automation tools (17 percent) • SAP Process Automation (15 percent) • Low-code development platform (14 percent) • No-code development platform (13 percent)
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What Drives Low-code, No-code Development?

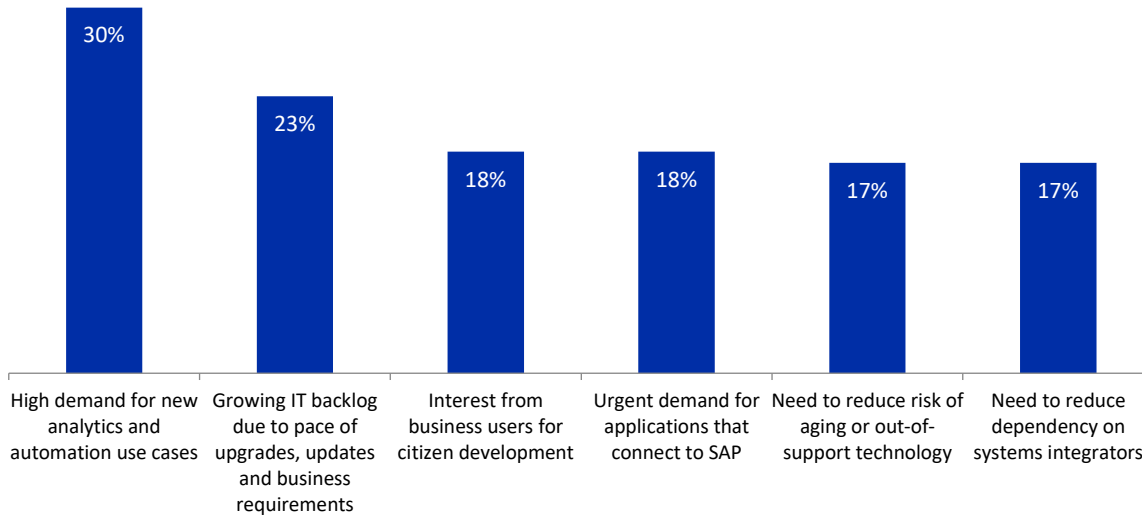
There are emerging drivers that are forcing businesses to consider more efficient, innovative ways to deliver applications to the business. Chief information officers are increasingly involved in helping business tackle the drivers.

The survey findings reveal that the top driver for low-code, no-code development is the high-demand for new applications including analytics, automation use cases (30 percent) followed by the growing IT backlog (23 percent). IT departments have their roadmaps packed with new applications roll-outs, updates and upgrades including the migration to SAP S/4HANA and other such high-risk projects that lead to backlog (**Figure 4**).

Business users are increasingly encouraging citizen development by encouraging non-IT-trained employees to develop applications (18 percent). Within the SAP customer base, there is also an urgent demand to connect other applications to SAP for seamless workflows (18 percent).

Many enterprises continue to run old or out-of-support applications which are in dire need of being rewritten on new platforms or replaced by new applications. They not only pose risk but become technical debt that holds back transformation. The need to reduce risks from such aging or out-of-support technologies by replacing them with standard SAP functionalities or other packaged solutions such as Software-as-a-Service applications is also a driver for 17 percent of respondents, like the need for reducing dependency on systems integrators.

Figure 4: Top drivers for low-code, no-code development

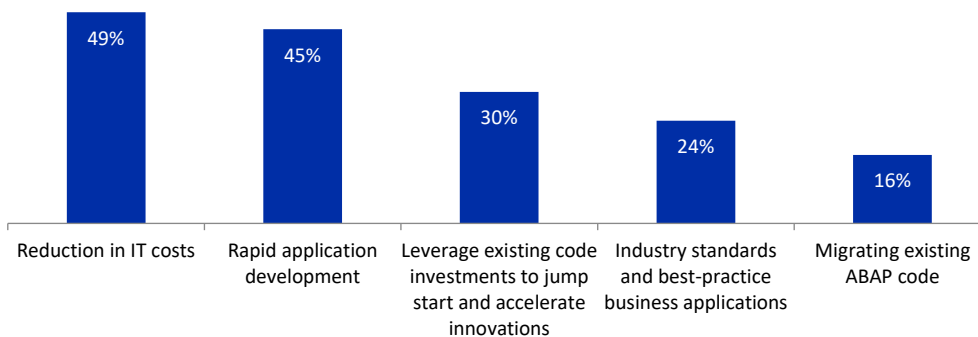


Source: SAPinsider, December 2022

Low-code-/no-code platforms are emerging as reliable ways for developing new applications that enable businesses to develop low complexity applications without much time investment. However, before investing in such platforms, companies need to be clear about what they want to achieve from their use.

In February 2022, SAPinsider’s research report, *Application Strategy for SAP*, revealed 49 percent of respondents considered IT cost reduction as their top goal. This was followed by rapid application development (45 percent) and leveraging existing code investments (30 percent). Only 16 percent looked at migrating existing ABAP code to the cloud using low-code platforms (Figure 5).

Figure 5: Goals for low-code/no-code platform



Source: SAPinsider, February 2022

How Do SAPinsiders Address Drivers?

Many organizations are taking actions to address the drivers and goals. Low-code, no-code development is still an aspiration and not a reality for many organizations. However, most respondents have started educating their stakeholders, understanding the value, evaluating platforms, and identifying use cases to make the adoption decision.

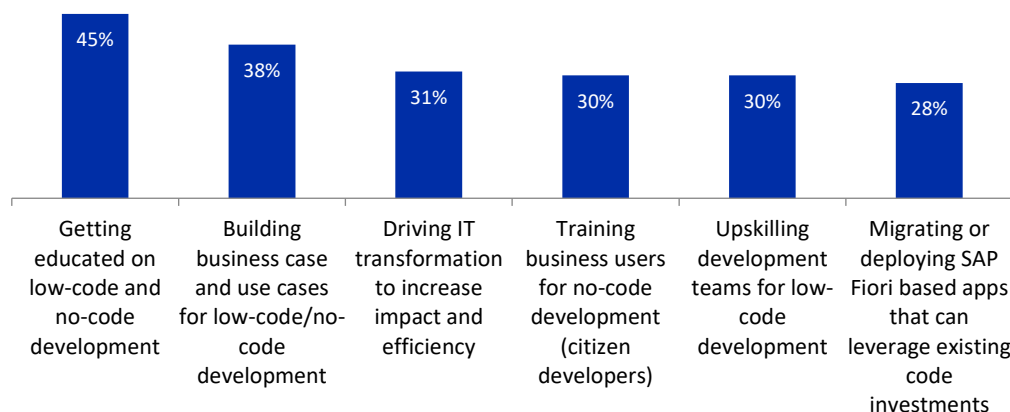
Before identifying or investing in such platforms, it is critical to understand the low-code/no-code philosophy. Companies are fast recognizing the need for maturity in IT processes, security, and governance before they embark on such platform adoption journeys. A lack of clarity on differences between low-code and no-code, their application challenges along with the misconceptions and skepticism have propelled respondents to enhance knowledge on low-code and no-code development (45 percent) **(Figure 6)**.

Aligned to this, 30 percent are training business users for no-code development and upskilling development teams for low-code development. This is one area where both IT and business must be even more collaborative.

Mapping business needs and capabilities against IT bandwidth and viability of no-code platforms can be the starting point of the collaboration. Hence, the survey finds that building business cases and identifying use cases are a priority for 38 percent of respondents.

Driving IT transformation to increase impact and efficiency through low-code, no-code development is critical for 31 percent of respondents. With IT functions facing multifarious challenges related to IT workforce — impending retirement of senior resources especially in areas such as ABAP, high turnover, the “great resignation” and the “quiet quitting” trends of the last few years, and the increasing remote or hybrid workforce — human resource challenges have worsened the IT backlog augmented by initiatives such as move to SAP S/4HANA or other digital transformation projects.

Figure 6: Top actions in low-code and no-code development



Source: SAPinsider, December 2022

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“From an SAP standpoint, it is very difficult to prepare ABAP for low-code development and integration. That will be a stumbling block for the near future.

**Managing Director,
Software Company,
EMEA**

A small percentage of respondents have started to migrate SAP Fiori-based apps to leverage existing code investments (28 percent). 24 percent of respondents are currently evaluating or deploying low-code/no-code development platforms.

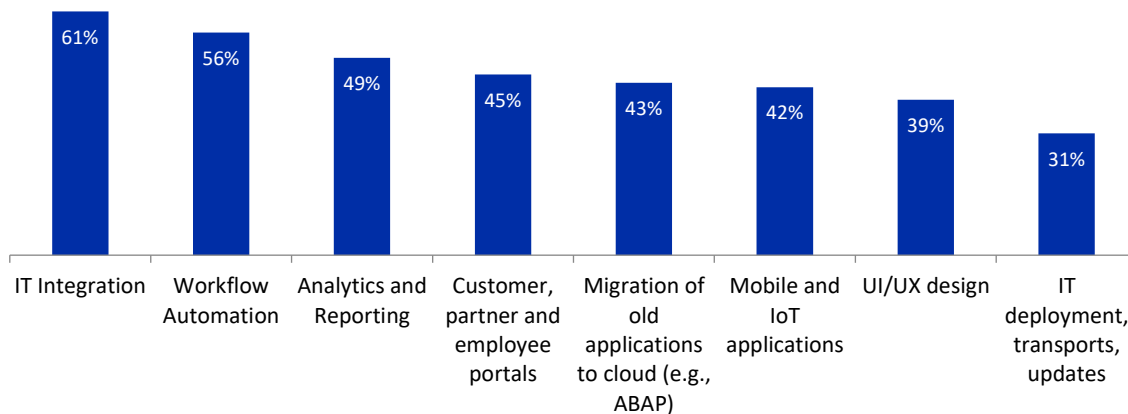
The survey findings revealed supply chain, and finance and accounting dominating the use of low-code development (56 percent) while purchasing (40 percent), sales and marketing (35 percent), customer service (34 percent), and human resources (31 percent) are the other top functions that are using low-code development. **(Figure 3)**

It is also clear from the survey responses that some use cases are more popular than others for low-code and no-code development.

With integration of SAP with other applications on cloud and on premise becoming pervasive and complex, the need to create and maintain integration is time-consuming, repetitive, and risky. Thus, IT integration comes out as the most popular use case for low-code development (61 percent) **(Figure 7)**.

With large vendors providing dedicated functionality for IT integration, there are vendors who specialize in low-code and no-code platforms and address integration exclusively. These low-code solutions provide drag-and-drop connectors and logic constructs to create integration flows and custom applications and enable workflow automation with minimal coding. Several have visual modeling functionality and can be configured with minimal tweaks. No-code platforms provide reusable components and pre-packaged integration templates for integration.

Figure 7: Top use cases for low-code and no-code development



Source: SAPinsider, December 2022

Workflow automation is another popular area (56 percent) where pre-packaged templates for standard workflows like order processing, human resource requests, and purchase orders can be quickly deployed.

Analytics and reporting is needed across departments (49 percent) and can benefit from no-code platforms that allow business users to drag drop data blocks to run custom analytics. Rolling out or modifying customer, partner and employee portals is another popular use case for no-code (45 percent) which business users can handle on their own.

The next most prevalent use case is for IT teams to be more efficient with repetitive tasks and use best practices. Others use cases include migration of old applications to the cloud

(43 percent), user interface/user experience (UI/UX) design (39 percent) and IT deployment, transports and updates (31 percent).

Key Takeaways

Based on our research, the following takeaways are clear:

- **Educate IT and business leaders on the possibilities of low-code/no-code development as part of application strategy.** Mere complaints about budget or IT backlog are not helpful. No-code development by business users can go a long way for becoming future-ready.
- **Set up metrics for low-code/no-code that are beyond just IT cost savings.** While low-code/no-code development could lead to efficiencies, looking at it from a cost reduction point is a tunnel view. The return on investment is not just about saving IT development costs. It is largely due to the tangibles and intangibles of moving rapidly to support business needs – the impact can range from faster time-to-market, better decision making due to analytics applications, better communications, and collaboration with entire value chain, and so on.
- **Upskill IT resources in low-code development for specific areas.** The research shows that low-code is leading no-code in adoption. IT resources can be the early adopters of low-code platforms, delivering business applications and updates faster, with pre-packaged use cases, migration libraries, etc. This does not mean IT layoffs. Instead, it means making IT more effective and directed to higher priority, complex application development.
- **Identify use cases for IT to tackle IT backlogs and workloads.** Integration, migration, transport, and release management are key repetitive and time-consuming tasks that could be initial candidates for low-code development. This transition can also help in projects that most SAP customers are grappling with today — the move to SAP S/4HANA as well as to the cloud. Low-code platforms can be utilized to run the migration as well as test it. This project, by itself, will not only deliver immediate value, but will set the company up for further low-code adoption.

Some of these actions will make the low-code and no-code strategy and development a major competitive differentiator for the company.

Chapter Two: How Do SAPinsiders Approach Low-code, No-code Development?

As discussed, many respondents are rethinking application strategy as they move to SAP S/4HANA and cloud. While low-code, no-code development is becoming part of this strategy, every SAP customer has several business and technical requirements that must be considered while rolling out this strategy.

This chapter will assess such requirements and enquire into the various technologies that respondents are using to address the requirements while meeting their goals.

Top Low-code, No-code Development Requirements

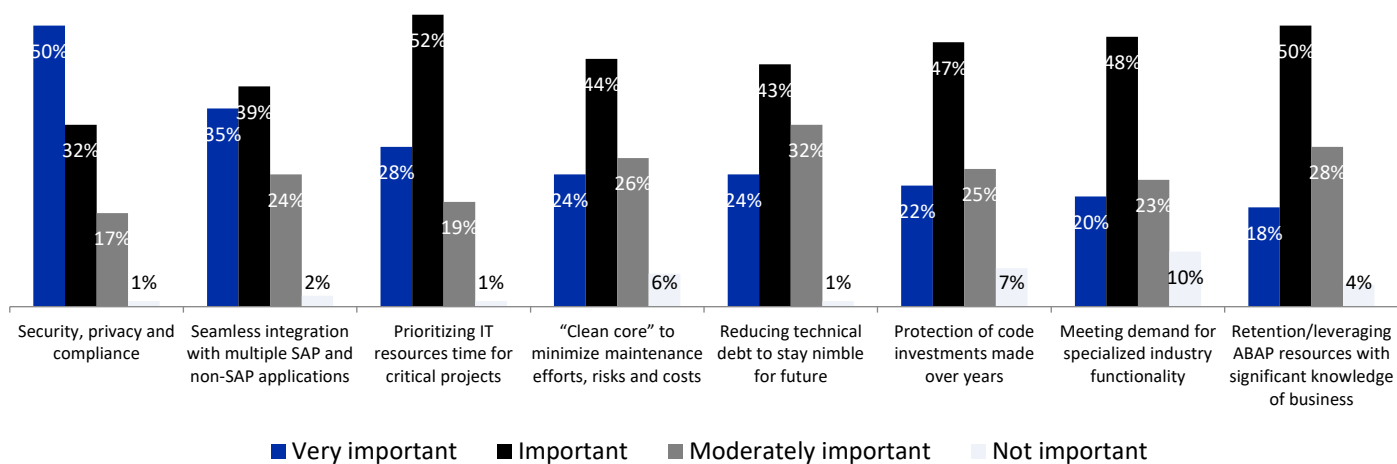
While the benefits of low-code, no-code development is clear, there are several requirements that need to be met for it to be a success.

The need for security, privacy, and compliance (50 percent) is a requirement cited as very important by most survey respondents. With the increasing prevalence and complexity of integration among SAP and non-SAP applications, the need for seamless integration is the next most cited requirement (35 percent).

The goals of achieving “clean core” (very important or important for 68 percent), reducing technical debt (very important or important for 67 percent), and leveraging code investments (very important or important for 69 percent) may contradict each other, but the need to balance all three is a requirement that low-code, no-code platforms can potentially help with by, for example, migrating existing code base to the cloud.

A few requirements are around IT efficiency, such as prioritizing IT resources’ time for critical projects (very important or important for 80 percent of respondents) and retaining and leveraging ABAP resources with significant knowledge of business (68 percent). (Figure 7).

Figure 7: Top requirements for low-code, no-code development for SAP



Source: SAPinsider, December 2022

In addition, respondents also want low-code, no-code development to meet demand for specialized industry functionality (68%). Low-code, no-code platform vendors are starting to meet this demand with industry-specific packages. Many vendors are starting to build their own marketplace of packages by partnering with other vendors in specialized areas — either functional or industry-specific.

Which Technologies Do Respondents Use for Low-code, No-code Development?

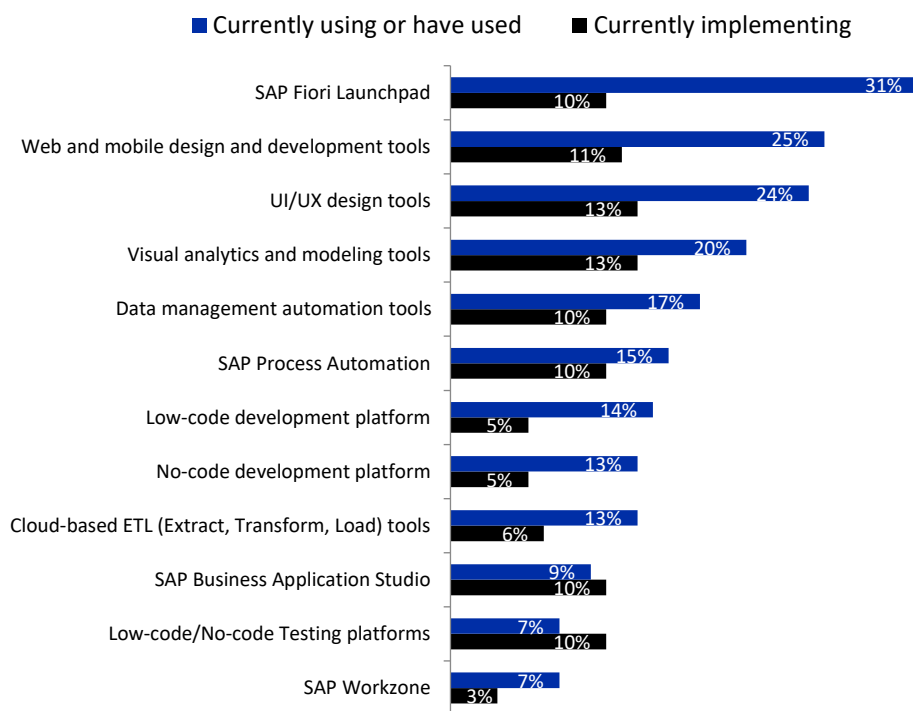
The low-code/no-code development space is being flooded with new platforms and tools. These are from large technology companies including SAP entering the space to provide robust platforms that seamlessly connect to their solutions, as well as from niche vendors who offer nimble platforms with attractive user interfaces, either specialized by industry or business process or function.

Apart from these dedicated development platforms, a rich set of technologies are available for specific use cases that many SAP customers are already using or implementing.

Currently, the top technologies used are SAP Fiori Launchpad (31 percent), web and mobile design and development tools (25 percent), user interface/user experience (UI/UX) design tools (24 percent). Dedicated low-code development (14 percent) and no-code development platform (13 percent) are not very prevalent yet (**Figure 8**).

SAP's own process automation (15 percent) and Business Application Studio (9 percent) are also limited in use.

Figure 8: Low-code, No-code technologies currently in use



Source: SAPinsider, December 2022

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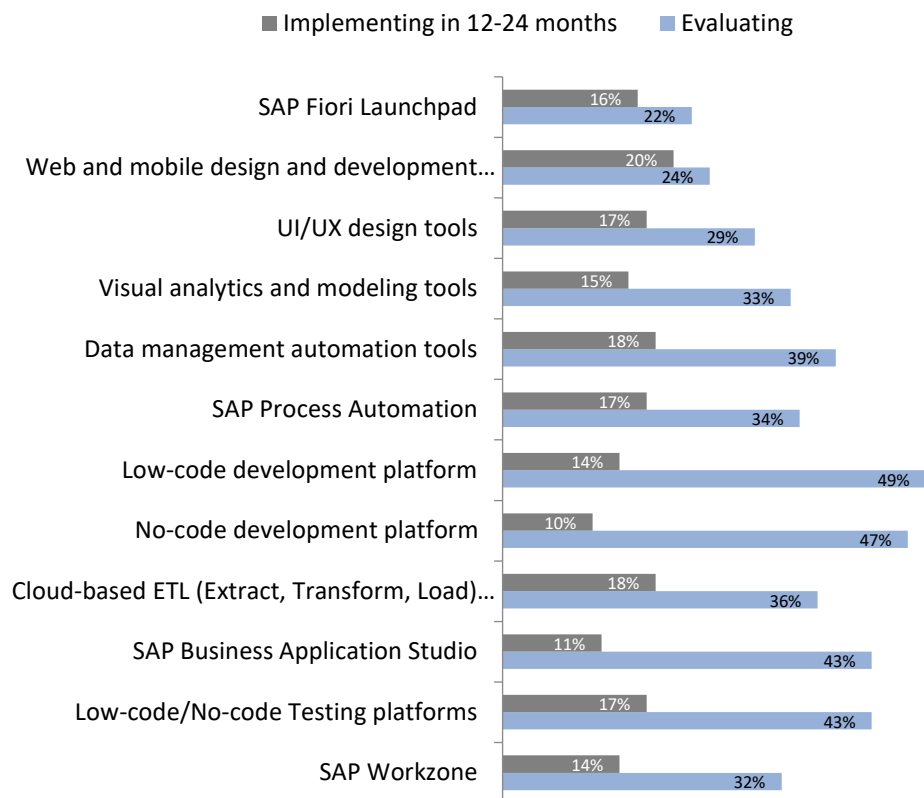
“We are not sure that the tools to examine end-to-end processes and highlight customizations are robust enough. They will be nice to have so that customizations can be accounted for when we migrate or change that process.”

Steve Ross
Head of Business Applications
C J Clarks

Yet, the picture changes dramatically as we look at what they are implementing or evaluating.

Nearly half the respondents are evaluating low-code development platforms (49 percent) and no-code development platforms (47 percent). Companies are also evaluating SAP Business Application Studio (43 percent) which comes with SAP Business Technology Platform and provides tight integrations and SAP Fiori-based user interface libraries for many common applications. Low-code/No-code testing platforms (43 percent) are also being evaluated (**Figure 9**).

Figure 9: Low-code, No-code technologies being implemented or evaluated



Source: SAPinsider, December 2022

The low-code/no-code development space is getting exciting with various approaches vendors are taking to help their customers get rapid return on investment.

Key Takeaways

When it comes to requirements and technologies related to low-code and no-code development, consider the following:

- Articulate clear requirements for clean core, technical debt, security, and privacy to enable proper evaluation and roll-out of low-code, no-code platforms. It is important for IT and business leaders to have a clear, uniform understanding of their requirements and the tradeoffs. Fuzzy concepts can lead to confusion and poor decision making. How

much clean core do we aim for? Which areas can we handle technical debt and its constraints better than others? What are specific security needs for various data structures and applications? IT leaders can define these requirements by collaborating with business leaders.

- **Identify integration needs and evaluate low-code, no-code solutions to tackle integration.** SAP customers have an overwhelming need to create and maintain seamless integrations. This is the popular use case with 61 percent of respondents selecting this, and could be a good place to launch a low-code platform. IT teams can immediately benefit and use that as a launchpad for further adoption.
- **Understand IT bottlenecks and free up IT resources bandwidth with tools and low-code/no code platforms.** Evaluate tools and platforms which may enable business self-service as well as automate or ease time-consuming IT tasks such as release, transports, migrations, and integrations. Key IT resources can be freed up to focus on more complex and valuable applications.
- **Evaluate low-code/no-code platforms that deliver industry-specific packages for immediate value and adoption.** Drag and drop of a much-needed industry-specific package can be a quick win for low-code/no-code development. Such quick wins can set the tone for the future motivating the organization to explore more areas of transformation.

Chapter Three: Required Actions

SAPinsider's continued research on topics such as application development, integration, SAP S/4HANA migration, data management and analytics, and CIO concerns have confirmed the fast pace with which SAP customers are moving to rollout a slew of applications and updates to meet business demand.

Moving to SAP S/4HANA, either rewriting or replacing ABAP custom code, deploying ABAP applications in the cloud, implementing cloud applications on SAP Business Technology Platform, integrating SAP with non-SAP applications, or developing SAP Fiori apps continue to accelerate as companies build expertise. IT resources, including the limited group of ABAP and cloud programmers, have their rosters packed.

In this scenario, a solid low-code, no-code development strategy, guidelines, and roadmap will ensure that IT and business teams can work efficiently to develop and maintain applications with low business risks and costs.

Steps to Success

This research reveals that SAP customers should apply the following key steps to build a successful low-code, no-code strategy and development:

- **Invest in building an enterprise-wide collaborative application strategy council with measurable targets, which can also include low-code, no-code strategy as part of it.** IT leaders should lead this process effectively, educating the executives and business leaders on the goals, requirements and challenges and collaborating on a mid-term and long-term strategy.
- **Create urgency for IT resources to be strategic and not just order takers for business.** IT teams should understand business, the drivers, and the challenges. They can be trained to work closely with their business counterparts to understand current and upcoming needs. Further, each IT resource needs to be trained to investigate their workloads and identify tasks that can be automated or developed using low-code platforms. Incentives and training can transform many IT resources to be strategic and meet business needs rather than check off on routine tasks.
- **Set the foundation for citizen development to reduce dependency on IT for simple applications.** Business users operate in a demanding environment and need to use data and analytics. With products rolled out rapidly, processes need to adapt quickly. Empowering business users to handle some of the IT load helps IT teams to focus on more complex applications. Certain business champions can lead the change with IT being the cheerleaders.

Such a robust application strategy with low-code and no-code intrinsically built in, backed by solid education and training among business and IT resources can go a long way in managing intense innovation and competitive pressures.

Methodology

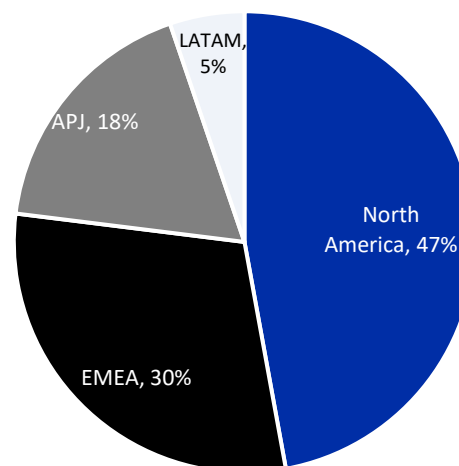
In October and November 2022, SAPinsider examined the experiences of business and technology professionals about how they are approaching low-code, no-code development. Our survey was administered to 141 members of the SAPinsider community and generated responses from across a wide range of geographies, industries, and company sizes. Respondents completed an online survey and provided feedback in customer interviews that questioned them on topics such as:

- What are your plans for low-code, no-code development??
- What are your primary goals with respect to low-code, no-code development?
- What are your organization's challenges in this area?
- What technologies and tools are you rolling out to support your strategy?

The demographics of the respondents included the following:

- **Job function:** The major functional areas reported by respondents included Information Technology/Software/Infrastructure (71 percent); Business Development/Sales (6 percent); Finance, Accounting, Tax (6 percent); Manufacturing (4 percent)
- **Market sector:** The major economic sector reported by respondents included Software and Technology (46 percent); Industrial (27 percent); Financial Services and Insurance (9 percent); Retail and Distribution (8 percent); Public Sector (6 percent)
- **Geography:** Of our survey respondents, 47 percent were from North America, 30 percent were from Europe, the Middle East, and Africa (EMEA); 18 percent were from Asia-Pacific, Japan, and Australia (APJ); and 5 percent 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's no wonder that organizations worldwide turn to SAPinsider for research with results.

The DART methodology provides practical insights, including:

- **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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