FSOL-301B-1: Flash Solutions for SAP

Jillian Coffin | VP & Publisher
August 8, 2019
Jillian Coffin
VP & Publisher, Storage, Cloud & Data Center

- Oversees the editorial, audience development, and sales and consulting efforts across website communities including SearchStorage.com, SearchCloudComputing.com, and SearchITChannel.com.

- Jillian has been working in the data storage community for 12+ years sharing purchase intent data with both established and emerging storage vendors who need to better understand changing market dynamics and maximize growth opportunities.

- TechTarget is the leading source of independent enterprise storage and flash technology content on the web and helped make it into a trusted resource to aid IT and business leaders in making informed decisions.
Session Panelists

Matt Morris
Sr. Solutions Marketing Manager

Erik Kaulberg
Vice President

Eric Herzog
Chief Marketing Officer & VP WW Storage Channels

Saroj Mohapatra
SAP SME

Western Digital
INFINIDAT
IBM
Cisco
TechTarget’s Storage audience

1.3 million Storage members globally

Storage and infrastructure buyers active in the last 90 days

151,810
North America

63,397
EMEA

18,200
APAC

3,835
LATAM

650K+
SearchStorage.com monthly page views

NVMe & NVMe-oF appetites increasing

2.6M+
Activities taken around Flash & NVMe in the past year (up 24% YoY)

90%
Increase in NVMe/ NVMe-oF activities since last year

580+
Flash and NVMe related pieces of content published on the TechTarget network in the last year alone
TechTarget’s SAP audience

2.1 million+ activities taken around SAP per year

SAP audience activity in the last 90 days¹

- 23,400+ North America
- 11,000+ EMEA
- 4,400+ APAC
- 900+ LATAM

11,000+ EMEA
23,400+ North America
4,400+ APAC
900+ LATAM

350K+ SearchSAP.com monthly page views

24%
Activity growth around SAP topics in the last year

67,000+
Prospects researching SAP each year

10,000+
unique active accounts with SAP installed

10,000+
unique active accounts with SAP installed

Organic rankings as of 7/15/2019; Activity insights reflective of the last 90 days | *APAC = ANZ, ASEAN & India | Data pulled from ERP segments
About TechTarget Research & Data

We sit on a vast amount of research and purchase Intent Data that allows us to analyze the latest trends, behavior and insights from our wide range of audiences

- **Annual IT Priorities Survey** is fielded to 4000+ global technology and LOB buyers to gather market insights on broad initiatives, technology adoption, budgets, and plans for the upcoming year
  - Regions surveyed 35% NA; 30% EMEA; 30% APAC; 5% LATAM
  - Company sizes range from large enterprise to SMB (50% from $10M+ annual revenue)

- **Quarterly Pulse Surveys** are fielded to 300+ respondents across targeted markets to better understand emerging techs, market disruption and key areas of change
  - Recent Pulse Surveys include: AI/ML, SAP, MSP, Flash & NVMe, DevOps)

- **Qualified Sales Opportunities Data** taken from 32K projects over the last 12 months across 80 technology markets

- **Priority Engine intent data** garnered from 200+ topically focused segments that represent the most active organizations week over week

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**20 years**

of publishing technology-specific content

**150+**

global B2B websites covering over 5,000 technology topics

**19.7M**

IT and Business professionals opted-in and GDPR compliant

**#1**

B2B Marketing Data Provider (Forrester Wave 2018)

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Worldwide
SAP State of the Union

Mandated migration from SAP ECC/Business Suite to S/4HANA by 2025

• Companies need to set establish deployment methods/proof of concept with following
  ▪ S/4HANA Cloud (Public Cloud, Hybrid Cloud, Private Cloud)
  ▪ S/4HANA (On-prem)

• Cloud migrations not a walk in the park and seeing some customers move to greenfield implementation

• Good news for storage vendors: On-prem seems to be preferred deployment model

• New opportunities with SAP Leonardo (Digital Innovation) and C/4HANA (Customer Experience)
  - How customers access SAP’s products/features across emerging techs like AI/ML, IoT, Blockchain and customer apps (still lots of runway here!)
Current SAP deployment methods vs S/4HANA deployment plans

Observations

1/3 of customers will use traditional on-premise models for S/4HANA deployment

1/3 Unsure!
Deployment models for planned SAP projects

<table>
<thead>
<tr>
<th></th>
<th>On-Prem</th>
<th>Off-Prem/Public Cloud</th>
<th>Hybrid Cloud</th>
<th>SaaS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relational database management system</td>
<td>62%</td>
<td>40%</td>
<td>28%</td>
<td>14%</td>
</tr>
<tr>
<td>Data Integration</td>
<td>53%</td>
<td>29%</td>
<td>33%</td>
<td>20%</td>
</tr>
<tr>
<td>Enterprise data platform</td>
<td>52%</td>
<td>52%</td>
<td>35%</td>
<td>19%</td>
</tr>
<tr>
<td>ERP</td>
<td>50%</td>
<td>33%</td>
<td>28%</td>
<td>26%</td>
</tr>
<tr>
<td>Financial software</td>
<td>50%</td>
<td>33%</td>
<td>23%</td>
<td>28%</td>
</tr>
</tbody>
</table>

Source: Qualified Sales Opportunities | Worldwide | Last 12 months
Cost and integration challenges preventing early upgrade

What are the top challenges that prevent your company from upgrading? (Choose all that apply)

- Cost: 50%
- Systems integration challenges: 38%
- Customization: 36%
- Data integration challenges: 32%
- Lack of skill set: 26%
- Compliance: 19%
- Security: 19%
- Lack of staff: 17%
- Lack of confidence in capabilities of new software: 13%
- Migration to cloud is a non-starter for us: 9%
- Lack of need: 5%

Source: TechTarget 2019 SAP S/4HANA Pulse Survey (Worldwide)

Observations

- Cost of change is still top of mind for customers moving to S/4HANA
- CIOs feel it is too costly to justify based on value of the ERP upgrade and ultimately not making case to LOB, sitting tight and looking at alternatives
Certified Cloud partners will still play a role along with other 3\textsuperscript{rd} party service providers

Which of these SAP certified cloud providers is your company likely to evaluate for infrastructure for its instance(s) of S/4HANA? (Choose all that apply)

- Microsoft: 69%
- Amazon Web Services: 67%
- Google: 43%
- IBM: 42%
- Alibaba Cloud: 9%
- Huawei Technologies: 9%
- Open Telekom Cloud: 5%

Source: TechTarget 2019 SAP S/4HANA Pulse Survey (Worldwide)
Workloads driving change in underlying storage

Which of the following workloads are most likely to undergo a change in their underlying storage? (Choose up to 3)

- Database/data warehouse: 31%
- Data protection/backup: 30%
- BI & big data analytics: 22%
- End user shares/end user files: 18%
- ERP: 15%
- Production applications (non-ERP, non-email): 13%
- Productivity/collaboration apps: 12%
- VDI/hosted desktop: 11%
- Storage for containers: 9%
- Development & test: 9%
- Remote office/branch office: 9%
- Edge computing: 6%
- Web e-commerce and sites: 6%

Source: TechTarget Flash Pulse Survey 2019 (WW) | n=427

70% of respondents looking to increase their storage spend
Performance is primary factor driving change in underlying storage workloads

Which of the following workloads are most likely to undergo a change in their underlying storage?*

What is the primary factor driving this change?

- Increased performance: 71%
- Decreased cost: 33%
- Manageability: 27%
- Better security: 24%
- Compliance/regulations: 9%
- Other: 7%

Source: TechTarget Flash Pulse Survey 2019 (WW) | n=55
Flash project requirements among SAP’s install base are more weighted to performance and power reduction

<table>
<thead>
<tr>
<th>Project Requirement</th>
<th>Overall Market</th>
<th>SAP Install</th>
<th>SAP DB Install</th>
<th>SAP ERP Install</th>
</tr>
</thead>
<tbody>
<tr>
<td>Refresh legacy primary storage</td>
<td>26%</td>
<td>25%</td>
<td>21%</td>
<td>23%</td>
</tr>
<tr>
<td>Reduce total cost of ownership</td>
<td>22%</td>
<td>20%</td>
<td>20%</td>
<td>19%</td>
</tr>
<tr>
<td>Improve existing application or database performance</td>
<td>20%</td>
<td>18%</td>
<td>17%</td>
<td>14%</td>
</tr>
<tr>
<td>Eliminate storage performance issues</td>
<td>19%</td>
<td>21%</td>
<td>21%</td>
<td>21%</td>
</tr>
<tr>
<td>Accelerate virtual server hosts</td>
<td>11%</td>
<td>6%</td>
<td>6%</td>
<td>7%</td>
</tr>
<tr>
<td>Improve performance for new applications</td>
<td>11%</td>
<td>11%</td>
<td>11%</td>
<td>11%</td>
</tr>
<tr>
<td>Reduce power and storage footprint</td>
<td>11%</td>
<td>11%</td>
<td>11%</td>
<td>11%</td>
</tr>
<tr>
<td>Simplify performance management of storage</td>
<td>10%</td>
<td>9%</td>
<td>9%</td>
<td>8%</td>
</tr>
<tr>
<td>Achieve the right price/performance ratio</td>
<td>10%</td>
<td>7%</td>
<td>7%</td>
<td>8%</td>
</tr>
<tr>
<td>Provide private cloud or cloud-like services</td>
<td>9%</td>
<td>8%</td>
<td>8%</td>
<td>11%</td>
</tr>
<tr>
<td>Deploy in converged infrastructure</td>
<td>7%</td>
<td>5%</td>
<td>6%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Source: Qualified Sales Opportunities and HG Data Crossover | Worldwide | Last 12 Months | 7/2019
NVMe scoring higher with Edge, ERP and Big Data Analytics

For these workload(s), which of the following is primary storage.

<table>
<thead>
<tr>
<th>Workload</th>
<th>NVMe</th>
<th>Hybrid storage</th>
<th>All flash</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edge computing</td>
<td>17%</td>
<td>38%</td>
<td>29%</td>
<td>17%</td>
</tr>
<tr>
<td>ERP</td>
<td>12%</td>
<td>42%</td>
<td>25%</td>
<td>21%</td>
</tr>
<tr>
<td>BI &amp; big data analytics</td>
<td>8%</td>
<td>59%</td>
<td>15%</td>
<td>17%</td>
</tr>
<tr>
<td>Database/data warehouse</td>
<td>6%</td>
<td>49%</td>
<td>23%</td>
<td>22%</td>
</tr>
<tr>
<td>Dev &amp; test</td>
<td>6%</td>
<td>45%</td>
<td>6%</td>
<td>42%</td>
</tr>
<tr>
<td>Data protection/backup</td>
<td>4%</td>
<td>47%</td>
<td>9%</td>
<td>40%</td>
</tr>
<tr>
<td>Production apps</td>
<td>54%</td>
<td>27%</td>
<td>17%</td>
<td></td>
</tr>
<tr>
<td>OLTP*</td>
<td>50%</td>
<td>38%</td>
<td>13%</td>
<td></td>
</tr>
</tbody>
</table>

Key Takeaways

- 47% of NVMe adopters plan to implement through storage array vs DAS

Source: TechTarget Flash Pulse Survey 2019 (WW) | n=23-121 | *Online transaction processing
Future purchases/upgrades

Which of the following SAP solutions does your company intend to purchase/upgrade in the future? (Choose all that apply)

<table>
<thead>
<tr>
<th>Solution</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAP S/4HANA</td>
<td>82%</td>
</tr>
<tr>
<td>SAP HANA</td>
<td>49%</td>
</tr>
<tr>
<td>SAP C/4HANA</td>
<td>40%</td>
</tr>
<tr>
<td>SAP SMB</td>
<td>21%</td>
</tr>
<tr>
<td>SAP BN</td>
<td>20%</td>
</tr>
<tr>
<td>SAP Supply Chain Mgmt</td>
<td>18%</td>
</tr>
</tbody>
</table>

Observations

- Customers are not marrying their S/4HANA transformation with SAP Cloud Platform
- Lots of confusion and education by partners is key

Source: TechTarget 2019 SAP S/4HANA Pulse Survey (Worldwide)
## Upcoming sessions

### Tuesday August 6th
- **BMKT-102A-1:**
  - **Title:** Know What the Flash Customer Wants and Needs
  - **Track:** Business/Marketing
  - **Presented by:** Dave Raffo
  - **Time:** 3:40pm to 4:45pm

- **BMKT-102B-1:**
  - **Title:** Data Growth and a future with Zettabytes
  - **Track:** Business/Marketing
  - **Presented by:** Mike Matchett
  - **Time:** 4:55pm-6:05pm

### Thursday August 8th
- **FSOL-301A-1:**
  - **Title:** Flash Solutions for Oracle
  - **Track:** Flash Solutions
  - **Presented by:** Dave Raffo
  - **Time:** 8:30am-9:35 am

- **FSOL-301B-1:**
  - **Title:** Flash Solutions for SAP
  - **Track:** Flash Solutions
  - **Presented by:** Jillian Coffin
  - **Time:** 9:45am to 10:50am

- **FSOL-302A-1:**
  - **Title:** Flash Solutions for Analytics
  - **Track:** Flash Solutions
  - **Presented by:** Mike Matchett
  - **Time:** 2:10pm to 3:25pm

- **FSOL-302B-1:**
  - **Title:** Flash Solutions for AI/ML
  - **Track:** Flash Solutions
  - **Presented by:** Jillian Coffin
  - **Time:** 3:40pm to 5:00pm
Thank you.

Jillian Coffin
VP & Publisher, Storage
# Primary factors driving change in Workloads

<table>
<thead>
<tr>
<th>Primary factor</th>
<th>Increased performance</th>
<th>Decreased cost</th>
<th>Manageability</th>
<th>Better security</th>
<th>Compliance / regulations</th>
</tr>
</thead>
<tbody>
<tr>
<td>BI &amp; big data analytics</td>
<td>64%</td>
<td>7%</td>
<td>12%</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>Industry specific apps</td>
<td>57%</td>
<td>4%</td>
<td>14%</td>
<td>14%</td>
<td>7%</td>
</tr>
<tr>
<td>Edge computing</td>
<td>54%</td>
<td>8%</td>
<td>17%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>OLTP</td>
<td>50%</td>
<td>19%</td>
<td>9%</td>
<td>13%</td>
<td>6%</td>
</tr>
<tr>
<td>Production apps</td>
<td>48%</td>
<td>10%</td>
<td>15%</td>
<td>12%</td>
<td>12%</td>
</tr>
<tr>
<td>Database/data warehouse</td>
<td>47%</td>
<td>8%</td>
<td>15%</td>
<td>16%</td>
<td>8%</td>
</tr>
<tr>
<td>ERP</td>
<td>47%</td>
<td>7%</td>
<td>7%</td>
<td>12%</td>
<td>11%</td>
</tr>
<tr>
<td>End user shares/files</td>
<td>38%</td>
<td>17%</td>
<td>13%</td>
<td>20%</td>
<td>10%</td>
</tr>
<tr>
<td>Storage for containers</td>
<td>38%</td>
<td>26%</td>
<td>21%</td>
<td>12%</td>
<td>3%</td>
</tr>
<tr>
<td>Remote/branch office</td>
<td>36%</td>
<td>15%</td>
<td>9%</td>
<td>33%</td>
<td>3%</td>
</tr>
<tr>
<td>VDI/hosted desktop</td>
<td>36%</td>
<td>11%</td>
<td>18%</td>
<td>31%</td>
<td>2%</td>
</tr>
<tr>
<td>Productivity/collab apps</td>
<td>33%</td>
<td>15%</td>
<td>15%</td>
<td>28%</td>
<td>2%</td>
</tr>
<tr>
<td>Development &amp; test</td>
<td>30%</td>
<td>21%</td>
<td>15%</td>
<td>12%</td>
<td>9%</td>
</tr>
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<td>Web e-commerce and sites</td>
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<td>22%</td>
<td>30%</td>
<td>4%</td>
</tr>
<tr>
<td>Data protection/backup</td>
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<td>18%</td>
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<td>19%</td>
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Source: TechTarget Flash Pulse Survey 2019 (WW) | n=23-121 | *Online transaction processing