SAP Infrastructure View

IDC's *SAP Infrastructure View* is an annual primary research survey that gains insights into infrastructure deployment patterns and choices for key software platforms from SAP. The SAP Infrastructure View expands IDC's previous biannual Special Report series on SAP infrastructure to a larger, global sample size. Infrastructure choices covered include hardware (servers and storage), deployment types (on premises and off premises, dedicated and shared cloud as-a-service environments, managed, hosted, and self operated). IDC will survey a mix of respondents who run SAP software platforms with SAP HANA and SAP software platforms without SAP HANA.

MARKETS AND SUBJECTS ANALYZED

In this service, IDC surveys respondents that have chosen to integrate SAP software platforms with the SAP HANA database as well as those that have chosen to integrate SAP software platforms with databases other than SAP HANA (e.g., Oracle, Microsoft SQL server, IBM DB2, SAP Sybase). Further, IDC will select respondents from a range of key industries, company sizes, and at various stages of adoption maturity. Finally, IDC will select respondents with on premises as well as IaaS deployments for their SAP landscape. The survey will ensure that a sizeable segment is running ERP on S/4HANA. In addition, the survey will probe SAP HANA and S/4HANA adoption, including with RISE and SAP.

CORE RESEARCH

- Executive summary (annual)
- Digest of survey findings (annual)
- Banner book with worldwide and regional insights where available (annual)
- Readout/webinar (annual)
- Unlimited access to associated analysts for inquiries
- Ability to request non-vendor-related data for reprints (additional charges)

Note: In addition to the aforementioned research available for the base price, subscribers will be able to access non-vendor-related data for reprints. Subscribers also gain the ability to provide input into future surveys. IDC will provide subscribers the ability to gain country, company size, and other non-published insights via custom market intelligence (CMI) add-ons. Subscribers will also have the option to purchase customized content packages, additional readout sessions, and other bespoke data insights via CMI add-ons.

In addition to the insight provided in this service, IDC may conduct research on specific topics or emerging market segments via research offerings that require additional IDC funding and client investment. To learn more about the analysts and published research, please visit: SAP Infrastructure View.

KEY QUESTIONS ANSWERED

1. What is the average spending on SAP infrastructure split by software category as well as by deployment type and environment location?
2. What is the current infrastructure usage, including bare-metal, virtualized and containerized, use of flash and hybrid storage (services), adoption plans and timescale(s) for Business Warehouse (BW) and ERP migration(s) to BW/4HANA and SAP S/4HANA?
3. What is the state of current implementations and future requirements of SAP HANA installations, covering database size (memory and storage), the use of data tiering, as well as expectations around performance, latency, availability, and security?
4. What are the reasons for deploying either on on-premises (non-cloud), at a hosted or managed service provider location, or in shared or dedicated cloud infrastructure environments?
5. How do migration requirements (including tools and costs) influence the numbers of compute and storage instances, use of physical servers and storage, and capex versus opex strategies?
6. What are the partner and vendor options for cloud deployment including considerations around availability, data integration, industry-specific solutions, workload types, automation, adjacent services/technologies, and perception of capabilities as a customer?

COMPANIES ANALYZED

This service reviews the strategies, market positioning, and future direction of several providers in the SAP infrastructure market, including:

SAP; ISV partners such as IBM, Microsoft, and Oracle; OEM infrastructure vendors such as Cisco, Dell, HPE, and Lenovo; cloud infrastructure services partners such as Amazon Web Services, Google, IBM, and Microsoft; and managed services partners such as Accenture, Deloitte, HCL, IBM, Infosys, Kyndryl, PwC, and Wipro.