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Your ERP, Your Rules

How SAP customers are rewriting their ERP strategy

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Key Takeaways

SAP customers are navigating a fundamental shift in how ERP systems are delivered and controlled. Our research of 455 organizations reveals that while SAP pushes toward cloud subscriptions with prescribed timelines, customers are discovering they have more strategic options than they might think.

- **Policy volatility and messaging issues have created significant unrest**
  Following a continuous stream of announcements and subsequent adjustments, only 17% fully understand SAP's latest migration policies and deadlines, while 84% express some level of concern about current messaging. This uncertainty hampers strategic planning, but is also encouraging customers to explore alternative ways forward.
- **The foundational S/4HANA proposition requires hard work to prove**
  95% say making a positive ROI case for S/4HANA takes significant effort or is genuinely difficult. While 69% acknowledge SAP's innovation focus, most remain in "wait and see" mode about whether theoretical benefits translate to real-world impact.
- **SaaS is generally accepted, but SAP's version raises legitimate concerns**
  77% support cloud principles but have reservations about SAP's specific approach, particularly in relation to potential vendor lock-in and ability to manage costs. Over 90% are concerned about escalating and unpredictable subscription costs over time.
- **Innovation now comes from everywhere, not just SAP**
  78% of all respondents expect to leverage advances from multiple vendors to innovate in and around ERP. This reflects increasing comfort among SAP customers to incorporate best-of-breed solutions into their environment rather than relying on a single vendor. ECC-only customers take this a step further, with 29% no longer looking to SAP for innovation at all.
- **Composable architectures unlock strategic flexibility**
  83% see the value or potential of composable approaches in relation to faster access to emerging tech like AI, while 94% recognize the freedom to select the best solution for each need. In practice this is about building around a stable SAP core with whatever works best.
- **Third-party support creates breathing room**
  94% see significant value in extending system life when it makes business sense, with 80% citing cost benefits. More importantly, 79% value the independence from migration pressure, allowing them to move when ready rather than when pushed.
- **Alternative approaches deliver real performance gains**
  Organizations using composable architectures with third-party support achieve above-average performance 83% of the time versus 27% for traditional approaches. This corroborates the notion that progressive strategies are primarily about achieving better business outcomes.
- **The future is more diverse than SAP's roadmap suggests**
  49% won't be running S/4HANA in the cloud even five years out, with 23% staying with on-premises ECC. This isn't resistance to progress - it's recognition that different businesses need different solutions, and one-size-fits-all rarely fits anyone perfectly.

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Why this research, and why now?

When an imposed challenge surfaces a strategic opportunity

If your organization is like most others, you're constantly juggling multiple technology-dependent initiatives. Growth plans, operational improvements, product innovations and new business models - they all hinge on getting your technology foundations right. But what happens when a critical vendor changes the rules unilaterally?

That's exactly what's happened to SAP customers. After decades of having near full control over their ERP systems, they're being pushed toward cloud subscriptions with what many consider to be onerous deadlines and restrictions. Many initially felt blindsided, and remain in limbo today as they work out how to respond.

> ***"ECC has been reliable, but we feel boxed in by SAP's roadmap."***
> *Senior IT Leader, Retail*

Reality check...

Technology vendors are often driven by their own business interests and investor expectations, so it's critical to set your own agenda.

But there's a real opportunity wrapped up in this challenge. While SAP creates pressure, broader technology shifts are opening up new strategic possibilities. Modern integration platforms and composable architectures have made multi-vendor innovation strategies easier than ever. What was once a complex integration is now widely regarded as standard practice.

Forward-thinkers are therefore using this moment to chart their own course toward competitive advantage. Against this background, now is the time to make sure you know the options open to you.

About the research

This report draws on input from 455 SAP customers - a mix of senior IT, application and business professionals involved in ERP-related strategy and planning (see Appendix A for demographics). The central theme of the research was SAP migration, but our approach went beyond immediate tactical decisions to explore how macro-shifts in the technology landscape are creating new strategic opportunities for SAP customers.

Topics covered include:

- Customer perceptions of SAP's migration policies and offerings, and issues arising.
- Broader industry developments that enable alternatives to SAP's prescribed roadmaps.
- Insights to help you plot your own course in line with your business priorities.

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Introduction

Whose system is it anyway?

For decades, ERP implementation followed a simple pattern. You defined requirements, selected software, then worked with partners to configure and customize the core system to meet your specific needs.

The end result? What started as generic software notionally became your ERP system - unique to your organization, under your control, upgraded on your timeline and aligned with your priorities.

But SAP is challenging this model. Like many enterprise software vendors, it's pushing hard towards Software as a Service (SaaS). The goal is moving existing customers to cloud-based deployments where SAP controls the entire technology stack and customers pay via subscription.

This fundamentally changes the ownership dynamic. Instead of controlling when and how you upgrade, you're now on SAP's schedule. Instead of perpetual licenses, you're paying ongoing subscriptions. Instead of having full control over the way you customize and integrate, you're working within SAP's constraints.

Historically...

After significant customization and integration, customers naturally viewed their ERP environment as "theirs" - even though the vendor retained IP of the underlying package.

> ***"Given our highly customized ECC landscape, we are opting for continuity and control over SAP's disruptive cloud-first agenda."***
> *Business Exec, Utilities Sector*

SAP's Basic Proposition

Traditional ERP model	Software as a Service
Perpetual software license with a separate maintenance contract. Customer provides the underlying infrastructure layer and manages the entire technology stack	Comprehensive subscription contract covering access to core software running in the cloud, plus management and support of the underlying systems environment
SAP = Supplier **Customer= Owner**	**SAP = Owner** **Customer = Tenant**
Upgrade cadence and timing controlled by the customer	Upgrade cadence and timing controlled by SAP

For many customers, especially those with larger, more complex environments, this feels like losing control of systems that are critical to daily operations. The tension isn't just about technology - given how fundamentally SAP is likely to be embedded into your business infrastructure, it's about who gets to decide your organization's digital future.

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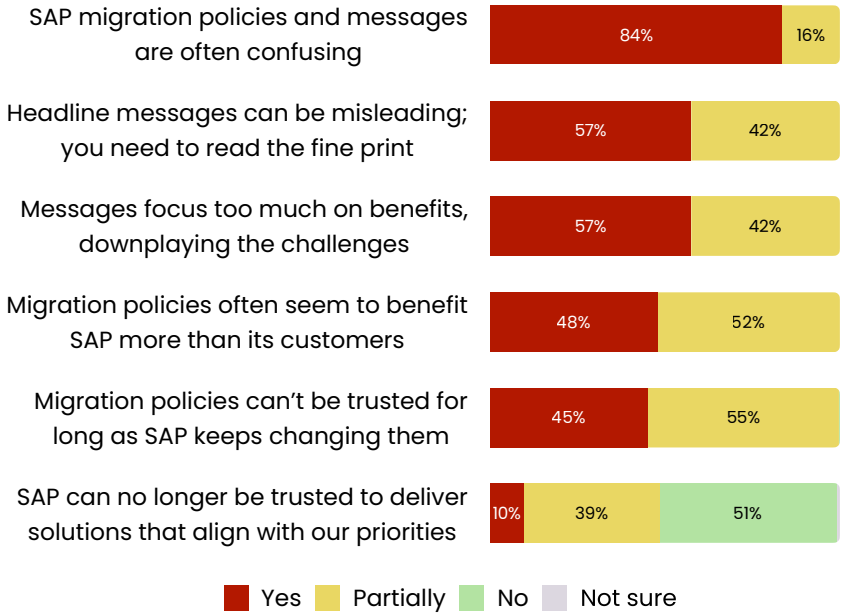
Chasing a moving target

Policy volatility and customer comms confusion

If you've been following SAP's migration announcements over the past few years, you've probably noticed the constant stream of adjustments. Extended deadlines, various packaging options, transition programs for complex estates - SAP appears to have made efforts to respond to customer concerns.

The trouble is, each new announcement has created fresh confusion rather than clarity, especially when SAP's focus is always on the positives, with the constraints, challenges and other implications relegated to the fine print.

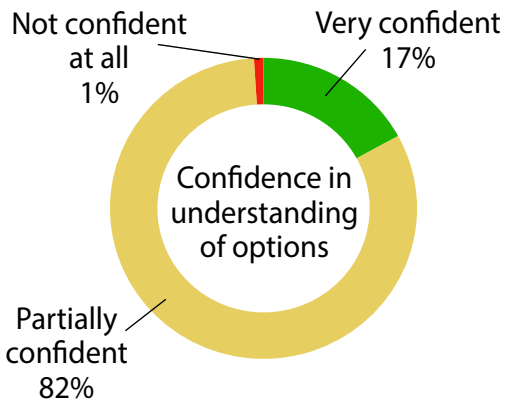
We often hear criticisms of SAP's policies and messaging around migration options. Do you think these frequently heard sentiments are fair?



You might be thinking this sounds familiar. Many customers tell us it's like chasing a moving target. Just when they think they understand their options, SAP announces another program or shifts another deadline. At least that's the way they feel.

Some think this is down to SAP being reluctant to concede too much at a time to stay on track with its own business objectives, e.g. to increase customer dependency, expand its level of control and maximize annuity revenue. Others say it's SAP truly underestimating the genuine problems many customers have in complying with the prescribed roadmap to S/4HANA in the cloud. In reality it's probably a bit of both. Either way, the result has been a landscape of overlapping programs and evolving policies that makes strategic planning extremely difficult, especially for ECC customers with larger and more complex installations - though many on-premises S/4HANA users are also facing migration deadlines.

How confident are you in your understanding of SAP's latest migration options/deadlines and how they apply to your system?



So against this backdrop of uncertainty, how are customers feeling about their options?

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Current sentiment

Impact of migration policy and messaging issues

When we asked customers to share additional thoughts about SAP's policies and messaging, the sentiment analysis reveals the true scale of SAP's communication challenge.

While 16% express purely positive views, nearly three-quarters fall into the "mixed responses" category - typically acknowledging SAP's technical strengths while expressing frustration with execution and customer alignment.

OPEN QUESTION:

Is there anything you would like to add to your responses relating to SAP policies and messaging, or say in defense of SAP?

Primarily critical 11%

Only critical or skeptical sentiments expressed

"A problem with SAP is that their support can be rigid and unresponsive, leaving organizations feeling stranded with critical issues."

"We need clearer, more consistent communication from SAP, as policy shifts and licensing changes often add complexity and uncertainty."

Mixed responses 73%

Both positive and negative sentiments expressed

"SAP modules are great for data consistency, but getting them up and running often takes much longer than expected."

"SAP's innovation in cloud infrastructure and data management is valuable, but the approach needs to be more customer centric."

Strong advocacy 16%

Purely positive sentiments expressed

"SAP gives us reliable data, helps meet regulations, and lets us process things in real time all crucial for modern banking."

"SAP has empowered us to work more efficiently and transparently, driving innovation and supporting our global growth."

Quotes shown are to give a flavor of the feedback received in each segment

The "Primarily critical" group highlights the existence of a relatively small but significant cohort of customers that seem generally unhappy with SAP overall.

But sentiment is just one factor when making migration decisions - even frustrated customers need solid business reasons to change course. So what's the actual business case for migrating from ECC to S/4HANA, and how does SAP's SaaS proposition stack up?

84%

are bothered by SAP's actions to one degree or another

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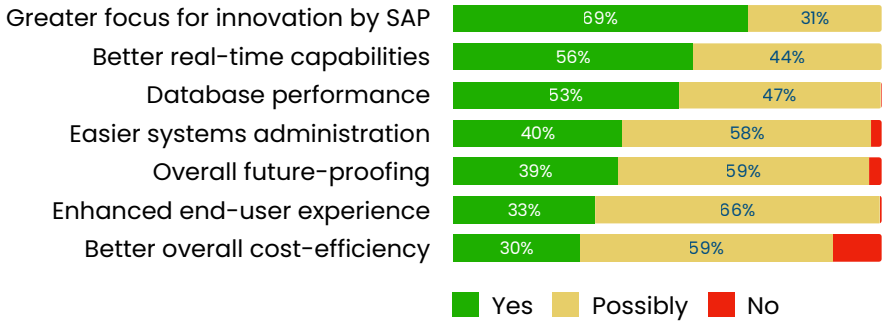
ECC versus S/4HANA

The business case challenge

When considering SAP's migration propositions, it's important to distinguish between the application software itself (ECC versus S/4HANA) and the delivery model (on-premises versus cloud with subscription pricing).

Does S/4HANA offer significant benefits over ECC in the following ways?

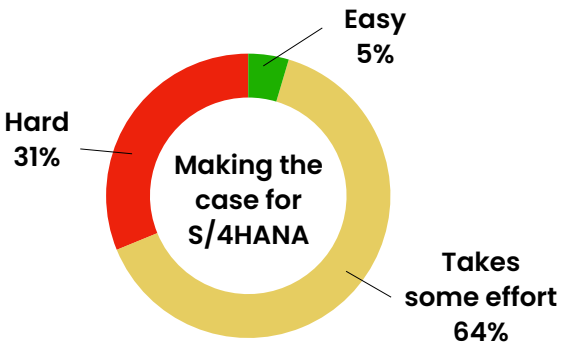


If we start with perceptions of S/4HANA, advantages in technical areas like better real-time capabilities and improved database performance are recognized by over half of respondents. Yet, the picture overall is quite mixed. Many, for example, appreciate SAP's innovation focus on this latest generation of its software, though paradoxically, don't always see this as translating to overall future proofing. One reason for this is probably that they don't regard all innovations to be relevant to them. However, another factor is undoubtedly that S/4HANA has increasingly become associated with SAP's SaaS offerings. This in turn raises the question of potential lock-in and the problem of conditional access to advanced functionality (such as AI).

Promise vs reality...

Many S/4HANA benefits remain theoretical for most customers, with even current users often unable to confirm that advantages translate to real-world impact.

How easy is it to make a positive ROI case for migrating from ECC to S/4HANA?



Put this together with the substantial number of customers responding "possibly" across all benefit areas, plus the cost, disruption and risk of major migration projects, and it's unsurprising that many say you need to work hard to make a positive ROI-based business case for S/4HANA.

We'll pick this up later in the report. In the meantime let's move on to the case for SAP's SaaS proposition.

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SAP's SaaS proposition

When principle meets practice

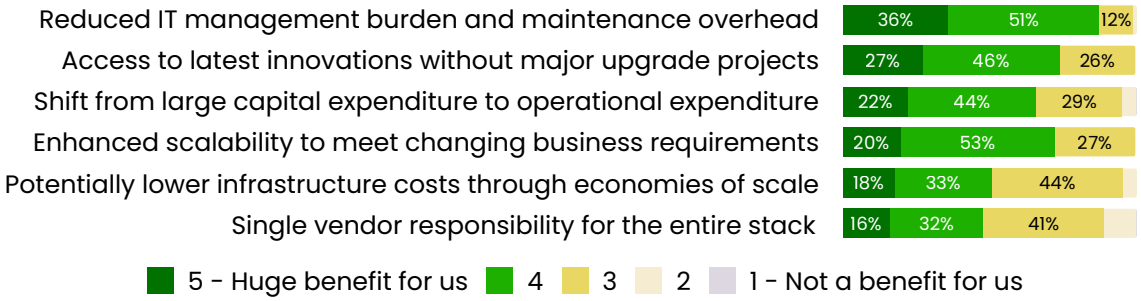
77%

are OK with SaaS in principle but have reservations about SAP's approach

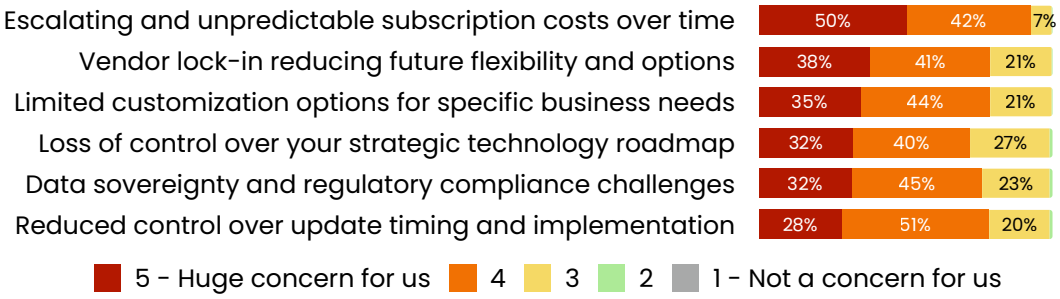
Organizations today are generally comfortable with cloud and subscription models, and after years of experience, most have learned valuable lessons about economics, sovereignty and risk management. They know it's a trade off.

When it comes to SAP's SaaS offering, the perceived benefits align with SaaS solutions in general, but the concerns tell a different story. The challenge isn't SaaS as a concept per se, it's how SAP has applied subscription terms typically used for simpler solutions to complex ERP environments.

How would you rate the benefits or potential benefits of the S/4HANA based SaaS/subscription model?



How would you rate these concerns?



92%

highlight escalating and unpredictable subscription costs as a significant concern

These results speak for themselves and underline the perceived mismatch between a quite restrictive commercial and delivery model, and the complex, customized and integrated nature of ERP.

That said, SaaS-based S/4HANA can be a good option for greenfield sites, migration of less complex systems or in situations where you are deliberately trying to simplify your environment - provided, of course, that you are comfortable with the SAP subscription terms.

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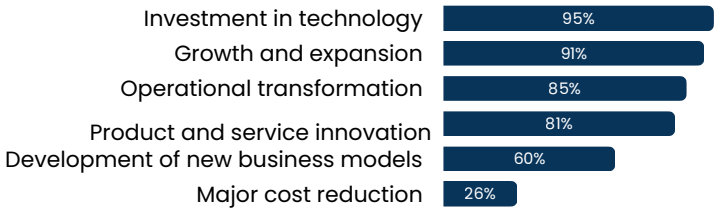
Focus on business priorities

Getting back to your innovation and growth agenda

The more you get into debating how to navigate through a single vendor's actions and policies, the bigger the danger of losing sight of what really matters to your organization. After all, solutions like ERP are just a means to an end, not an end in their own right.

Are any of the following a particular priority for your organization right now?



Before continuing, it's useful to remind ourselves of the overarching priorities that shape most strategic business agendas. With these priorities in mind, many customers clearly value SAP's innovation efforts. But others caution that the company is not moving quickly enough in some of the areas most important to them, with ECC customers sometimes feeling left behind.

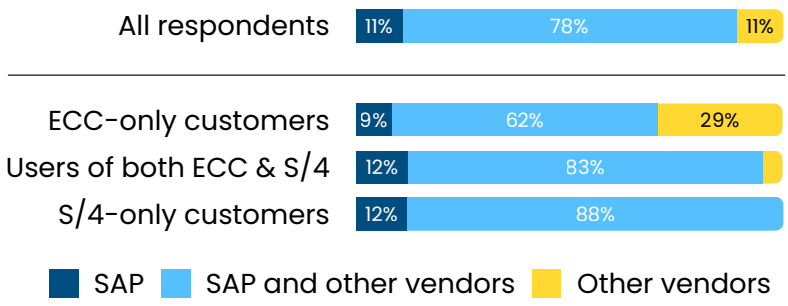
> ***"We generally prefer innovating outside of the ERP core."***
> *SAP Specialist, Manufacturing*

> ***"Innovation seems to lag behind market needs, forcing customers to seek external solutions."***
> *Senior IT Leader, Services*

> ***"While SAP is still a key part of our technology stack, its pace of change often does not keep up with the rapidly shifting customer expectations and retail innovation pressures we face."***
> *Senior IT Leader, Retail*

Perhaps the most significant finding in this area is the matter-of-fact way most customers acknowledge that SAP is not the only game in town when it comes to innovating in and around ERP.

In the next three years, where will most meaningful ERP-related innovation come from?



29%

of ECC-only customers no longer look to SAP for innovation

This shift reflects a broader understanding that innovation opportunities exist across the technology ecosystem. The question then becomes how you tap into this broader innovation landscape while maintaining the stability and integration your business depends on.

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Introducing the composable approach

A fundamental change in how we view ERP systems

Building on the notion of innovation coming from multiple sources, an architectural shift that's already well-established in other areas of IT is now very relevant to SAP customers. It's called "composable," and it's already starting to impact the world of ERP.

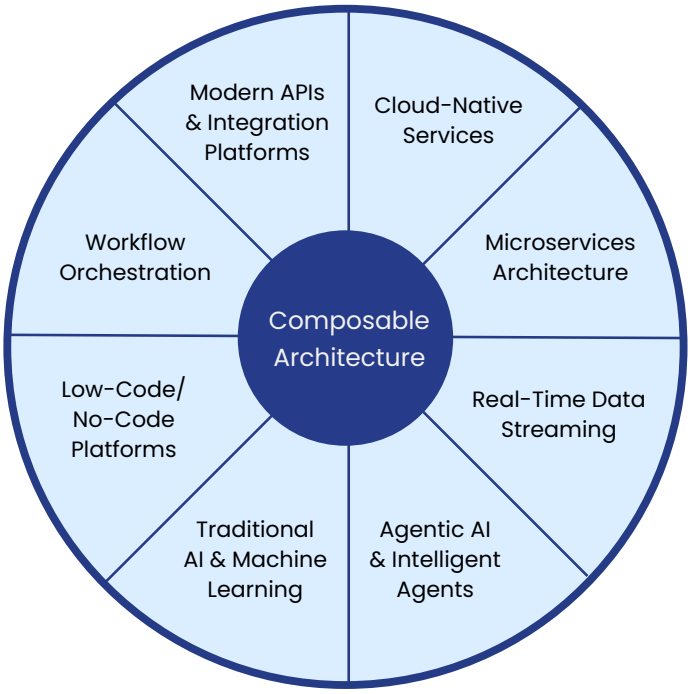
Now you might be wondering how this composable approach actually works in practice. The shift represents an evolution from the monolithic ERP systems of the past to more flexible, interconnected architectures.

ERP generations...

From monolithic, through modular to composable - the evolution of ERP continues to the next architectural era.

Here's what's changed - while early ERP systems were designed as unified environments (one database, one vendor, one massive system), today's architectures embrace service-oriented approaches that make integration with external components much more straightforward.

Tools and platforms that enable the composable approach



The broader IT world has already made this shift as standard practice. Modern APIs, integration platforms and workflow orchestration tools make it routine to blend best-of-breed components while delivering seamless user experiences.

Among these enabling technologies, agentic AI is receiving particular executive attention, and is causing much excitement in tech circles.

But composable architecture isn't just about preparing for AI agents - it's about creating foundations that let you choose the best solution for each business need.

> ***"We recognize that composable could give us an edge in innovation-heavy segments."***
> *Business Exec, Manufacturing*

But what do customers actually think about the benefits of this approach? While the technology foundations are clearly maturing, the real test is whether organizations see genuine value in adopting composable architectures for their ERP environments.

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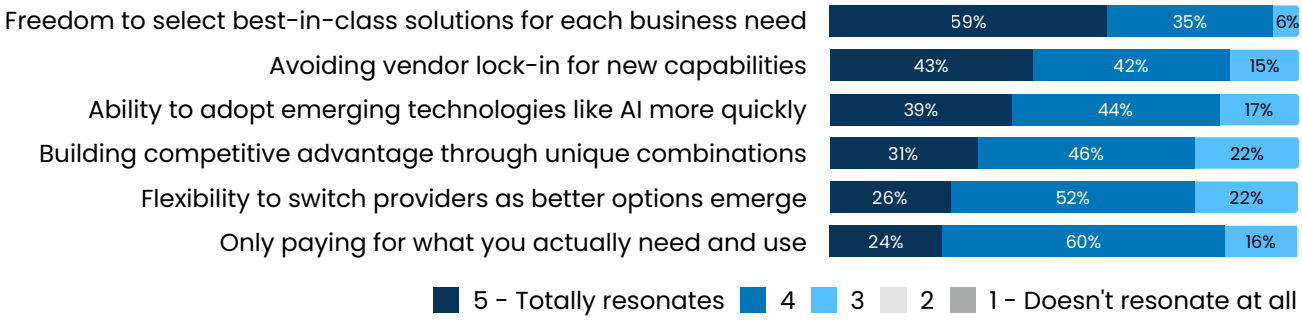
The composable advantage

A closer look at the benefits

When we look more closely at the open composable approach, it's clear that the benefits resonate well with SAP customers across a range of important areas.

Based on what you know or have heard, how much do these potential benefits of the open composable approach resonate with you?



In some cases the approach represents a notional antidote to some of the the concerns raised by many when evaluating SAP's SaaS model, e.g. vendor lock-in, lack of control over the pace of innovation (whether you want to go faster or slower) and avoiding excessive costs.

> ***"We prefer open composable [architecture] as it lets us deploy emerging tech like GenAI without sacrificing control or flexibility."***
> *Senior IT Leader, Services Sector*

It also provides a workaround to SAP's restrictive policies such as withholding access to AI if you are not on a subscription contract. This is especially relevant to customers who wish to adopt AI, but retain their ECC perpetual licenses.

> ***"We're choosing open composable [architectures] for advanced analytics and IoT integrations, while extending ECC support on core modules."***
> *Senior IT Leader, Services Sector*

However, the composable approach is also seen as delivering value in its own right, which is in line with the drivers for adoption seen in IT more broadly. Sometimes it's a case of getting faster access to emerging technologies when SAP is not moving quickly enough. On other occasions it means adopting a third-party alternative when the SAP option doesn't meet your needs or is implemented in a way that doesn't work for you.

83%

See composable as a way to get faster access to emerging technologies

But once you start down the composable route, the question then becomes how do you implement safely in mission-critical ERP contexts? This is where third-party support services come in that can operate across vendor and system boundaries.

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The role of third-party support services

Enabling composable architectures safely

While modern IT architectures make it straightforward to compose systems from multiple sources, you still need to avoid operational chaos when issues arise. How do you ensure someone takes ownership if things go wrong across vendor boundaries?

This challenge is being addressed through specialized support providers who build deep knowledge of your environment and can work across different systems and vendors.

Open composable architecture

Leverages advances in APIs, integration platforms, workflow orchestration and agentic AI to blend best-of-breed components and build rich, seamless user experiences

Customized cross-vendor support

Leverages third-party support and maintenance services to avoid fragmented and ambiguous responsibilities, and finger-pointing between original vendors

Third-party support providers have established a proven history in delivering comprehensive support to ERP customers - often to extend the life of older customized systems. They already have the necessary skills and experience to allow composable approaches to be used safely in mission-critical ERP contexts.

Resource redirection...

The ability to avoid or defer core system upgrades becomes particularly valuable when you can redirect those resources to innovations with greater business impact.

Coming back to the innovation theme, if migrating your ECC environment to S/4HANA delivers only marginal business benefit, why not redirect those resources to innovations that represent greater strategic value? Same question if you're considering moving your on-premises S/4HANA system to the cloud.

> ***"Rather than a disruptive move, we're evolving our SAP landscape through selective upgrades and third-party support."***
> *Senior IT Leader, Services Sector*

Many SAP customers are already using or exploring these options as complementary enablers of a multi-vendor innovation strategy, with the added benefit of reducing overall dependency on SAP.

On that note, while third-party support services are valuable for enabling composable approaches, their benefits extend far beyond this single use case.

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Third-party support benefits beyond the composable model

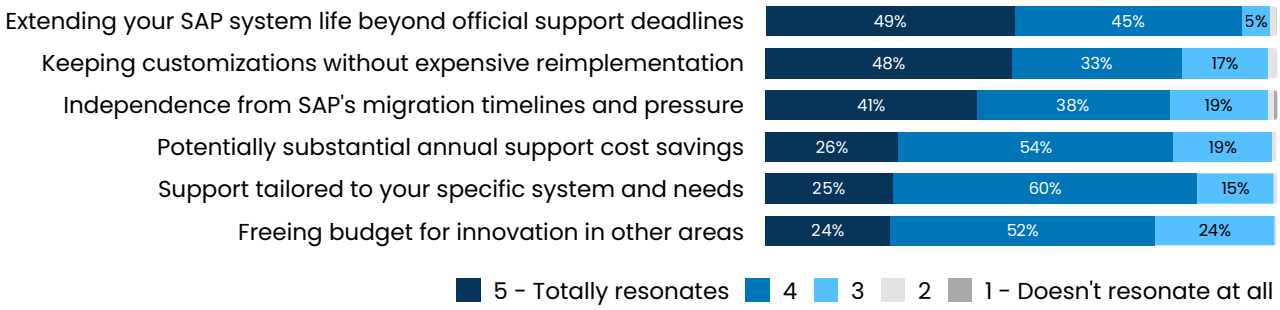
A highly versatile solution

So far in this report, we've been considering third-party support services as an innovation enabler alongside the open composable approach. However, it's important to remember that such services have been used for decades by many SAP customers wanting an alternative to standard SAP support and maintenance contracts.

A common motivation has historically been to extend the life of older SAP systems to avoid or defer upgrades, but taking advantage of a more inclusive set of services (compared to standard vendor support) and looking for cost efficiencies have also been traditional drivers.

> ***Reminder...***
>
> Third-party support services have been well-proven over many years of use.

Based on what you know or have heard, how much do these potential benefits of third-party support services for SAP resonate with you?



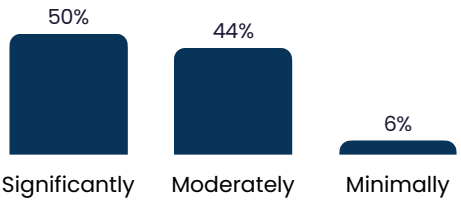
49%

See the ability to extend the life of existing systems as a huge benefit

(another 45% view it as significant)

On a specific point, one of the biggest challenges with established SAP systems is the degree to which most of them have been enhanced, modified or extended. The right partner will include the code underpinning customizations and integrations within their contracts and SLAs, removing a significant ongoing headache, especially with older systems.

To what degree have your SAP systems been customized?



> ***"With third-party support, we avoid false timelines and keep full control over our SAP environment."***
>
> *Senior IT Leader, Retail*

The bottom line is that tailored third-party support can not only help to optimize day-to-day ops, but can also provide a level of freedom and flexibility that can be exploited in many different ways, while reducing your dependency on SAP.

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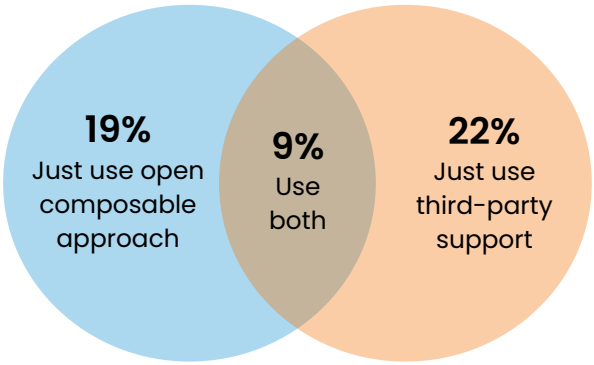
Do progressive delivery approaches work?

Assessing the impact

While adoption levels of open composable architectures and third-party support remain relatively modest, both are gaining momentum as organizations seek greater flexibility and control. But do these progressive delivery approaches actually deliver better business outcomes? To find out, we developed a performance scorecard based on how well current SAP environments meet business needs across key operational areas, then segmented respondents based on their overall average scores.

Adoption of progressive approaches



50% currently use neither

How well does your current ERP environment meet your needs in the following areas?

Segmenting the sample based on delivery against needs

Divide respondents into two equal-sized groups based on average scores

→ *Those scoring* **Above average**

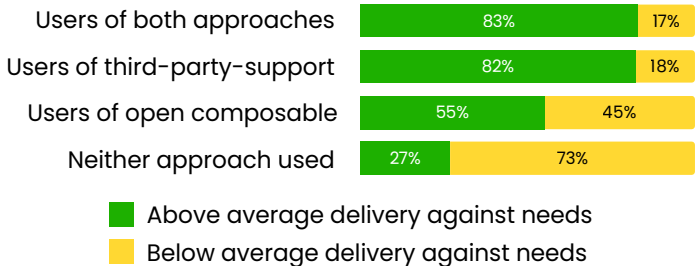
→ *Those scoring* **Below average**

The correlation that emerged is striking. Organizations using both approaches report above-average performance 83% of the time, compared to just 27% for those using neither. Even single approaches show marked improvement. While many factors affect performance, this alignment is probably no coincidence.

83%

of organizations using both open composable and third-party support are achieving above average performance

Adoption of progressive approaches aligns with delivery against business needs



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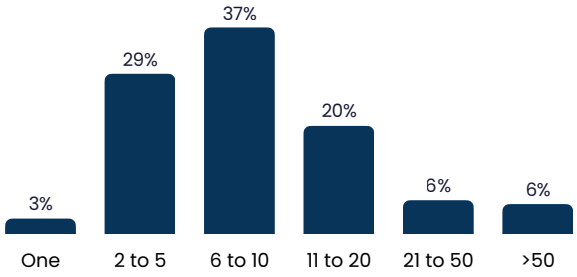
The realities of larger and more complex estates

There's no one size fits all

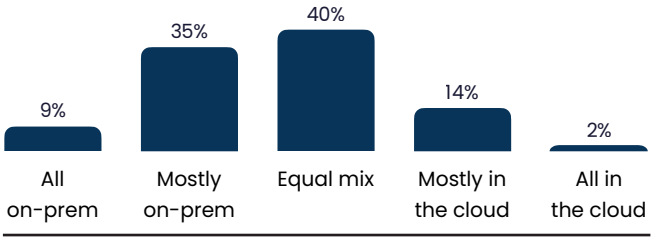
The reality is that ERP estates are a lot messier than SAP's standard roadmaps sometimes seem to acknowledge. Most organizations run multiple instances across different business units, with varying levels of complexity and customization. In many cases, they may also have a mix of SAP generations and versions in place, spread across various data centers, hosting platforms and cloud services.

How many SAP instances do you have in production?



This isn't poor planning - it's pragmatic recognition that different parts of the business have different needs, risk tolerances, and migration priorities and objectives.

Where do your SAP systems run?



Note: 'On-premises' was defined as meaning any infrastructure that you control, e.g. in your own data center or in a privately hosted environment.

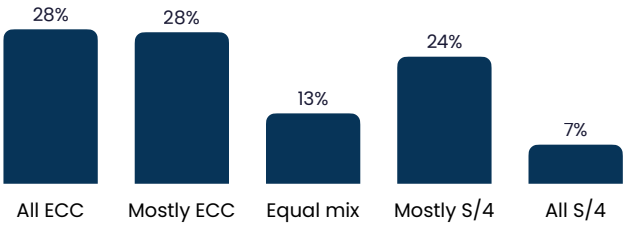
The upshot is that it rarely makes sense for you to consider moving your whole SAP estate to the same destination over the same timescale, and certainly not in a "big bang" style.

At a minimum, you're generally looking at a phased approach that sequences migrations based on business priorities, technical complexity and available resources.

> ***"To manage risk and cost, we're evaluating a gradual S/4HANA transition, supported by a hybrid model and selective integration of third-party solutions."***
> *Senior SAP Specialist, Utilities/Telco*

This could mean that you move smaller, simpler SAP instances onto a SaaS model quickly, but leave larger, more complex instances where they are, supported by third-party services.

What's the rough split between ECC and S/4HANA?



You don't need permission...

It's perfectly legitimate and practical to leave large, complex and critical ECC systems as they are for now while you evaluate options.

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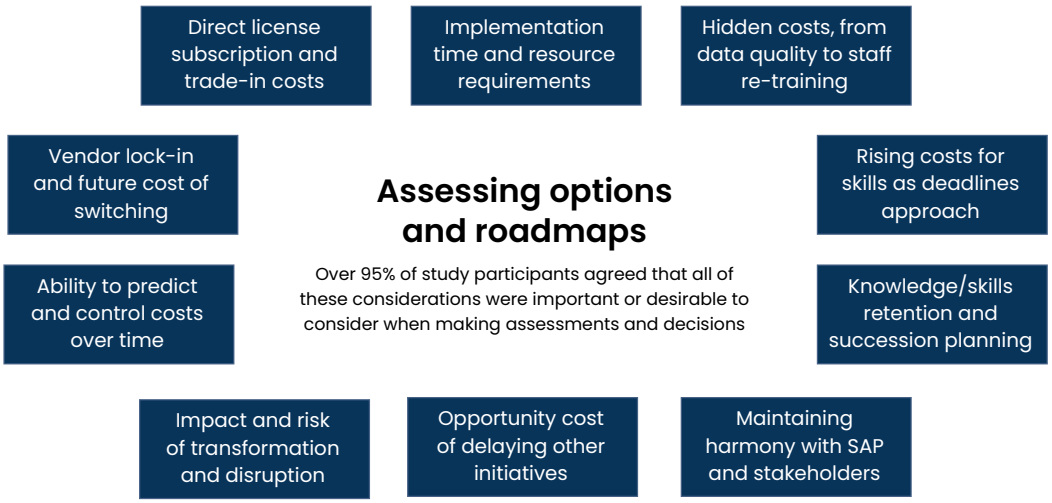
Decision-making practicalities

Beyond core product and service characteristics

Our discussion so far has mostly been concerned with the shape and attributes of the various solutions and approaches available to customers. However, when assessing migration options and possible roadmaps, a range of other important factors need to be considered as follows:



Most of what we see here will likely already be familiar to you if you've been working in and around SAP systems for a while. One item worth calling out, though, is the need to maintain harmony among your internal stakeholders and with SAP, which is particularly important if you intend to deviate from SAP standard policies and prescribed roadmaps.

From an internal perspective, it's critical that senior executives are fully on board with your plans. They not only need a clear understanding of the rationale behind your proposed roadmap, they also need to be aware of the implications. An example here might be having to forego full access to certain advanced features tied to subscription contracts. The last thing you need is a persuasive SAP account manager exploiting partial knowledge to create a fear of missing out in the minds of key decision-makers.

Of course, the impact of SAP policies around access to innovations may be zero or minimal if you go down the open composable route with third-party support. But you need to consider what SAP might do down the line to entice customers into SaaS arrangements that may intentionally or otherwise disadvantage you.

Think ahead...

Consider how SAP's future actions might affect those who have "strayed from the path" and plan accordingly.

When it comes to maintaining harmony with SAP, this is especially important if you are adopting a hybrid approach. A common strategy among those with larger, more complex estates is to make migration decisions on an instance-by-instance basis as previously discussed. In addition, there may be new requirements down the line for which SaaS makes sense.

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Looking to the future

So what's the outlook?

Predicting the future in this whole area is very difficult. Migrations will always involve a level of cost and disruption. For any particular SAP instance, a judgment call needs to be made on whether the likely incremental value will cross the threshold needed to deliver a positive ROI. This in turn depends on the approach you take, e.g. the degree to which you will leverage SAP vs third-party innovations.

> ***"We're using a steady evolution approach to avoid disruption, while prepping for a longer term transition."***
> *SAP Specialist, Transport & Logistics*

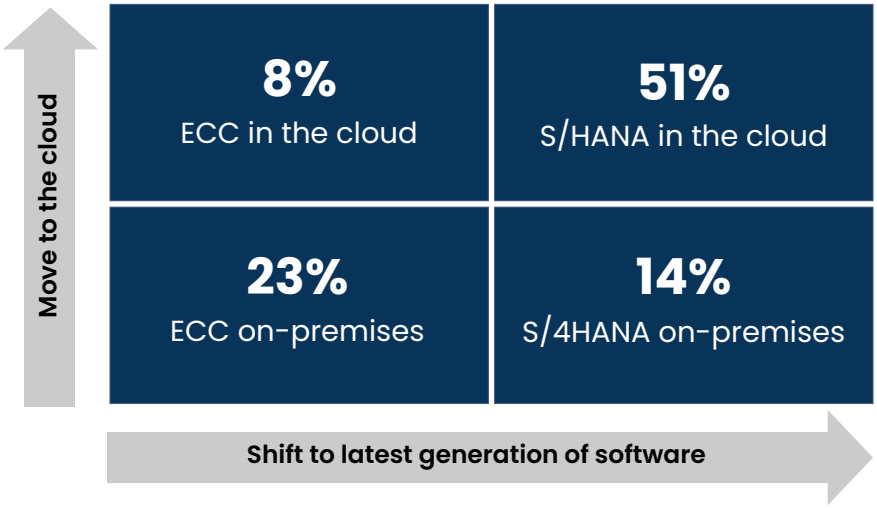
Reality check...

It simply isn't possible to move a large SAP estate that quickly.

Zoom out to your overall estate, and with each instance subject to a different set of drivers and constraints, you could legitimately argue that asking customers where they anticipate being in 5 years time is an unfair question. But we asked anyway as we wanted to get a feel for peoples' instincts based on what they know today. We're glad we did as the responses are actually extremely revealing.

While there's a general direction of travel towards S/4HANA in the cloud, only half of our respondents say they will have made this journey 5 years from now. And that's without breaking this out by which SAP program or other model they might be using - a topic we avoided given the already complex and volatile landscape of options.

Which of the following best describes where you expect your SAP environment to be in 5 years



49%

anticipate that in 5 years time, they will still NOT be running S/4HANA in the cloud

However, against the backdrop of SAP's migration policies, it's telling that 23% say they will still be running ECC on-premises in 5 years. These organizations will clearly not be standing still over the next half-decade, so will likely be turning to third-parties to advance their ERP systems. This is consistent with the finding noted earlier that many ECC-only customers have already stopped looking to SAP for innovation. It also corroborates the role of open composable strategies and third-party support.

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Final thoughts

A familiar set of moves and maneuvers

The perennial dance between SAP and its customers around upgrades and migrations is nothing new. SAP invests heavily in R&D and wants to see its users benefit from this. Then there's the practical reality from the software vendor perspective that maintaining too many older releases gets expensive and diverts resources from creating better solutions.

Customers, meanwhile, have traditionally been reluctant to tamper with mission-critical systems. The "if it ain't broke, don't fix it" mantra has dominated - understandably so given the time, cost, effort and inevitable risk involved. Historically, customers migrated when some other event provided the impetus, like a major transformation program or M&A deal. Every few years, individual customers would re-align with SAP for a while, then the dance would start over.

But this time feels different

> ***New rules...***
>
> SAP is proposing a fundamental shake-up of the traditional ownership and control model.

In recent years, we've been witnessing something more fundamental than a software upgrade debate. At the center of this latest dance - or perhaps "duel" - is a reshaping of the relationship between vendor and customer around ownership and control.

The irony is how many customers have found this situation quite liberating. If you're being pressured to take an action that's undesirable or totally impractical, you might as well explore other options. And that's exactly what's happening. Rather than switching ERP vendors - there's little appetite for that - SAP customers are finding pragmatic ways to innovate while maintaining ownership and control.

Removing the friction from the business-first approach

Bringing everything we have discussed together, the overarching takeaway from this research is that customers today have more ways than ever before to fight back against technology vendors trying to hijack their business agenda. The vast universe of best-of-breed solutions, established enablers of open composable architecture and tailored third-party support services can significantly boost your freedom. The friction, cost and risk of composing multi-vendor solutions have been drastically reduced. It's now safer and easier to put your own business objectives and priorities first without compromise.

> ***A clear opportunity...***
>
> Many organizations are discovering they can redirect resources from unwanted migrations to innovations with greater strategic value.

The mindset that comes with this is already normal in the context of IT in general, and we hope this research encourages even more SAP customers to start thinking in this way in relation to ERP.

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About

About Freeform Dynamics

Freeform Dynamics is an IT industry analyst firm. Through our research and insights, we help busy IT and business professionals get up to speed on the latest technology developments and make better-informed investment decisions.

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Appendix A

The insights presented in this report are based on input gathered from 455 respondents during interactive conversations over the telephone or via web conference. Interviewees were predominantly CIOs, senior IT level roles, SAP specialists and business managers/execs.

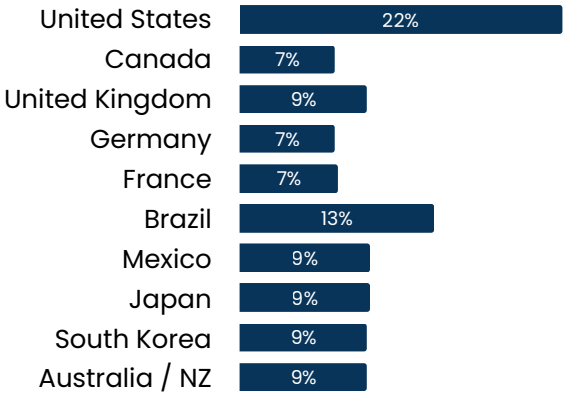
Respondents were drawn from medium and large mainstream enterprises operating across a range of industry sectors. Geographies included the United States, Canada, United Kingdom, France, Germany, Brazil, Mexico, Japan, South Korea, Australia and New Zealand.

Freeform Dynamics was responsible for survey design, data collection and analysis, together with results interpretation and the reporting of study findings.

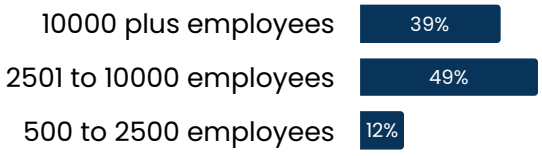
Our thanks go to Rimini Street for sponsoring this research, and to all of the participants who generously contributed their time, knowledge and insights to make this study possible.

Demographics

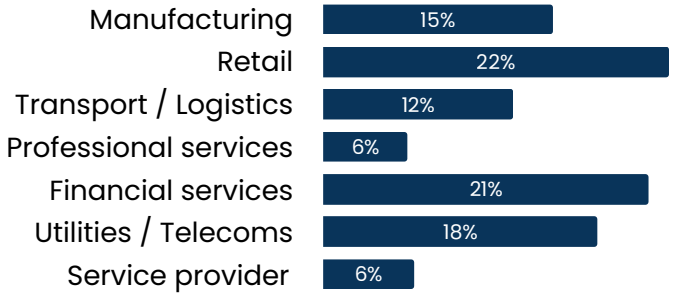
Country



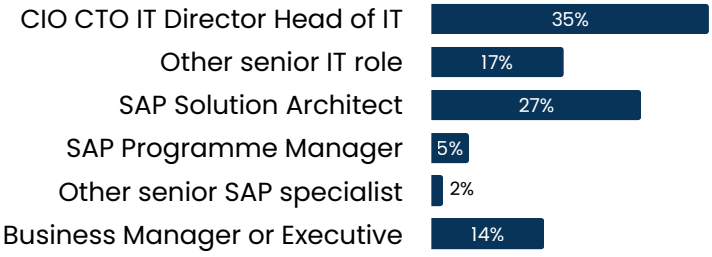
Organization size



Industry



Role



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