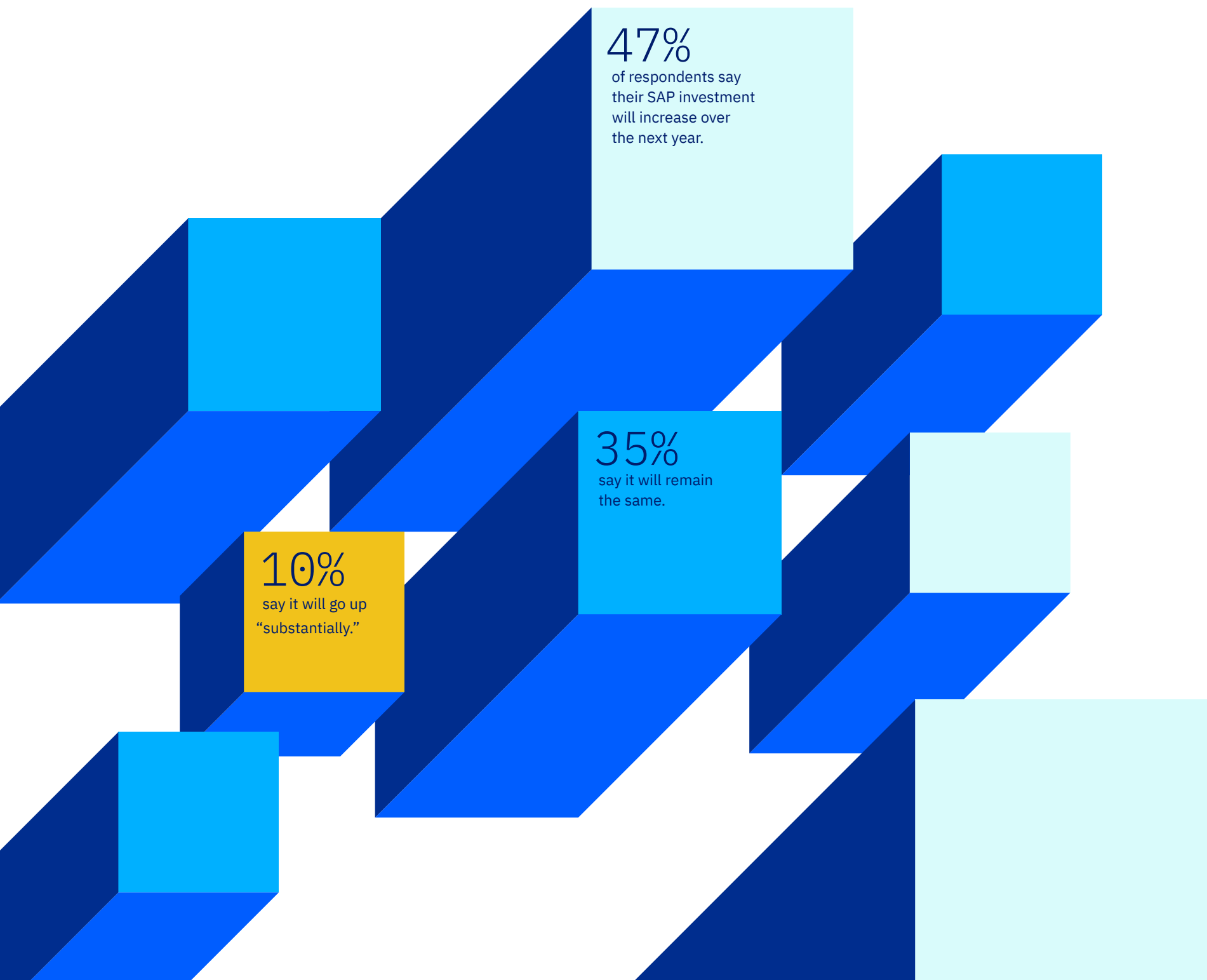


Insights on SAP

How cloud, data and AI
are transforming ERP





47%
of respondents say
their SAP investment
will increase over
the next year.

35%
say it will remain
the same.

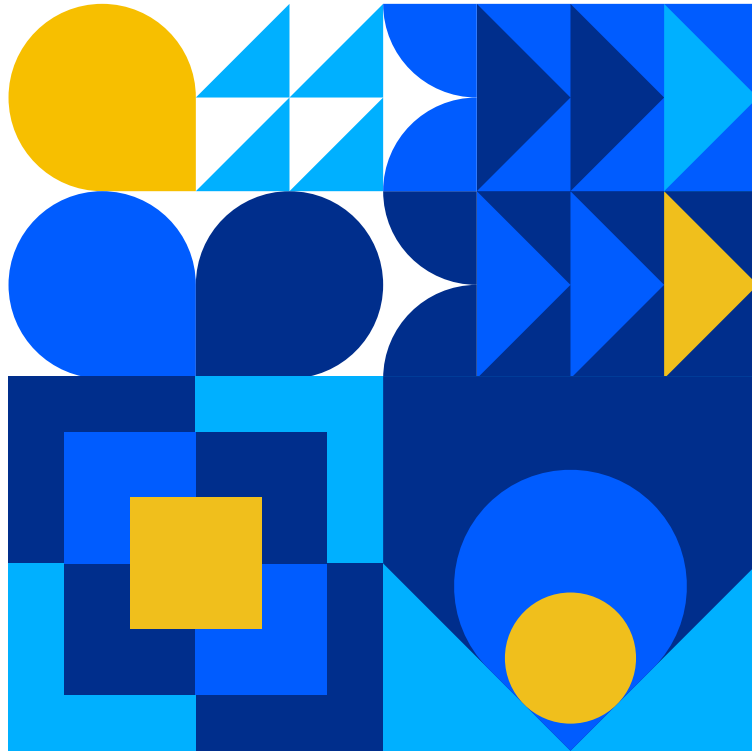
10%
say it will go up
"substantially."

Introduction

In early 2023 we surveyed 500 C-suite, VP and director-level executives at SAP customers around the world. We found that SAP investment is a clear priority for most.

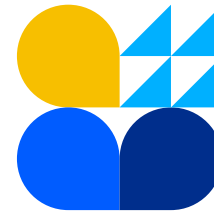
But the future of SAP goes beyond investment in familiar capabilities. Businesses are transforming to stay relevant—embracing a new level of productivity powered by data-driven insights and AI, achieving agility and delivering exceptional employee and customer experiences.

We find that the SAP market is one of enormous opportunity, building on past successes and positioning for a more competitive future.

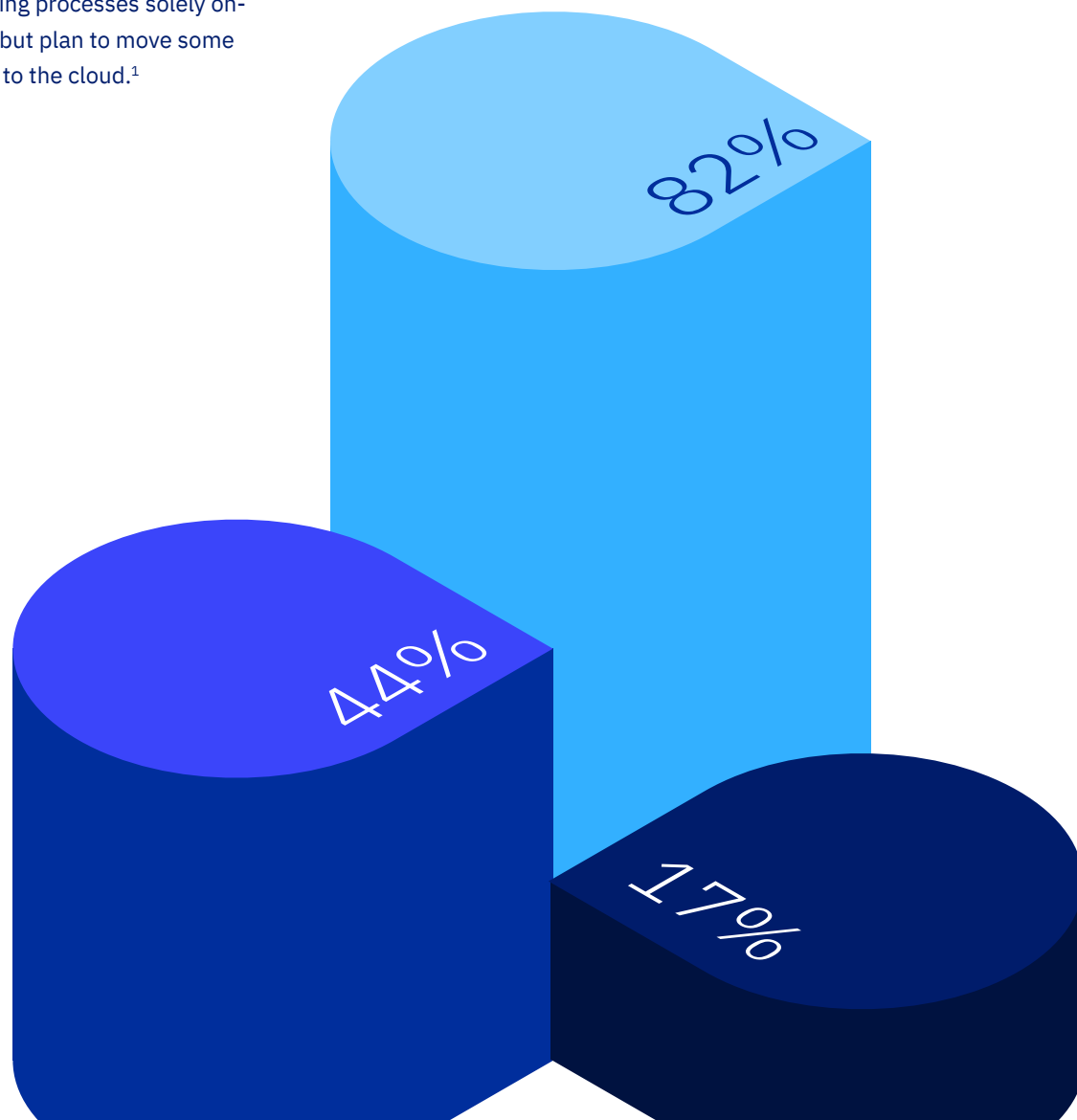


This report offers insights on the topics that are most important for SAP customers today, as they seek to:

- 01 Capitalize on cloud as a transformation driver
- 02 Master the art of change at every level
- 03 Transform how your business works with data and AI
- 04 Use ERP to strengthen future operations



- 82% of respondents are operating at least some processes on cloud.
- 44% plan to move on-premises workloads to cloud within the next 12 months.
- 17% are operating processes solely on-premises, but plan to move some processes to the cloud.¹



01 Capitalize on cloud as a transformation driver

Businesses are using the flexibility and agility of cloud-based ERP solutions to navigate turbulent markets. For example, migrating from on-premises SAP systems to cloud-based SAP systems can help enterprises build a strong foundation, revolutionize processes, and speed innovations such as composable ERP, in which solutions that drive differentiation are composed from OData services and Microservices.

For these organizations, the journey to cloud isn't just about the promised benefits of cloud migration, such as cost savings, reliability, regular updates, security, speed of innovation, performance, accessibility and automation. The full value from the journey is in creating a future-proof foundation that enables more connected and intelligent processes.

Read on to see why:

- The SAP cloud landscape is highly fragmented.
- S/4HANA is the enabler of cloud benefits.
- Transformational architectures should be built on cloud.

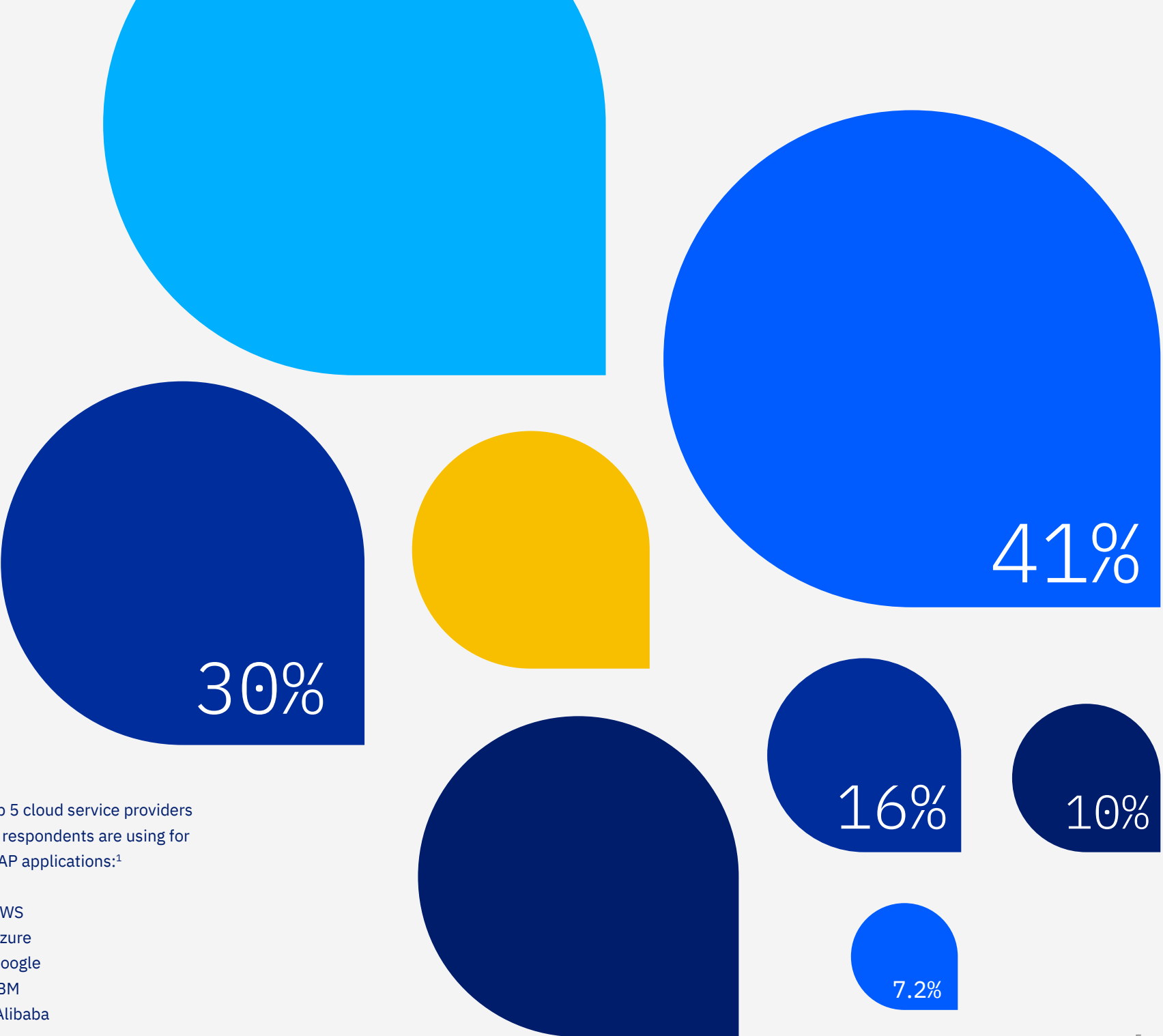
More resources:

[Schedule a rapid discovery workshop with IBM experts →](#)

[Learn more about BREAKTHROUGH with IBM for RISE with SAP →](#)

The SAP cloud landscape is highly fragmented

Our survey data shows that AWS and Microsoft Azure are highly favored for SAP workloads. The decision of which cloud service provider to choose hinges on pre-existing consumption agreements with incumbent providers for other workloads. Furthermore, this decision is greatly influenced by the availability of the SAP RISE license option as well as existing ownership of S/4HANA licenses, which enable direct consumption agreements with one or more cloud service providers.



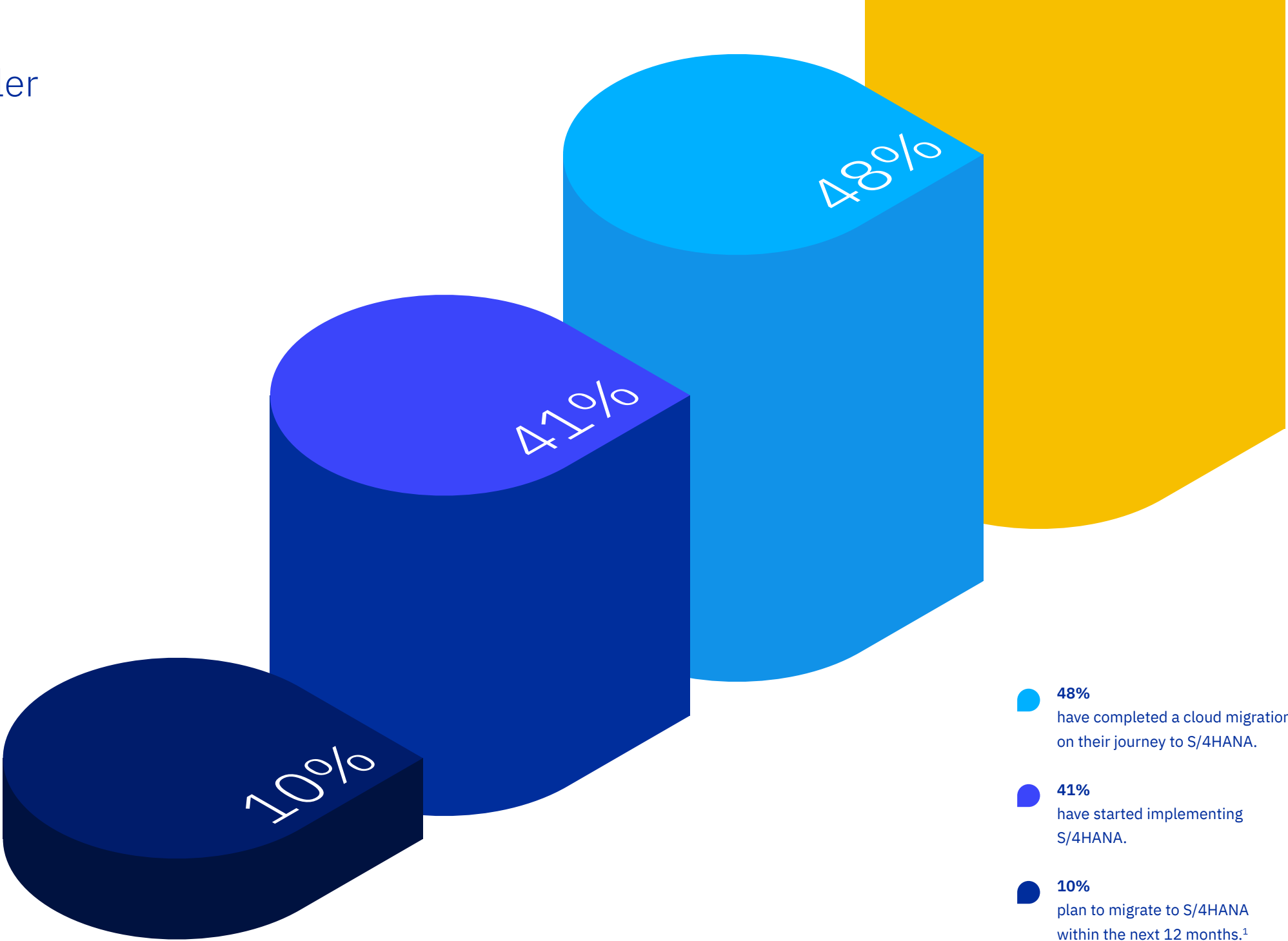
The top 5 cloud service providers survey respondents are using for their SAP applications:¹

- 41% AWS
- 30% Azure
- 16% Google
- 10% IBM
- 7.2% Alibaba

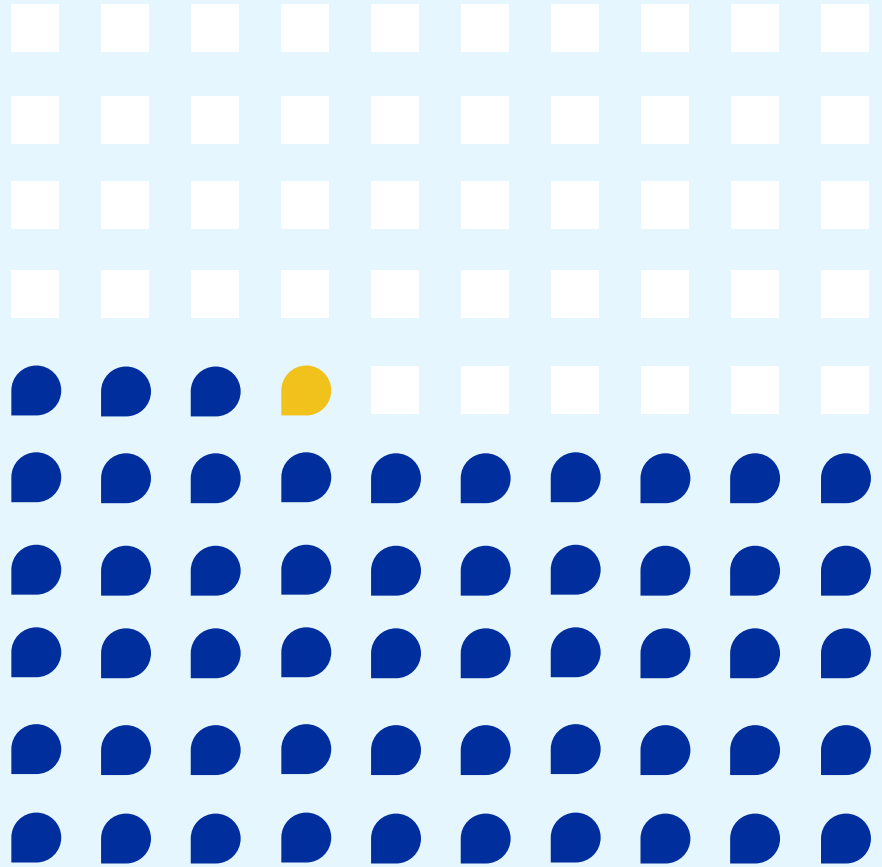
S/4HANA is the enabler of cloud benefits

One key driver of S/4HANA adoption is the end of Mainstream Maintenance for ECC6 (EhP6-8) and Netweaver 7.5 by 31 Dec 2027.

However, for those that do move, S/4HANA is quickly becoming the foundational element of today's operations transformations.



SAP customers report both progress and challenges on the S/4HANA journey



54%
rank public and private cloud as a top 3 priority.

Important considerations to include:

- 1. Choosing public or private cloud edition.**
Most of the largest organizations are selecting S/4HANA Cloud private edition due to its broader functionality.
- 2. Selecting the best implementation approach.**
 - **Brownfield** approaches migrate the ECC system to the new HANA database with minimal transformation.
 - **Bluefield** approaches migrate nondifferentiated ECC elements and use new S/4HANA functionality to transform critical processes.
 - **Greenfield** implementations redesign process areas to take full advantage of capability enhancements in the SAP solution.

3. Choosing transformation as a service. RISE customers choose to purchase S/4HANA cloud infrastructure from the provider of their choice, and receive technical managed services from SAP or a premium supplier like IBM on a SaaS-based license contract.

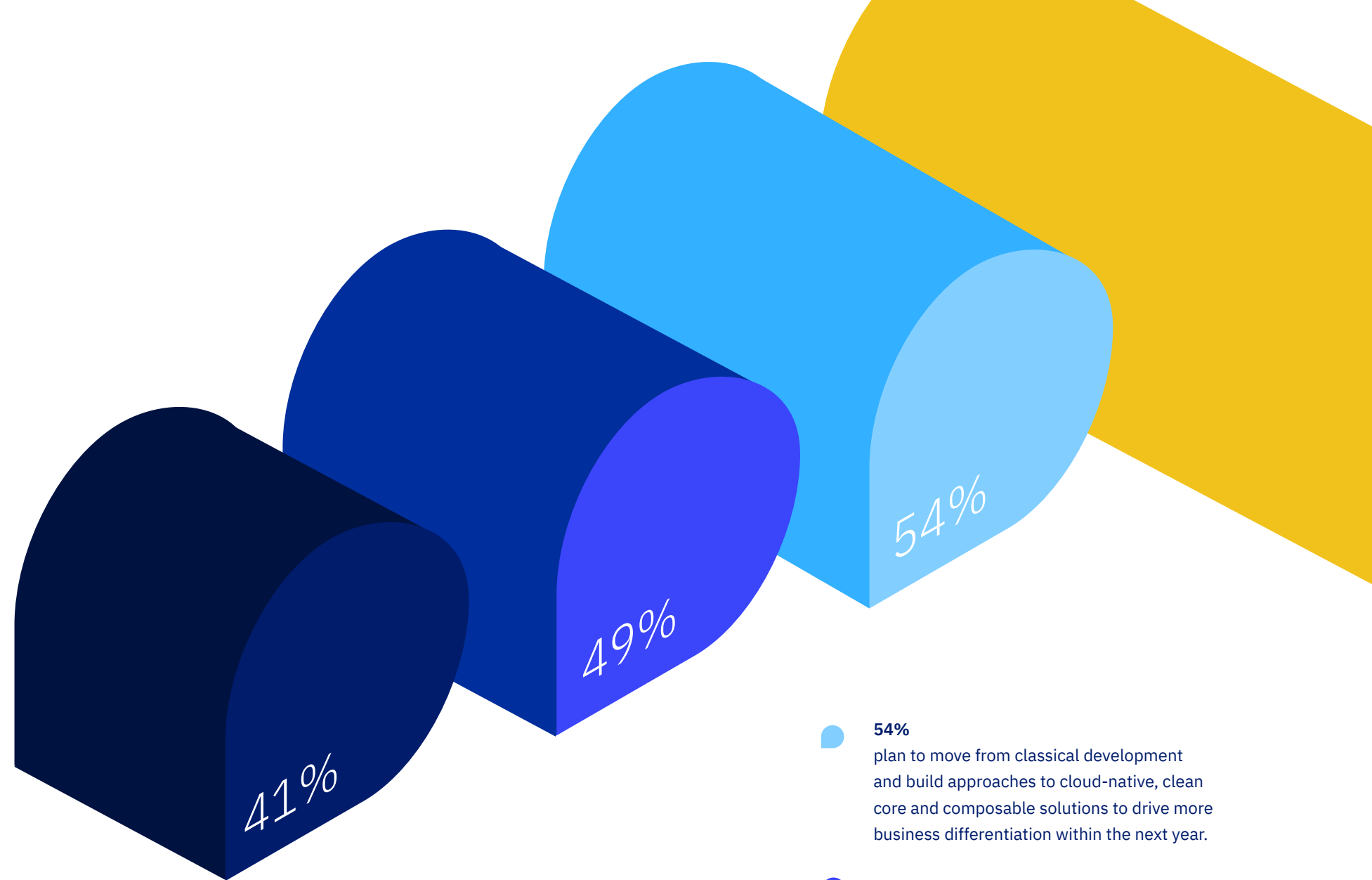
TaaS offerings such as RISE with SAP have many perceived benefits:

- 53%**
Cloud subscription model
- 53%**
Inclusion of all SAP software
- 48%**
Single party to address service-level agreements
- 45%**
Single-source operations and contract package

Transformational architectures should be built on cloud

Cloud-based environments and the adoption of S/4HANA enable organizations to take advantage of modularized, composable architectures. Leading organizations are deploying key capabilities in a clean core approach that includes refactoring heavy ECC ABAP customizations to reduce their technical debt. Extensions are being built through cloud-native apps that are template-driven, low-code, and simple to deploy on SAP Business Technology Platform (BTP), OpenShift and other platforms.

The next generation of ERP platforms delivers new experiences and ways of working to make solutions simpler and smarter by using AI and machine learning (ML) capabilities as well as composable architecture and services. They enable faster responses to evolving business needs, allowing for easier integration of intelligent workflows and best-of-breed applications.



- 54%** plan to move from classical development and build approaches to cloud-native, clean core and composable solutions to drive more business differentiation within the next year.
- 49%** plan to refactor to clean core and cloud-native styles as a part of the move to S/4HANA.
- 41%** have started refactoring classic ABAP code to clean core and cloud-native styles.¹

Japan Airlines optimizes operational efficiency with SAP

As part of their mission to become the world's favorite airline, Japan Airlines Co., Ltd. (JAL) decided to move to S/4HANA to improve operational agility through automated workflows in their ERP. And to align with their cloud-first strategy, JAL deployed the new system on SAP RISE private cloud edition with AWS, allowing the company to migrate from its SAP ECC/EC-CS applications.

In addition, JAL is now able to gain new insights into their financial performance, from analyzing the cost per flight in greater detail to visualizing data and creating dashboards that enable data-driven decision-making in near real-time.

With support from IBM Consulting™, JAL:²

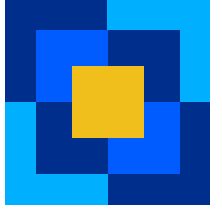
- Streamlined and optimized its mission-critical SAP solutions on cloud
- Achieved a smooth rollout despite a 100% remote deployment
- Reduced their SAP customizations by 60%
- Benefited from high availability and consistently high performance for exceptional service continuity

“We chose the cloud to reduce the need for maintenance and management, allowing us to assign our IT personnel to value-added activities. The cloud also makes it easier to elastically increase server resources during periods of high demand, and to recover our systems in the event of a disaster scenario.”

Mr. Takafumi Asako

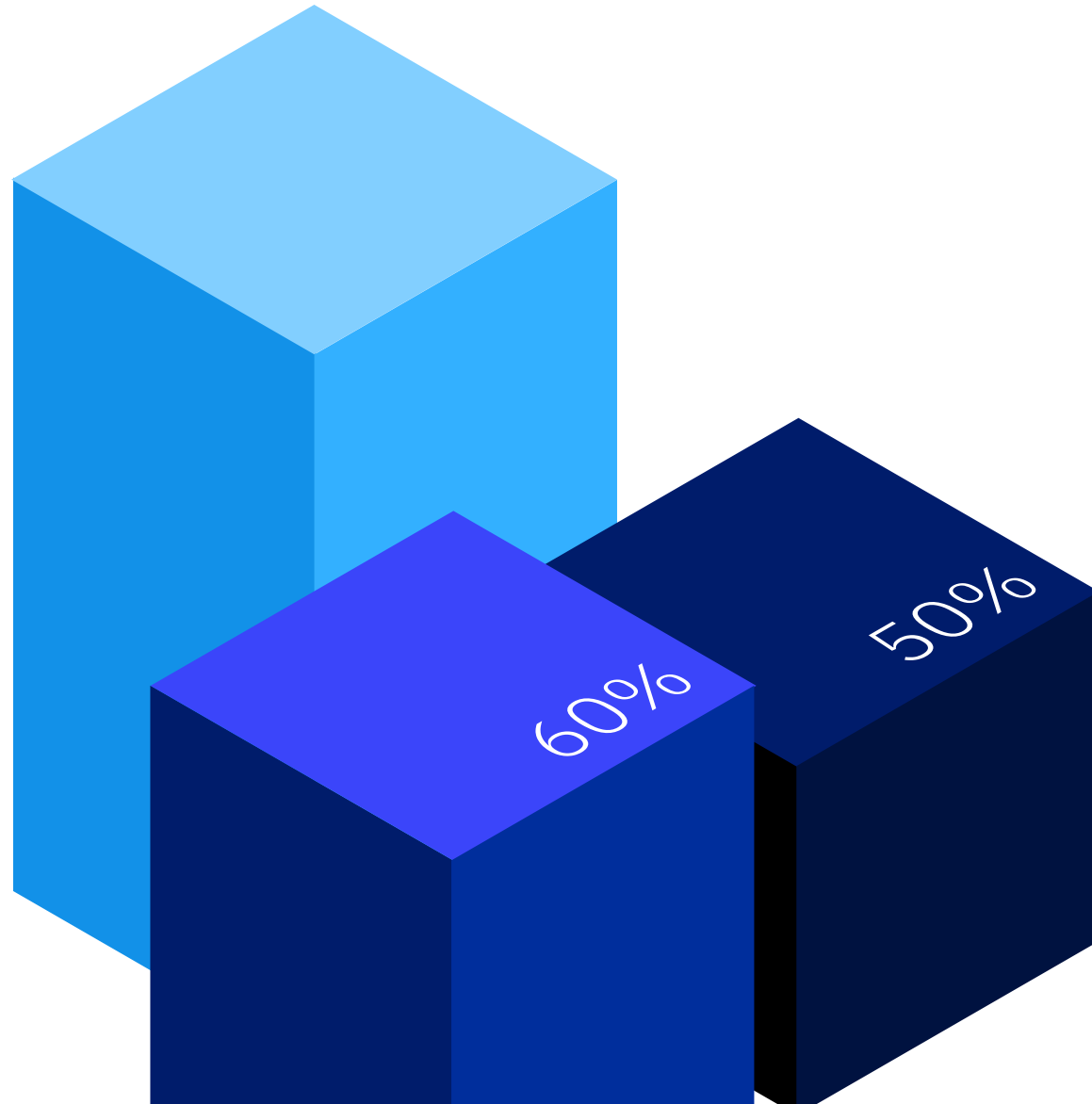
Manager, General Administration Systems,
IT Planning and Promotion Department, JAL





■ Almost **60%** of respondents say they have trouble making the business case for S/4HANA.

■ Over **50%** say it's hard to find the right skills in new technologies to support change.¹



02 Master the art of change at every level

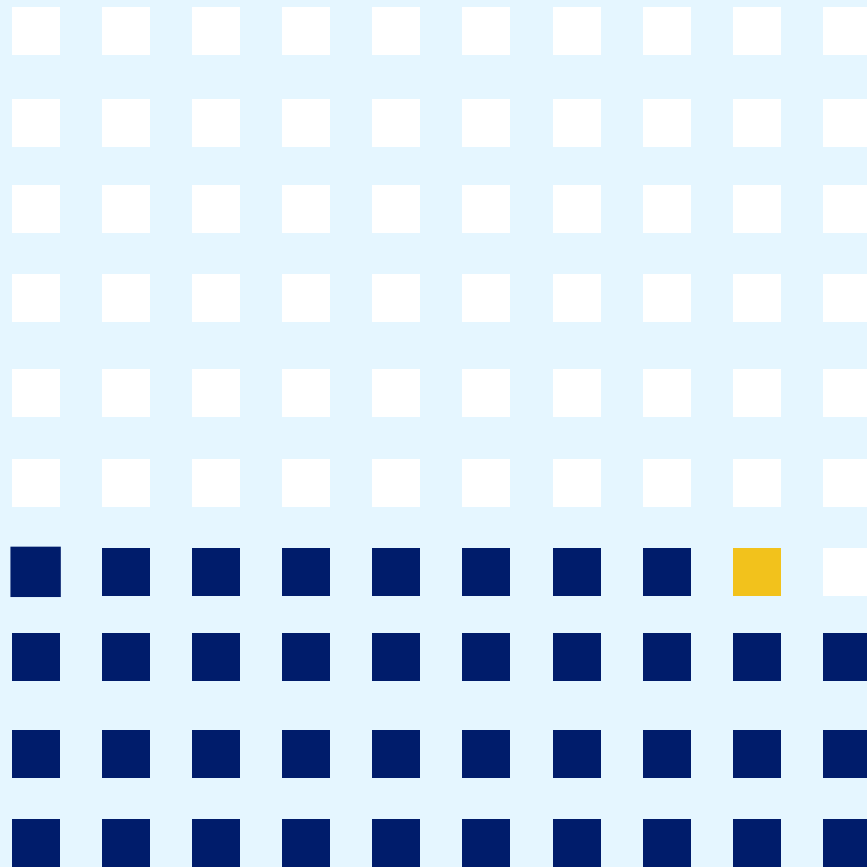
Because of the deep integration of SAP products in critical processes, organizational change management is crucial for every transformative SAP program.

The need for proactive, focused change management is even more apparent with today's S/4HANA transformation programs, which affect employees at all levels. At its best, change management helps by letting you define moments that matter through a persona-led transformation journey across your key business process workflows, enabling a richer user experience, higher productivity gains and greater process efficiencies.

More resources:

[Explore IBM organizational change services →](#)

[Assess an approach and define a strategy to address security, risk and compliance requirements →](#)



39%

of SAP users plan to adopt a culture of continuous insight and improvement within the next 12 months.¹

Here are the key points for maximizing the value of change management at each level of your workforce.

Nurture beneficial executive-level behavior.

Aligned and active executive support drives adoption and increases the value of your SAP transformation. These five factors are the most important for effective change management:

1. Communicate with the whole organization to focus on the *why* of the change.
2. Focus on balancing tradeoffs for decisions that affect process owners.
3. Include the change program and solution as a natural part of leadership communications and reinforcement.
4. Prioritize the change; aligning other programs and priorities to minimize distractions and maximize benefits.
5. Continue advocating for the change, even when you encounter opposition.

Unstick the mid-level management. Because mid-level managers are focused on operations and likely have KPIs to attain and report, they can get fixated on the current state and fall back on familiar processes that undermine larger change. For these managers, it's important to emphasize that managing process change isn't just about hitting a go-live date for a new technology system.

They need to prepare ahead of the go-live and continue supporting afterward. For example, they can focus on:

- Employment leads who advocate for the change in each local business
- Partnership between the deployment team and the operational change management team to share learnings and results
- Revised KPIs that allow for short-term disruption to support long-term growth

Empower end users. Despite all the management planning, your users may not understand how the change affects their work. There's incredible power and clarity in sending users a simple notification—about 60 days prior to the first time they will use a new SAP-enabled process—that includes targeted steps that the user can take to prepare, such as a demo to watch, free online training to complete, a simulation they should try out and a feedback survey to submit. With one simple note you can start to break through any uncertainty and put the power in your users' hands.

Successful change management involves mobilizing each user in the change, giving them some choice about how to proceed. It's also beneficial to encourage frontline champions for the change; these individuals engage their peers, give feedback to the management team, and support frontline training and adoption.

Dressing the team for success at Levi Strauss & Co.

To unify its operating platform and model, Levi Strauss & Company (LS&Co) launched a program to deploy a single SAP S/4HANA environment across its global business. The program started with a global template definition phase and has deployed to some of its largest markets. Functional areas of process transformation include finance, order to cash, inventory, management and planning, direct to consumer, and wholesale operations.

The globally deployed cloud environment, hosted through SAP RISE, has provided new benefits and capabilities around harmonized processes, standardized data and the ability to view and rectify orders in real time.

Program leaders took a focused approach to ensure that organizational change management was a priority in the program. An agile project with IBM Consulting enhanced its organizational change management processes, built executive-level commitment, and helped design communication strategies and training for internal users.

To support scaled deployment activities and reduce cutover risks, LS&Co built a culture of developing class-leading learning materials with SAP Enable

Now and focused on training execution. For its US release, the business achieved 100% training compliance before system go-live. The organizational change management emphasis also focused inward on the project team to identify bottlenecks and ensure a continuous improvement approach to execution.

“Adopting a completely new ERP at a company as large as LS&Co. is no small feat; these programs live and die on change management. As we went through the program, we tripled down on change management to drive solution adoption and proficiency. Our C-suite leaders have held our business accountable to adopt standard solutions, which has resulted in a S/4HANA system providing agility for our operating model, accelerated solution deployment and optimized ongoing TCO.”

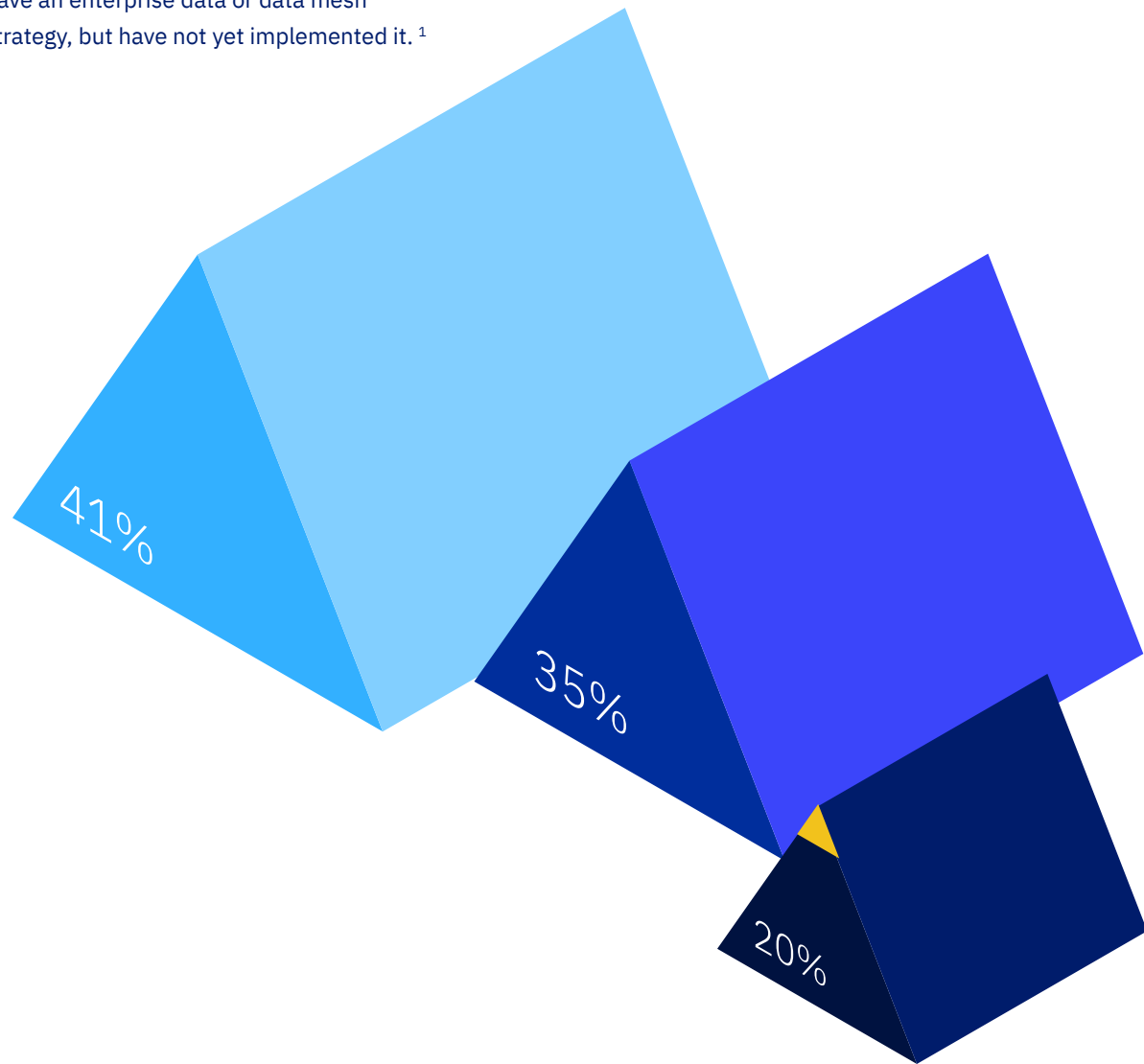
Chris Conrad

Program sponsor, SVP and CIO at LS&Co





- 41% are developing an enterprise data or data mesh strategy.
- 35% have begun implementing an enterprise data or data mesh strategy.
- 20% have an enterprise data or data mesh strategy, but have not yet implemented it. ¹



03 Transform how your business works with data and AI

Over the last decade, developments within digitization, AI, the Internet of Things (IoT) and edge computing have led to an exponential growth in data, creating additional complexity for enterprises to manage. Increasingly, SAP customers need insights from data that resides both inside and outside their SAP data sets. This intensified complexity has made the integration and governance of data a growing priority.

SAP data and analytics solutions give users across departments a single point of entry to view the data they need. This single entry point means enterprise data—including from existing cloud data lakes and warehouses— can be more easily shared, while remaining protected and avoiding data duplication. The wider availability of data can transform how your business works.

Read on to see how SAP customers are able to:

- Establish a data-driven culture across the business.
- Lead with AI.

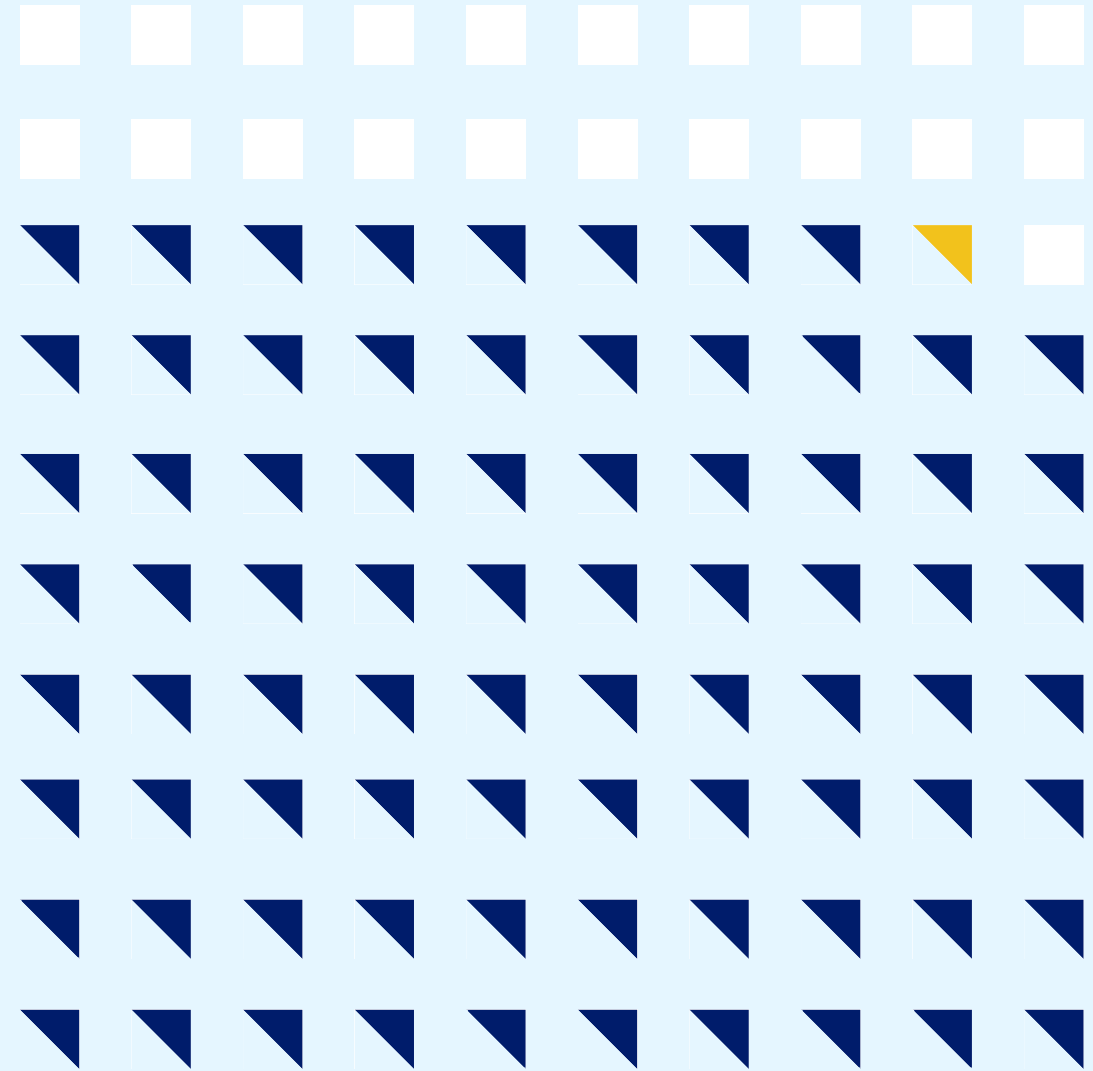
More resources:

[Assess current state of data readiness, identify risk areas and develop an optimized data strategy →](#)

[Determine how your business can harness the power of AI →](#)

79%

of organizations state that looking ahead twelve months, data will be more important to their organization's decision-making.³

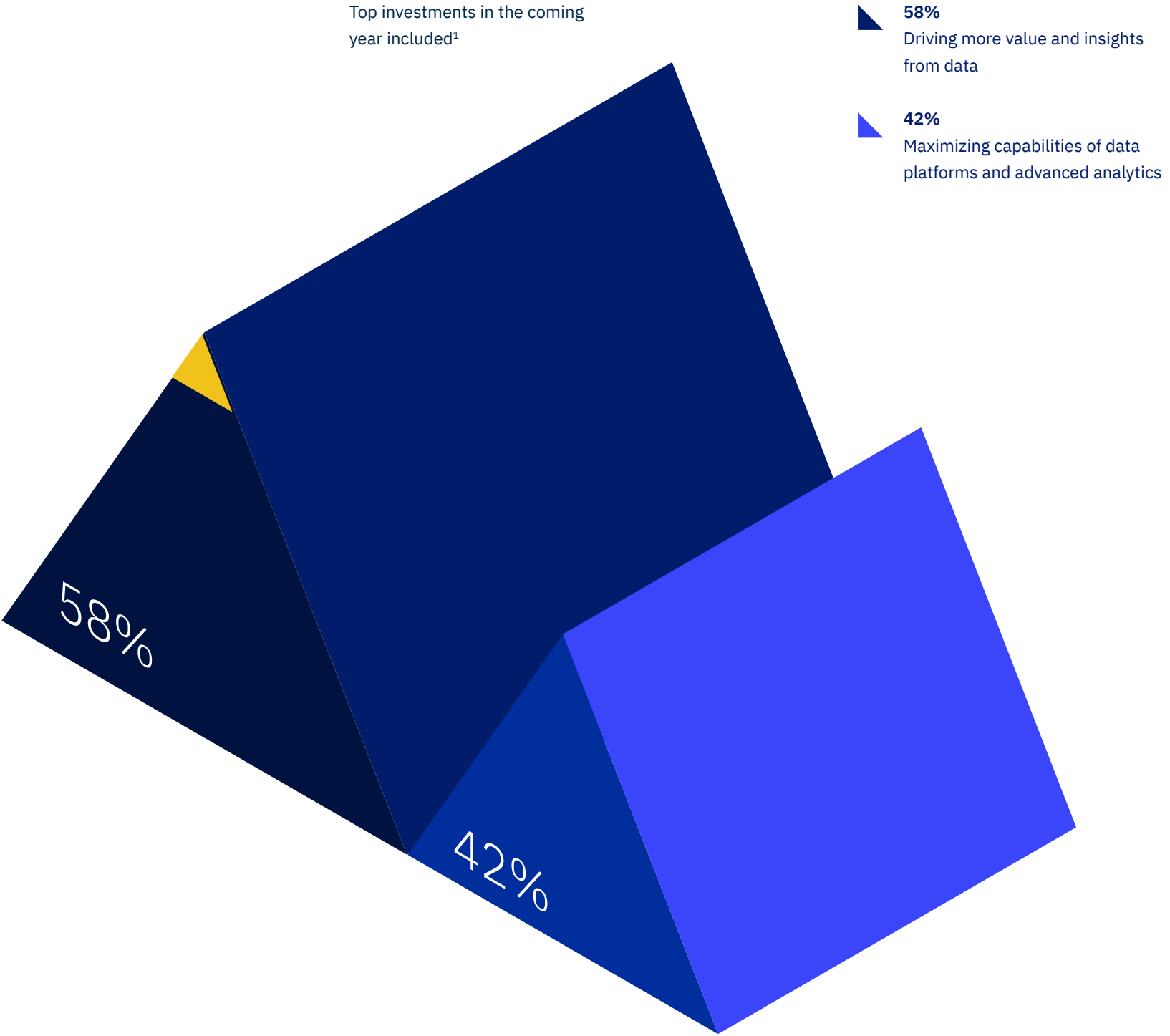


Establish a data-driven culture across the business

Organizations are starting to treat data as valuable and manage it accordingly, with a clear understanding of its audience and lifecycle. This is the basis of a data-driven culture that treats data as a strategic asset, one that provides empirical evidence to guide decisions. This culture prioritizes data quality, ensures data privacy and security, and maximizes the value of data assets.

Creating an organizational data fabric and activating SAP data as data products can unlock additional insights by supporting advanced AI-based or ML-based intelligent automation solutions for better decision-making. These solutions enable you to automate repetitive or error-prone tasks, optimizing business processes, enhancing efficiency, boosting productivity and gaining new insights into customer behavior and market trends.

Top investments in the coming year included¹



Data drives growth for Glen Dimplex

Dublin-based Glen Dimplex offers a range of products, from consumer kitchen appliances to industrial heating, ventilation and cooling units.

Following years of successful acquisitive growth, Glen Dimplex has sales, manufacturing and distribution facilities around the world. Previously, many of these business units relied on their own separate systems and processes to drive day-to-day operations—complicating the company’s planning activities. For instance, it could take up to two weeks of painstaking manual work to collate a sales trends report. Ultimately, this fragmented data environment made it difficult to produce high-quality products and deliver them on time.

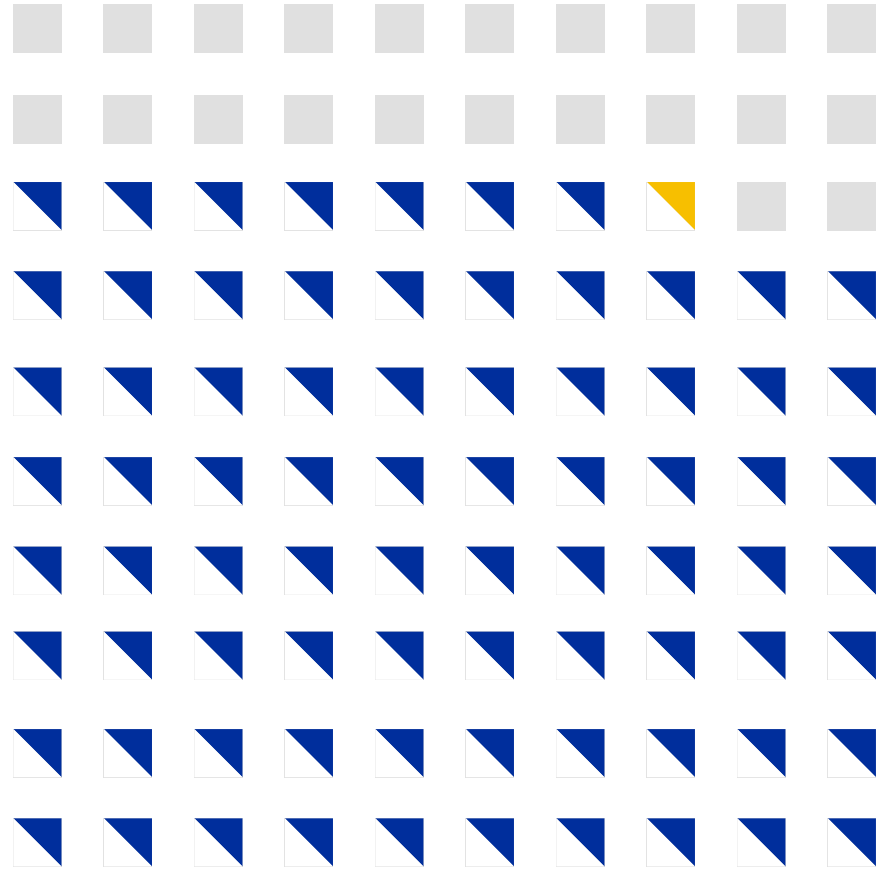
Glen Dimplex chose the next-generation ERP SAP S/4HANA as the foundation for its integrated business processes. Through a series of workshops with IBM Consulting and leaders from across its business, Glen Dimplex designed integrated workflows in SAP S/4HANA. Using accelerators, such as IBM® Blueworks Live, the company rapidly modeled the new processes and identified optimal ways to implement them in the SAP solution. The move to S/4HANA has enabled 99% faster business intelligence reporting and contributed to a 20% increase in on-time and in-full deliveries.⁴ Today, Glen Dimplex uses SAP BW/4HANA and Microsoft Power BI to make it fast and easy for employees to explore business data in SAP S/4HANA.

“As well as delivering on all our core operational requirements, SAP S/4HANA offers real-time analytics through an extremely intuitive user experience. The ability to convert our rich operational data into actionable business intelligence insights in seconds was another of the key reasons we selected SAP S/4HANA.”

James Munro
Program Director, Glen Dimplex



Lead with AI



78%

of respondents have AI among their top five priority technology initiatives.¹



Many business leaders are rushing to utilize new generative AI and ML capabilities. But intelligence is more than AI. It's a combination of applied data insights, automation, AI and ML that enables organizations to increase end-to-end visibility and agility into operational processes so they can respond faster and more effectively. Designing intelligence into existing systems and processes has the potential to positively influence revenue, productivity, experiences and efficiencies. So although AI is a priority for most organizations, many are still trying to determine exactly *how* AI should be used to increase intelligence in and with their SAP systems.



37% of surveyed customers plan to apply process insights as part of their transformation program.



19% plan to begin process insights within the next year.

The advent of foundation models is an inflection point in AI. Leading organizations are already starting to incorporate foundation models into workflows, particularly those involving generation, summarization and classification. The adoption of pre-trained foundation models can unlock exciting use cases for SAP customers with the potential to significantly redesign processes.

While many organizations are investing in developing, using and offering foundation models and generative AI, adopting these models in an enterprise setting entails a specific set of considerations. For an enterprise, the trustworthiness of the models, energy efficiency, performance, portability, and the ability to leverage enterprise data effectively and securely are paramount. The benefits of AI are irrelevant if enterprises cannot have confidence in the predictions and content generated by the models.

SAP is emphasizing a strategy of embedding AI models into the core of SAP, as well as extending the enterprise data approach to use AI models developed on the BTP to make insights more actionable. The recent announcement to embed IBM Watson® capabilities into SAP Start provides one example of how enterprises can unlock new levels of productivity by infusing AI, automation and data into core business workflows.

This infusion should be strategic and programmatic, not tactical, and needs to accommodate enterprise requirements for privacy, security and governance. It should focus on driving material impact in process outcomes designed into processes that turn transactional execution into intelligent workflows.

To fully realize the benefits of intelligent workflows infused with AI, it's important to understand which components can be optimized with AI. These optimizations aren't only redefining ways of working, but also driving dramatic improvements in transactional cost and material improvements in KPIs.

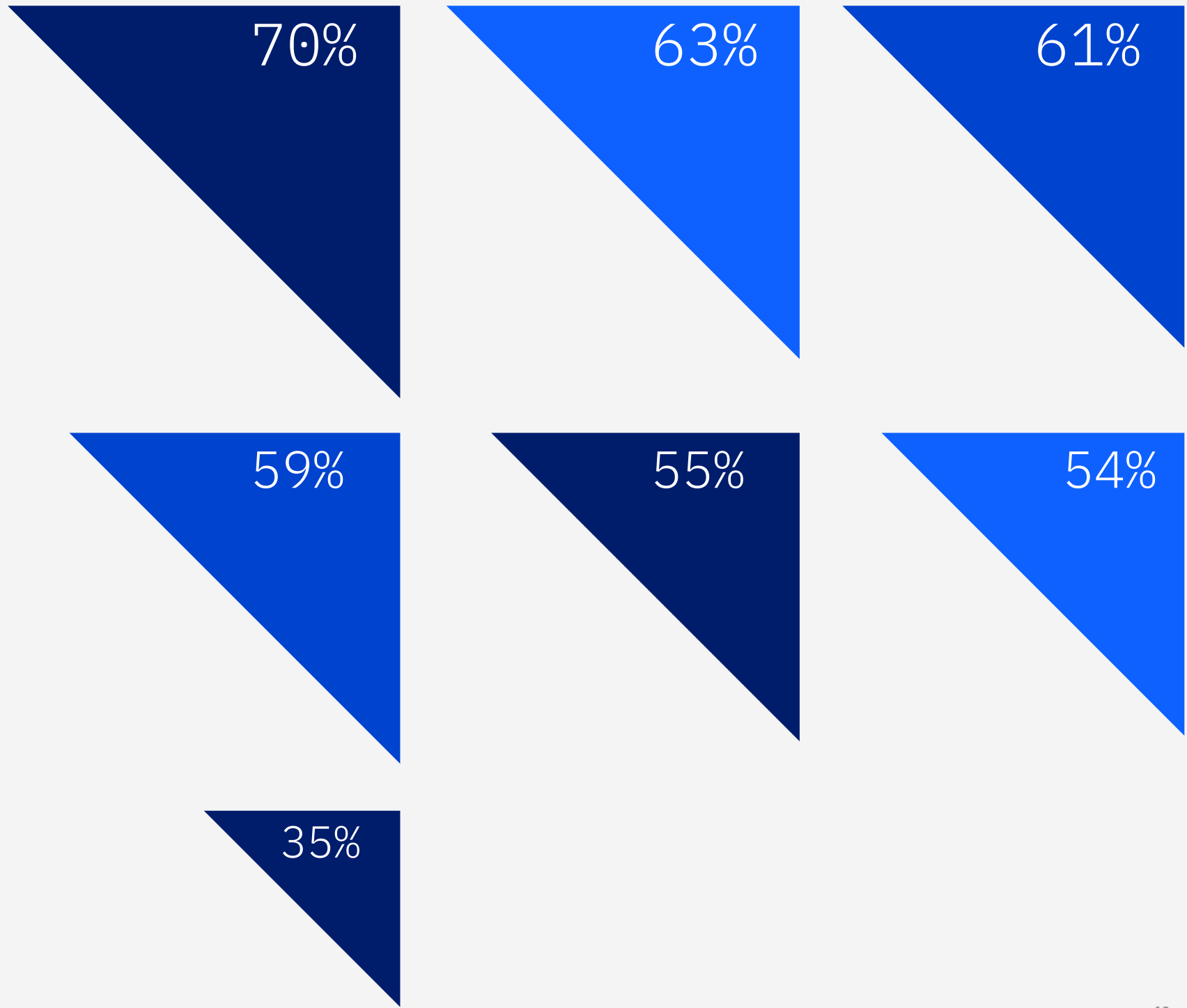
Businesses are demanding AI that produces accurate and trustworthy results, can scale across clouds, and can be easily adapted to enterprise domains and use cases. Watsonx™ is designed to help them address those needs.

IBM Consulting's watsonx practice brings expertise in the generative AI technology stack as well as domain and industry experience that can help accelerate clients' business transformations.

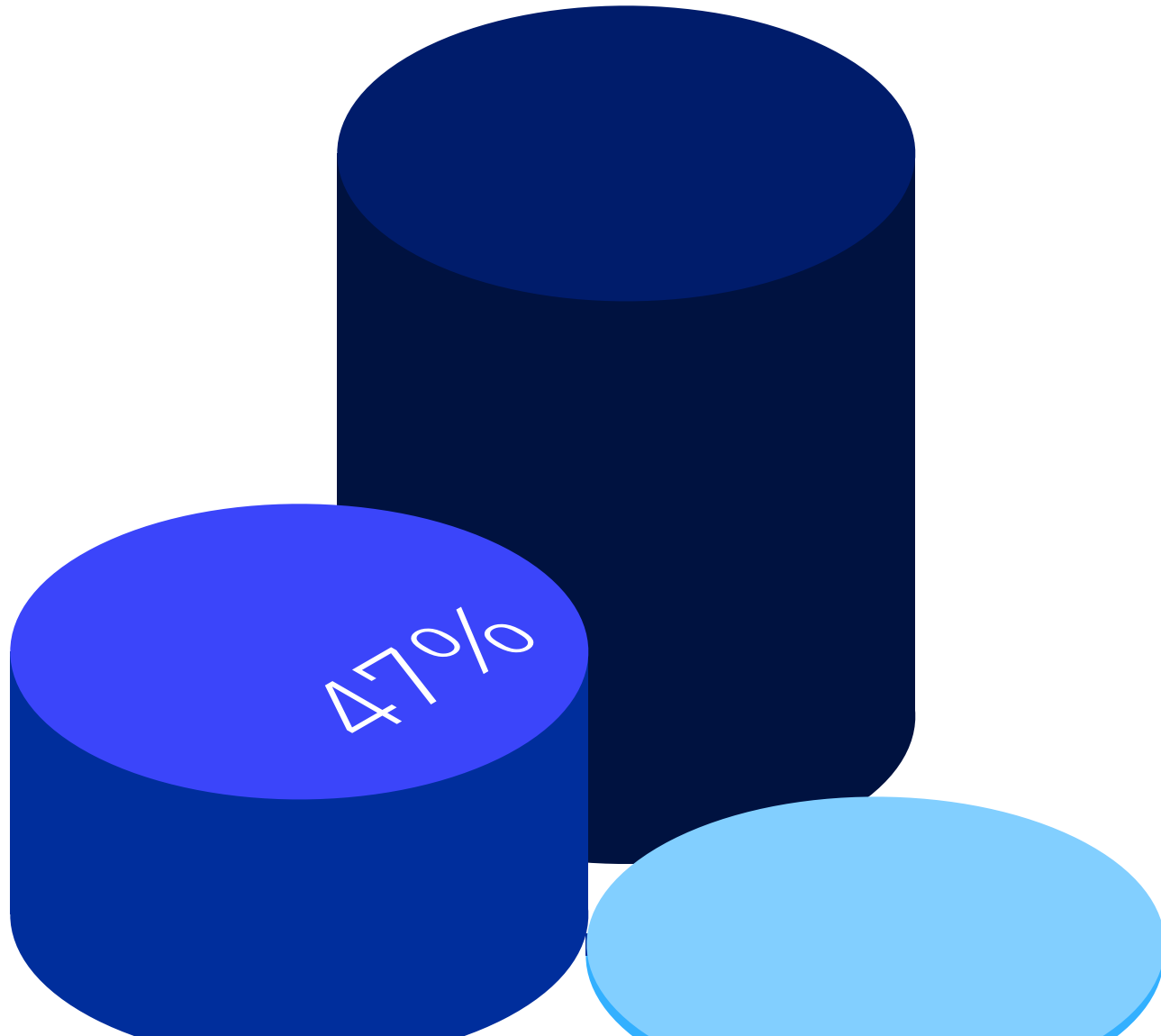
[Let's put AI to work and make the world work better — together.](#)

Areas where respondents are planning to apply AI and automation¹

- 70% Services
- 63% Marketing
- 61% Sales
- 59% Finance
- 55% HR
- 54% Supply chain
- 35% Procurement



● 47% of customers identify SAP as contributing tangible business value in improving long-term sustainability.¹



04 Use ERP to strengthen future operations

Organizations are now able to move beyond traditional ERP systems, taking advantage of modular technologies to standardize data flows and processes. This shift allows for the customization of SAP deployments to improve integration and interoperability, flexibility and scalability, differentiation and innovation in novel ways.

For example, SAP customers are now able to address goals that haven't traditionally been closely associated with ERP to:

- Achieve long-term success with sustainable practices.
- Create a world-class customer experience (CX).
- Capitalize on the platform economy.

More resources:

[Explore IBM Consulting customer experience →](#)

[Learn about IBM Consulting Sustainability Services →](#)

Achieve long-term success with sustainable practices

The market is pivoting to mandatory reporting based on global and regional regulatory frameworks and therefore companies need to report sustainability performance with the same rigor as financial performance. Investors now rely on the quality of ESG reporting to make new procurement and investment decisions.

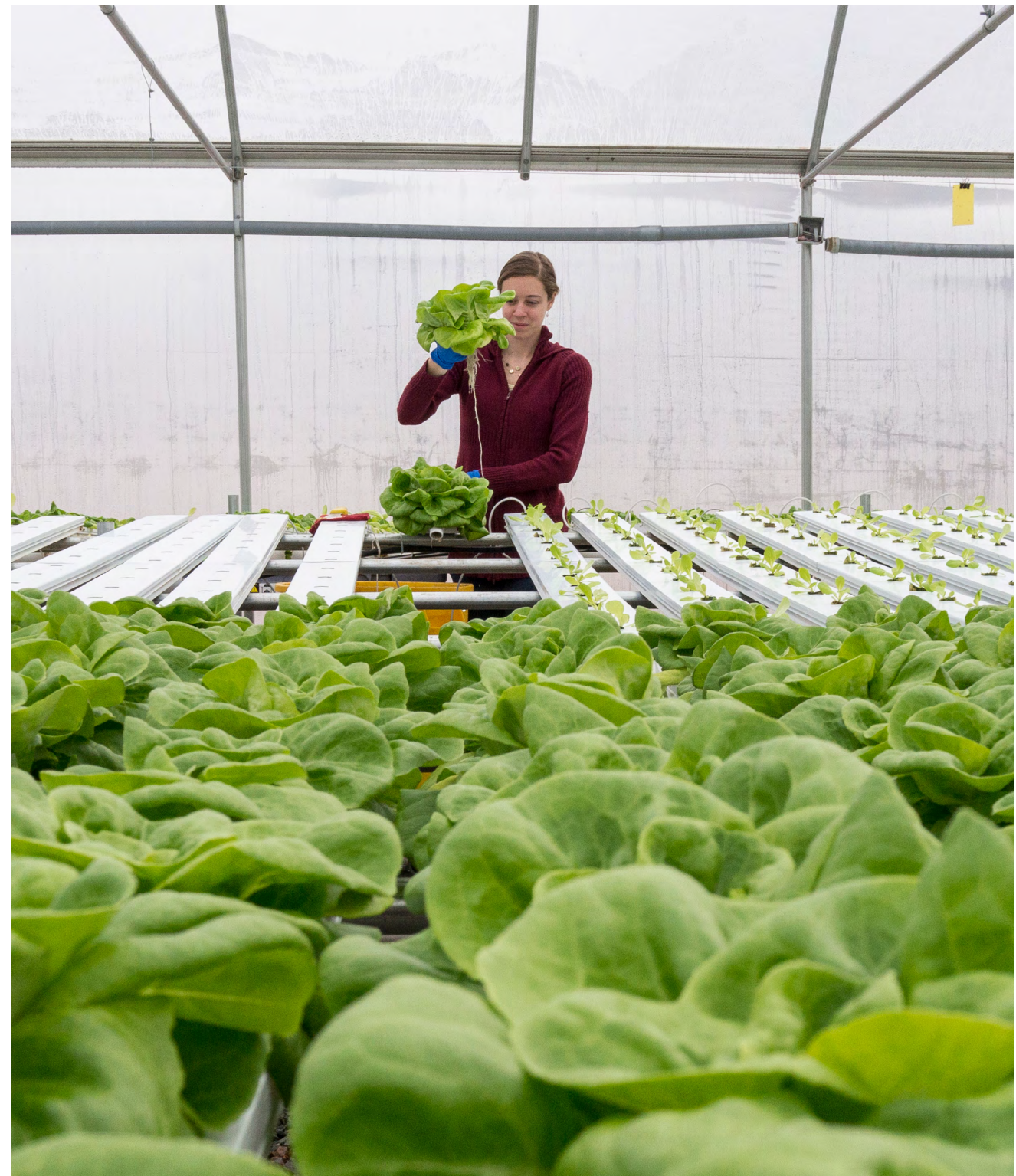
SAP customers need the ability to record and report ESG data more accurately, in real time, with actuals, using reliable data sets that are auditable and attestable from across the enterprise. However, organizations are struggling to comply with reporting as they often operate with disconnected, disparate sources of critical business information.

While **95%** of organizations have developed an ESG proposition, only **41%** have made progress in executing on their ESG ambitions, and only **10%** of executives believe they have made significant progress towards their ESG vision.⁷

The single biggest challenge in this area continues to be acting instead of discussing the problem. Next-generation SAP now enables you to go beyond recording and reporting, and start connecting your environmental, social and financial data holistically.

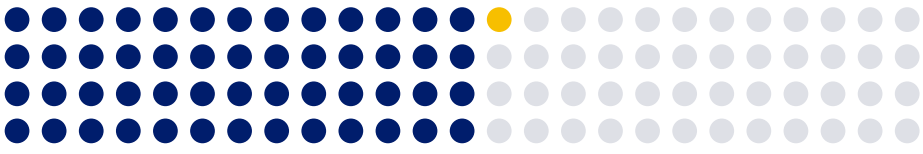
For example, clean energy company [Iberdrola](#) supplemented its current SAP Ariba solutions with GoSupply, which provides supplier ratings, to achieve its sustainable sourcing goals.

Although some organizations are reluctant about sustainability, recent research shows that companies that take sustainability commitments seriously experience profitability overperformance **46%** more than their reluctant counterparts do.⁶

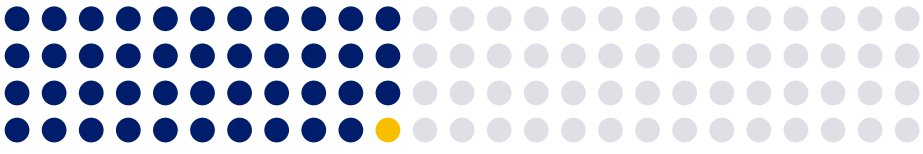


Create a world-class customer experience

About half of SAP customers in this year's survey are using or plan to use SAP CX solutions.



53% of respondents currently use CX solutions.



44% plan to implement Commerce Cloud in the next 12 months.¹

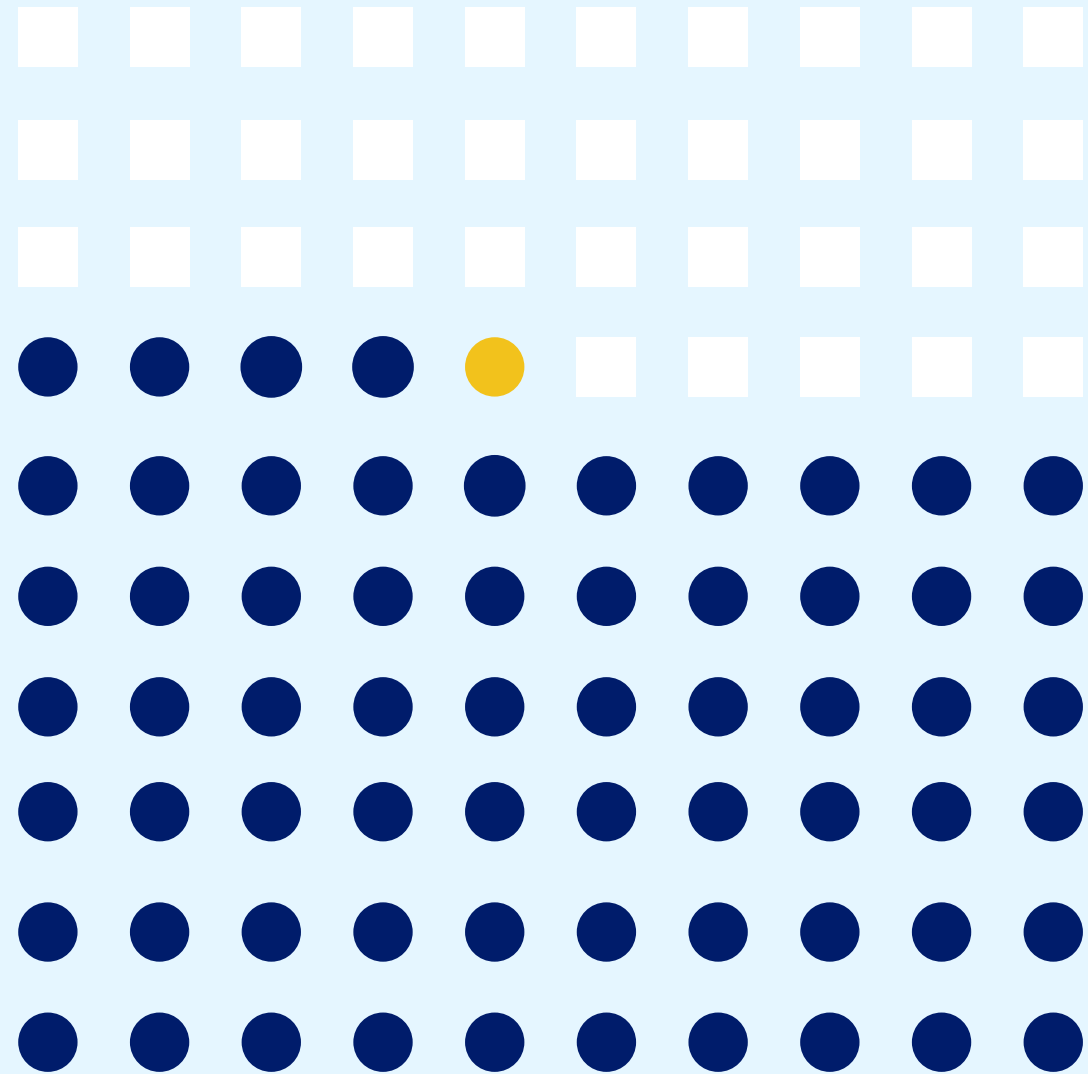
Change is the only constant in CX, and leading organizations must determine how to remain agile and compete in the era of hyper-relevance. As outlined in [The 5 pillars of personalization at scale](#), customers now expect highly personalized, new and engaging digital experiences. CX solutions need to quickly react to changing customer needs and market dynamics, which can range from adding a new distribution channel or adopting a new business model, such as subscriptions, to providing omnichannel services, such as curbside pickup. The survey findings around SAP Commerce Cloud may indicate the need for organizations to rapidly invest in their digital capabilities. These capabilities can help personalize the user experience in real time while balancing business priorities for profitable growth.

Some organizations are working toward achieving a true end-to-end CX by integrating the digital front office with the digital core of S/4HANA, which can bring innovative benefits. For example, recent supply chain disruptions highlighted the need for reliable product availability and delivery information. SAP products offer the ability to draw a connection from demand signals, such as product searches, add to carts, and social media shares to supply chain data, such as inventory on hand, predicted to arrive and returns in process. This connection can support intelligent product inventory, promotions, and pricing decisions that contribute to profitability.



65%

of respondents plan to use their SAP investments to transform their customer experience over the next 12 months.¹



Capitalize on the platform economy



55% currently using SAP ECC.



53% currently using SAP CRM and CX solutions.¹

SAP provides the digital infrastructure for collaboration, exchanging data and insights, creating new value, and orchestrating end-to-end process flows within an organization. This orchestration should be the first step to enable the use of the platforms to drive data exchange in a connected enterprise—but in many organizations, it doesn't exist.

Integrating multiple SAP services with S/4HANA allows businesses to benefit from a holistic and unified platform enterprise-wide, with interoperability in mind to work seamlessly with S/4HANA. More than half of businesses surveyed have adopted SAP solutions in ERP, CRM and CX and, as previously noted, 58% are focused on driving more value and insights from their data.¹

For example, S/4HANA capabilities can be extended using SAP Ariba to streamline procurement processes, improve supply chain efficiency and manage their compliance and risks more proactively. By combining insights from data analytics and AI, organizations can not only gain deeper insights into their operations, but also truly harness the power of data in their ERP ecosystem.

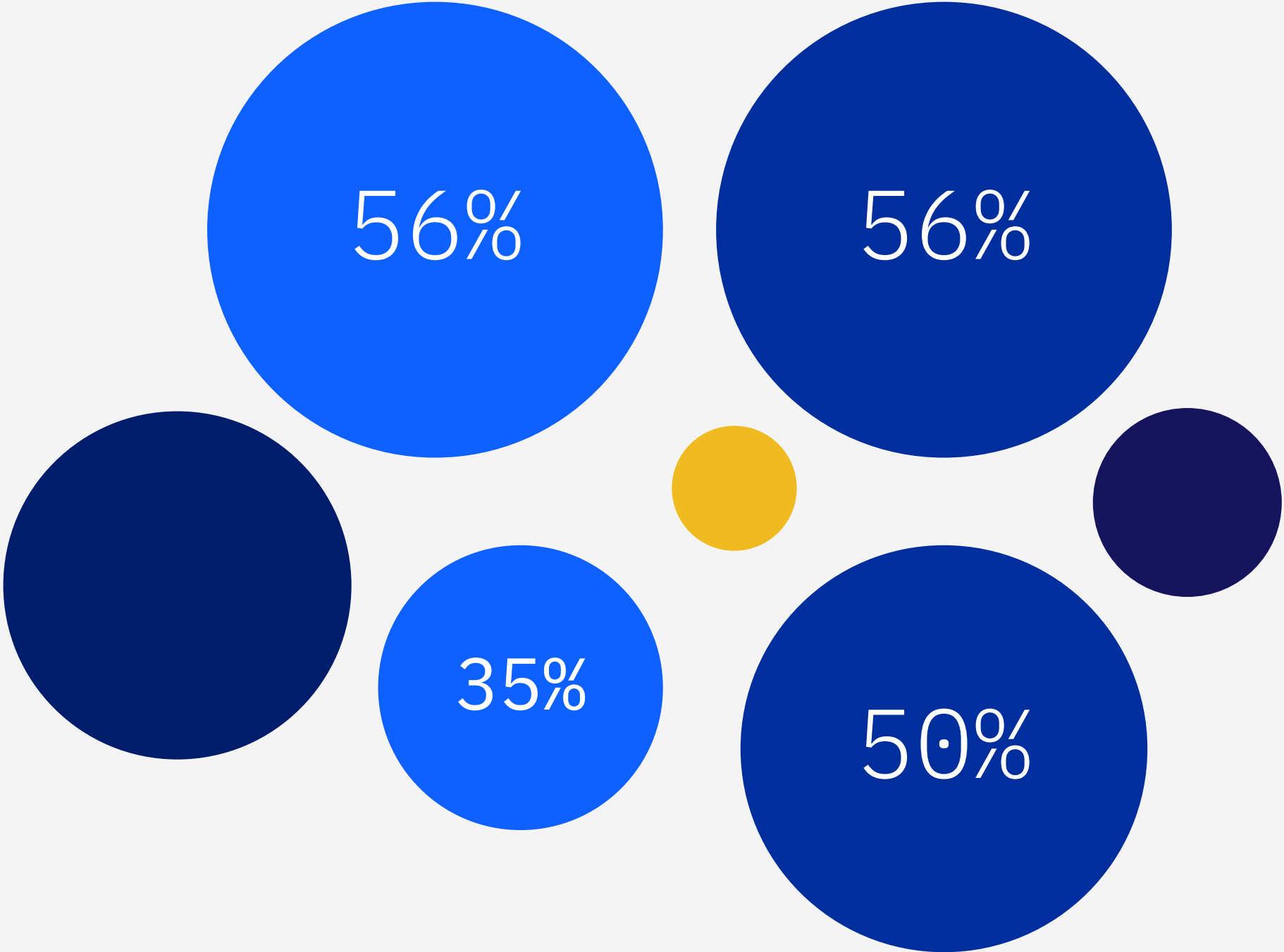
Next-generation use cases for the platform economy include

- Supply chain visibility
- E-commerce
- On-demand services
- IoT
- Energy management



Respondents are planning to move various processes to S/4HANA in the next 12 months.¹

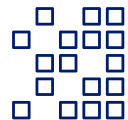
- 56% Finance
- 56% Procurement
- 50% Supply chain
- 34% Sales





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Thought leadership contributors

Michael Perera

Global Managing Director, SAP
IBM Global Sales

Stacy Short

VP, Global SAP Partnership Executive
IBM Consulting

Garrick Keatts

Senior Partner – Practice Leader, SAP
IBM Consulting

Jennifer Donnelly

SAP Global COO
IBM Consulting

Wadih Bargach

SAP CX Global Go To Market Lead
IBM Consulting

Kristi Choate

Partner, Finance & Supply Chain Transformation SAP Process Adoption
IBM Consulting

Allan Coulter

Global CTO for SAP
IBM Consulting

Mihir Gor

IBM Distinguished Engineer, UKI SAP CTO and Global SAP Sustainability CTO
IBM Consulting

Kristil Robarts

Director, Product Marketing
IBM Consulting

Report and survey methodology

This report is examined through a future-looking editorial lens, offering IBM's perspective on ongoing and upcoming developments in the SAP ecosystem. These topic areas are driven by survey data, IBM's thought leaders and consultants working with global SAP clients, and a supporting group of industry and topical experts. The survey was fielded between January and February 2023. It consisted of 500 responses from C-suite, vice-president-level and director-level executives, spanning North and South America, Europe, the Middle East and Asia. IBM collaborated with Oxford Economics on the development, recruitment and analysis of the quantitative survey.

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Report and survey methodology

This report is examined through a future-looking editorial lens, offering IBM's perspective on ongoing and upcoming developments in the SAP ecosystem. These topic areas are driven by survey data, IBM's thought leaders and consultants working with global SAP clients, and a supporting group of industry and topical experts. The survey was fielded between January and February 2023. It consisted of 500 responses from C-suite, vice-president-level and director-level executives, spanning North and South America, Europe, the Middle East and Asia. IBM collaborated with Oxford Economics on the development, recruitment and analysis of the quantitative survey.

