
BENCHMARK REPORT

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THE CIO's 2024 AGENDA FOR SAP, SAP S/4HANA, THE CLOUD AND BEYOND



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Executive Summary

Insider Perspective

“Within SAP, there is an increased flow of investment for integration partners and analytics. There is undoubtedly value on the table, it is just a matter of convincing the business, not just IT.”

– ERP SOLUTIONS ARCHITECT

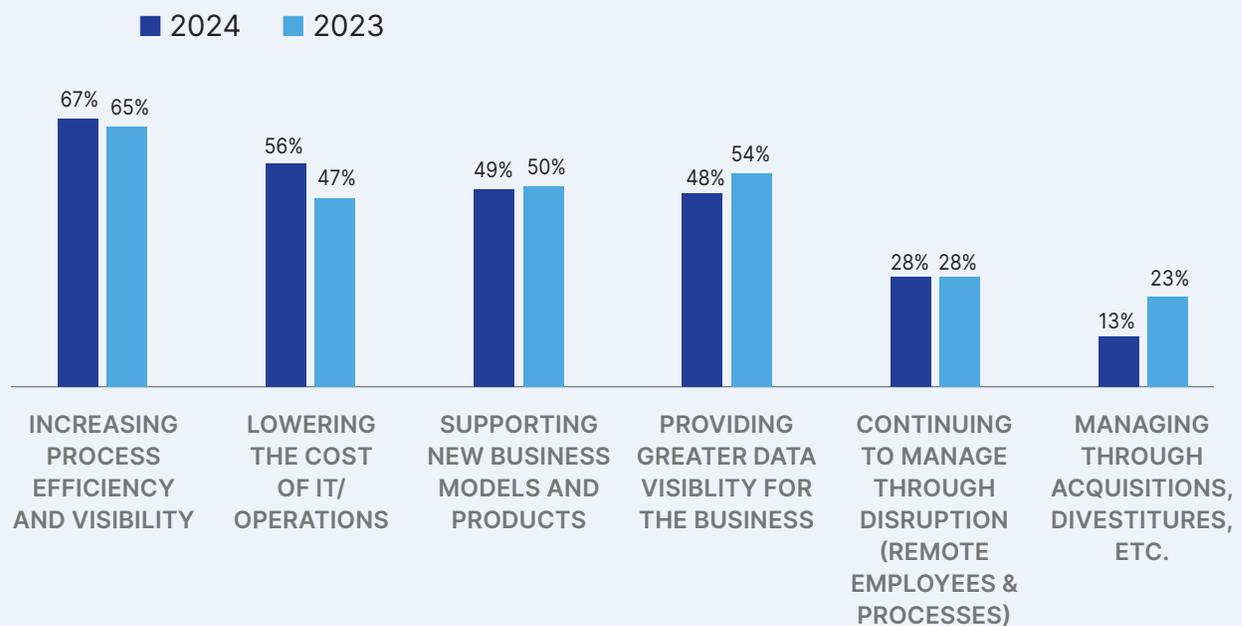
BUSINESS LEADERS, particularly Chief Information Officers (CIOs), are tasked with the vital job of ensuring that their organization’s data and IT structure delivers agility, visibility, and efficiency to all parts of their enterprise. With a constantly-shifting business landscape, decision-makers are always searching for solutions and strategies that bolster the capabilities that their IT architecture can deliver.

To provide deep and meaningful insights into how technology leaders are thinking and how they are prioritizing their focus for 2024, SAPinsider surveyed 124 executives within its community in February, March, and April 2024. SAPinsider conducted numerous in-depth individual interviews with executives from diverse companies and industries on the core areas that they plan to focus on in 2024. These results were then compared to the previous year’s research on the same array of topics.

The survey revealed that organizations will likely continue to invest significant resources into strengthening their SAP landscapes. Nearly three-quarters of the survey respondents (74%) reported that their firms will have either the same or a larger budget for 2024 SAP-related projects as compared to their 2023 SAP-related budgets.

When questioned on their top priorities for the coming year, tech leaders had a largely similar focus as they did in 2023 (**Figure 1**). For the third year in a row, increasing process efficiency and visibility remained the absolute top focus among CIO’s, selected by two-thirds (67%) of respondents. This was up slightly from 65% in 2023.

Figure 1: Top Business Priorities for 2024



One IT and systems leader said their organization wanted to “concentrate more on optimizing and refining our business processes to add value to our customers. This is possible only considering recent innovations put forward by SAP.” Organizations will likely continue to increase their SAP investment as SAP continues to deliver systems and solutions that allow them to improve business processes and deliver ROI.

Additionally, many of the tech leaders surveyed who noted that their company will reduce SAP spend in 2024 indicated that this is only taking place so the organization can save up to use those resources on a move to SAP S/4HANA in the future.

Nearly half of survey respondents noted that supporting new business models and products (49%) and providing greater data visibility (48%) were also significant priorities for 2024. Both of these responses dipped slightly as compared to 2023.

One of just two priorities selected by over half of respondents (56%) was lowering the cost

of IT and operations. This priority saw the steepest year-over-year increase, as it was highlighted by just 47% of respondents in 2023.

Organizations are keen on integration, consolidation, and simplification. With the growing emphasis on operating businesses in a smarter, more data-driven way, CIOs must find a way to streamline their business processes and improve their data management strategies. Data management serves as the backbone for all AI, automation, and analytics capabilities that enterprises are desperate to deploy. CIOs are continuing to prioritize integrated data management landscapes, data cleansing tools, and data governance solutions.

Though budgets are consistently robust throughout the SAP user organizations surveyed by SAPinsider, respondents are still determined to reduce the cost of IT and operations. This can be achieved through targeted investment in automation and data management services. This allows organizations to maintain a clean core, reduce inefficiencies, and lower overall operating costs.

The survey revealed some of the following trends and insights into how executives are prioritizing their SAP investments for the coming year:

- SAP S/4HANA is once again the top strategic investment for leaders in 2024, as more than half (54%) of respondents named the updated ERP as one of their most strategic investments of the year. This figure is roughly in line with the 2023 survey, at 55%. With the 2027 end of maintenance deadline for SAP ECC looming, organizations are still in the process of evaluating and deploying the new ERP system.
- Broadly speaking, SAP budgets are consistent, with 42% of executives reporting that their SAP budget for 2024 is the same as the year before. Furthermore, 32% have a larger budget and 26% reported having a smaller budget.
- Similar to SAP budgets, most organizations are planning to have an equal or larger financial investment set aside for service and solution partners in 2024. The survey found that 37% of organizations will increase their third-party investment, while 46% of respondents said that budget will remain the same.
- The top priority behind increasing process efficiency and visibility (67%) in 2024 was lowering the cost of IT and operations (56%). This response leapfrogged both supporting new business models and products (49%) and providing greater data visibility for the business (48%), which were second and third, respectively, in 2023. This indicates that CIOs and technology leaders are feeling increased pressure to operate in a more cost-effective manner.
- The response to RISE with SAP continues to be a mixed bag. The share of respondents deploying RISE with SAP more than doubled, from 6% in 2023 to 13% in 2024 — a relatively small share. For 2024, one-quarter of respondents plan to evaluate RISE with SAP, a further 14% are currently in the evaluation process, and 10% have already decided to use it. These figures are nearly identical to the ones uncovered in 2023.

REQUIRED ACTIONS

Based on the survey responses and interviews conducted, technology leaders should consider the following strategies as they plan for the 2024 initiatives and beyond:

- **Lay out your SAP S/4HANA roadmap.** Just like in 2023, SAP S/4HANA is the top strategic investment CIOs are targeting for 2024. Yet a significant portion of SAP users still have yet to begin their transition to the new ERP system, despite the 2027 end of maintenance deadline moving one year closer. Companies that still have not started the digital transformation process should solidify their plans by finding a trusted partner that can equip them with the skills and knowledge they need for this project.
- **Equip your organization with the skills it needs now and in the future.** Many CIOs noted that a lack of internal skills is a major impediment to transforming their organization into an agile, data-driven enterprise. Yet just because an employee may not have mastered AI or other advanced skillsets, doesn't mean they are unable. Sometimes, upskilling current employees can be faster and more cost-effective than an in-depth hiring process. Tech leaders should identify the skills the organization will need to remain agile well into the future and find current or prospective employees that can deliver those capabilities.
- **Reimagine business processes to maximize efficiency.** CIOs and technology leaders indicated that they are feeling increased pressure to operate more efficiently. The move to SAP S/4HANA is an ideal time to thoroughly evaluate all business processes and determine which ones are working effectively and those that can be changed. Migrating inefficient practices from legacy systems can weigh down organizations for years to come. As part of the planning process, tech leaders should evaluate workflows and compare them with other possibilities that will become available through SAP S/4HANA.

CHAPTER ONE

What's Driving Leaders' Budgets, Challenges, and Investments in 2024?

SAPinsider's latest research confirms what many tech leaders already know: it is still a good time to be an SAP professional. Despite uncertain economic and geopolitical circumstances still swirling around the globe, companies continue to invest in their SAP ecosystem.

The majority of SAP organizations are planning to invest as much if not more of their resources into SAP and its associated projects in 2024. Much of this investment is necessary because of the 2027 end of maintenance deadline for SAP ECC. Organizations must ensure that they have the partners, skills, and technological infrastructure to make their move to SAP S/4HANA successful.

LEADERS ARE CHALLENGED BY THE NEED TO STAY ON TOP OF EVOLVING TECHNOLOGIES

While the promise of advancing technology is certainly exciting, it can also be daunting. Keeping up with technology (44%) was one of the top three challenges tech leaders say they are facing in 2024 (Figure 2), CIOs and other executives indicated that they are feeling stretched thin by the ever-expanding technological landscape that they are ultimately responsible for.

Businesses are constantly in flux, reacting to market forces as well as internal directives. This tension accounts for the other significant issues tech leaders highlighted as their top challenges for 2024. Managing change ranked as the top difficulty, selected by nearly half (49%) of respondents.

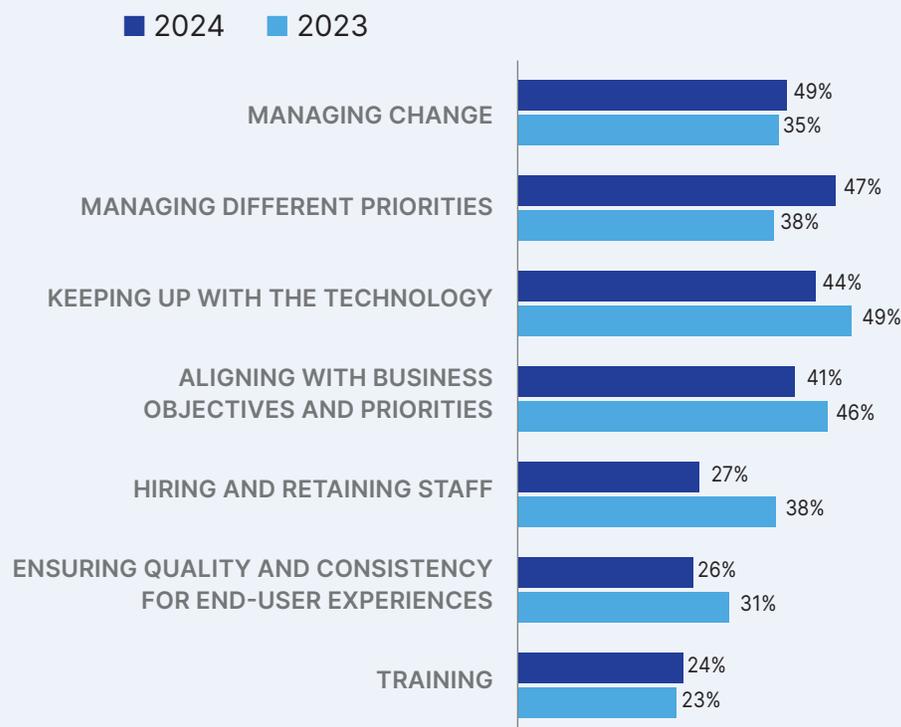
CIOs must account for external forces pressing on them to alter workflows, such as macroeconomic forces, shifting customer preferences, and other disruptions. On the other hand, they must also factor in internal pressures or challenges that may be pulling them in another direction, such as budget limitations and competing priorities.

Insider Perspective

“Last year, we completed a technical conversion from our SAP ECC 6 environment to SAP S/4HANA and it went well. But we have two more phases to that project. Phase two is about how we can maximize the investment for S/4HANA without thinking of all these various SAP add-ons, how can we truly utilize the new features functionalities within the core SAP S/4HANA.”

**– DEIDRE COUSINS, CIO,
GRACEKENNEDY**

Figure 2: Top Challenges For Leaders



Unsurprisingly, managing different priorities was the second-most commonly selected challenge noted by tech leaders in the survey, highlighted by nearly half (47%) of all respondents. Ultimately, tech leaders need to find solutions that provide the agility to meet external forces as they change, while also delivering on the needs that each team has within their own organization.

TECH LEADERS MUST NAVIGATE THE PARTNER ECOSYSTEM

An essential piece of this puzzle is the expansive partner ecosystem that exists around SAP. To keep pace with the rate of change both within and outside of SAP, these organizations have released new products and functionalities designed to integrate seamlessly within a given SAP ecosystem.

These essential partners can provide significant ROI by reducing downtime in technical migrations, creating and implementing solutions that improve workflows, and offering a second opinion from the outside on how the organization can improve operational performance.

Recognizing this importance, 37% of SAP organizations are boosting their budgets for service and solution partners in 2024, according to survey results. This is more than double the figure (17%) of SAP organizations that plan to decrease their investment with these partners, leaving 46% who will spend roughly the same amount as they did in 2023.

These figures are roughly in line with the 2023 survey, indicating that organizations continue to find value in going to third-party organizations within the SAP orbit to find specifically-tailored solutions that can help in a myriad of different situations.

Insider Perspective

“The city is all in on BTP. I believe it is important to set up a platform properly. We first put the staff through formal training, and then we hired contractors to help us stand up and get the initial system configurations working with our infrastructure. As part of that effort, we had incorporated on the job training as part of the contract in order to allow the staff to apply the skills they had learned to a real-life application. It helped to re-enforce their learning and simultaneously reduced the risk of us being unable to support the platform after the contractors rolled off.”

– GRACE BROSNON, CTO,
CITY OF TACOMA

SAP S/4HANA is the top area of focus for this investment, as leaders need to find partners who can ensure that they have a holistic view of their entire SAP landscape before embarking on a digital transformation. Yet partners can deliver significant value in virtually any area of an organization.

While these partners can certainly be helpful when deployed in the right circumstances, the growing number of third-party organizations can be overwhelming for tech leaders. CIOs must make difficult decisions when deciding how to allocate the resources they have allotted to spend on investments with service and solutions providers.

KEY TAKEAWAYS:

REMOVING SILOS IMPROVES WORKING CONDITIONS FOR EVERYONE: While there is no single technological solution that will meet the needs of every company, employing strategies that improve communication and remove silos can only be a benefit. When teams are able to work better together, they can collaborate to find meaningful solutions and help each other overcome obstacles.

INVESTMENT IS ONLY MEANINGFUL IF IT IS TARGETED CORRECTLY: While tech leaders may not be able to become intimately familiar with the offerings every partner has, they should perform due diligence on which firms have a track record of delivering significant ROI in areas where they may be lacking.

ENSURE IT HAS A SEAT AT THE TABLE: While planning out potential projects for CIOs to take on is important, all the plans are meaningless if tech leaders do not have a strong voice in overall company budgeting and allocation decisions. It is vital that the CIO has strong relationships with all stakeholders throughout the business, ensuring that IT teams are not siloed and can ensure that the entire SAP landscape at their enterprise is maximized.

CHAPTER TWO

How People Fit into Ongoing Transformation and Innovation Initiatives

Beyond the necessity of the move, adopting these newer technologies can give businesses a competitive advantage, equipping them with advanced analytics and planning capabilities and providing them with the flexibility to work with more agility to meet shifting business needs.

Tech leaders should also not overlook the human element of IT discussions. Adopting new technologies can energize employees that might otherwise feel stagnant. Allowing a team to master and leverage a new skill can break monotonous work cycles and provide a renewed sense of purpose that improves output and overall employee satisfaction.

Companies that leverage advanced technologies may also earn a leg-up in the race to attract top talent entering the workforce. Whether these are recent graduates or experienced professionals, ambitious SAP professionals want to use the most recent and exciting solutions available to maximize their productivity and remain on the cutting edge of the technology world.

This attractiveness to employees will be crucial in 2024, as 29% of survey respondents said that they planned to have a larger SAP team than they did the year before, as compared to just 12% of respondents who say their SAP team will decrease in size.

TECH LEADERS IDENTIFY THE MOST IMPORTANT SAP-RELATED SKILLS

In 2023, SAP S/4HANA skills were far and away the most sought-after, selected by 58% of survey respondents (**Figure 3**). No other response had more than a 40% share. Yet in 2024, this is no longer the case. The joint-top skills that CIOs wanted to develop or add were Analytics and Integration (46%).

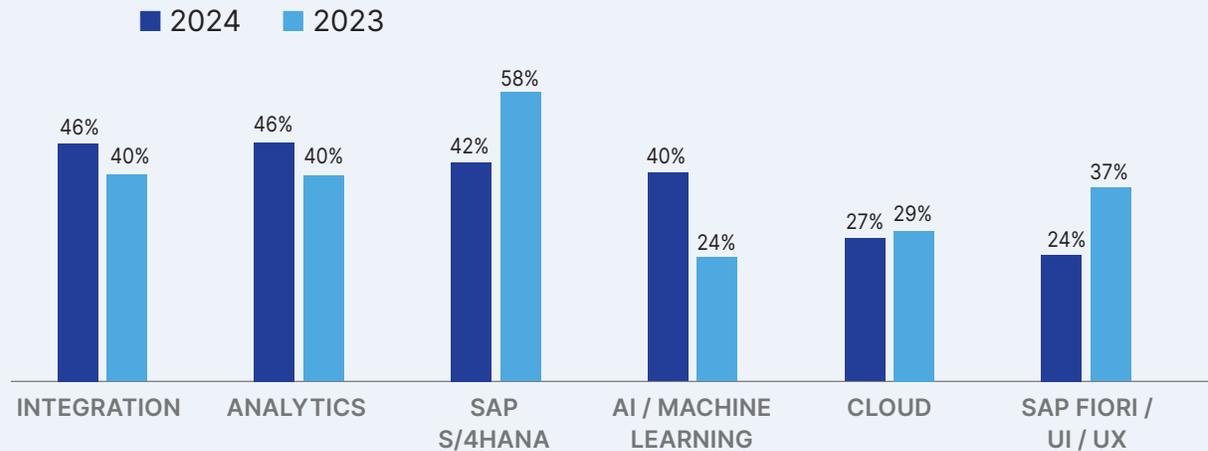
The dip in those CIOs who need SAP S/4HANA skills is unsurprising. As more and more organizations implement the new ERP and ultimately become reliant on it, the familiarity level with SAP S/4HANA will rise, along with the share of the SAP workforce that is proficient in using it.

Insider Perspective

“Utilizing APIs, integration, and security within SAP systems is vital for advancing our strategic initiatives. These competencies are essential for achieving seamless connectivity across different systems and technologies, improving operational efficiency, and providing solid protection against cyber threats. By excelling in these areas, we can substantially boost our agility and gain a competitive advantage in a digital-first world. Such strategic proficiency not only optimizes our internal operations but also strengthens our company’s digital assets against potential vulnerabilities, positioning our business for lasting growth and promoting a culture of relentless innovation.”

– CIO

Figure 3: Top Challenges For Leaders



As organizations seek to work in a more efficient, streamlined manner, integration skills are becoming more indispensable. Integrating modules provides organizations with the ability to gain end-to-end visibility of essential areas like finance and the supply chain. Additionally, as the SAP ecosystem expands, there must be IT team members who are able to integrate SAP and non-SAP systems.

Analytics skills are growing in importance, increasing from a 40% response share in 2023 to 46% in 2024. As companies are pushed to operate in a smarter, more data-driven way, analytics skills are necessary to help them forge a path forward. Identifying inefficiencies and better anticipating changes is an essential ability to maintain a competitive edge.

Analytics is one of the key focus areas made possible by AI and automation, which we will touch on in Chapter 3. SAP organizations will no doubt have intense interest in finding workers with the ability to harness AI to deliver real-time analytics so that they can stay one step ahead of the competition.

KEY TAKEAWAYS:

UPSKILLING IS KEY: When companies lack a skill they need for their organization, they may

feel the need to hire someone already proficient in that area. However, IT leaders should seek out prospective workers with an appetite for learning and growth, then provide them with the opportunity to hone their SAP skills.

PRODUCTIVITY AND EMPLOYEE SATISFACTION GO HAND IN HAND:

By and large, people want to leave work at the end of the day feeling like they accomplished something meaningful. Providing SAP professionals with more advanced tools can help them become more productive and therefore more satisfied. Advanced automation capabilities, such as Robotic Process Automation (RPA), can automate mundane and repetitive tasks, leaving human workers more time to spend on work that adds value to the organization. This leaves them with an enhanced sense of satisfaction.

RELY ON PARTNERS TO FILL IN ANY GAPS:

CIOs must grapple with the tension between a desired to have a highly-skilled workforce and the realities of limited budgets to bolster IT teams. Tech leaders should consider partners can deliver temporary team members to help get certain projects up and running and educate current team members. These temporary workers can be especially effective in SAP S/4HANA deployments, as they are also temporary projects.

CHAPTER THREE

SAP S/4HANA and AI Remain Top Areas of Investment for CIOs and Other Leaders

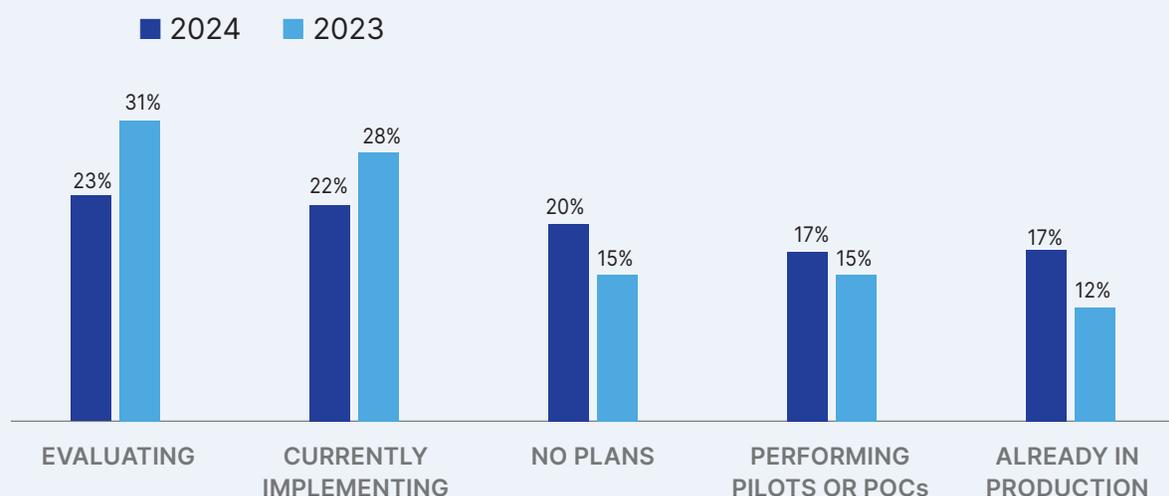
SAP S/4HANA remains the single tech investment taking up the most time, attention, and resources in the SAP landscape by a wide margin. Just like in 2023, over half of executives in our research study (54%) named the new ERP system as the area in which the most strategic investments would be targeted in 2024.

However, SAP S/4HANA adoption has not shown much progress amongst respondents over the last year. In 2024, 17% of survey participants said they already have SAP S/4HANA in production, up from 12% in 2023. Less than half of organizations (39%) are either performing proof-of-concept tests or pilot programs or are in the process of implementing SAP S/4HANA.

Interestingly, one out of five (20%) executives surveyed said they had no plans for SAP S/4HANA in 2024 whatsoever. Unfortunately for these respondents, they cannot wait much longer to take action to begin their digital transformation journey, with the 2027 end of maintenance deadline looming.

Depending on the size of the organization, these moves can take many months, and racing against a deadline looming can lead to rushed projects, cut corners, and ultimately a less successful rollout. CIOs and other tech leaders must evaluate different processes, technologies, infrastructure, and partner options before this process can even begin, leaving those behind in the process with little time to catch up.

Figure 4: Plans for SAP S/4HANA



AI AND AUTOMATION ARE THE CORE OF THE FUTURE FOR TECH LEADERS

One of the key benefits of SAP S/4HANA is its ability to facilitate AI and automation capabilities throughout an organization. In last year's report, many tech executives were becoming aware of the promise that AI held. With the publicity frenzy surrounding technologies like ChatGPT, tech leaders wanted to see how these advanced capabilities could benefit their business.

In 2023, less than a quarter of survey respondents (24%) said AI and machine learning skill sets were among the most important for their SAP team. By 2024, that figure ballooned to 40%. Despite this keen interest, most companies are still in the early stages of AI/ML implementation. Two-thirds (67%) of respondents said they either have not yet started implementing AI or ML, or they were only in the pilot stages (**Figure 5**). Only about one in six respondents (15%) said they had more than two AI/ML projects in production.

CIOs and tech executives cited numerous reasons for wanting to bolster their AI/ML capabilities. By far the leading motivation for working

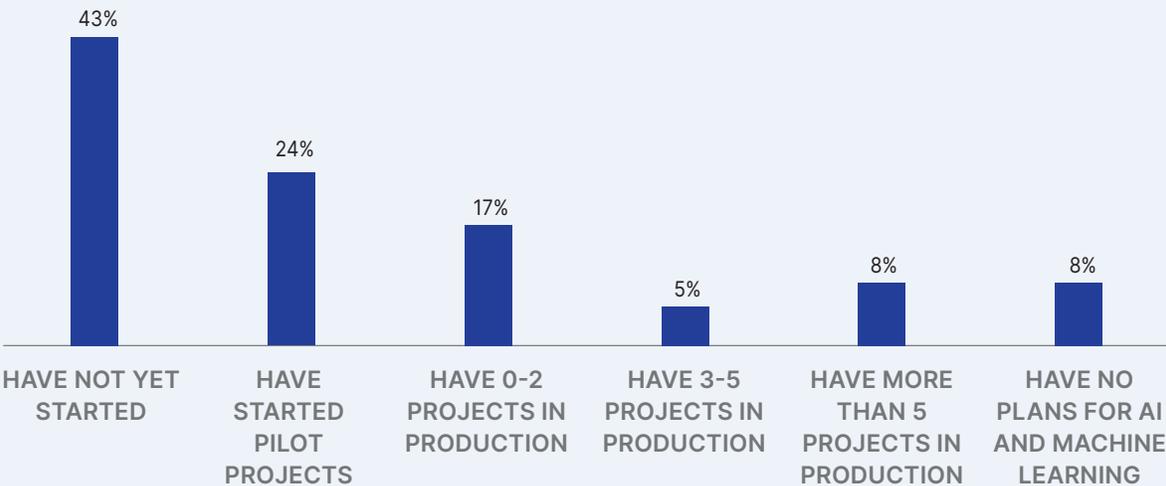
with AI/ML, cited by nearly two-thirds of respondents (64%), was the desire to improve business processes. AI/ML can automate repetitive and tedious processes much more quickly than a human can do them manually, break down silos, and streamline workflows.

Another common driver for using AI/ML was to improve data and analytics, highlighted by nearly half (44%) of survey respondents. These advanced capabilities can infuse data throughout decision-making processes to help businesses run more intelligently, identify anomalies, and provide recommendations for how organizations can improve their operations.

The unfortunate reality for many organizations is that there are a number of hurdles that they must clear in order to make any AI/ML ambitions a reality. First and foremost, they must be able to justify the opportunities within their organizations before these projects can get off the ground. More than one-third of respondents (36%) said a lack of a business case was one of their biggest challenges regarding AI/ML.

With newer and emerging technologies like AI/ML, CIOs and tech executives often do not have years of proof of significant ROI that they can take to their boards to justify a major investment. Some organizations may not have found

Figure 5: Progress Implementing AI and Machine Learning



the correct business case where AI/ML technologies can be a better use of funds compared to other areas. When companies have numerous projects on the backburner for years, it can be difficult for something like AI/ML to jump to the front of the line.

DATA QUALITY AND SECURITY ARE KEY OBSTACLE STANDING IN THE WAY OF AI/ML

Data is the lifeblood of AI/ML and automation capabilities. In the past, organizations may have overlook data quality and security issues. Yet tech executives must recognize the enhanced value data has in an analytics-powered world and ensure that their data is ready for AI/ML.

One of the most common concerns held by over one-quarter (29%) of survey participants was about data security or governance issues. As with any emerging technology, AI/ML faces significant scrutiny over how these tools utilize data, and whether or not leveraging data in this way opens companies up to an increased risk of a data breach.

About one in five (20%) of respondents said that one of their main obstacles was the fact that their data needs to be cleaned up. Organizations must have cleansed, centralized, and harmonized data so that they can teach AI/ML solutions properly and automate solutions effectively. The old adage “garbage in, garbage out” rings especially true in these instances, as training ML models on inaccurate or duplicated data can compound mistakes.

KEY TAKEAWAYS

DON'T DAWDLE WHEN IT COMES TO SAP S/4HANA: The end of maintenance deadline for SAP ECC is more than two years away, in 2027. This may feel a long way off, but companies that do not get going on their digital transformation risk being left behind. The move to SAP S/4HANA is a significant undertaking, both in terms of time and financial investment. This will only get more difficult closer to 2027, as available partners to help with these transformations grow scarce. If they have not already, CIOs should begin planning their move to SAP S/4HANA by evaluating their own organization and determining the best partner to help them.

WORK SMARTER WITH AI-POWERED ANALYTICS AND PROCESSES: Many tech executives noted a lack of a business case for using AI. Yet there is always room for business process improvement, and AI can deliver value by streamlining workflows and automating repetitive processes. Beyond these capabilities, advanced analytics can provide insight into market conditions, giving businesses a competitive advantage.

DATA IS DIGITAL GOLD. TREAT IT ACCORDINGLY: Utilizing AI/ML tools is no longer a matter of if, but when. Organizations should prioritize their data, both in terms of quality and security. IT leaders must have a robust data governance and security plan in place, focusing on observability and segregation of duties so that only approved users can access data, while ensuring those same users keep a close eye on their information. Additionally, CIOs should ensure that their data is cleansed and centralized so there are no errors or duplicates impeding AI/ML capabilities.

Methodology

In February, March, and April of 2024, SAPinsider examined the experiences of CIOs and other tech leaders about their budgets, teams, and planned investments for 2024. The survey was administered to 124 technology leaders in the SAPinsider Community and generated responses from across a wide range of geographies, industries, and company sizes.

Respondents completed an online survey, and SAPinsider conducted in-depth interviews on questions such as the following:

- Is your budget for SAP and related technologies decreasing, staying the same, or growing in 2024?
- What are the top business priorities shaping your agenda and outlook for this year?
- Describe your current status related to SAP S/4HANA?
- In what key areas are you making significant partner investments?
- What are some of the critical skillsets that you need to add to your team?

The demographics of the respondents included the following:

MARKET SECTOR The survey respondents came from every major economic sector, including Software & Technology (34%); Industrial (31%); Retail & Distribution (14%); Public Sector and Healthcare (11%); Financial Services & Insurance (7%); and Hospitality, Transportation, and Travel (2%).

GEOGRAPHY Of our survey respondents, 52% were from North America; 24% were from Asia-Pacific, Japan, and Australia; 19% were from Europe, the Middle East, and Africa; and 4% were from Latin America.

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