

# SAP InfrastructureView 2023: Premium

AN IDC SPECIAL INTELLIGENCE SERVICE

IDC's *SAP InfrastructureView 2023: Premium* is an annual primary research survey that gains insights into the infrastructure (servers and storage), both on premises and in the public cloud (infrastructure as a service) that is supporting SAP software. 2,000 respondents across 5 countries are surveyed, consisting of 1,000 who run SAP software on premises and/or on IaaS with SAP HANA, and 1,000 who are currently running SAP software on premises and/or on IaaS without SAP HANA. Additionally, the survey will probe on S/4HANA.

## Markets and Subjects Analyzed

Respondents are split equally between those currently running SAP software on the SAP HANA database versus those currently running SAP software on another database than SAP HANA (Oracle, SQL server, DB2, Sybase, etc.). Those surveyed are located in multiple different countries/regions, including the United States, Canada, the United Kingdom, Germany, and APAC. Respondents are chosen from a range of key industries, company sizes, and states/stages of adoption. The survey will ensure that a sizable segment is running ERP on S/4HANA.

## Core Research

- IDC SAP InfrastructureView Part 1: Adoption and Levels of Use
- IDC SAP InfrastructureView Part 2: Market Trends
- IDC SAP InfrastructureView Part 3: End-User Sentiments
- IDC SAP InfrastructureView Part 4: Summary of Findings and Vendor Guidance

In addition to the insight provided in this service, IDC may conduct research on specific topics or emerging market segments via research offerings that require additional IDC funding and client investment. To learn more about the analysts and published research, please visit: [SAP InfrastructureView 2023: Premium](#).

## Key Questions Answered

1. What is the average spend on SAP infrastructure split by software category as well as by deployment type including on premises, with a managed service provider, and in the cloud (IaaS and/or SaaS)?
2. What is the current infrastructure usage — how much SAP software is run on bare metal versus virtualized versus containerized — as well as adoption plans and timescales for Business Warehouse (BW) and ERP migrations to SAP S/4HANA?
3. What are the current implementations and future requirements of HANA installations, covering database size (memory and storage), the use of data tiering and persistent memory, as well as expectations around performance, latency, availability, security, and migration requirements (including tools and costs)?
4. What are the reasons for deploying on either on premises/MSP or cloud-specific (IaaS) infrastructure including the cost of migration and tools, numbers of compute and storage instances, use of physical servers/storage, and capex versus opex costs?
5. What is the partner and vendor choice for cloud deployment including considerations around availability, data integration, industry-specific solutions, workload types, automation, adjacent services/technologies, and perception of capabilities as a customer?

## Companies Analyzed

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