



Nordic SAP Market Research

Essential insights to succeed with your
SAP transformation

 **T Systems**

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CONSULTING

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EXPERIENCE
BEYOND
DIGITAL

About the survey

Format

Online survey conducted by IDC.
Data gathering period in 2022.

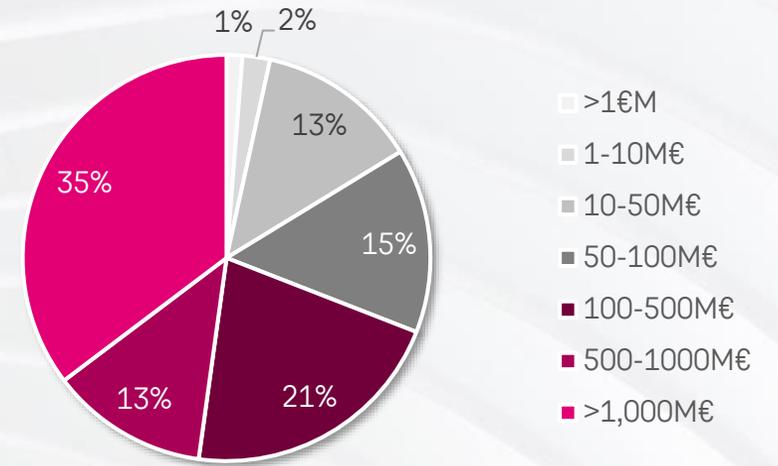
Audience

400 respondents from Nordic corporations across private industries. No participation from the public sector.
Decision makers or influencers within SAP.

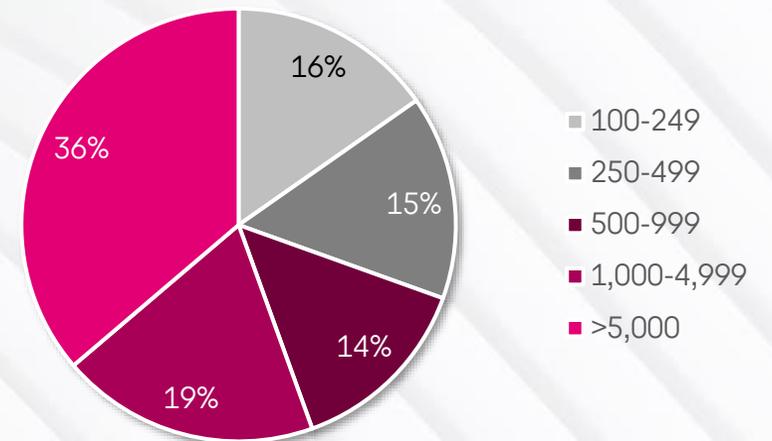
Purpose

Investigate the drivers for SAP transformation across Nordic companies and measure the maturity level of cloud and S/4HANA adaptation.

Revenue

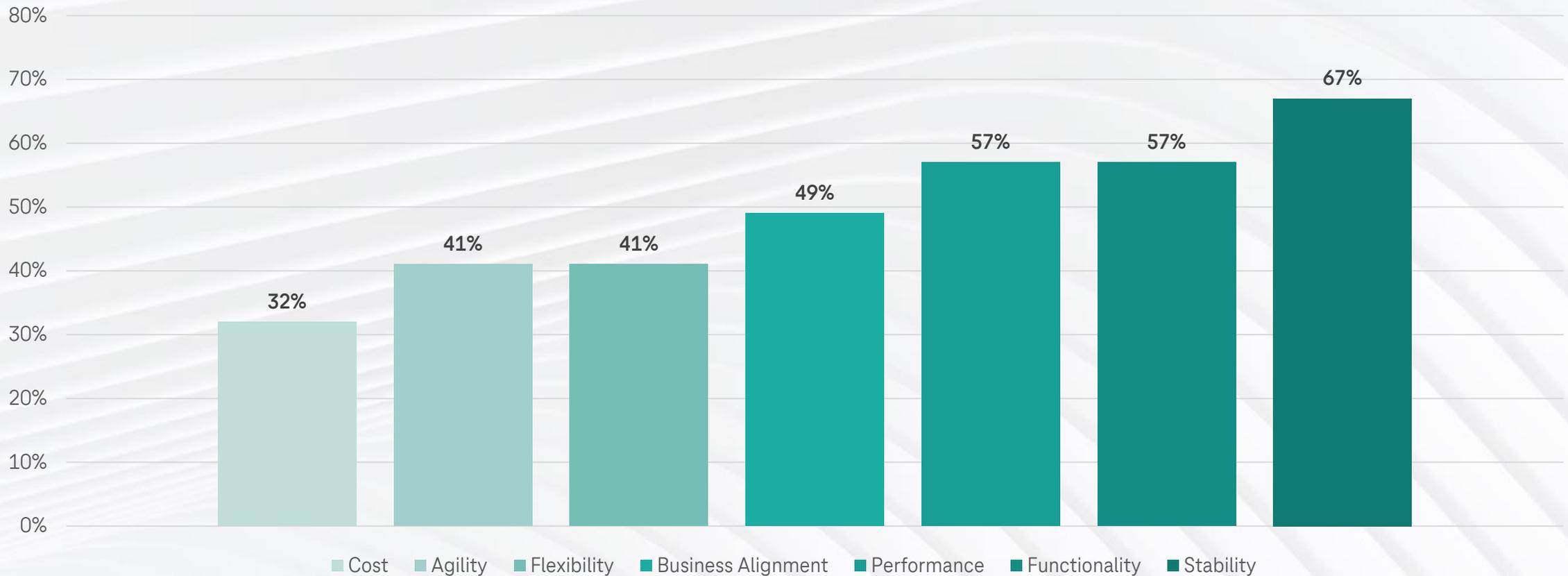


Employees



Legacy SAP doesn't meet new business requirements

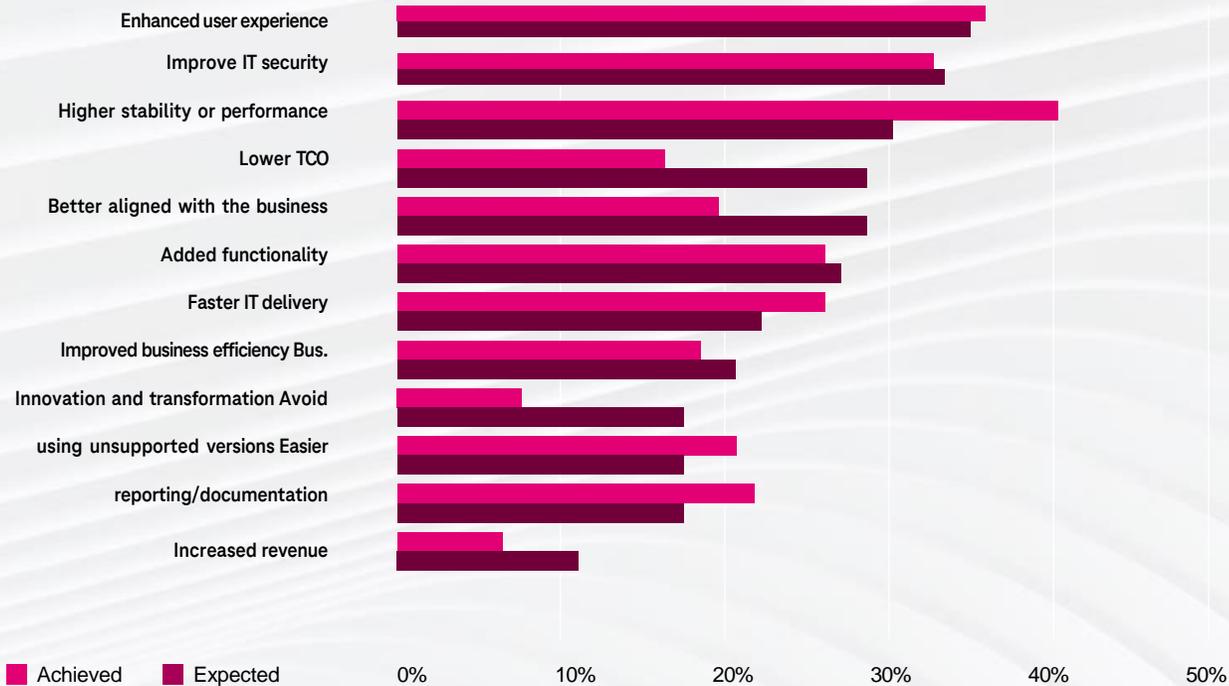
SAP ECC 6.0, N = 63 (multiple choice)



Expected and achieved outcomes of SAP modernization projects

What were the main outcomes of modernizing your SAP landscape/adopting SAP?

Using SAP S/4HANA, N = 92

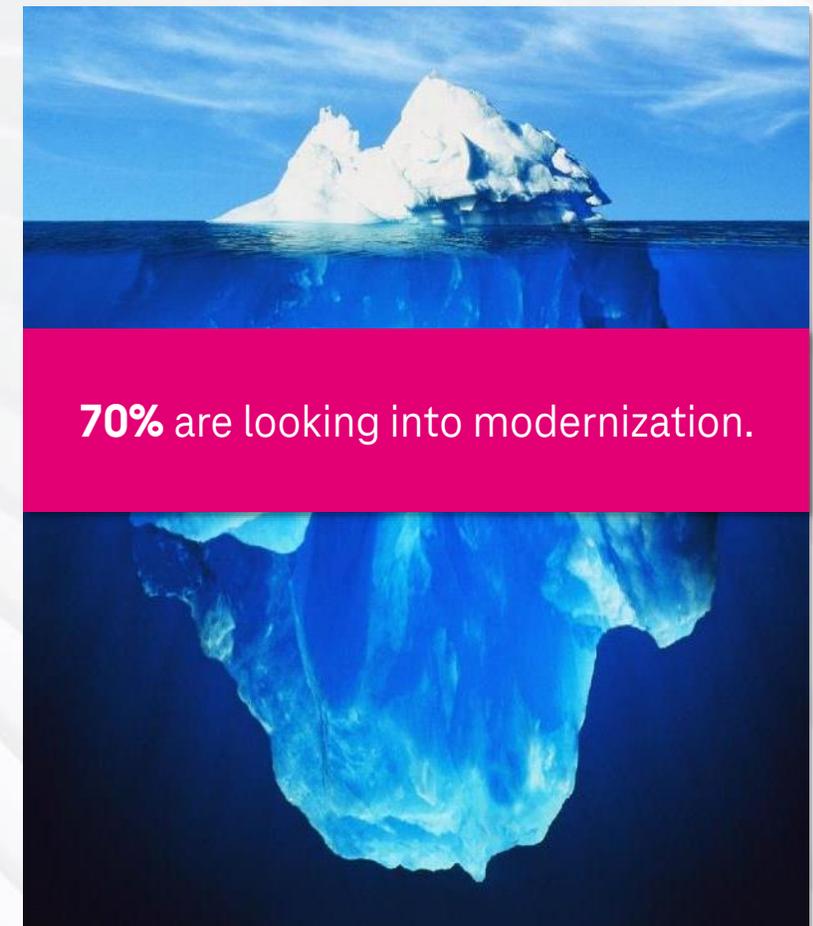
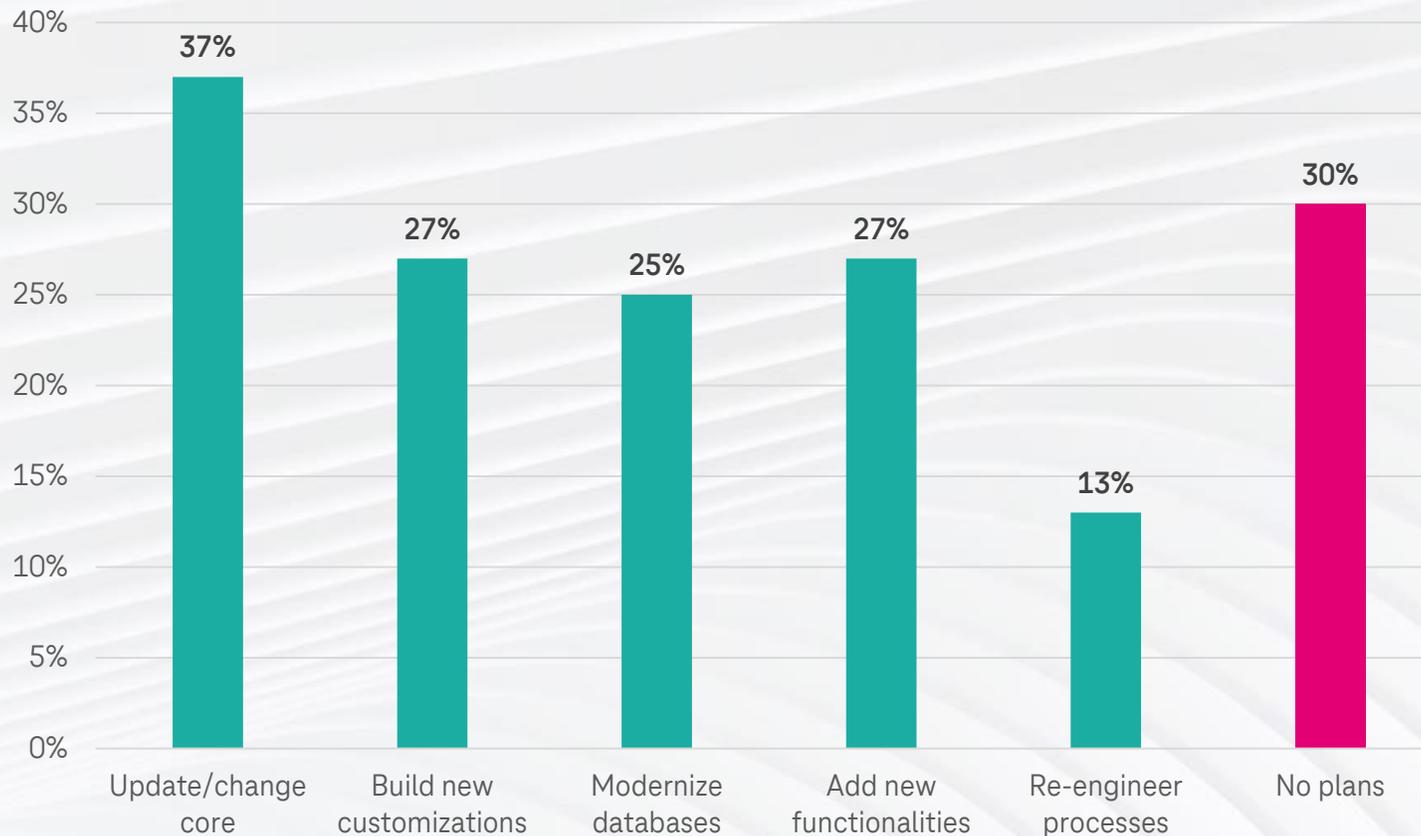


60% of IT Management expect to achieve TCO savings, but only **11%** achieved so.

Modernization transcends upgrading the core

Do you have concrete plans to upgrade, modernize or change your SAP landscape within the next 24 months?

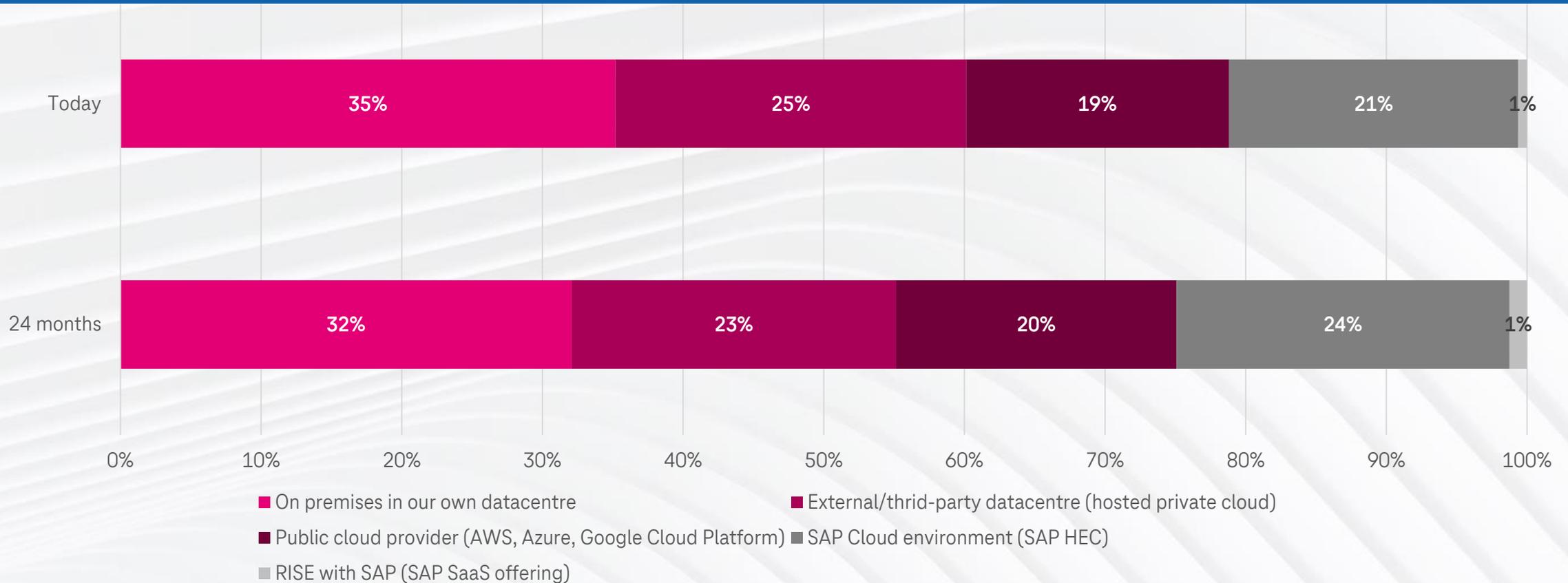
SAP ECC 6.0, N = 63 (multiple choice)



Moderate move towards public cloud

Which infrastructure is your organization currently running or planning to run its SAP workloads on?

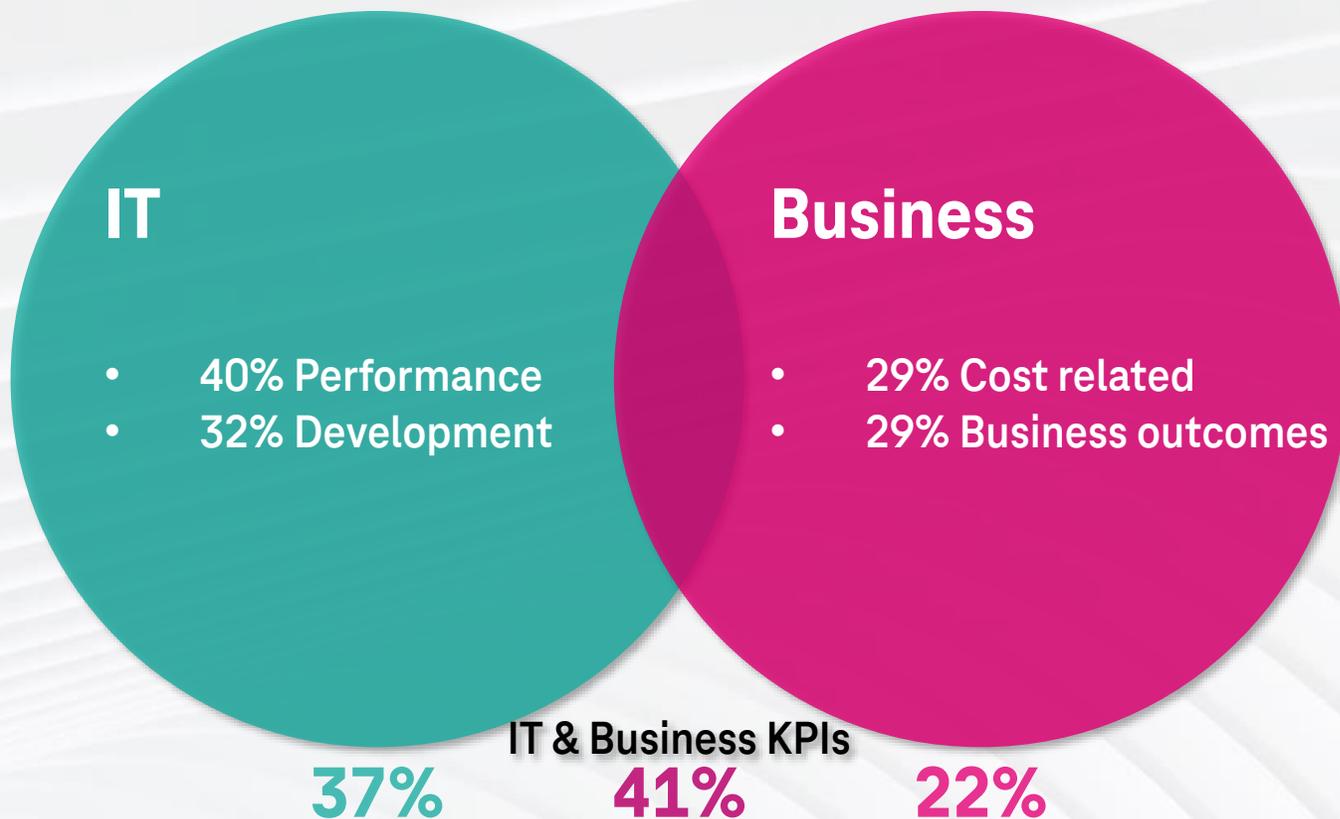
Use SAP, N = 321



KPIs are not implemented across domains

Which types of KPIs do you use to access and benchmark the performance of the SAP environment?

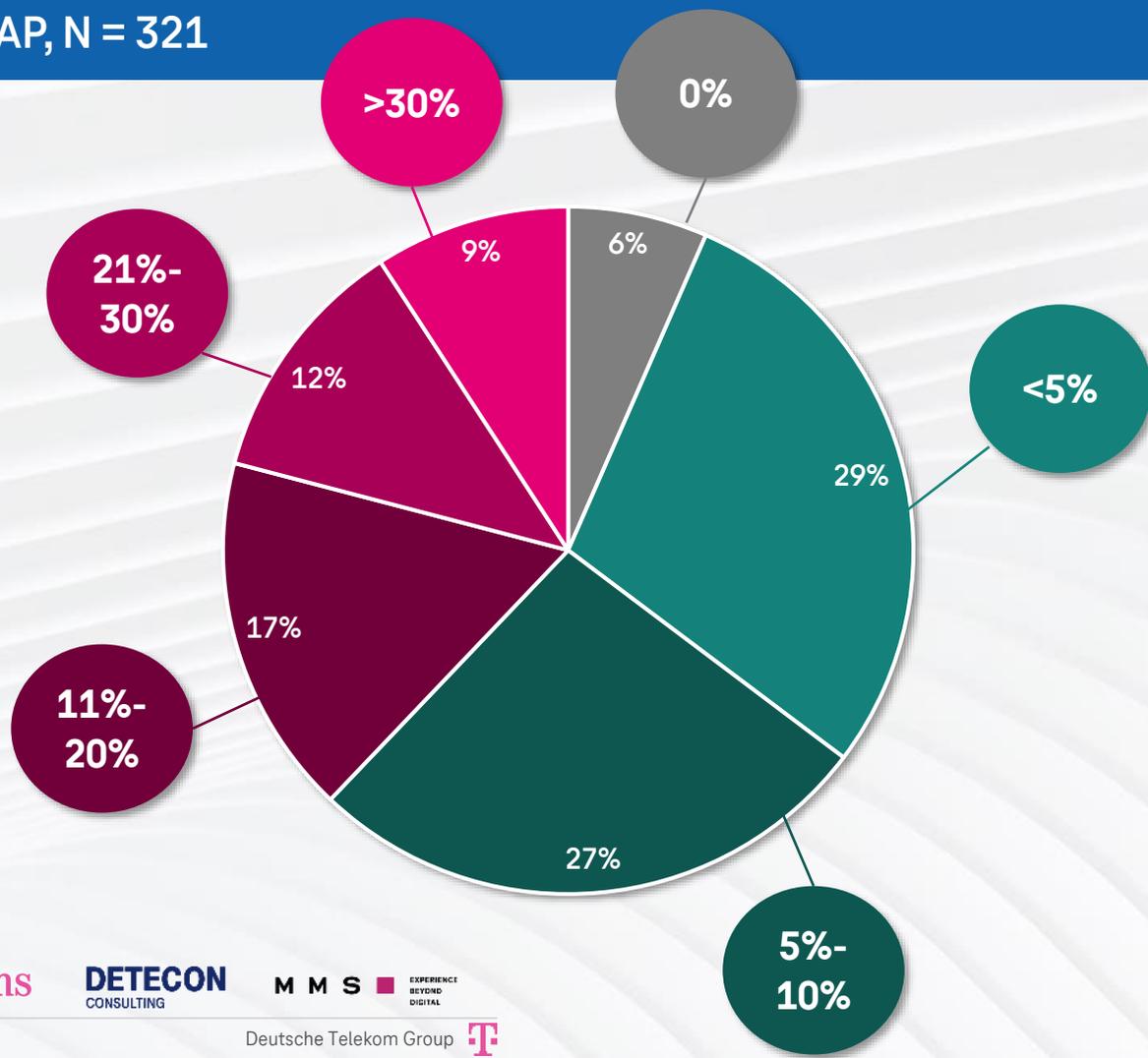
Use SAP, N = 321 (multiple choice)



Unutilized licenses is a source for cost optimization

What is your best estimate of the share of the purchased SAP licenses that is currently not used?

Use SAP, N = 321

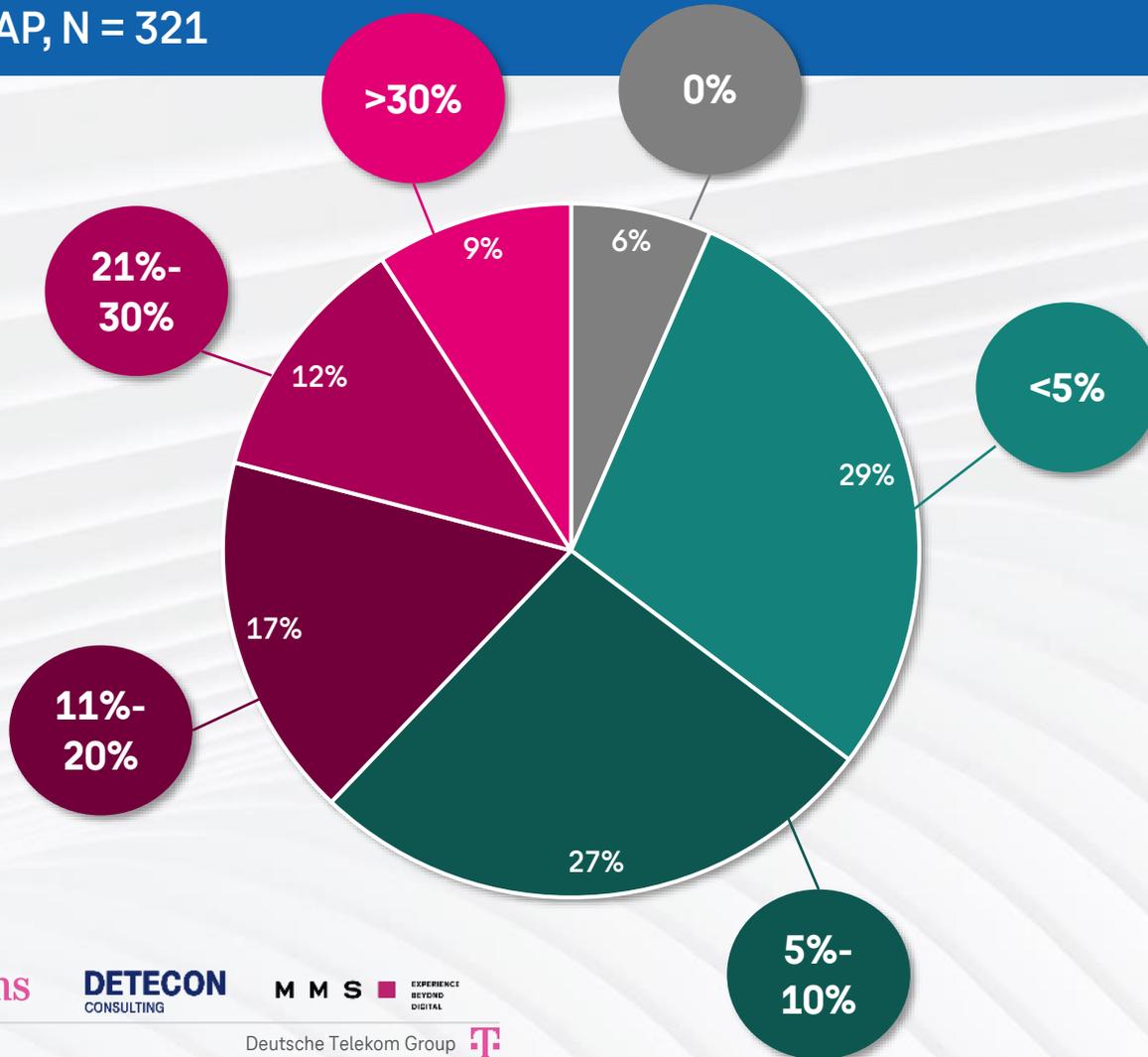


More than a third have at least 10% unutilized licenses

Unutilized licenses is a source for cost optimization

What is your best estimate of the share of the purchased SAP licenses that is currently not used?

Use SAP, N = 321



"We have zero idle licenses"



Corporate Management (C-level)

33%



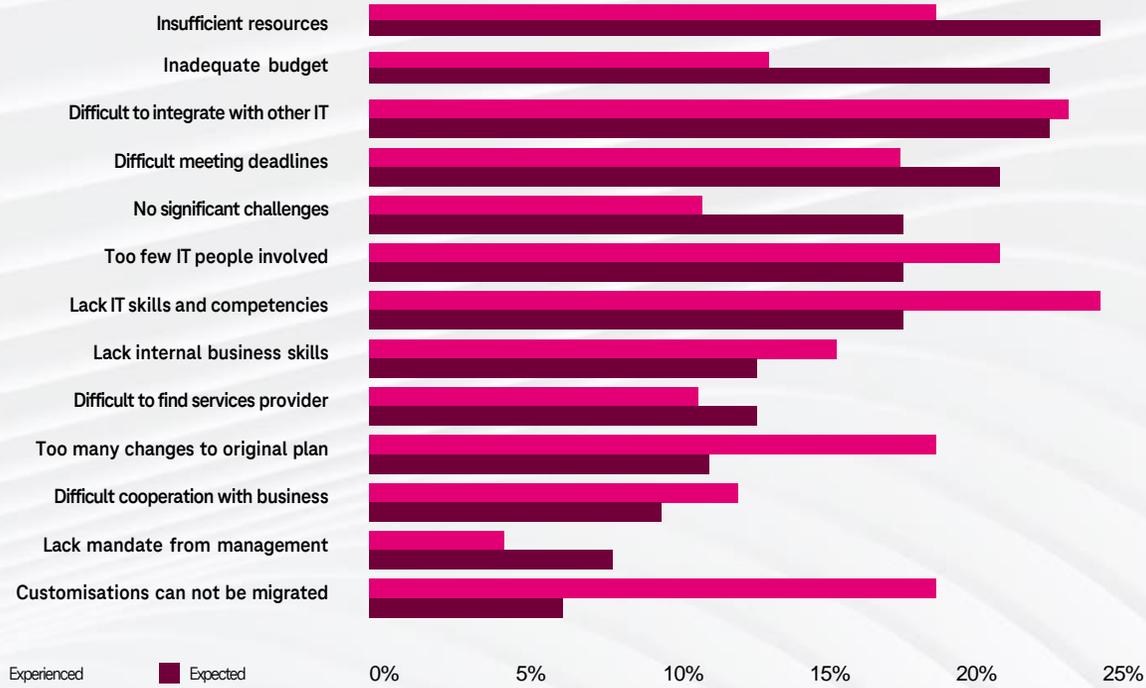
IT Management

0%

Expected and experienced challenges of SAP Modernization

What were the largest obstacles or challenges in your SAP modernization efforts or adoption?

Using SAP S/4HANA, N = 92

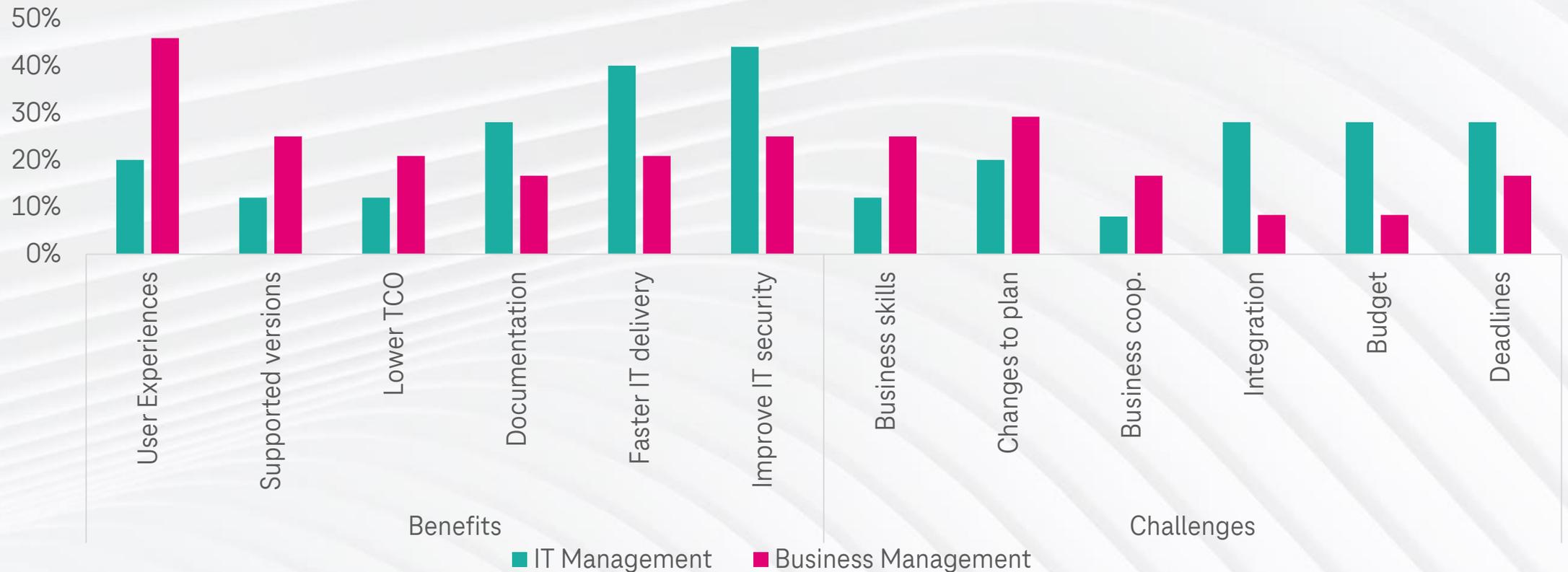


33% of Manufacturing companies say integration with other IT Systems is the largest barrier.

There is a prevalent IT and business disconnect

What is your best estimate of the share of the purchased SAP licenses that is currently not used?

Use SAP, N = 321



Implications and Recommendations

What is your next move?

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5 Recommendations

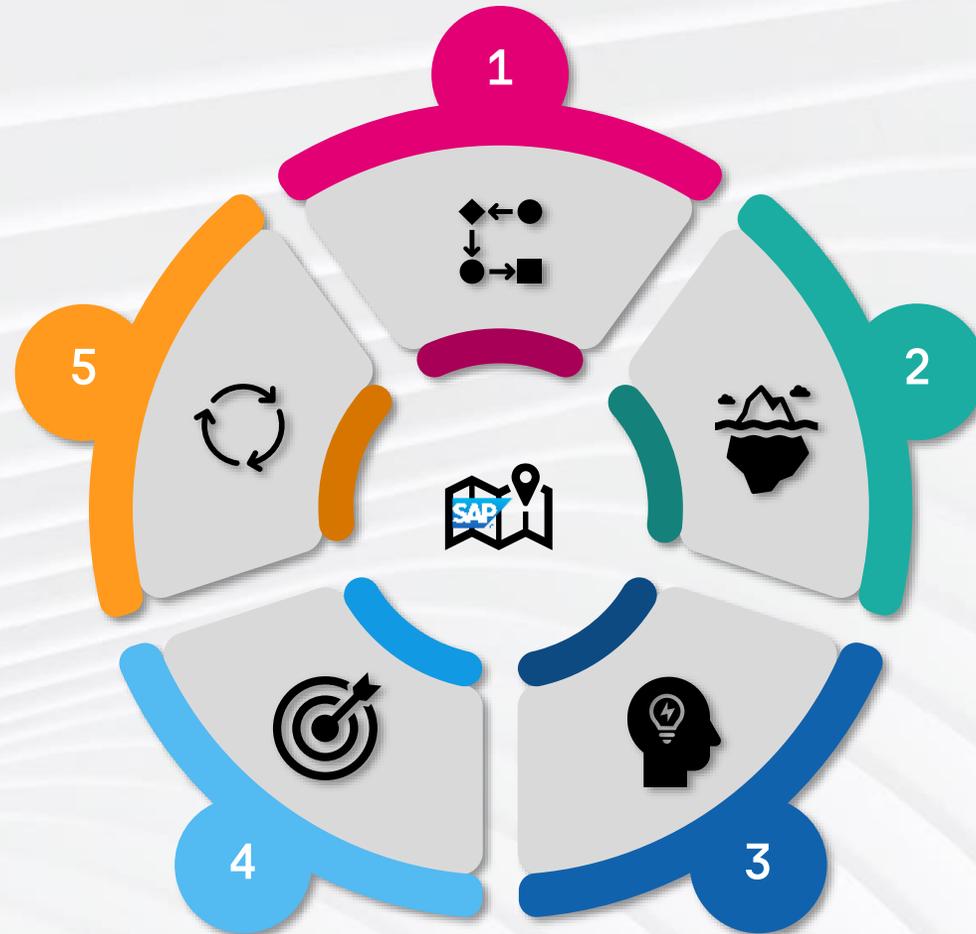
To succeed with your SAP transformation

Recognise modernisation as a process not a project.

SAP modernisation is often perceived as a project with set objectives and an end date. A modern SAP environment, however, is not a distinct monolithic system and individual elements as well as adjacent systems and underlying infrastructures should continuously be modernised, replaced, and upgraded leveraging the latest available technologies to support the constantly evolving business requirements.

Implement KPIs to assess business and IT progress and performance.

KPIs are essential for assessing current performance and progress. If resource use and outcomes are not quantified and measured, they are rarely recognised. It is vital that both IT related and business related KPIs are established. For example, the business needs to understand the impact on delivery times or customer experiences, while IT still needs to know system availability or deployment frequencies.



Treat you SAP modernisation as business transformation.

The SAP system is at the core of your business which is increasingly digital and more agile. You need to treat your modernisation efforts as initiatives to promote this change and support new work processes and business models, and not merely an efficiency exercise supporting the current work processes more effectively.

Acknowledge the scope and complexity.

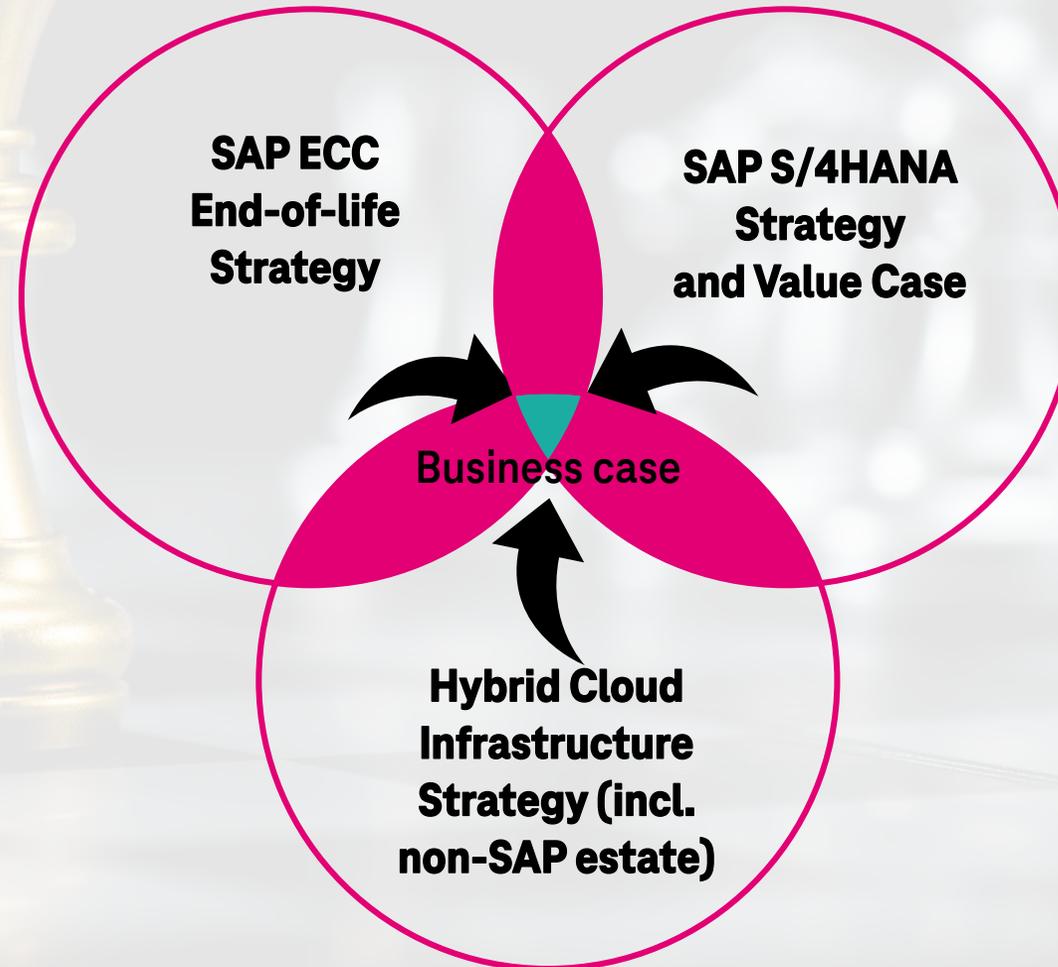
SAP modernisation involves much more than upgrading the core ERP environment. Neglecting to upgrade databases, rewriting customisations, and renewing the underlying architecture, will often result in rigid and poor performing system, inhibiting the potential outcomes of the modernisation.

Ensure adequate resources and access to skills.

Virtually every company is struggling to attract and retain IT employees and must cope with shortage of skills. Nonetheless, it is paramount that enough resources are assigned to the SAP modernisation endeavours. Critically, this must include combined IT and business skills to maximize the business value.

SAP S/4HANA migration: Not one, but three strategies required

Existing SAP systems will exist over the migration period for as long as it takes to complete business transformation



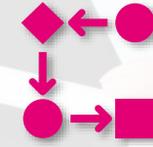
Where will ROI come from?



10-20% will come from **TCO** reductions



30-40% will come from **increase in productivity** of business intelligence and application development



50-60% will come from **improved business processes**

5 fundamental steps to master

Before you embark your SAP transformation journey

T-Systems Magenta Pathway Framework



- 1) Understand the look and feel of S/4HANA
- 2) Identify your end goal
- 3) Build business case and timeline for your transformation
- 4) Analyze your data and right-size your SAP landscape before moving to S/4HANA to achieve cost savings
- 5) Determine the best choice of infrastructure platform for your business

Use-cases

Delivering tangible business outcome

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Hybrid Cloud for optimum business flexibility

CHALLENGE

- Boosting innovation capabilities and exploring new business areas
- 500 business critical SAP systems all around the world
- Optimizing collaboration in product/solution development

SOLUTION

- Adding Microsoft Azure Cloud to the sourcing mix to **create a hybrid cloud strategy**
- Providing a suitable platform for the respective SAP application
- Harmonizing business processes across all platforms (One IT)
- Establishing high security standards on all platforms

BENEFITS

- Hybrid cloud for **75,000 SAP users at 600 locations globally**
- Higher agility for business development
- Improved collaboration with partners
- Offering the optimum platform for respective SAP/Non-SAP systems (public/private cloud, classic)
- Fostering innovation capabilities of public cloud (fast ramp-up, service development etc.)



“ We’ve had good experience with the private cloud. Now we’re taking the next step. I can well imagine getting a lot of SAP applications from the public cloud in a few years.

Christian Eigler, Corporate CIO of Continental

Real-time access to KPIs thanks to SAP S/4HANA®

CHALLENGE

- **Harmonization of business processes** for more agility and digital innovation
- Technological leap to SAP S/4HANA® as a company's digital core for consistent processes
- **Corporate growth not viable** based on the new business operating model

SOLUTION

- **Greenfield implementation of SAP S/4HANA®** based on SAP's Best Practices and T-Systems accelerator frameworks
- Processes and customizing adaptation according to market needs, legal and fiscal requirements (taxes & calculations, electronic invoice, etc.)

BENEFITS

- **Cost savings** due to higher productivity and faster time-to-market cycles
- **Enabling growth and innovation** by implementing SAP S/4HANA® as the company's new digital core
- **Real-time access to KPIs** provide the basis for proactive and profound management decisions



Futureproof SAP landscape for growth strategy

CHALLENGE

- **Smooth migration:** Interruption-free transition during ongoing operations
- **Reducing complexity:** By simplifying functional processes and removing obsolete features and duplications
- **Improving competitiveness:** Real-time insights into KPIs, even from mobile devices allow a faster reaction to market demands

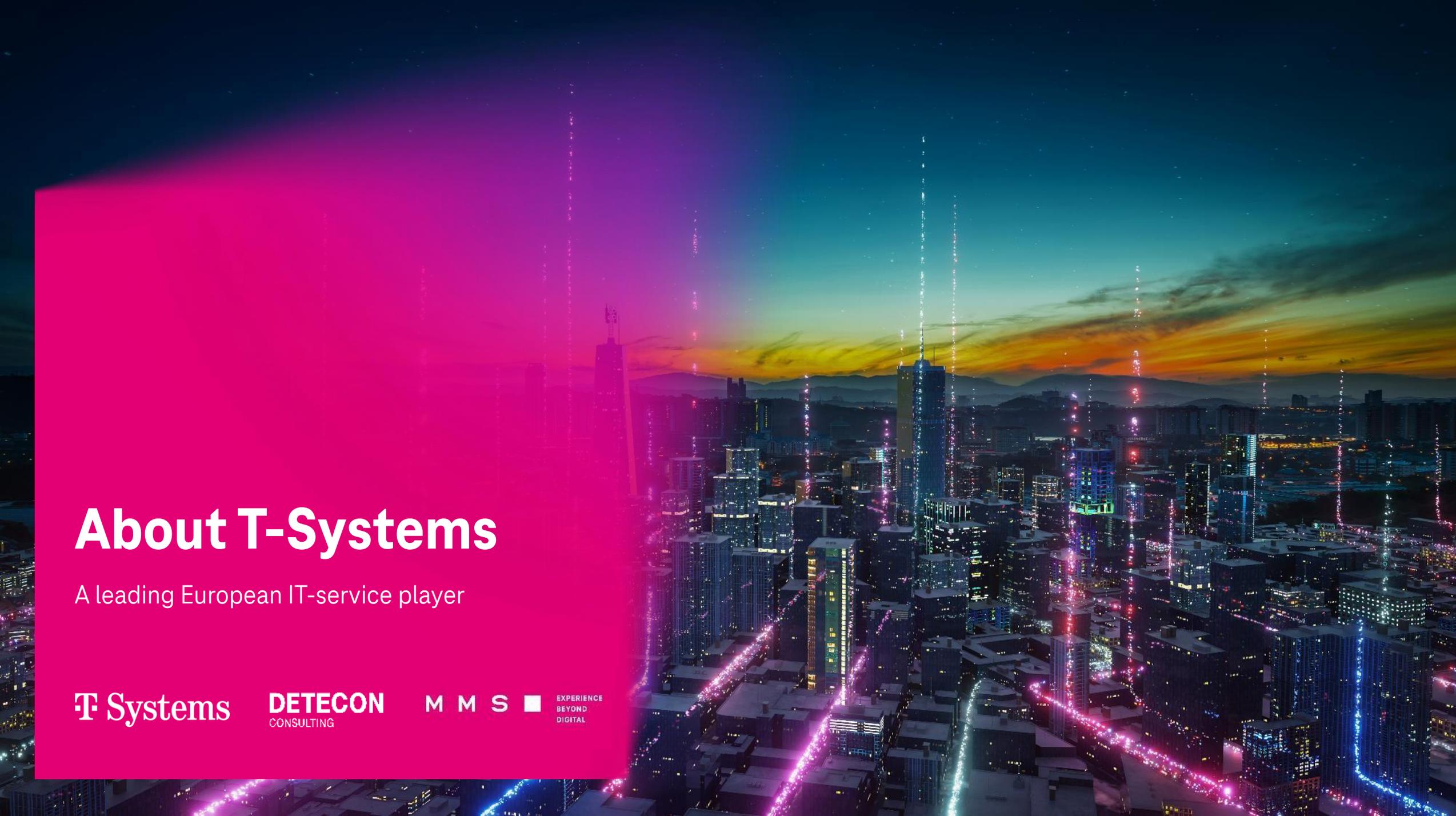
SOLUTION

- The transition of complex business supporting systems from SAP® R/3® to **SAP S/4HANA®** using a **brownfield approach**
- Enforcing two available sandbox machines, allowing for the avoidance of stoppages and simultaneous operations in different environments
- Technical and functional execution of the system conversion, based on the methodology SAP Activate

BENEFITS

- Becoming a Mobility Service Provider: SAP S/4HANA® supports the company's vision enabling new digital services
- **Mobile access to KPIs thanks to SAP Fiori® apps**
- Future-proof SAP landscape as a functional and technical foundation for implementing new technologies like Internet of Things, Blockchain, etc.
- **Improved business agility** for further growth



An aerial night view of a city skyline, likely San Francisco, with numerous skyscrapers illuminated. The sky is a mix of deep blue and orange from the setting or rising sun. Several vertical and diagonal lines of light, in shades of pink, purple, and blue, streak across the scene, suggesting digital data or network connections. A large, semi-transparent pink rectangle is overlaid on the left side of the image, containing the text.

About T-Systems

A leading European IT-service player

 T-Systems

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BEYOND
DIGITAL

T-Systems Worldwide



Advisory

1010

Digital
Enabler



Security



Cloud
Services

28,000+
Employees (FTE)

#1

IT Service provider
in Germany

#2

IT Service provider
in DACH

20
Countries

Slovakia:
Strategic
Delivery
Center

Russia:
Strategic
Delivery
Center

≈581
Petabytes
Storage

Germany:
Headquarters

16

Data centers

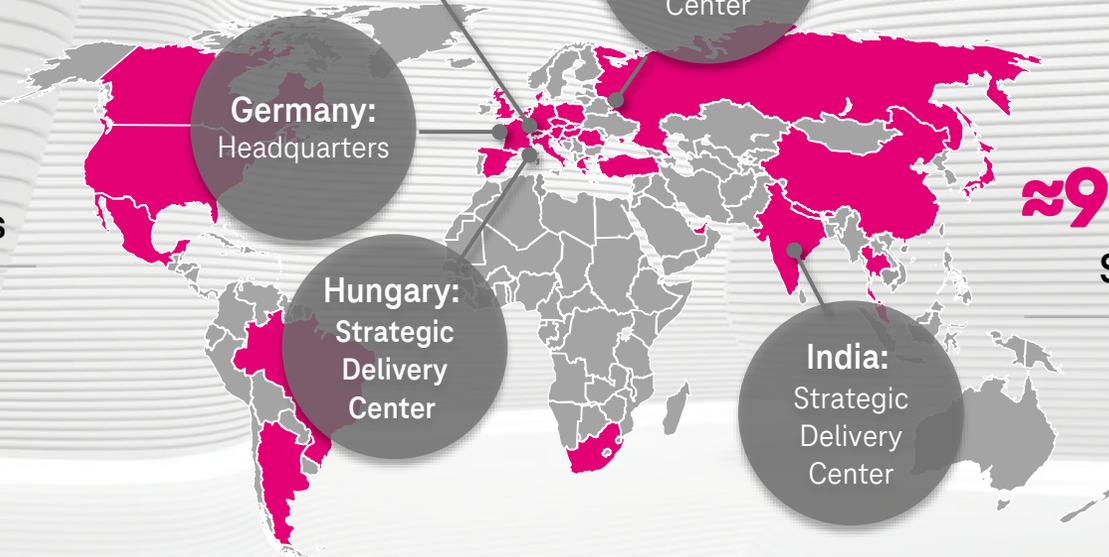
≈90,000
Servers

Hungary:
Strategic
Delivery
Center

India:
Strategic
Delivery
Center

DAX30
Provider

8
Security operation
centers (SOCs) globally



T-Systems: Global SAP capabilities

CAPABILITIES



> 20 Years of SAP Experience
Numerous accreditations in SAP



4000+ SAP Experts
Niche industry specific know-how
Experienced pool of SAP S/4HANA consultants



Global Delivery Presence
EMEA, APAC, LATAM, NA



SAP digital solutions around
S/4HANA Transformation, Cloud Advisory,
Migration and Managed Services
*RPA, Virtual assistance, AI,
ML and IoT based solutions*

EXPERTISE



600+ Customers Worldwide
40+ S/4HANA Studies
1000+ successful SAP migrations

End-2-End certified partner



End-2-End SAP partner, combining
infrastructure hosting, System
integration capabilities and expertise
and a reliable application maintenance
support and modernization partner

Digital at core



Accelerated transformation to Digital core,
Greenfield/ Brownfield & Bluefield™. Tool based
approach with SNP, SmartAMM analytics solutions

SAP DevOps to enable a Higher Speed of Digitalization

SAP Partner Excellence Award "Service Partner of the Year 2020" Region SAP Nord EMEA

SAP® Certified in DevOps

SAP® Certified in Cloud and Infrastructure Operations

SAP® Certified in SAP HANA® Operations

SAP® Certified in SAP Business Suite Solutions Operations

SAP® Certified in Hosting Operations

SAP® Certified in SAP® SuccessFactors® Solutions Operations

SAP® Certified in SAP S/4HANA® Solutions Operations

SAP Global Platinum Reseller

SAP Global Partner

E2E certified SAP Partner gloTomsy

Microsoft Azure Gold Partner

Microsoft Gold Partner

Global Outsourcing Service Provider of the Year

Partner Managed Cloud Award

Global Platinum Reseller of the Year

ISO Provider Lens 8 x Leader

USP



Any Cloud
Combine the advantages of
Public and Private Cloud



Security
Highest security standards, Cyber Security
Department, DT Security GmbH



Automation
Automation degree of over 95% -
confirmed by analysts



Accelerators
Fast adoption & execution via
automated assessment tools, packages



T-Systems SAP E2E Portfolio

Managed Cloud Services

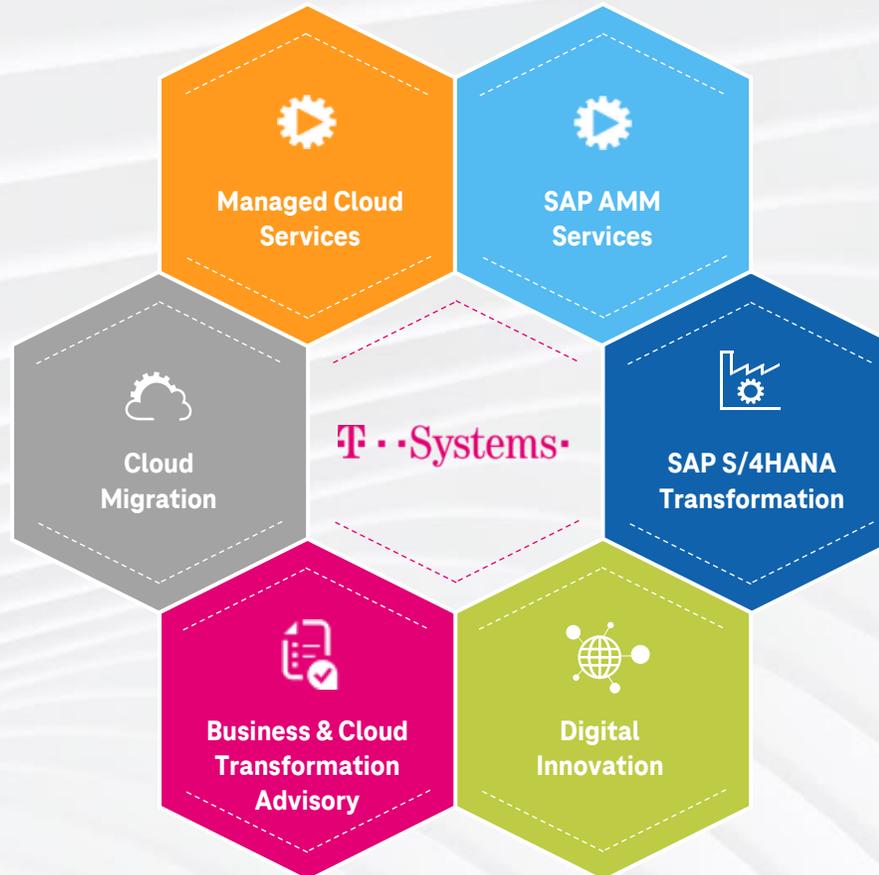
- Proven Managed Services to ensure higher levels of business performance and sustainability
- Focus on multi & hybrid cloud scenarios – one stop shop for e2e coverage & orchestration
- Our heritage for decades

Cloud Migration

- Rapid, secure & effective migration of SAP workloads to cloud
- Proven service - our core business especially for SAP HANA in the last decade
- ONE TSI cloud approach & SAP specifics in TSI Cloud Migration Framework (CMF)

Business & Cloud Transformation Advisory

- Trusted advisor for both SAP business & cloud transformation
- SAP focused cloud & transformation strategy across the T-Systems portfolio
- Compelling methodology and clear statement of work also covering SAP RISE



SAP AMM Services

- Application and user layer managed by T-Systems
- Combine AO and AMM – proven service with clear synergies
- DevOps Services

SAP S/4HANA Transformation

- Accelerated transformation to SAP's Digital Core, Greenfield/Brownfield & Bluefield™
- Process analysis and automation with SAP Business Process Intelligence (BPI) and our partner SNP
- Fast adoption & execution via packages

Digital Innovation

- Next Gen digital services for SAP & non-SAP: AI, machine learning, Blockchain, IoT
- Optimize sustainability with SAP and T-Systems
- Make the most out of SAP Business Technology Platform (SAP BTP) and hyperscaler microservices/software stack(s)

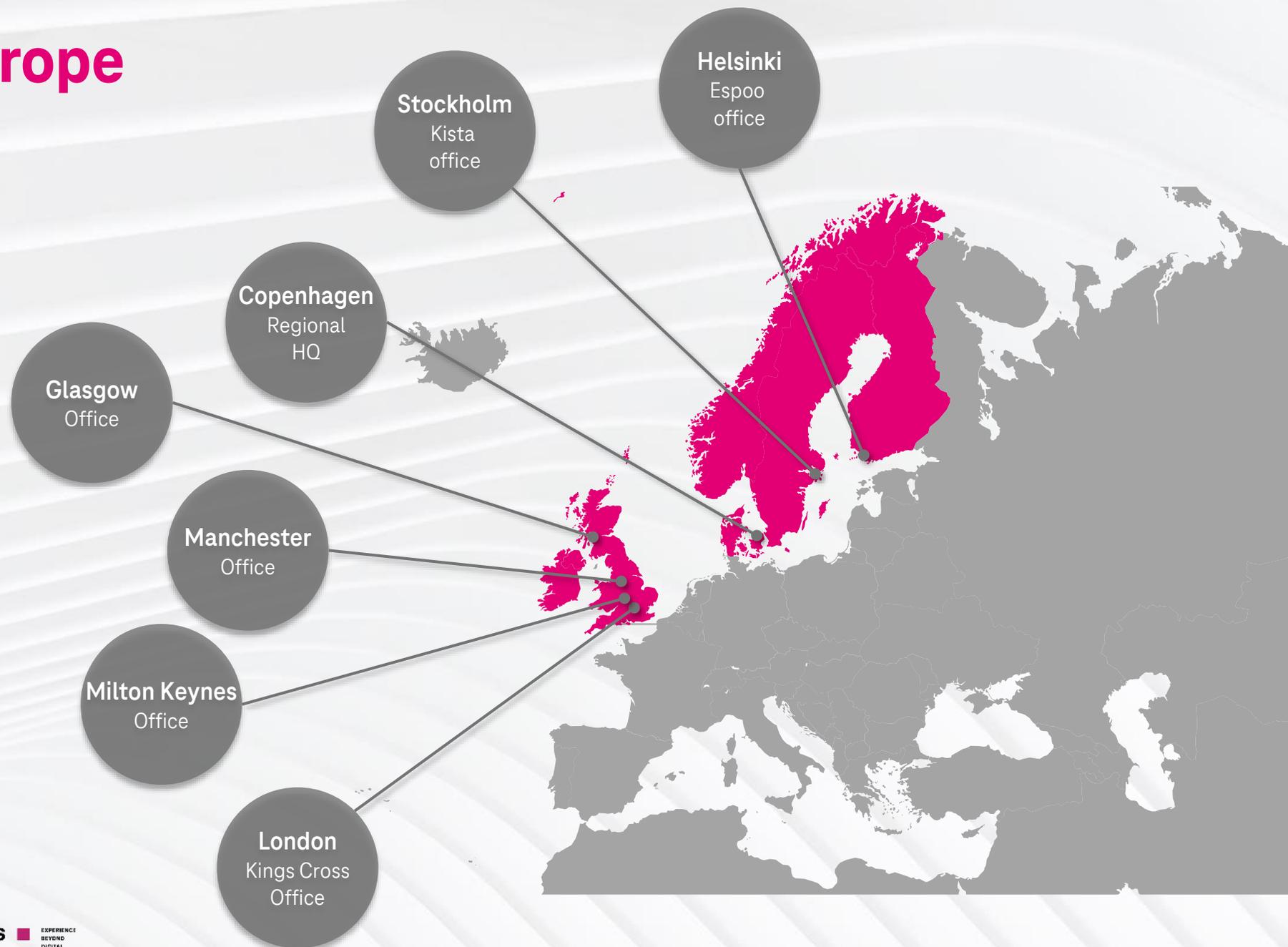
 Sustainability Enabler

Northern Europe

#7
Office locations

+200
Employees

+15
Nationalities



Our Strategy

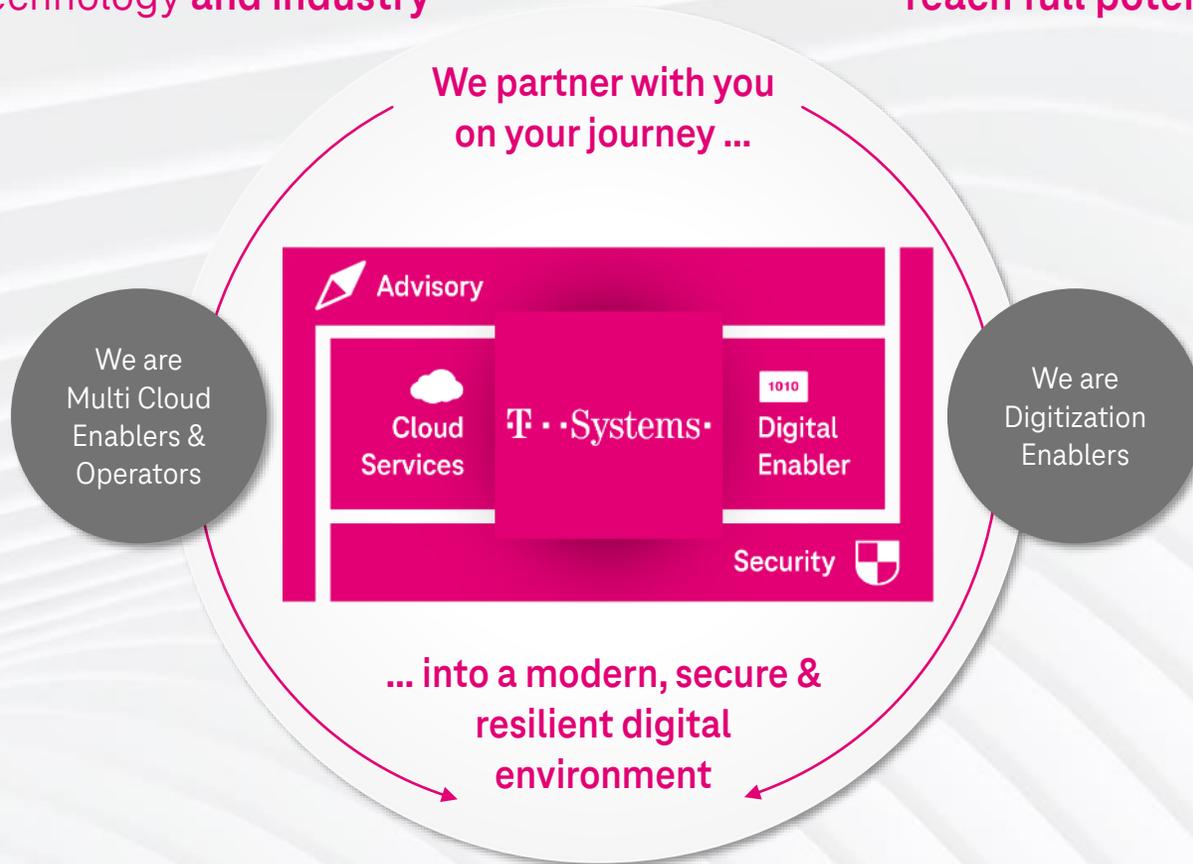
Our Vision

Most reliable ICT solutions provider with best technology and industry expertise

We enable organizations to reach full potential through digitization

Our Mission

-  Data sovereignty
-  Innovation with an open partner ecosystem
-  Secure operational excellence



- Learning & relentless improvements 
- #peoplemakeithappen
Agility and T-Mindset 
- Sustainability & Diversity 

Creating Future Businesses – Advisory Services



Detecon, subsidiary of T-Systems, provides management consulting with a pronounced technology edge helping customers drive transformation across the digitalization spectrum, from ideation and prototyping to smart solution deployment.

Advisory

- Digital Strategy & Innovation
- Digital Operation & Performance
- Industry Advisory
- Sustainability Consulting

A Dependable Digital Foresight

1010

Shaping the future requires a reliable and competent provider of digital services, the Cloud, IoT, security, and connectivity – with an agile and end-to-end approach.

Digital

- Smart Factory
- IT Modernization
- AI & Automation
- SAP Solutions
- New Work Solutions
- Digital Reliability
- Connected Mobility
- Intelligent Enterprise
- Blockchain
- Edge Computing
- Customer Service Solutions / Self Services
- Digital Marketing
- Digital Sales & E-Commerce
- Digital Consulting

Cloud Services For A Resilient IT Infrastructure



With strategic partners & selecting the right provider, T-Systems offers optimal cloud solutions that include; an assessment of existing IT, strategy consulting, migration to the cloud and cloud management as the basis for digitization.

Cloud

- Multi-Cloud Environments:
- Private Cloud, Sovereign, Public Cloud
- Cloud Migration Framework for SAP, non-SAP, and Mainframe
- SAP S/4 HANA Consulting & Transformation
- SAP on any Cloud
- SAP Digital Transformation
- BI & Analytics
- Smart Security for SAP Solutions

A Systemic Approach To Security



T-Systems is a managed security service provider and offers the appropriate consulting and security solutions from the Deutsche Telekom Security GmbH for a wide digitization spectrum.

Security

- Managed Cyber Defense
- Cloud & Data Security
- Network Security
- Endpoint Security
- Industrial & IoT Security
- Professional Services

Comprehensively Digital

The digital umbrella of T-Systems

Needs to be updated

T Systems

Enabling your digital transformation

Experienced digital and vertical system integrator
Solutions provider for enterprise customers
Global delivery model with explicit offshoring strategy

Advisory that sets the course for your digital future

Many years of digital IT and management consulting expertise
Broad technological background
Sound business and transformation know-how

DETECON
CONSULTING



M M S  **EXPERIENCE BEYOND DIGITAL**

Digital services accelerating business growth

Passionate, agile and flexible
Experienced service provider for digital solutions and services for large and medium-sized companies
Sound technological background and integration experience

We Create Value For Our Customers



Future Skilling

Broad-based training programs for our employees to learn digitization with the **latest technologies**.



Agile Work

Our **agile framework and methods** form the foundation of how we work and cooperate – internally and with our clients.



New Work

Our experiences lead to **innovative New Work solutions** for our employees and customers.

The basis: Our T-Mindset. Our values and behavior make us unique. **Customer centricity and innovation** are in our DNA. We work in an **agile and collaborative way**. We strive for **continuous improvement** and don't settle for less.

#peoplemakeithappen

We Have Solutions That Are Optimized For Focused Industries



Automotive



Manufacturing



Transportation & Logistics



Emerging Industries

Our employees with special industry know-how develop tailor-made solutions for your industry. You benefit from their experience and concrete best practices from our worldwide industry projects.

We Have Leading Global Customers That Trust Us

Long term customer relationships and precise knowledge of the respective industry sectors are the basis of our success.



More references and projects



We Have Long-lasting Committed Partnerships



> 500 prominent technology and industry partners, as well as numerous start-ups



We Are Committed To Becoming Green – Come With Us!

0%

Direct and indirect energy consumption until 2025

0%

Full scope emission until 2040

Our climate targets



Fleet



Value chain



Buildings



Suppliers



Member of Climate neutral Datacenter Pact



High-efficiency LEED-certified Datacenter Biere

[Research project](#) to increase self-sufficiency

Our Measures

Footprint reduction along full scope

Energy efficient Datacenter

Carbon Footprint Consulting



[Sustainability through Digitization](#)



Low Carbon Infrastructure Services

Our Service

Enabling clients to reach their sustainability goals

Analysts Confirm Our Differentiators

1010 Digital

Market-leading capabilities in Digital Business transformation confirmed by 5 leader positions in ISG benchmark

Gartner. ***ISG**

tekno**logy** PAC

NelsonHall  **GlobalData.**
Decode the Future

Leader Positions

39

Latest analysts' ratings



Cloud & Infrastructure

Named a leader on ten consecutive occasions in Gartner Magic Quadrant for Data Center Operations and Hybrid Infrastructure Managed Services

Gartner. ***ISG**

**Overall 70
leader positions
from 19
benchmarks
In 2020-21**

Leader Positions

21

Latest analysts' ratings



Security

Leader in Cyber Security Solutions and Services; Operating Security Services in Germany, is appreciated by many mid-tier customers

***ISG**  **GlobalData.**
Decode the Future

Leader Positions

5

Latest analysts' ratings



Our Global Leadership



Adel Al-Saleh

Member of the Board of Management of Deutsche Telekom and CEO T-Systems



Urs M Krämer

Chief Commercial Officer



Christoph Ahrendt

Chief Financial Officer



Georg Pepping

Chief Human Resources Officer

Our Regional Leadership



Jesper Kryhlmann

Managing Director
Northern Europe



Lars Bjørn Falkenberg

VP Sales & Advisory
Northern Europe



Thomas Deeg

VP, Finance
Northern Europe



Rikke Spangenberg

VP, Human Resources
Northern Europe



Scott Cairns

Head of Portfolio
Northern Europe



Julian Hartung

Head of Delivery
Northern Europe



Omar Ayoub

Head of Operations
Northern Europe



Peter Hecht

Marketing Director
Northern Europe

**“The best time to plant
a tree was 20 years ago.
The second best time is now”**

– Chinese proverb



**It's time to accelerate your
digital transformation journey.**

Connect with us

Find more information about how we can accelerate your digital transformation journey on our website or follow us on social media to stay in the known.



Nordic



UK

