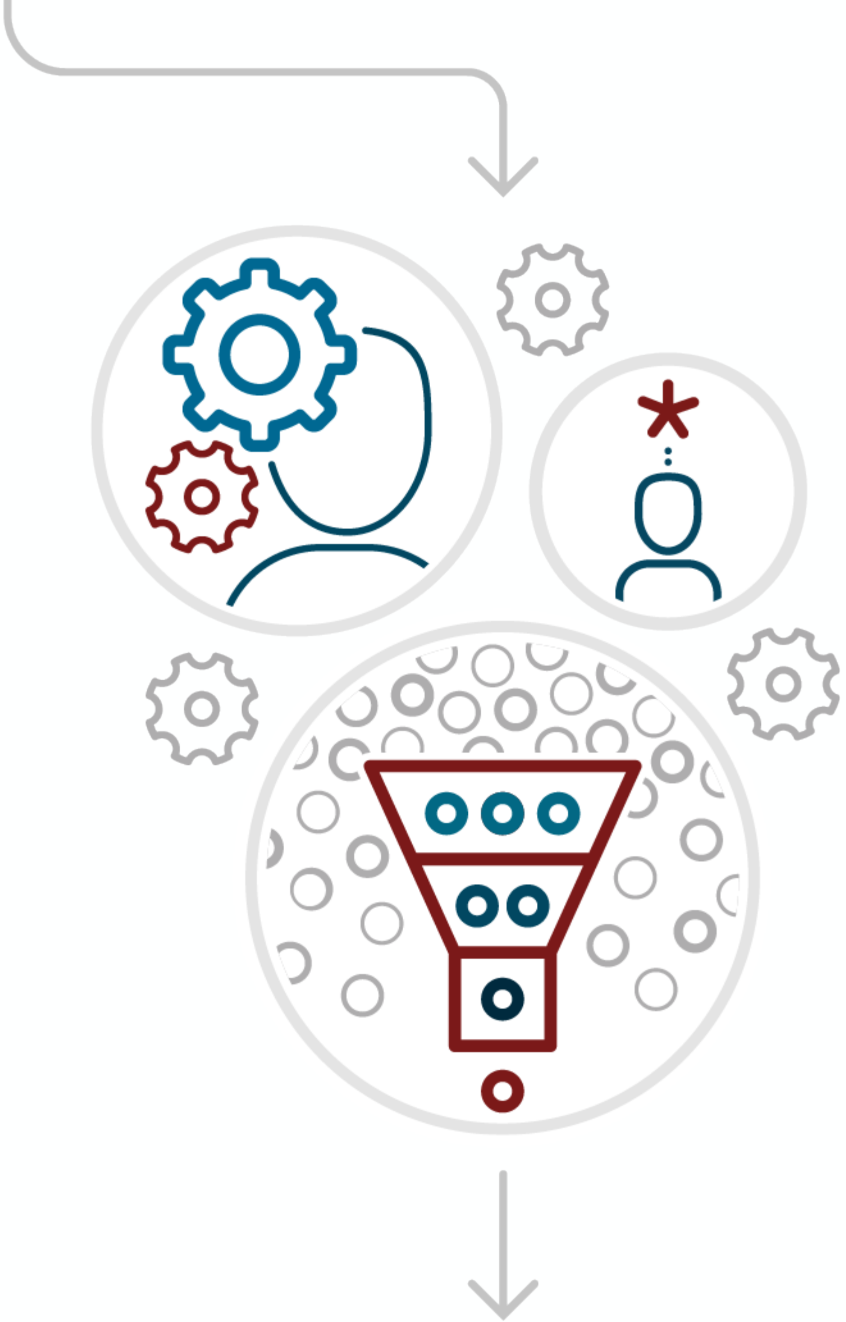
Flash Memory Summit

FSOL-301B-1:

Flash Solutions for SAP

Jillian Coffin | VP & Publisher

August 8, 2019



Jillian Coffin

VP & Publisher, Storage, Cloud & Data Center

- Oversees the editorial, audience development, and sales and consulting efforts across website communities including **SearchStorage.com**, **SearchCloudComputing.com,** and **SearchITChannel.com**.
- Jillian has been working in the **data storage community** for **12+ years** sharing purchase intent data with both established and emerging storage vendors who need to better understand changing market dynamics and maximize growth opportunities
- TechTarget is the leading source of independent enterprise storage and flash technology content on the web and helped make it into a trusted resource to aid IT and business leaders in making informed decisions.

Session Panelists

Matt Morris

Sr. Solutions Marketing Manager

Western Digital

Erik Kaulberg

Vice President

INFINIDAT

Eric Herzog

Chief Marketing Officer & VP WW Storage Channels

IBM

Saroj Mohapatra

SAP SME

CISCO

TechTarget's Storage audience

1.3 million Storage members globally

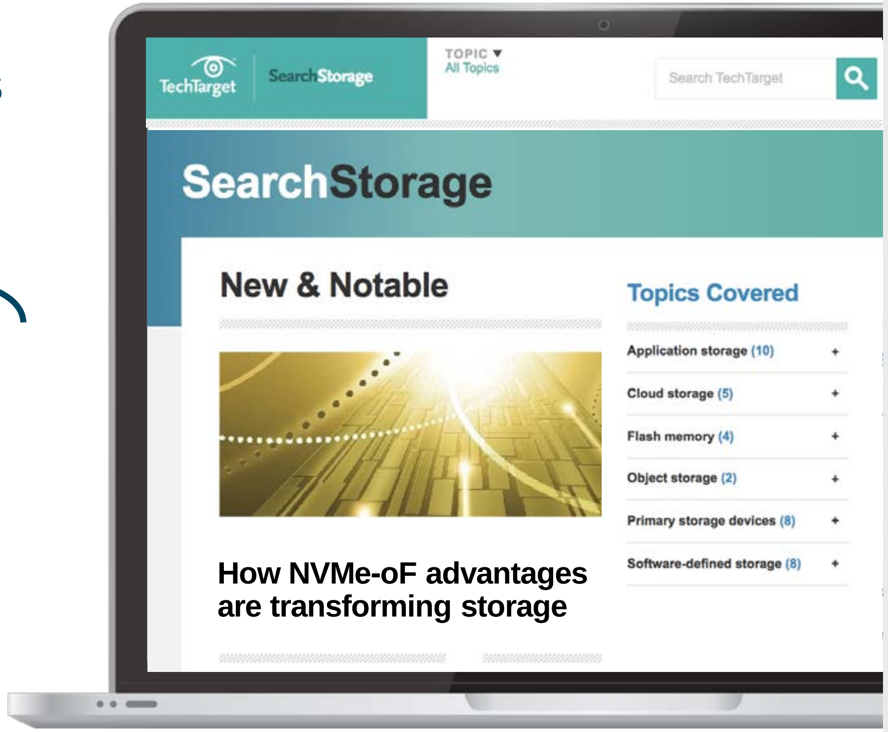
Storage and infrastructure buyers active in the last 90 days[1]

151,810
North America

63,397
EMEA

18,200
APAC

3,835
LATAM



650K+ SearchStorage.com monthly page views

NVMe & NVMe-oF appetites increasing

2.6M+
Activities taken around Flash & NVMe in the past year[2] (up 24% YoY)

90%
Increase in NVMe/ NVMe-oF activities since last year[2]

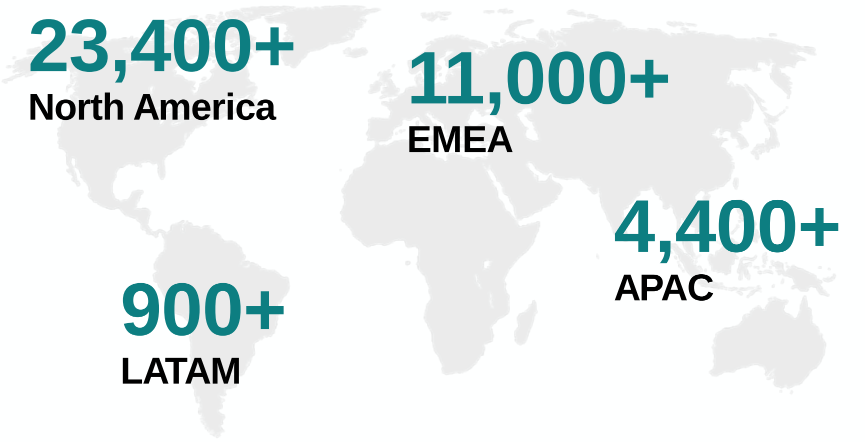
580+
Flash and **NVMe** related pieces of content published on the TechTarget network in the last year alone

TechTarget Activity & Audience metrics 7/19/19; [1]Priority Engine; [2]Over the past 12 months (WW)

TechTarget's SAP audience

2.1 million+ activities taken around SAP per year

SAP audience activity in the last 90 days[1]

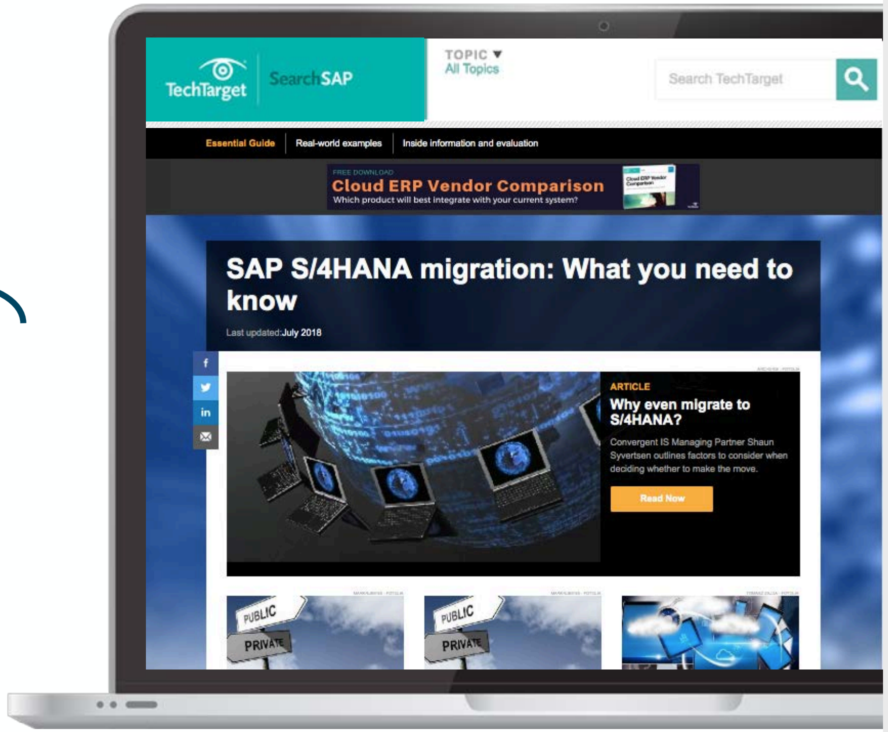


23,400+ North America

11,000+ EMEA

4,400+ APAC

900+ LATAM



350K+ SearchSAP.com monthly page views

24%
Activity growth around SAP topics in the last year

67,000+
Prospects researching SAP each year

10,000+
unique active accounts with SAP installed

About TechTarget Research & Data

We sit on a vast amount of research and purchase Intent Data that allows us to analyze the latest trends, behavior and insights from our wide range of audiences

- **Annual IT Priorities Survey** is fielded to 4000+ global technology and LOB buyers to gather market insights on broad initiatives, technology adoption, budgets, and plans for the upcoming year
  - *Regions surveyed 35% NA; 30% EMEA; 30% APAC; 5% LATAM*
  - *Company sizes range from large enterprise to SMB (50% from $10M+ annual revenue)*
- **Quarterly Pulse Surveys** are fielded to 300+ respondents across targeted markets to better understand emerging techs, market disruption and key areas of change
  - Recent Pulse Surveys include: AI/ML, SAP, MSP, Flash & NVMe, DevOps)
- **Qualified Sales Opportunities Data** taken from 32K projects over the last 12 months across 80 technology markets
- **Priority Engine intent data** garnered from 200+ topically focused segments that represent the most active organizations week over week

20 years
of publishing technology-specific content

150+
global B2B websites covering over **5,000** technology topics

19.7M
IT and Business professionals opted-in and **GDPR compliant**

#1
B2B Marketing Data Provider (Forrester Wave 2018)

TechTarget

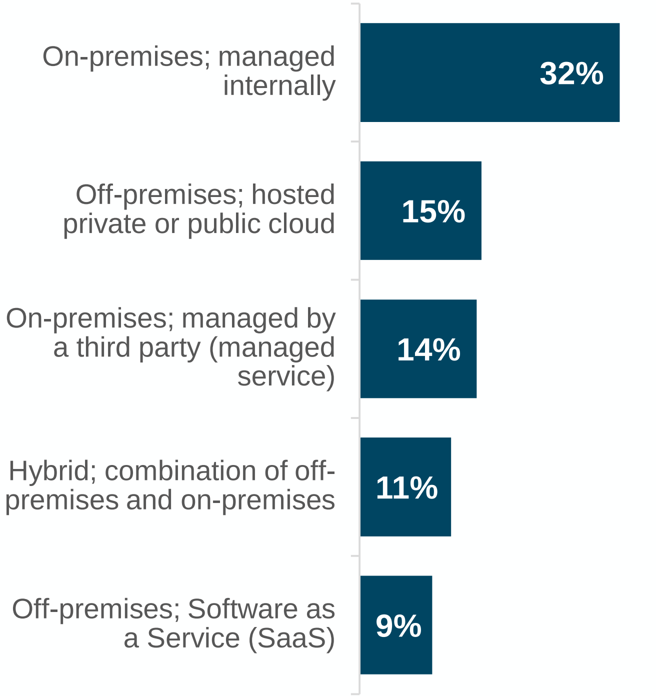
SAP State of the Union

Mandated migration from SAP ECC/Business Suite to S/4HANA by 2025

- **Companies need to set establish deployment methods/proof of concept with following**
    - S/4HANA Cloud (Public Cloud, Hybrid Cloud, Private Cloud)
    - S/4HANA (On-prem)
- **Cloud migrations not a walk in the park and seeing some customers move to greenfield implementation**
- **Good news for storage vendors:** On-prem seems to be preferred deployment model
- **New opportunities with SAP Leonardo (Digital Innovation) and C/4HANA (Customer Experience)**
    - How customers access SAP's products/features across emerging techs like AI/ML, IoT, Blockchain and customer apps (still lots of runway here!)

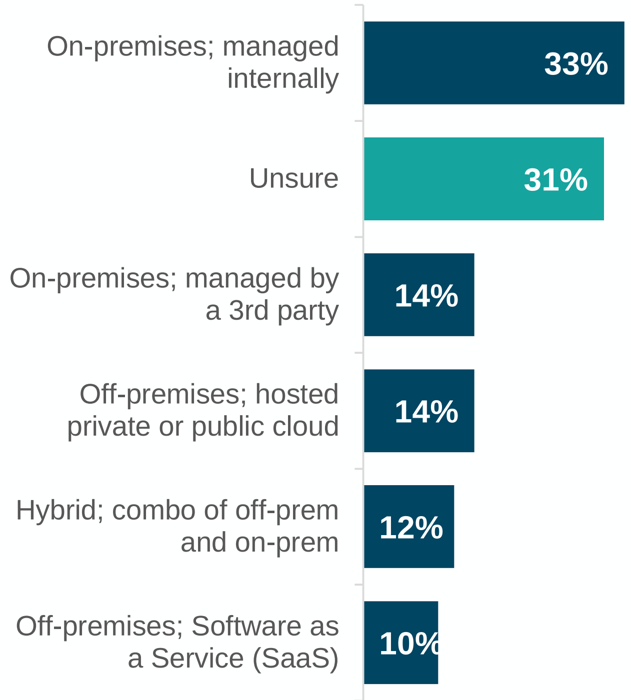
Current SAP deployment methods vs S/4HANA deployment plans

Current SAP deployment methods



How are your company's current SAP solutions deployed? (Choose all that apply)

S/4HANA deployment plans



How will your organization deploy S/4HANA? (Choose all that apply)

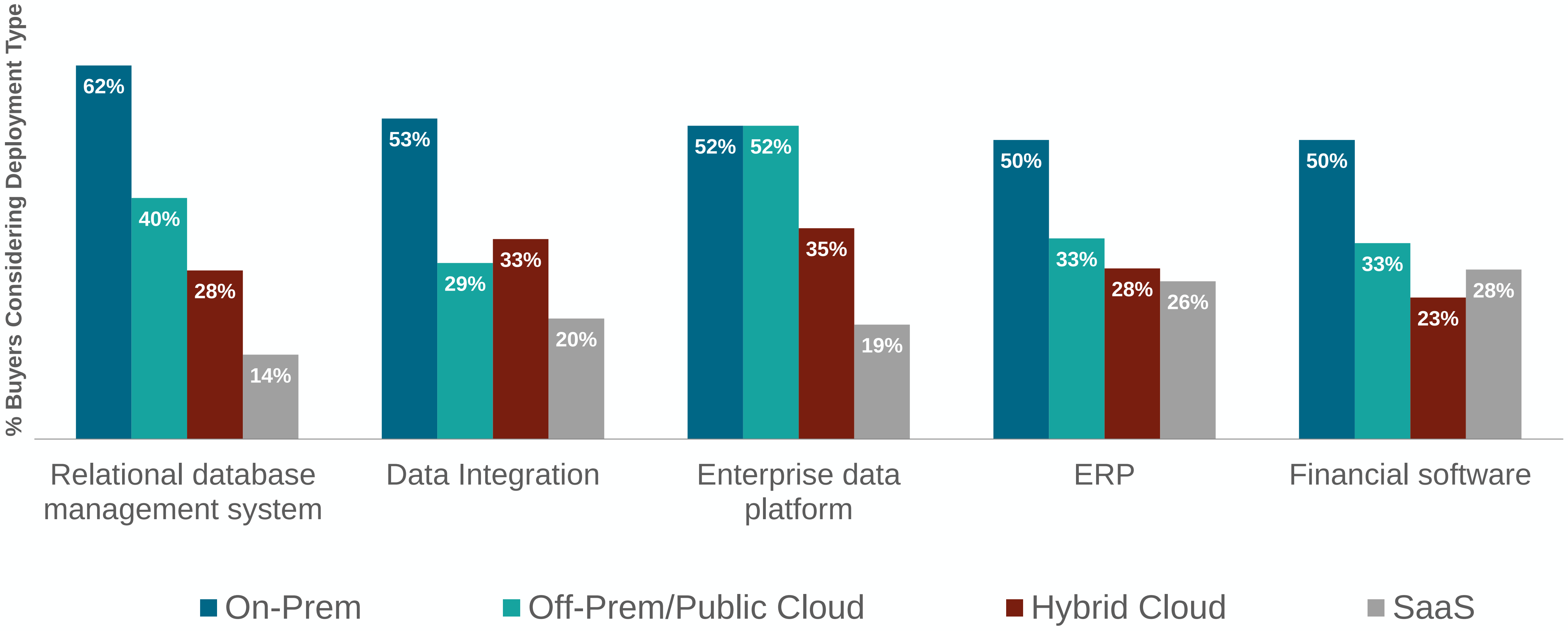
Observations

1/3

of customers will use traditional on-premise models for S/4HANA deployment

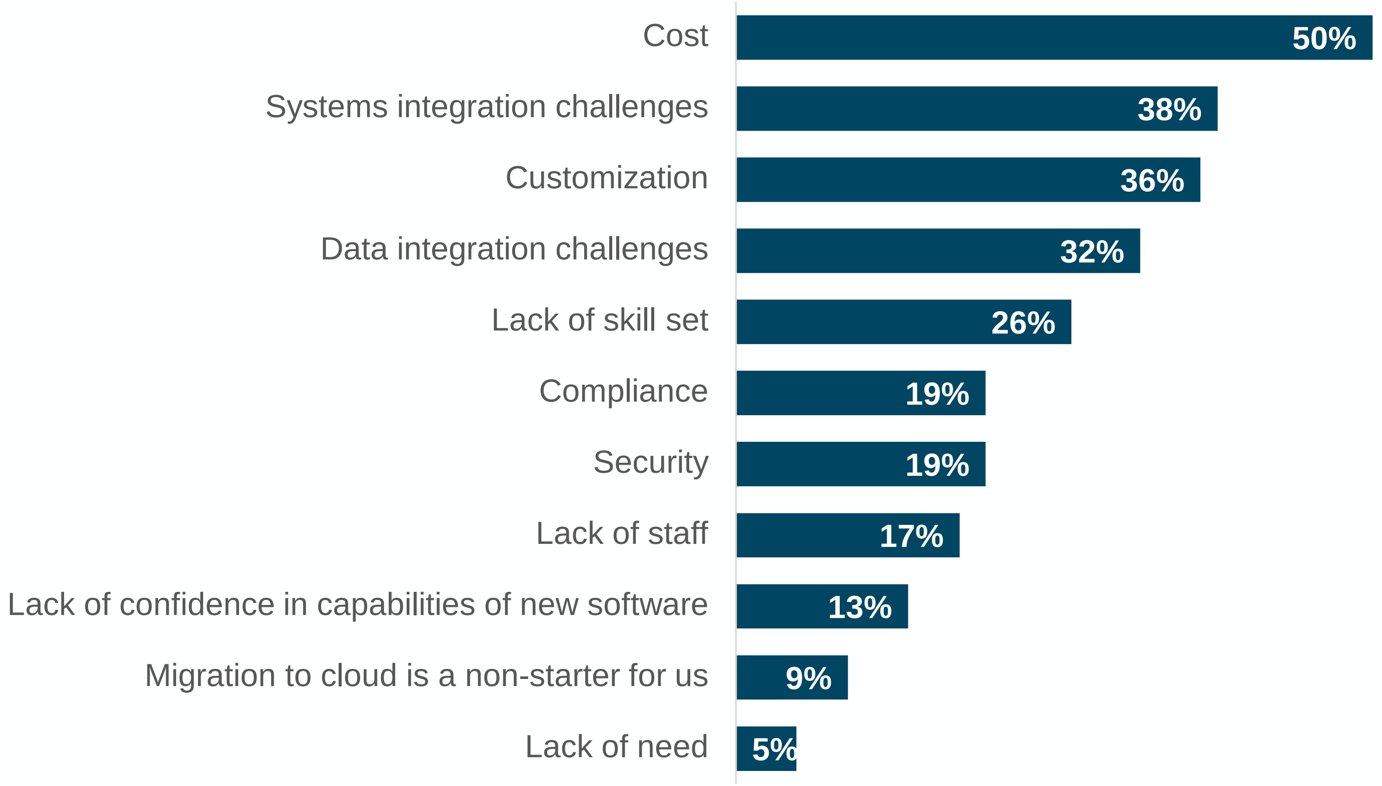
1/3 Unsure!

Deployment models for planned SAP projects



Cost and integration challenges preventing early upgrade

What are the top challenges that prevent your company from upgrading? (Choose all that apply)



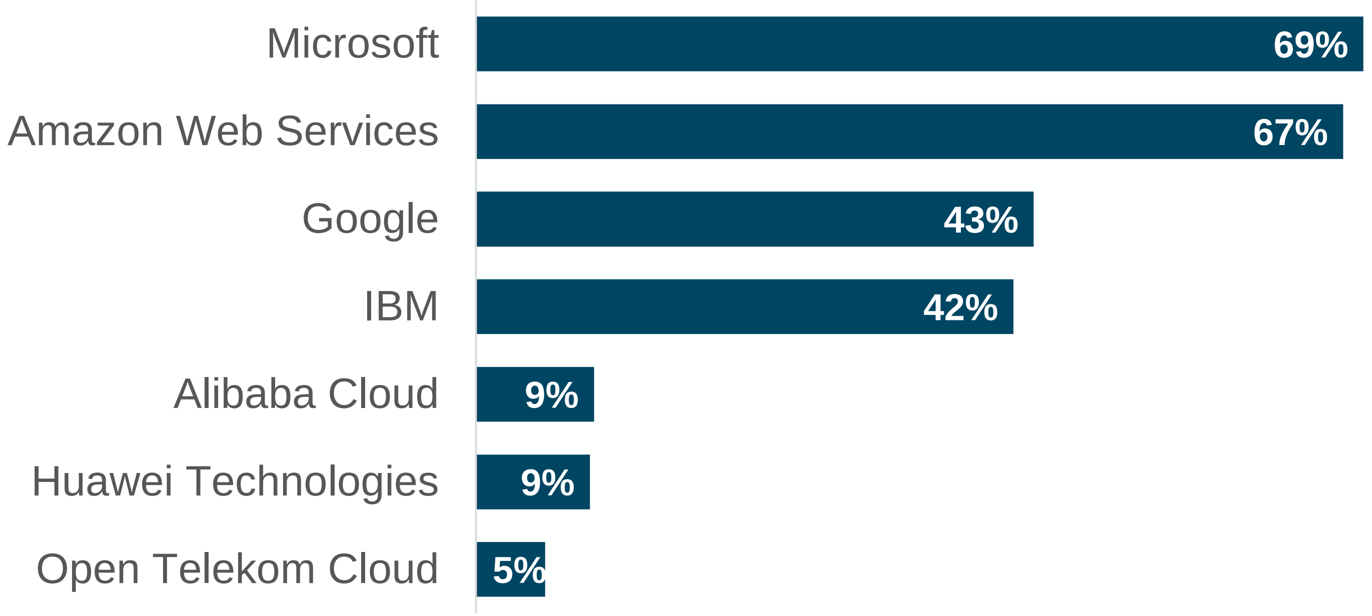
Observations

- Cost of change is still top of mind for customers moving to S/4HANA
- CIOs feel it is too costly to justify based on value of the ERP upgrade and ultimately not making case to LOB, sitting tight and looking at alternatives

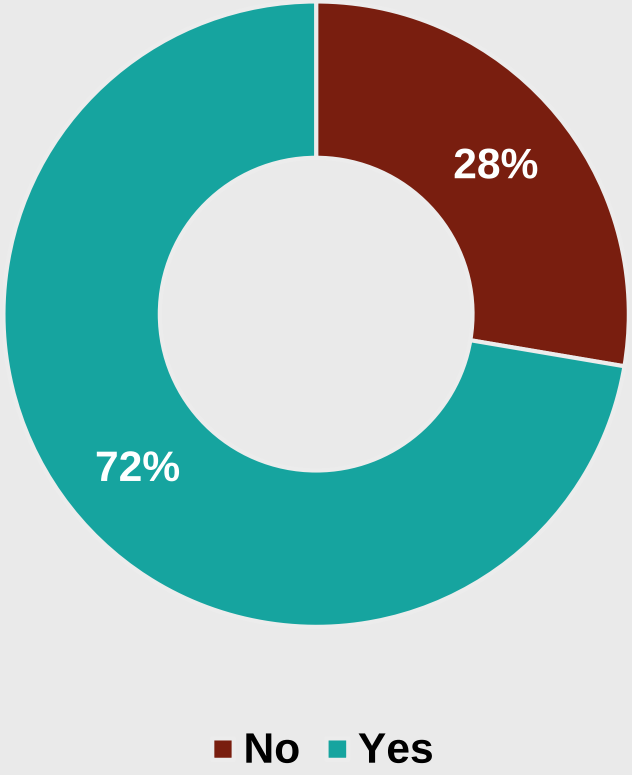
Source: TechTarget 2019 SAP S/4HANA Pulse Survey (Worldwide)

Certified Cloud partners will still play a role along with other 3rd party service providers

Which of these SAP certified cloud providers is your company likely to evaluate for infrastructure for its instance(s) of S/4HANA? (Choose all that apply)



Leveraging third parties

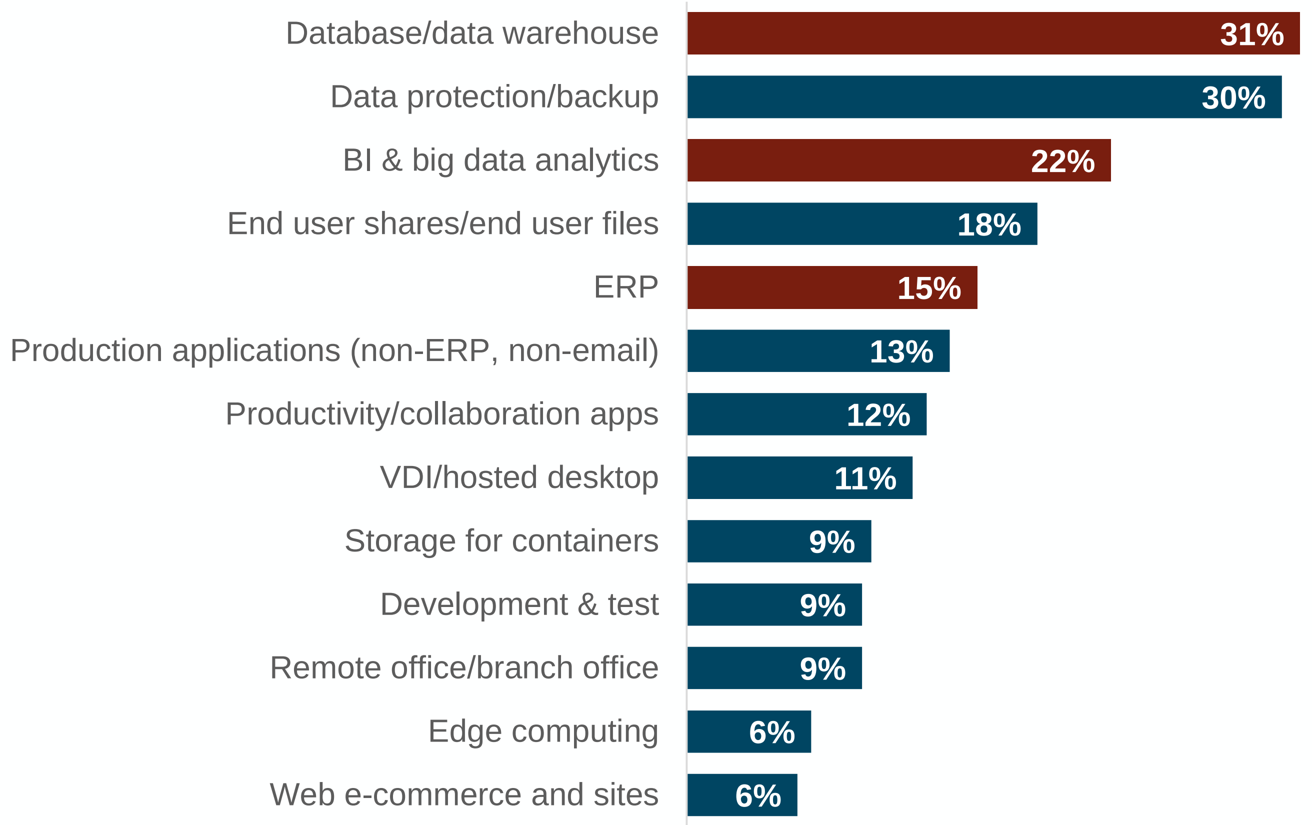


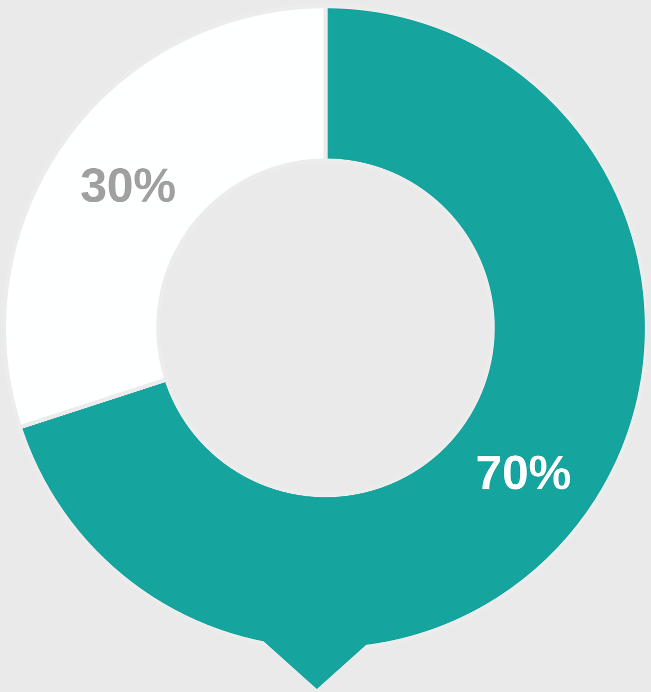
Source: TechTarget 2019 SAP S/4HANA Pulse Survey (Worldwide)

Is your organization likely to leverage 3rd party IT consultants, systems integrators or management consultants to assist in the planning, customization, migration, or maintenance of your S/4HANA implementation?

Workloads driving change in underlying storage

Which of the following workloads are most likely to undergo a change in their underlying storage? (Choose up to 3)





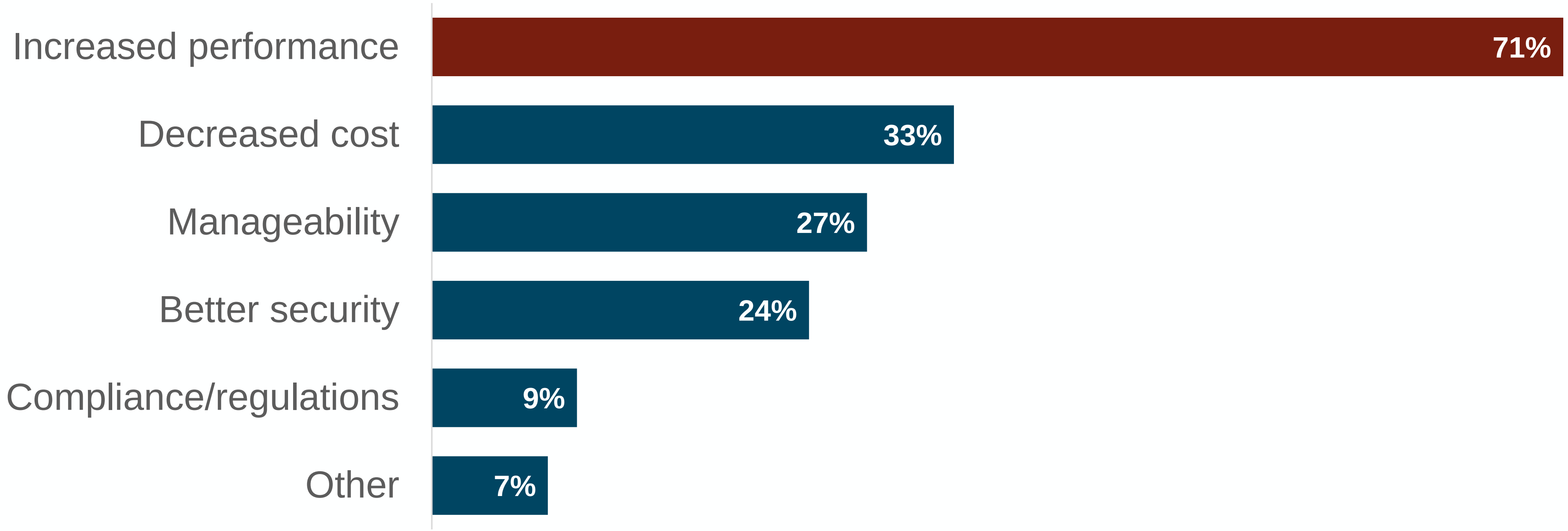
70%

of respondents looking to **increase their storage spend**

Performance is primary factor driving change in underlying storage workloads

*Which of the following workloads are most likely to undergo a change in their underlying storage?**

What is the primary factor driving this change?



Source: TechTarget Flash Pulse Survey 2019 (WW) | n=55

Flash project requirements among SAP's install base are more weighted to performance and power reduction

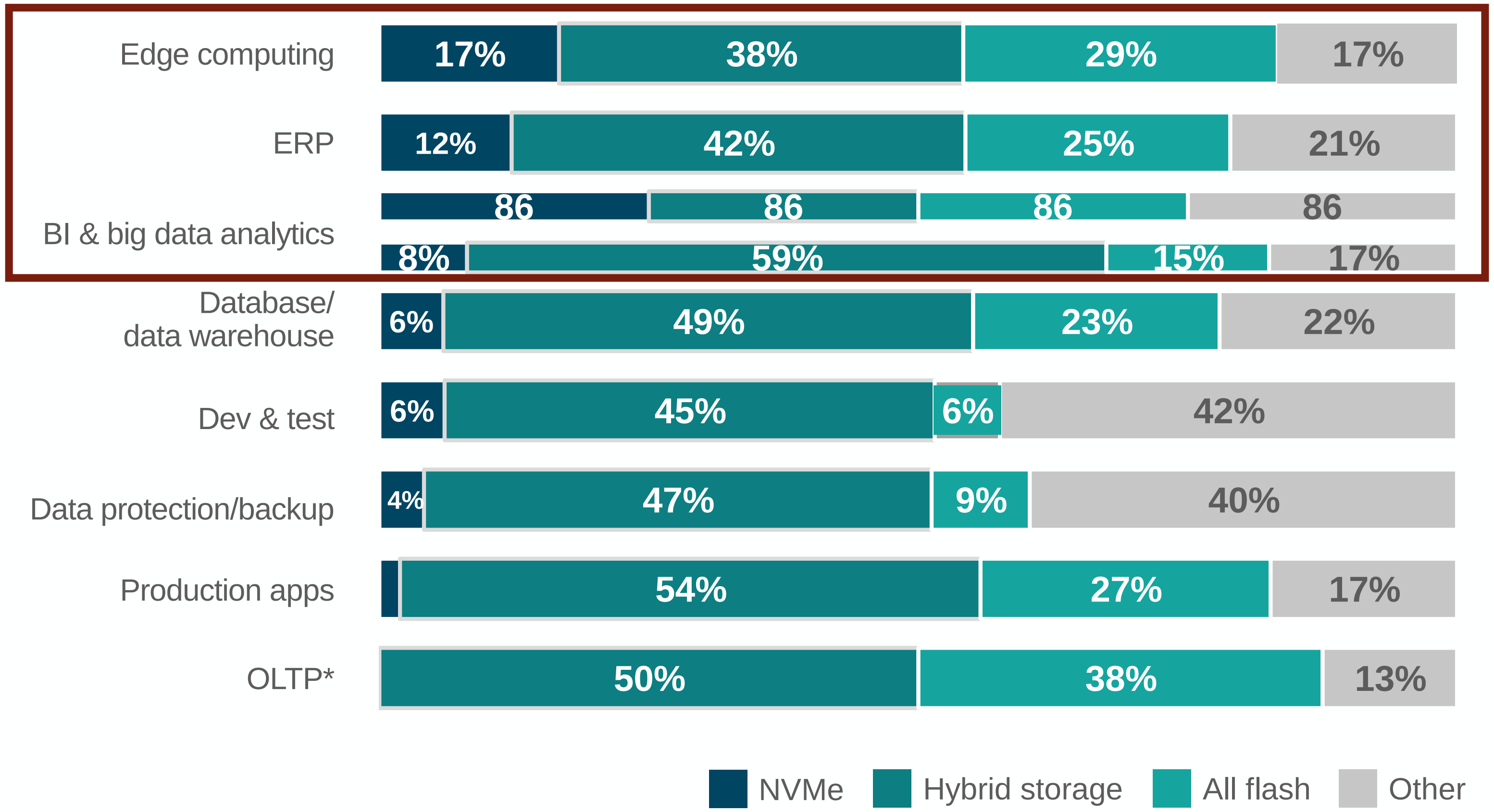
Project Requirement	Overall Market	SAP Install	SAP DB Install	SAP ERP Install
Refresh legacy primary storage	26%	25%	21%	23%
Reduce total cost of ownership	22%	20%	20%	19%
Improve existing application or database performance	20%	18%	17%	14%
Eliminate storage performance issues	19%	21%	21%	21%
Accelerate virtual server hosts	11%	6%	6%	7%
Improve performance for new applications	11%	11%	11%	11%
Reduce power and storage footprint	11%	11%	11%	11%
Simplify performance management of storage	10%	9%	9%	8%
Achieve the right price/performance ratio	10%	7%	7%	8%
Provide private cloud or cloud-like services	9%	8%	8%	11%
Deploy in converged infrastructure	7%	5%	6%	5%

High Med-High Med Low

Source: Qualified Sales Opportunities and HG Data Crossover | Worldwide | Last 12 Months | 7/2019

NVMe scoring higher with Edge, ERP and Big Data Analytics

For these workload(s), which of the following is primary storage.

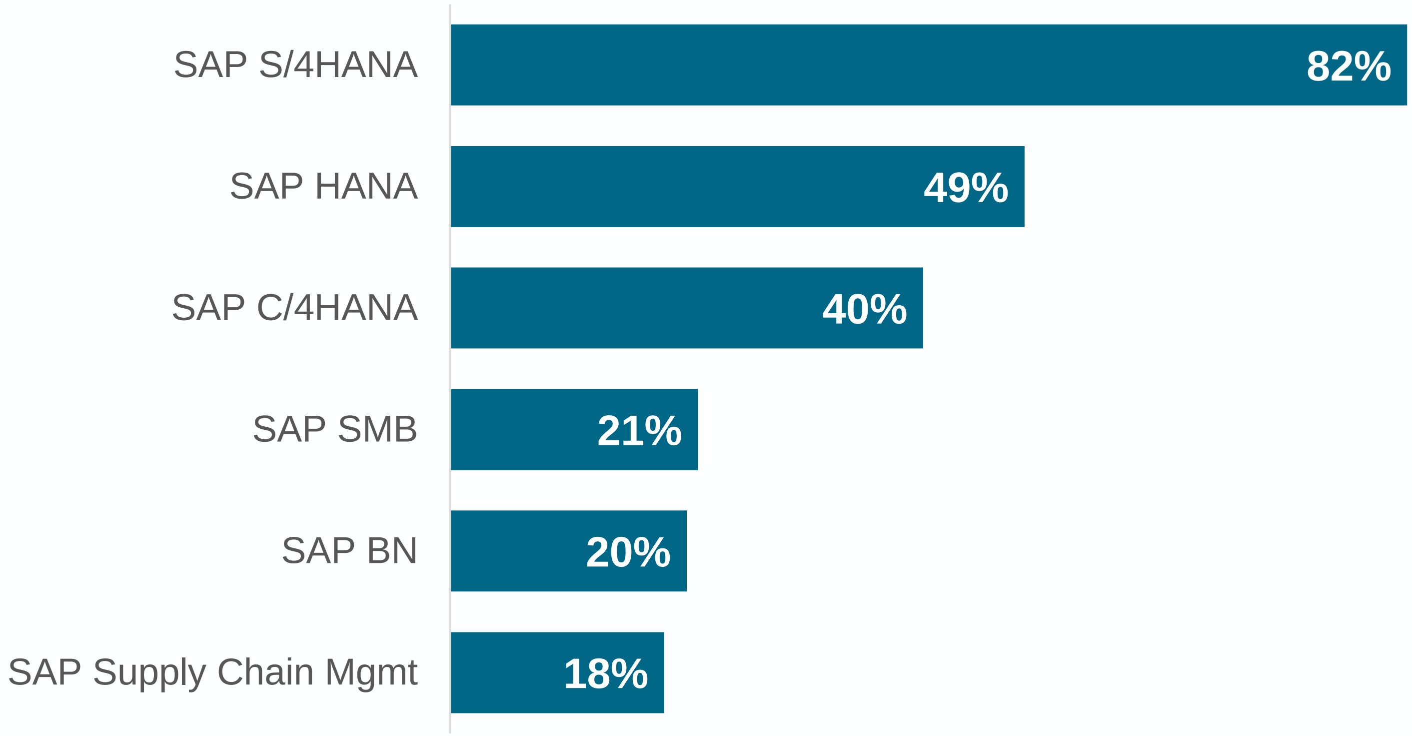


Key Takeaways

- 47% of NVMe adopters plan to implement through storage array vs DAS

Future purchases/upgrades

Which of the following SAP solutions does your company intend to purchase/upgrade in the future? (Choose all that apply)



Observations

- Customers are not marrying their S/4HANA transformation with SAP Cloud Platform
- Lots of confusion and education by partners is key

Upcoming sessions

Tuesday August 6th

BMKT-102A-1:
Know What the Flash Customer Wants and Needs

Track: Business/Marketing

Presented by: Dave Raffo

Time: 3:40pm to 4:45pm

BMKT-102B-1:
Data Growth and a future with Zettabytes

Track: Business/Marketing

Presented by: Mike Matchett

Time: 4:55pm-6:05pm

Thursday August 8th

FSOL-301A-1:
Flash Solutions for Oracle

Track: Flash Solutions

Presented by: Dave Raffo

Time: 8:30am-9:35 am

FSOL-301B-1:
Flash Solutions for SAP

Track: Flash Solutions

Presented by: Jillian Coffin

Time: 9:45am to 10:50am

FSOL-302A-1:
Flash Solutions for Analytics

Track: Flash Solutions

Presented by: Mike Matchett

Time: 2:10pm to 3:25pm

FSOL-302B-1:
Flash Solutions for AI/ML

Track: Flash Solutions

Presented by: Jillian Coffin

Time: 3:40pm to 5:00pm

Thank you.

Jillian Coffin
VP & Publisher, Storage

Primary factors driving change in Workloads

	Increased performance	Decreased cost	Manageability	Better security	Compliance /regulations
BI & big data analytics	64%	7%	12%	7%	7%
Industry specific apps	57%	4%	14%	14%	7%
Edge computing	54%	8%	17%	4%	4%
OLTP	50%	19%	9%	13%	6%
Production apps	48%	10%	15%	12%	12%
Database/data warehouse	47%	8%	15%	16%	8%
ERP	47%	7%	7%	12%	11%
End user shares/files	38%	17%	13%	20%	10%
Storage for containers	38%	26%	21%	12%	3%
Remote/branch office	36%	15%	9%	33%	3%
VDI/hosted desktop	36%	11%	18%	31%	2%
Productivity/collab apps	33%	15%	15%	28%	2%
Development & test	30%	21%	15%	12%	9%
Web e-commerce and sites	30%	13%	22%	30%	4%
Data protection/backup	16%	25%	18%	19%	19%

HIGH

LOW

Source: TechTarget Flash Pulse Survey 2019 (WW) | n=23-121 | *Online transaction processing