Technology & Innovation
Overview and Outlook

Business Technology Platform –
The Fastest Way to Turn Data into Business Value
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Executive Summary

SAP’s strategy “The Experience Company powered by the Intelligent Enterprise” aims to help customers to thrive in the new economy where being a data-driven enterprise and delivering exceptional experiences is key to their success.

Customers have unprecedented opportunities for innovation but still struggle to turn data into impactful business outcomes. Challenges in managing complex data landscapes, gaining deep analytical insight and utilizing intelligent technologies are making it hard for enterprises to adapt their business processes to the growing pace of change in the marketplace.

In a dynamic market, SAP has a unique position to address those challenges powered by its in-depth insight and access into business data and processes as well as comprehensive technology portfolio. Our goal is to evolve SAP’s digital platform into a business technology platform that allows customers to focus much stronger on their business, rather than on the technical building blocks.

To deliver this promise, SAP is providing solutions across four key technology markets of Database & Data Management, Analytics, Application Development & Integration, and Intelligent Technologies addressing all customers’ needs to listen, understand and act on their data. As an open platform, we also strategically grow our ecosystem and embrace partner solutions to offer complementary value to our customers.

The business technology platform is targeted to provide enterprises the flexibility and speed in the development of business applications as customers and employees demand better experiences and high adaptability to their needs. The outcomes are (1) enabling our customers and partners to easily extend SAP’s intelligent suite with their own innovative capabilities, (2) integrate it with third party solutions without any friction and (3) build new applications that have high impact on their business processes. (4) The platform also serves SAP internally for integrating and embedding SAP Leonardo capabilities into the intelligent suite, allowing us to further increase productivity and value to customers. Lastly, it is a key part of our innovation engine where we work on the next-generation intelligent enterprise solutions and co-innovate closely with our customer and partners.

With SAP’s strong business and technology assets, and our close collaboration with customers and partners, SAP is uniquely positioned to deliver a business technology platform that enables enterprises to turn their data into business value in the fastest possible manner.

The Purpose Of This Document

This whitepaper covers the platform and technology direction of SAP and outlines how we support our customers in turning data into business value in the fastest possible way in the context of the Experience Economy. In The Experience Economy. The focus is on understanding customer needs across the main technology markets, SAP’s unique position and our respective strategic aspirations help customers to become intelligent enterprises and deliver the next-generation experience for their customers, employees, product and brand.

This document was updated towards TechEd 2019. It is neither a dedicated product strategy nor does it comprise a comprehensive SAP technology strategy as these are or will be covered elsewhere.
The Intelligent Enterprise and the Experience Economy

Last year, SAP unveiled our strategy to deliver the Intelligent Enterprise\(^1\). At the core of our strategy was SAP’s strong belief that every company needs to address three key challenges in today’s economy:

- **Leverage synergies to minimize costs for funding innovation**
- **Deliver a next-generation customer experience in a world of disruption**
- **Better engage employees to attract and retain top talent**

Intelligent enterprises have the visibility, focus, and agility to overcome those challenges and deliver a step change in productivity, redefine the end-to-end customer experience, and transform workforce engagement.

Our strategy lays out a framework that showcases the three technical components that every company must have to become an intelligent enterprise:

1. **Intelligent Suite**
   - An integrated, yet modular suite of line-of-business (LoB) applications that enables our customers to share insights across functions to better manage stakeholders and their day-to-day operations.

2. **Digital Platform**
   - Data management and cloud platform technologies to dynamically orchestrate the growing volume of data and business processes across an intelligent enterprise, so that customers can make sense of their data in real-time. The digital platform forms the foundation of all intelligent activities.

3. **Intelligent Technologies**
   - Tools and technologies that turn intelligence into business outcome such as analytics, machine learning (ML), artificial intelligence (AI), the Internet of Things (IoT), and blockchain. They are delivered through the digital platform, embedded within intelligent suite applications, and applied to processes that integrate both SAP and third-party data and applications.

As we observe the marketplace, we recognize that the challenges companies are trying to solve have not fundamentally changed. However, the companies that are most successful in overcoming these challenges and surpassing their peers are the ones that understand how to consistently deliver exceptional experiences. In fact, organizations that lead in customer experience outperformed laggards on the S&P 500 Index by nearly 80%\(^2\). This proves that we are in an Experience Economy, where the key to competitive differentiation lies in the experiences that you deliver.

\(^{1}\) [https://www.sap.com/products/intelligent-enterprise.html]
\(^{2}\) "2019 Customer Experience ROI Study", Watermark Consulting, 2019
Therefore, this year SAP is evolving its strategy to be “The Experience Company powered by the Intelligent Enterprise”. We believe that it is our responsibility to help our customers thrive in this new Experience Economy. That is why we acquired Qualtrics International Inc., the market leader and creator of experience management software. With Qualtrics’ offerings for Experience Management, we can help companies solve those same challenges, but with far greater insight and understanding of their business. Together, we now have the power to merge two data sets, experience data (X-data) and operational data (O-data), and to serve customers with greater intelligence so they can understand not only the organizational impacts of every decision and action they take, but also the human impacts.

In an era in which data plays a vital role in all decision-making and in every business process, having the ability to manage big X-data and O-data, gaining new levels of business insights, and turning them into impactful actions is an absolute key to customer success. As business data volume grows exponentially, and as enterprises have access to an abundance of new intelligent technologies, customers have countless opportunities to influence experiences and reimagine their business processes through data-driven innovation.

The following outlines two examples for the opportunities in reimagining business processes:

1. **Drive a step-change in productivity**: A global clothes retailer collects big and diverse data from SAP C/4HANA including X-data from Qualtrics software and from third party sources such as comments on social media. This data is streamed into a data lake integrated with SAP HANA and dedicated to a customer behavior analysis project where intelligence is applied by building ML models to predict changes in customers’ buying preferences. The results are streamed in real-time to SAP C/4HANA marketing campaigns, where a new campaign is automatically triggered via SAP Intelligent Robotic Process Automation whenever a change in customer preference is identified, significantly increasing marketing productivity leading to additional revenue.

   Reimagining business processes is more than adding modest improvements to an existing process. It can create digital disruption which adds unique competitive advantages for a company and can even change the game for an entire industry.

   Research from McKinsey finds that this kind of digital disruption shaves 30% off company’s revenue growth and 25% off growth in EBIT for incumbents who don’t take action. Digital entrants who introduce new business models are stealing share from incumbents, displacing 2 points of YoY growth on average. However, the research finds that companies’ comprehensive strategic response to such digital disruptions and investments in digital technologies are worth around 4.5 points in EBIT and 6 points in revenue.³

2. **Build new business models**: A lighting hardware company uses SAP Leonardo IoT, SAP Analytics and SAP Cloud Platform Integration to deliver a light-as-a-service business model. By connecting the lighting hardware to sensors, and orchestrating and analyzing its data streams, customers can receive a variable bill based on usage instead of paying for lighting upfront. In addition, customers can gain insight in costs and usage with an intelligent solution that is able to predict future costs. This solution helps users to make better informed and confident decisions, drives operational efficiency and saves energy.

³  “The Response to Digital Disruption”, McKinsey Global Institute, 2017
The role of technology and innovation in the evolving Experience Economy has never been more important for the success of our customers. As customers’ and employees’ demand for better experiences increases, enterprises must focus on their businesses and adapt to change, rather than concentrating on technical building blocks. We believe that these needs can be addressed with a “business technology platform” that provides the required platform services combined with the business semantics, content and context which are key to turn data into meaningful business outcomes. The winners will be intelligent enterprises that utilize this platform to get the most out of their experience and operational data and processes. This is the goal of SAP’s business technology platform where the business-centric technologies of SAP Cloud Platform, SAP HANA, SAP Analytics, and SAP Leonardo power the intelligent suite, enable new data-driven innovation scenarios and together with Qualtrics help our customers to turn into Experience Companies.

Therefore, SAP’s vision for the business technology platform is to provide the required technologies for intelligent enterprises to power the intelligent suite, deliver the next-generation experience management, and offer the necessary technologies standalone to our customers and partners for unlocking new types data-driven innovation.

In this document, we share our high-level strategic aspirations for the business technology platform and our focus areas in the board area Technology & Innovation.

The New Platform Challenges

The demand for best product experience is also increasing for enterprise solutions. Customers expect to get the maximum value from their business applications “right out of the box”. These expectations involve working with connected end-to-end business processes, with embedded intelligence and consistent user experience. With the intelligent suite, we aim to cater to those expectations and deliver customers the highest level of innovation embedded in our business applications.

Customers who want to maximize their opportunity to achieve the most impactful business results must also have all the necessary services for creating their own innovative solutions. However, even with the great technical progress across industries, most customers still struggle to innovate at scale and turn data into business outcomes.

Enterprises share that they are experiencing challenges to manage the growing volume of data, that deep insights are difficult to come by and that deriving business value from new intelligent technologies requires too much effort. All those challenges are holding enterprises back from acting on X- and O-data and adapting their business processes to the growing pace of change in the marketplace.

SAP has identified strategic business problems across four key technology markets that customers must solve to become data-driven intelligent enterprises and unleash the full potential of the Experience Economy. Those markets are Database & Data Management, Analytics, Application Development & Integration and Intelligent Technologies.

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4 “Business technology platform” refers to the evolution of SAP’s digital platform into a platform that provides comprehensive business-centric services for data-driven innovation, adding unique value to customers by allowing them to focus on the business rather than on the technology building blocks. Such business-centric services may include business semantic layers, master data services, automation of data science processes and more which will be detailed later in this document.
Market #1 Database & Data Management

Customer Need
Manage big and diverse data, which can fuel analytics, ML/AI, and IoT solutions to make better and more confident business decisions.

Customer Challenge
Data is getting too complex to manage:
Enterprises do not have full visibility of their data landscape and the ability to efficiently process the excessive volume of data that they store in multiple locations, facing severe data quality and compliance challenges.

Trends: Over the recent years, the database & data management market has been driven by key trends of non-relational databases, in-memory technology, and convergence of operational and analytical database systems. By far the biggest driver will be cloud: Gartner forecasts show dbPaaS almost tripling in revenue, from $4.2 billion to $12.3 billion, during the next five years, with a 31.6% compound annual growth rate (CAGR) from 2017 through 2022.

The market continues to be dynamic and innovative as customers’ data landscapes evolve, illustrated by accelerated transition to the cloud, flexible multi-cloud deployment, and decentralized data architectures. Databases are adopting multi-modal capabilities to support broader analytical requirements while reducing data movement.

Market #2 Analytics

Customer Need
Analyze data to drive better planning and decision-making; get real-time visibility into dynamic business environments; and simulate the impact of business decisions.

Customer Challenge
Turning insights into action is challenging:
Business users struggle to interpret static reports and visualizations that are not provided in context, and often not easily located, when insights-driven decisions need to be made during a business process.

Business users struggle with information that requires a lot of manual work to produce, is too fragmented across LoBs, and that is limited in forward-looking aspects.

Analytics projects don’t efficiently scale on all data platforms (e.g., lack of needed data management capabilities in non-relational databases).

Trends: A new era of augmented analytics is ushering in a wave of disruption beyond modern business intelligence (BI) by providing the best combination of machine-automated insights and human-authored analysis. Upcoming trends in augmented analytics (including AI, ML, natural language query, insight generation, search and conversational BI including voice, and real-time streaming) are gaining traction.

In addition to analyzing past and current business results, the market for enterprise planning solutions that connect future strategic, financial and LoB plans is rapidly growing.

Cloud adoption is growing at a steady pace, in particular for financial/business planning and analysis. Analytics is influenced by data gravity, meaning there is a desire to have analytic engines and insight platforms close to data sources in an effort to speed up access to data, improve security, and avoid timing conflicts between real-time data sources.

5 Database & Data Management market sub-categories: database (RDBMS, Hadoop, NoSQL), information management (data integration, data quality, data streaming, information governance).
6 “State of the Big Data” study, SAP, 2017
7 “Market Guide for Database Platform a s a Service by Donald Feinberg, Rick Greenwald and Adam Rhontal, Gartner, December 14 2018
8 Analytics market sub-categories: BI, planning, and augmented analytics
9 “Big Data Executive Survey 2018 Executive Summary of Findings”, NewVantage Partners, 2018
Market #3 Application Development & Integration

Customer Need
Extend, integrate and build enterprise applications across different vendors with intelligent and insightful capabilities at scale.

Customer Challenge
IT cannot adapt fast enough to business requirements:
Platform-as-a-service (PaaS) vendors provide diverse technologies that lock customers in and lack “business-first” capabilities, such as access to ERP functions and simple integration which limits the ability of IT to apply data driven intelligence and adapt business processes to the growing pace of change in the marketplace.

Trends: Cloud platform services are on the rise with special-purpose PaaS offerings (xPaaS) that fall into two main categories of technology PaaS and business PaaS. Hyperscalers have become leading technology PaaS vendors providing IaaS-centric platform services (for example, around compute, storage, network). Business PaaS are led by SaaS vendors utilizing open APIs to their business processes and offering business capabilities as-a-service that drive their application extensions, development and integration.

Technology PaaS services are complementing customers’ ability to scale Business PaaS services for extending and building new applications. This results in a growing number of partnerships between both types of vendors to deliver seamless interoperability for their services and greater value to customers.

Market #4 Intelligent Technologies

Customer Need
Deliver new level of insights, human augmentation, and automation of business processes on premise, in the cloud, in business applications and over edge devices.

Customer Challenge
Intelligent technologies ROI is still very low:
Embedding intelligent technologies in business processes requires multiple complex tools and expensive skill sets, resulting in exceptionally long time to value.

Trends: Intelligent technologies continue to move rapidly towards augmented and embedded AI/ML application functionalities. This is well paired with the need to process massive amounts of data in real-time with low latency which are expected to dominate new software features in the cloud and at the edge of the network.

To address the growing need for AI/ML, different vendors are attempting to deliver dedicated platforms to streamline and operationalize data science processes. New edge frameworks are increasingly being combined with IoT management frameworks to support new applications.

55% of organizations rate their alignment between IT and business as moderate or worse.  

64% of companies struggle to keep up with executing on the internal demand for Predictive Analytics or Machine Learning.

11 Application Development & Integration market sub-categories: app platform, content/collaboration, process integration, API management, lifecycle management, identity, mobility management.
12 Intelligent tech market sub-categories: Cognitive/AI (natural language processing/natural language generation, voice, deep learning), IoT (connectivity, platform, software, security), RPA.
13 “Powering the Intelligent Enterprise with AI, Machine Learning, and Predictive Analytics”, Forrester Consulting, commissioned by SAP, August 2018.
In the next chapters, we will detail our strategic aspirations, describing what we would like to achieve and our key focus areas for our business technology platform vision. To shape our best path forward, it is important to understand first SAP’s unique or “unfair” advantage in the highly competitive technology markets we play in.

Two key factors uniquely position SAP to provide the required technologies for the Intelligent Enterprise to unlock data-driven innovation, power its intelligent suite and deliver the next-generation experience around customer, employee, product and brand:

1. **In-depth insight and access into business data and processes**
   For more than four decades, SAP has been the leading player in the enterprise applications market. Our more than 437,000 customers around the globe trust us to run their most mission critical business process across all LoBs. And with our expertise in 25 industries, SAP is in an optimal position to help customers turn technology into business outcome.

2. **Comprehensive and enterprise-ready technology portfolio**
   SAP is the only vendor that provides all the required solutions for data-driven innovation with full enterprise qualities such as data governance, compliance, and security. We are recognized as a market leader by industry analysts in many domains across our portfolio, and our products are available on premise, in the cloud, at the edge and in hybrid deployment models. SAP can offer customers one unified platform and integration of all data assets, to re-imagine their business processes.

Those factors combined power SAP to deliver a unique business technology platform that enables us to embed innovation in our intelligent suite and helps our customers and partners to turn data into business value in the fastest possible way. As we reviewed earlier, a business technology platform allows customers to focus much stronger on their business, rather than on the technical building blocks. All the required services to turn data into action are provided in one unified platform with high degrees of automation, where each service is enhanced with rich business context, semantics and relevant content. This significantly improves customers’ ability to reimagine their business processes by extending SAP applications with data-driven intelligence, integrate with SAP solutions out-of-box, embrace complementary partner solutions and create new differentiating business applications; all in a fully enterprise-ready and secured fashion.

In the Experience Economy, it is critical for enterprises to have flexibility and speed in the development of business applications, as customers and employees demand better experiences. SAP is uniquely positioned to deliver a business technology platform for enterprises, enabling them to manage and act on enterprises’ X- and O-data and adapt business processes to change in the best possible manner.
Technology and Innovation Strategic Aspirations

Technology and Innovation Strategic Aspirations and Key Focus Areas

Now, more than ever, our customers have a strategic need for the right technologies that can help them become intelligent enterprises and fully capture the unprecedented value of the Experience Economy.

To help our customers on this journey, we are focusing on three strategic aspirations aimed at maximizing the value provided with the intelligent suite, enabling customers to easily extend and integrate SAP applications with differentiating capabilities and at investing in longer-term innovation to anticipate and address business needs.

Each strategic aspiration has key focus areas as well as high-level goals which give more context on SAP’s plans in each area.

Strategic Aspiration #1: Deliver a Business Technology Platform to Our Customers

To help our customers to thrive in the Experience Economy and the evolution of the four main technology markets, we want to provide the business technology platform capabilities they need to adapt their business processes and turn data into action. For managing the “explosion” of data and to capture real-time value from different types of information, our customers should have a unified database and data management solution that is powered by SAP HANA to run their increasing analytical and transactional workloads. This also includes providing all the needed services to connect, discover, orchestrate, and manage data from non-SAP systems, an additional key factor in the evolution of our database and data management offering.

Another strategic aim is to help our customers move from experimenting with intelligent technologies such as ML/AI, IoT, and analytics, to applying them continuously in their business processes in an easy and secured way. This will enable them to extend and integrate the intelligent suite with their new insights, intelligence, and innovative solutions, which is crucial to differentiate their businesses from the competition.

Having one unified platform solution reduces the friction in using individual technologies to solve each step in the process of turning data to action separately. It also can save unnecessary data movement between different technology stacks and provide service synergies out of the box such as integrated and augmented data management with data intelligence services.

In order to maximize the platform’s reach and value for our customers, the relevant services need to be available in the cloud, on premise, at the edge and in hybrid deployment models. Another key element to achieve this goal is to leverage hyperscalers where possible for scalable infrastructure and complementary technology services to our platform offering. By opening our business technology platform, partners can more easily engage and extend SAP’s offerings to provide services and additional value to customers. This openness provides customers more value and choice. It enables us to focus on the differentiating factors which were reviewed earlier around business-centric platform services and delivering one unified solution to address all customers’ challenges in turning data into impactful business outcomes.

Therefore, with a business technology platform we aim to directly address the modern platform challenges and help enterprises make use of their full potential for data-driven innovation in the Experience Economy.
Business Technology Platform
Fastest Way to Turn Data into Business Value

Outcomes:
- Intelligent suite with infused SAP Leonardo capabilities
- Frictionless integration of intelligent suite with third-party solutions
- Simple extension of intelligent suite with customer and partner innovation
- New customer and partner business applications

Figure 5: Business technology platform marketecture

Key Focus Areas

<table>
<thead>
<tr>
<th>Business-centric platform services</th>
<th>Our Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leverage SAP’s leadership in the enterprise applications market to offer differentiating business technology platform services that simplify the extension and integration of the intelligent suite with innovative capabilities and third-party solutions</td>
<td></td>
</tr>
</tbody>
</table>

| One unified business technology platform for data, analytics, and intelligence | |
| Connect the listen-understand-act value chain which spreads over different tools from different market categories into one single platform solution with valuable services synergies – demonstrating a platform where the “whole is bigger than the sum of its parts” |

| Partner and developer ecosystem growth | |
| Deliver an open platform and simplify development processes on top of SAP services to accelerate our customers’ and partners’ time-to-market in building new features and applications |
Strategic Aspiration #2: Embed Integration and Innovation Across the Entire Intelligent Suite

Providing a robust business technology platform helps our customers to address their modern platform challenges and empowers them to innovate by focusing on improving business processes and abstracting technical complexity.

As we previously reviewed, in the Experience Economy customers’ expectations to get the maximum value from their business applications is increasing significantly. SAP’s strategy to embed large-scale innovation in the intelligent suite providing maximum value to our customers "out of the box" is extremely important in catering to those expectations.

For this reason, SAP also leverages the business technology platform foundational and advanced technologies internally to deliver customers an intelligent suite with valuable innovation, connect all business processes, and automate repetitive tasks. The role of technology and the related efforts for this strategic aspiration are among our first-order priorities as this enables us to deliver our customers not only a “set of applications” but a suite of intelligent and connected business processes across all LoBs that no other vendor can provide.

Embedding integration and innovation in the intelligent suite will further increase customer satisfaction and adoption of SAP LoB applications. It will also help to indirectly address many of the platform challenges that customers face, for example providing additional time for data scientists when the relevant intelligence is already embedded in applications.

Figure 6 Example of planned end-to-end integrated business processes

<table>
<thead>
<tr>
<th>Key Focus Areas</th>
<th>Our Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Embedded intelligence</td>
<td>Massively embed intelligent technologies such as analytics, ML/AI, IoT, and blockchain in our applications, harnessing them to drive customers’ business outcomes with built-in insights and process automation</td>
</tr>
<tr>
<td>Out-of-the-box integration</td>
<td>Integrate customers’ SAP business processes and data to increase productivity and apply intelligence across the entire value chain, enabled by SAP applications using common master data services and exposing standard APIs</td>
</tr>
<tr>
<td>User Experience</td>
<td>Deliver consistent, augmented, and connected experience services tailored to the emerging user needs of the Experience Economy across the intelligent suite, on both front- and back-office systems</td>
</tr>
</tbody>
</table>
Strategic Aspiration #3: Incubate the Next Generation of Intelligent Enterprise Solutions

SAP’s long-standing leadership in the enterprise application market started with the innovative spirit of our founders and continues with our ability to take data, insights, and technology assets to solve problems our customers encounter every day. Today, our customers face increasing pressure to integrate the latest technologies to allow business process optimization and automation as well as business model innovation in a fast, efficient, and enterprise-grade manner.

Building on our proud history, we continue delivering growth into new markets and constantly reimagine our technology to meet our customers’ changing expectations.

Innovation at scale results not only from using technology but from a combination of human-centric-methodology, technology, and architectural thinking. With the design thinking methodology, we have set the de-facto standard for human-centric innovation. Adding architectural knowledge aligned with the SAP Intelligent Enterprise Framework ensures that created solutions fit together and into the big picture of the intelligent enterprise strategy in the Experience Economy.

As a trusted advisor, we support our customers as they orchestrate the best intelligent technologies to establish a continuous innovation lifecycle which equips them with new differentiating capabilities and enables us to constantly enhance the business technology platform services we deliver. By supporting these efforts, we intend not only to address our customers’ long-term needs but also to unlock similar levels of new market opportunities to those that we have made possible in the decades since we shipped our very first products.

<table>
<thead>
<tr>
<th>Key Focus Areas</th>
<th>Our Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applied research</td>
<td>Explore cutting-edge technologies and business model innovation in key focus areas where SAP could have massive future impact</td>
</tr>
<tr>
<td>Internal and external innovation acceleration</td>
<td>Help innovators inside and outside of SAP to build products, find customers, and change industries</td>
</tr>
<tr>
<td>Customer-centric approach for innovation</td>
<td>Drive enterprise-grade co-innovation projects with customers to design, test-drive, and build advanced intelligent enterprise solutions tailored to their specific business needs. Foster an innovation culture within customer enterprises and leverage the end-to-end use of intelligent technologies to make innovation real.</td>
</tr>
</tbody>
</table>
The Road Ahead...

At SAP we have the pleasure and responsibility to serve our over 437,000 customers resulting in 77% of the world’s transaction revenue touching SAP systems, and 1.8 billion experience touchpoints running on our Qualtrics offerings. This whitepaper covers the platform and technology direction required to serve those and future customers of SAP – describing our key technology and innovation focus areas and how it all comes together under one unified business technology platform to help every intelligent enterprise thrive in the Experience Economy.

Feedback? Great!

You have feedback for this whitepaper? Great! Please share your thoughts with us. Your anonymous, aggregated feedback will then be used to shape the content and direction of further SAP materials.
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