

A Rimini Street White Paper

# Why SAP® Customers Choose Third-Party Support

**Rimini Street**<sup>®</sup>  
Redefining Enterprise Software Support™



#### About Rimini Street, Inc.

Rimini Street is the leading third-party provider of enterprise software support services. The company is redefining enterprise support services with an innovative, award-winning program that enables Oracle and SAP licensees to save 50 percent on annual support fees and save up to 90 percent on total support costs over a decade. Clients can remain on their current software release without any required upgrades or migrations for at least ten years. Hundreds of global, Fortune 500, midmarket, and public sector organizations from virtually all industries have selected Rimini Street as their trusted, independent support provider.

To learn more, please visit [www.riministreet.com](http://www.riministreet.com) or call within the USA 888-870-9692 or internationally 702-839-9671.

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## Executive Summary

Your SAP software is mature and stable and more than supports your business requirements. SAP applications are robust and proven, successfully processing hundreds of thousands of transactions daily and supporting mission-critical operations for tens of thousands of companies around the world. In terms of integration, functionality, and global scope, SAP offers a formidably strong lineup of applications.

### Software Maintenance Costs Are Crippling Your Budget

But a significant pain point for many SAP customers is the total cost of ownership of their software – including the high cost of operating, maintaining and upgrading their SAP applications.

### Strategic Decisions Are Looming

In addition to the high total cost of maintenance, SAP licensees must assess and address several important issues related to their SAP applications, including the uncertainty of future SAP product roadmaps, questions about SAP's ability to deliver real innovation, and a potential “forced march” to future SAP releases and platforms. The urgency is growing for SAP licensees to make critical decisions for their SAP strategy:

- To explore other next-generation enterprise software platforms?
- To stay current on SAP's Enhancement Pack schedule?
- To upgrade or not to upgrade?
- To remain on expensive vendor support that delivers questionable value to the customer but more than 90 percent margins to the software vendor?

In general, you should be asking yourself whether SAP's announced development plans are aligned with your company's real business needs.

### Why SAP Customers Choose Third-Party Support

This white paper surveys the state of SAP applications today, analyzes the strategic roadmap ahead for customers using SAP under SAP annual support, and concludes with actionable recommendations for SAP licensees. Major points:

- Today's proven, robust SAP releases can run your business operations for the next decade and beyond. As an SAP customer you are the beneficiary of decades of continuous product development.
- If you are an SAP Business Suite 7 Customer, there is limited ROI in staying current on SAP's Enhancement Packages. This is shown by the fact that adoption rates of the business process within delivered Enhancement Packages are extremely low.
- If you are an SAP ECC 6.0 customer, there is limited ROI in upgrading to SAP Business Suite.

- You can save millions of dollars by leveraging third-party support to avoid expensive upgrades and reduce maintenance fees and related costs.
- Third-party support helps you reduce risk and avoid vendor lock-in – keeping your options open for future next-generation systems.

### You Have a Choice of Providers for SAP Support

SAP software is world-class, “the best of the best,” and customers love it. But those same customers are straining under the tremendous maintenance cost burden, struggling to justify continuing to pay SAP annual fees where there is in fact little or no demonstrable ROI from those fees.

Third-party support from Rimini Street replaces SAP annual support for your SAP system, enabling you to save 50 percent on annual support fees and up to 90 percent on your total cost of maintenance, including the avoidance of expensive forced upgrades and support for your customized code.

SAP licensees are choosing third-party support from Rimini Street for substantial cost savings, guaranteed ultra-responsive support, premium features and reduced risk – and because today, more than 500 world-class organizations have already validated that third-party support is a proven option.

## The Current State of SAP Applications

### Brief History of SAP

#### What's In a Name?

The history of SAP's name is complicated. The company was originally called Systemanalyse und Programmentwicklung (System Analysis and Program Development or SAP for short). The acronym SAP was later changed in meaning to stand for Systeme, Anwendungen und Produkte in der Datenverarbeitung (Systems, Applications and Products in Data Processing). In 2005 SAP AG became the company's official name.

– *AG is short for Aktiengesellschaft (corporation).*

#### The Early Years: SAP R/1 and R/2

In June 1972 five former IBM engineers in Mannheim, Baden-Württemberg, Germany – Dietmar Hopp, Klaus Tschira, Hans-Werner Hector, Hasso Plattner and Claus Wellenreuther – founded a company that would become known as SAP.

SAP's early focus was on developing standardized application software for real-time data processing; the company's first customer, signed in 1972, was Imperial Chemical Industries (ICI). In 1973 SAP released its first financial accounting software, a module called RF that served as the cornerstone of the system of interlocking software modules that would come to be called SAP R/1. (The "R" of R/1 stood for "realtime," and the "1" indicated it was the first release.)

A hallmark of SAP systems has always been the tight integration and interoperability of its software products, and by 1975 R/1 had expanded to include applications for purchasing, inventory management and invoice verification. A new release in 1980, SAP R/2, added more business functionality and a different – though still mainframe-based – technology foundation.

#### The 1990s: SAP R/3

SAP R/3, with its client/server architecture and graphical user interface (GUI), followed in 1991. While the number "3" in R/3 related to the fact that R/3 was SAP's third major business software release, it also reflected R/3's three-tier client/server architecture: database server, application server and client PC. By the late 1990s SAP was moving its products and customers to the Internet with its mySAP.com solution, an early platform for web-based business processes.

#### The 2000s: New ECC/NetWeaver Technology Platform Leverages Internet Connectivity

SAP R/3 through release 4.6c (2001) consisted of various applications built on top of SAP Basis, SAP's set of middleware programs and tools. In the early 2000s, SAP replaced the Basis architecture with the new SAP Enterprise Central Component (ECC) and the SAP NetWeaver Web Application Server. The new platform was designed to enable SAP customers to take advantage of the possibilities offered by internet-enabled services-oriented architecture (SOA).

The SAP Business Warehouse, Strategic Enterprise Management and Internet Transaction Server were also merged into SAP ECC, allowing users to run them under one instance. Going forward, all SAP applications would be built on top of the ECC/NetWeaver architecture.

#### 2009–Present: SAP Business Suite 7

In 2009 SAP unveiled its Business Suite 7 – a retooling of its major product lines on the ECC/NetWeaver platform. As of this writing, Business Suite 7 is the "current" release, and SAP plans no further incremental upgrades of the suite – that is, there is no "SAP Business Suite 8" in the works. Instead, while leaving the core Business Suite 7 system as stable as possible, SAP delivers periodic

Support Packages and Enhancement Packages containing new technological underpinnings and business functionality that customers can choose to implement or not implement as they wish. (Most SAP customers are choosing to implement only a small portion of the new functionality in SAP Enhancement Packs.)<sup>1</sup>

SAP's software application products for business have been associated with ERP ever since Gartner coined the phrase "Enterprise Resource Planning" in 1990. While SAP ERP 6.0 is still regarded as the company's flagship product, SAP Business Suite 7 includes the following product lines:

- Enterprise Resource Planning (ERP) 6.0 (replaces SAP R/3 ERP 4.6c)
- Customer Relationship Management (CRM) 7.0
- Product Lifecycle Management (PLM) 7.0
- Supply Chain Management (SCM) 7.0
- Supplier Relationship Management (SRM) 7.0

#### **Other SAP Product Offerings**

Other major SAP product offerings include governance, risk and compliance (GRC) solutions; Duet (a joint offering with Microsoft); performance management solutions; and radio-frequency identification (RFID). SAP offers service-oriented architecture capabilities (calling it Enterprise SOA) in the form of web services that are wrapped around its applications.

While its original products were typically used by Fortune 500 companies, SAP now actively targets small and medium-sized enterprises (SME) with its SAP Business One and SAP Business All-in-One offerings.

#### **Strategic Acquisitions**

While SAP's impressive long-term growth has been largely organic, it has occasionally strategically acquired other major software vendors – notably business intelligence solution provider Business Objects for \$6.8 billion USD in 2007, database and mobile platform vendor Sybase for \$5.8 billion USD in 2010, and cloud-based HCM company SuccessFactors for \$3.1 billion USD in 2011.

<sup>1</sup> See, for example, "SAP Enhancement Pack 5 Fact Sheet," Panaya, undated publication. Panaya reports that the most activated Enhancement Pack 5 functionality is in the Financial application area, 22 percent of Panaya's SAP customers having activated SAP New General Ledger Accounting. Adoption percentages of the vast majority of other application areas were in the single digits.

## Vast SAP Product Landscape

Today the SAP product portfolio is comprehensive, robust and well tested by millions of users around the globe. Companies have invested millions of dollars to deploy and support their SAP systems. A comprehensive list of SAP products:

### Business Solutions

- SAP Advanced Planner and Optimizer (APO)
- SAP Analytics
- SAP Apparel and Footwear Solution (AFS)
- SAP Business Information Warehouse (BW)
- SAP Business Intelligence (BI)
- SAP Catalog Content Management (CCM)
- SAP Convergent Charging (CC)
- SAP Enterprise Buyer Professional (EBP)
- SAP Enterprise Learning
- SAP Portal (EP)
- SAP Exchange Infrastructure (XI) (From release 7.0 onwards, SAP XI has been renamed as SAP Process Integration (SAP PI))
- Governance, Risk and Compliance (GRC)
- Enterprise Central Component (ECC)
- SAP HANA (High-performance Analytics Appliance)
- SAP Human Resource Management Systems (HRMS)
- SAP Internet Transaction Server (ITS)
- SAP Incentive and Commission Management (ICM)
- SAP Knowledge Warehouse (KW)
- SAP Manufacturing
- SAP Master Data Management (MDM)
- SAP Rapid Deployment Solutions (RDS)
- SAP Service and Asset Management
- SAP Solutions for Mobile Business
- SAP Solution Composer
- SAP Sourcing
- SAP Strategic Enterprise Management (SEM)
- SAP Test Data Migration Server (TDMS)
- SAP Training and Event Management (TEM)
- SAP NetWeaver Application Server (Web AS)
- SAP xApps
- SAP Supply Chain Performance Management (SCPM)

### Industry Solutions

- SAP for Retail (ISR)
- SAP for Utilities (ISU)
- SAP for Public Sector (IS PSCD)
- SAP for Oil & Gas (IS Oil & Gas)
- SAP for Telecommunications (IST)

### Solutions for Small and Midsize Enterprises

- SAP Business One (6.2, 6.5, 2004, 2005, 2007, 8.8x)
- SAP Business ByDesign[1]
- SAP Business All-in-One

### Platforms and Frameworks

- SAP Enterprise Services Architecture
- SAP NetWeaver Platform
- SAP NetWeaver Portal (formerly SAP Enterprise Portal)
- SAP NetWeaver BW (formerly SAP NetWeaver BI- Since SAP purchased Business Objects the term SAP BI refers to the presentation layer (reporting) tools to avoid confusion between existing SAP BI solutions.)
- SAP NetWeaver Visual Composer
- SAP Auto-ID Infrastructure
- SAP Composite Application Framework
- SAP NetWeaver Development Infrastructure
- SAP Business Connector (deprecated/removed from product range)

### Legacy Platforms

- SAP R/2
- SAP R/3

### Others

- SAP CCMS, monitoring program
- SAPgui
- eCATT
- SAP Central Process Scheduling, process automation and job scheduler
- SAP Solution Manager

### The Future: Cloud, Mobile and In-Memory Computing

Going forward, SAP plans to keep its core ERP applications stable, with little new development. As with the other major enterprise software vendors, SAP's research and development spend as a percentage of its total revenue has declined steeply since 2001.<sup>2</sup> SAP says its R&D focus and investment now and into the future will be on in-memory computing, the Sybase mobility platform and various cloud technologies.<sup>3</sup> For example, SAP is pouring money into the development of HANA (High-Performance Analytics Appliance), an in-memory business intelligence database allowing real-time analytical data processing at extremely high speeds.<sup>4</sup>

There has been some testing of these newer solutions among SAP's customer base, but mainstream adoption, if it occurs at all, is probably years away. In the meantime, SAP customers are looking at the total cost of ownership (TCO) of their SAP system within their overall IT portfolio, evaluating their strategic roadmap, and looking at potential alternatives.

Indeed, whether or not SAP's big data, mobile and cloud initiatives ever gain widespread market traction is an open question. When gauging the potential success or failure of SAP's future plans, it is instructive to recall similar lofty plans that have failed to materialize. For example, look at Business ByDesign, the OnDemand offering from SAP: SAP enthusiastically planned to have 10,000 customers and \$1 billion USD in revenue from Business ByDesign by the year 2010. However, ultimately SAP had to go back to the drawing board with Business ByDesign because of intractable cost-per-user and scalability issues. As of today, there are only 500–600 Business ByDesign customers. Will SAP's HANA, mobile and cloud initiatives fare any better?

Historically, it has taken SAP many years to fully deliver incremental innovation; competitors have often been first to market in a given category. With little future innovation to offer on its flagship ECC 6 ERP package, SAP has announced that Mainstream Maintenance will run through 2020 (see next section). This enables SAP to buy some time to attempt to provide some value with its Enhancement Packages as it tries to invade the technology stack and compete effectively against entrenched giant Oracle in the database market and the gamut of next-generation SaaS providers in modern web-based business applications.

<sup>2</sup> Abridged Mind blog, "The Broken Promise of Software Maintenance Fees," April 29, 2009, <http://abridgedmind.blogspot.com/2009/04/broken-promise-of-software-maintenance.html>, accessed July 11, 2012. "Maintenance fees have come under fire in recent weeks as vendors like SAP and Oracle look to extract 22% annually from customers while providing a questionable return. The implied promise of maintenance fees is that you pay them each year to the vendor in order to fund the ongoing development and enhancement of the product you rely on. The promise is being broken. Badly."

<sup>3</sup> See, for example, Jacquelyn Howard, "SAP continues to push HANA, cloud, mobility," SearchSAP, December 14, 2011, <http://searchsap.techtarget.com/news/2240112511/SAP-continues-to-push-HANA-cloud-mobility>, accessed May 9, 2012.

<sup>4</sup> SAP press release, "SAP Unveils Unified Strategy for Real-Time Data Management to Grow Database Market Leadership," April 10, 2012.

## SAP Support Challenges

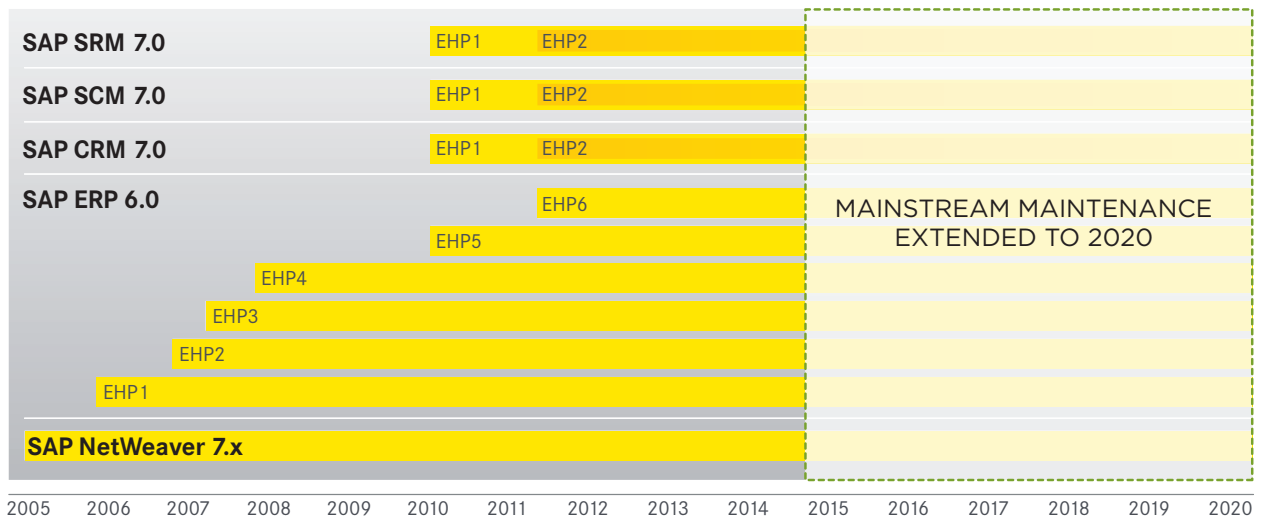
Historically, SAP software releases typically went through a seven-year cycle of “standard” maintenance, at list price, followed by a two-year period of “extended” maintenance at an increased list price.

In 2008 SAP decided to increase support fees across the board to 22 percent annually under the umbrella of “SAP Enterprise Support.” This decision provoked controversy and frustration among users and was the subject of intense discussion among user groups and in the industry press.

The resulting pressure saw SAP and SUGEN (SAP User Group Executive Network) agree to a major benchmarking exercise to prove the value of the new support pricing policy to customers. In December 2009, SAP delayed its Enterprise Support price hikes until agreement had been reached on the benchmarks and KPIs (Key Performance Indicators).

As a result of this benchmarking exercise, in January 2010 SAP reversed its 2008 decision on Enterprise Support price increases and reintroduced its Standard Support package for customers, saying the move was “a demonstration of its commitment to customer satisfaction.”<sup>5</sup> The move to reinstate Standard Support (now called “Mainstream Maintenance” through 2020 – at 18 percent of annual license fees – “will enable all customers to choose the option that best meets their requirements,” the company said. SAP will continue to ladder the Enterprise Support fees upward to 22 percent over the next few years.

### SAP Business Suite 7: Core Applications



Under SAP’s current maintenance policies, it will continue to support the core applications of Business Suite 7 as well as NetWeaver 7.x until December 2020. As that date approaches, annual fees will notch upward to 22 percent. Source: Eric van Rossum and Bertram Schulte, “SAP Business Suite Innovation Strategy and Road Map,” SAP AG, 2011.

<sup>5</sup> SAP, “SAP Expands Maintenance and Support Portfolio, Offering Choice, Predictable Pricing and Best Value To All Customers Globally: Announces Availability of Tiered Support Program; Maintains SAP® Enterprise Support Pricing for 2010,” press release, January 14, 2010.

**Acknowledged Industry Leadership**

Industry analysts from Forrester Research, Gartner, Altimeter Group, Nucleus and AMR Research recognize Rimini Street as the leader in third-party enterprise software support.

### With Third-Party Support, SAP Customers Now Have Options With Their SAP Investment

SAP's support model dates back to the 1990s, when enterprise software customers gladly paid, in the form of annual maintenance fees, a hefty percentage of their original software license fees in the expectation that SAP's development organization would continue to flesh out the business functionality of a still-incomplete product set. Now that SAP applications have reached full maturity, customers and analysts are saying that the old maintenance value equation has changed. Today, customers may be more reluctant to pay full vendor annual maintenance fees on aging systems, because innovation on those platforms has effectively plateaued.

Times have changed and in today's market SAP customers have a choice of maintenance providers. Enhancement Packages implemented and upgrades undertaken just to "stay current" under the vendor's support program are no longer necessary. Your SAP asset is robust, comprehensive and fully functional with limited additional value being added to the core applications. The software is now nearly 20 years old and has been used extensively by millions of users throughout the world to process billions of dollars of transactions. After two decades of continuous development, innovation within the core business processes used by the vast majority of SAP customers may have reached its limits.

### The Third-Party Support Option

Rimini Street Support replaces vendor annual support with guaranteed savings of 50 percent while providing an ultra-responsive support program with premium services. Our program is designed for enterprise software customers that want better value for their annual maintenance fees. Rimini Street enables you to save up to 90 percent on your total support costs over a decade, and to remain on your current software release without any required upgrades or migrations for five, 10 years or more.

When you switch to Rimini Street Support you can:

- Save 50 percent over your current annual support fees.
- Remain on your current SAP release for as long as you wish – five, 10 years or more.
- Receive timely one-off fixes, all tax, legal and regulatory compliance updates, and support for your customizations.
- Retain the option of upgrading to at a later date – but you'll upgrade only if and when it makes sense for your business, not just because the vendor wants you to.

## Choices for Your Strategic Roadmap

SAP has been developing a roadmap that it promotes as “The SAP Way: SAP Business Suite Innovation Roadmap,” claiming that it offers enterprise software customers “the future-proof choice.”<sup>6</sup> Essentially, SAP’s roadmap is an optimistic plan for getting you to HANA and the other technologies it is currently developing. In its roadmap, SAP claims it will offer “more innovation,” “less disruption,” and “long-term predictability.” We summarize SAP’s plan for you in the table below, and introduce a different option: Rimini Street Support. At the end of this white paper we will return to this table with further analysis and commentary:

Choice #1: SAP Roadmap for You	Description
“More Innovation”	SAP recommends staying current with SAP “innovations,” which it categorizes into “evolutionary innovations” and “breakthrough innovations.” Claimed evolutionary innovations include the further development of existing business processes and the user experience, as well as an emphasis on total cost of ownership (TCO). Claimed breakthrough innovations are defined as “radically improved or new functionality” such as HANA, mobile computing and cloud computing.
“Less Disruption”	Noting that customers wish to avoid cost, time and resource drains while adopting new innovations, SAP claims that it will deliver innovations “continuously and non-disruptively.”
“Long-Term Predictability”	As proof of its claim that SAP is “the future-proof choice,” SAP touts the fact that it has extended its Mainstream Maintenance for core applications of SAP Business Suite 7 by five years, through December 2020.
Choice #2: Rimini Street Support	Description
Maximize the Value of Your Current SAP Release via Third-Party Support	With Rimini Street you can remain on your current software release without any required enhancements or upgrades for the next decade and beyond. Save 50 percent on annual support fees, avoid expensive Enhancement Packages and upgrades, and receive more responsive, relevant support for your SAP applications.

Let’s take a closer look at each benefit claimed by SAP in its roadmap for your future, carefully separating SAP’s finely honed marketing language and speculative future “vision” from reality.

<sup>6</sup> Eric van Rossum and Bertram Schulte, “SAP Business Suite Innovation Strategy and Road Map,” SAP AG, 2011.

“More Innovation” (SAP Roadmap Part 1):

#### “Waves of Innovation” or Vendor Lock-In?

SAP paints a picture of its customers today moving through successive waves of innovation into the future:<sup>7</sup>

- **Today: Increase customer-driven innovation** – SAP is stressing its cloud and mobile offerings it claims will help lay the groundwork for further innovations to come. In addition, SAP touts its enhanced user interface, as well as its Customer Connection program which is purportedly aimed at giving SAP customers more of a voice in the company’s future R&D.
- **Wave I: Value through innovations** – SAP wants you to invest in new functionality, citing “mobile devices as the new desktop,” HANA Accelerators and enhanced analytics.
- **Wave II: Value through Business Suite on HANA DB** – In the second wave, SAP sees you adopting new functionality either natively on its HANA database or side-by-side with your existing database.
- **The Future: Value through native HANA innovation** – SAP’s vision involves an eventual wholesale migration to the HANA platform: you’ll rip out your existing Oracle or other database, replace it with HANA, and commit to SAP’s plan to deliver new and existing functionality as native HANA applications.

What’s wrong with this picture? Here are the facts:

- **In reality, the future of enterprise software is very much in doubt.** The truth is that the enterprise software industry is in turmoil, facing multiple inflection points and paradigm shifts. Many outcomes are clearly within the realm of possibility, but no reasonable, credible person outside the sales and marketing departments of the big software vendors will tell you they know exactly what the future holds.
- **SAP is facing severe competition and the ultimate outcome is uncertain.** Yes, SAP is investing heavily in its HANA, cloud and mobile capabilities. But meanwhile, Oracle is investing heavily in its Fusion platform and assorted “Red Stack” software, middleware and hardware, and is slowly developing its own cloud and mobile landscapes. And around the world, small up-and-coming firms are rapidly bringing to market a range of truly innovative technologies that may ultimately drive the traditional big legacy vendors out of business – just as today’s legacy vendors drove hugely successful incumbents like mainframe software vendor Dun & Bradstreet out of business in the 1990s with the disruptive innovation of client/server architecture.

<sup>7</sup> Eric van Rossum and Bertram Schulte, “SAP Business Suite Innovation Strategy and Road Map,” SAPAG, 2011.

- **Beware of choosing a winner of the current platform wars just as the first skirmishes are getting started.** One industry observer, focusing on current trends in analytics and big data and noting the strident claims and counter-claims issuing from SAP and Oracle regarding the alleged superiority of their respective technologies and approaches, rhetorically asks, “With so many accusations flying back and forth, but little hard data to go on, what is a would-be buyer supposed to think?”<sup>8</sup> You might want to wait until some of the dust settles from the database/platform wars before committing your company to the roadmap laid down for you by any one particular vendor.

<sup>8</sup> Amanda Andonian, “Oracle vs SAP? How the Hardware Giant Might Be Losing Ground in Analytics and Big Data,” *Business-Software.com*, May 2, 2012, <http://www.business-software.com/blog/oracle-vs-sap-how-the-hardware-giant-might-be-losing-ground-in-analytics-and-big-data/>, accessed May 9, 2012.

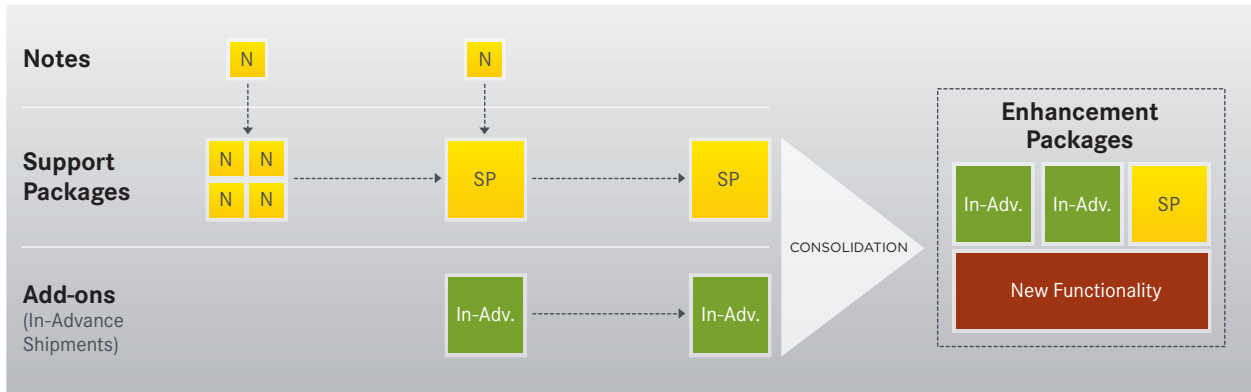
“Less Disruption” (SAP Roadmap Part 2):

**Are Enhancement Packages and Upgrades Really Non-Disruptive?**

SAP’s current “Innovation Delivery Model” is multilayered:

1. Individual Notes roll up into Support Packages (quarterly delivery).
2. Support Packages and Add-On In-Advance Shipments are consolidated into Enhancement Packages (delivery roughly every two years).

**SAP Innovation Delivery Model**



Source: Eric van Rossum and Bertram Schulte, “SAP Business Suite Innovation Strategy and Road Map,” SAP AG, 2011.

**Keeping Up With SAP Support Packages Is Expensive**

A recent study by Panaya reported that “The effort involved in implementing [SAP] Support Packages is quite considerable, reaching an average of 73 person days per support package.”<sup>9</sup> Do the math: at \$1,000 a day, 73 person days equals \$73,000 per Support Package; if SAP delivers 20 Support Packages per year, the total cost of applying and testing them comes to \$1,460,000 per year.

Noting that customers wish to avoid cost, time and resource drains while adopting innovations, SAP claims that it will deliver innovations “continuously” and “non-disruptively.”

- **“Continuously”?** **Yes.** SAP’s timetable for delivering innovations is indeed “continuous” through 2020 and beyond: user interface changes, line-of-business and industry enhancements, accelerators, analytics, mobile applications, cloud services involving virtualization and B2B networks, and so on. The more technical “innovations” you apply to your SAP system, the greater risk of vendor-lock in you run. Further, customers are warily aware that resources SAP spends on next-generation innovations are resources it cannot spend on improving Business Suite 7 core applications.
- **“Non-disruptively”?** **Doubtful.** SAP claims it will deliver its innovations non-disruptively. But customers are still faced with significant ROI and resource challenges vis-à-vis Support Packages, Enhancement Packages, and other components of SAP’s delivery model. For example, SAP Support Packages present a very uncertain value proposition (see left sidebar). Rimini Street Support eliminates the expensive burden of applying and testing all of SAP’s bulky Support Packages.

<sup>9</sup> “2009 SAP® Support Practices Benchmark Survey,” Panaya, Inc., 2009.

If stabilizing on and maximizing your already enormous investment in your current robust, fully functional SAP business applications is your goal, then it is in your best interests to explore the freedom from software vendor agendas that is opened up by the third-party support option.

SAP's roadmap for your business is best characterized not as "continuous and non-disruptive delivery of innovation" but rather as "continuous disruption and expense resulting from early buy-in to one software vendor's agenda, with highly uncertain ROI." In contrast, Rimini Street streamlines the support process, delivering only the software fixes and compliance updates you need. Rimini Street's personalized support methodology lets you redeploy valuable resources or achieve significant savings.

“Long-Term Predictability” (SAP Roadmap Part 3):

### Is the Success of Any Major New Technology Platform Initiative Ever Predictable?

SAP points to the fact that it has extended Mainstream Maintenance for its Business Suite core applications through December 2020, claiming that this “manifest[s] the long-term predictability of the Business Suite.”<sup>10</sup>

However, as we explain in this white paper and as many industry observers have noted, whether or not SAP’s development initiatives in big data, mobile delivery and cloud computing ultimately succeed is radically unpredictable. What is, in fact, predictable to the point of certainty is that you will pay increasing annual maintenance fees for the next eight years and that you will continue to receive the same lackluster level of service responsiveness that you have become accustomed to from SAP.

Key points when assessing whether SAP’s roadmap really offers “long-term predictability”:

- **Vision is not reality.** It’s a long way from vision (vaporware) to reality (development, testing, and mass adoption, in the real world, of the major elements of a new software platform).
- **Vague future-looking statements are not reality.** In an email about its April 10, 2012 press conference promoting its “unified strategy for real-time data management to grow database market leadership,” SAP said it “intends to become the #2 database vendor by 2015.”<sup>11</sup> SAP’s accompanying press release is dotted with optimistic if vague forward-looking statements: “is envisioned to become,” “is planned to be the core,” “is intended as a supported option,” and so on.<sup>12</sup>

While we are not faulting SAP for what various observers have called its “boldness”<sup>13</sup> and “spunk”<sup>14</sup> in promulgating a vision of itself as a legitimate contender with Oracle in the database market, we are emphatically pointing out that a vision is very different from reality. To say you have a vision is one thing; to claim your vision will pan out over the long term in a highly predictable fashion is something completely different.

<sup>10</sup> The “core applications” as defined by SAP are: SAP ERP 6.0, SAP PLM 7.0, SAP CRM 7.0, SAP SCM 7.0 and SAP SRM 7.0. Eric van Rossum and Bertram Schulte, “SAP Business Suite Innovation Strategy and Road Map,” SAP AG, 2011.

<sup>11</sup> Barb Darrow, “SAP to Oracle: ‘I will drink your milkshake,’” *gigaom*, April 10, 2012, <http://gigaom.com/cloud/sap-to-oracle-i-will-drink-your-milkshake/>, accessed May 9, 2012.

<sup>12</sup> SAP press release, “SAP Unveils Unified Strategy for Real-Time Data Management to Grow Database Market Leadership,” April 10, 2012.

<sup>13</sup> Fritz Nelson, “SAP’s Bold Bet: Rule Cloud, Mobile, Big Data,” *InformationWeek*, February 2, 2012, [http://www.informationweek.com/news/software/enterprise\\_apps/232600164](http://www.informationweek.com/news/software/enterprise_apps/232600164), accessed May 10, 2012.

<sup>14</sup> Barb Darrow, “SAP to Oracle: ‘I will drink your milkshake,’” *gigaom*, April 10, 2012, <http://gigaom.com/cloud/sap-to-oracle-i-will-drink-your-milkshake/>, accessed May 9, 2012.

It's natural that software vendors paint a rosy picture of the future success of their development projects; but software vendors, and SAP in particular, are often notoriously (and unrealistically) optimistic about the future prospects and real-world value to customers of their product offerings.<sup>15</sup>

Recall, for example, SAP's stumbles with the rollout of Business ByDesign mentioned above: easily forgiven marketing bravado gone wrong or serious market error and business miscalculation? Regardless, such missteps bespeak the risk of putting too much faith – and money – into any of SAP's sweeping visions for the future. When considering the very modest adoption rates of Business ByDesign, one must ask whether SAP HANA, the Sybase mobile platform, and SAP's cloud offerings will be any more successful.

Remember, you have a choice of annual enterprise software maintenance providers. With third-party support you can sit out the platform wars until 2020, accruing enough money from your savings to buy a shiny new SAP system several times over; and you can be sure SAP will be doing everything in its power to win you back as a full-maintenance-paying customer.

<sup>15</sup> Oracle's Larry Ellison, in a quarterly analyst conference call on March 12, 2012, said, "When SAP, and, specifically Hasso Plattner, said they're going to build this in-memory database and compete with Oracle, I said, 'God, get me the name of that pharmacist, they must be on drugs.'" Julie Bort, "Larry Ellison Says SAP 'Must Be On Drugs' To Think It Will Hurt Oracle," *Business Insider*, March 21, 2012, [http://articles.businessinsider.com/2012-03-21/news/31218831\\_1\\_database-hasso-plattner-timesten](http://articles.businessinsider.com/2012-03-21/news/31218831_1_database-hasso-plattner-timesten), accessed May 10, 2012.

## SAP Customers Have Strategic Decisions to Make

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“The most common reason we hear for deferring an upgrade is the lack of a convincing business case.”

– Paul Hamerman, Forrester Research, “Application Upgrades: How to Make Upgrade Decisions When Business Value Proves Elusive,” June 25, 2010

SAP licensees considering their strategic application roadmap going forward should reckon their total cost of ownership for SAP products and be aware that:

- Mainstream Maintenance fees are steadily going up over the next few years – eventually to 22 percent.
- There is limited value in new enhancements and upgrades, given the maturity of the SAP product.
- Much of today’s red-hot innovation is coming from smaller, nimbler firms – not from SAP and the other large business software vendors. This is familiar pattern in the history of software: up-and-coming players are inherently able to offer more cutting-edge creativity, more disruptive technologies, and innovation that’s better, faster and cheaper than large incumbent legacy firms.<sup>16</sup>

Going forward, you need to decide: To stay current on SAP Enhancement Packages or not? To upgrade or not to upgrade? To stay with your current SAP applications, move towards HANA, or explore other next-generation platforms? To remain on expensive vendor support that delivers questionable value, or to keep strategic options open and accrue funds incrementally towards innovative IT initiatives with savings from third-party support?

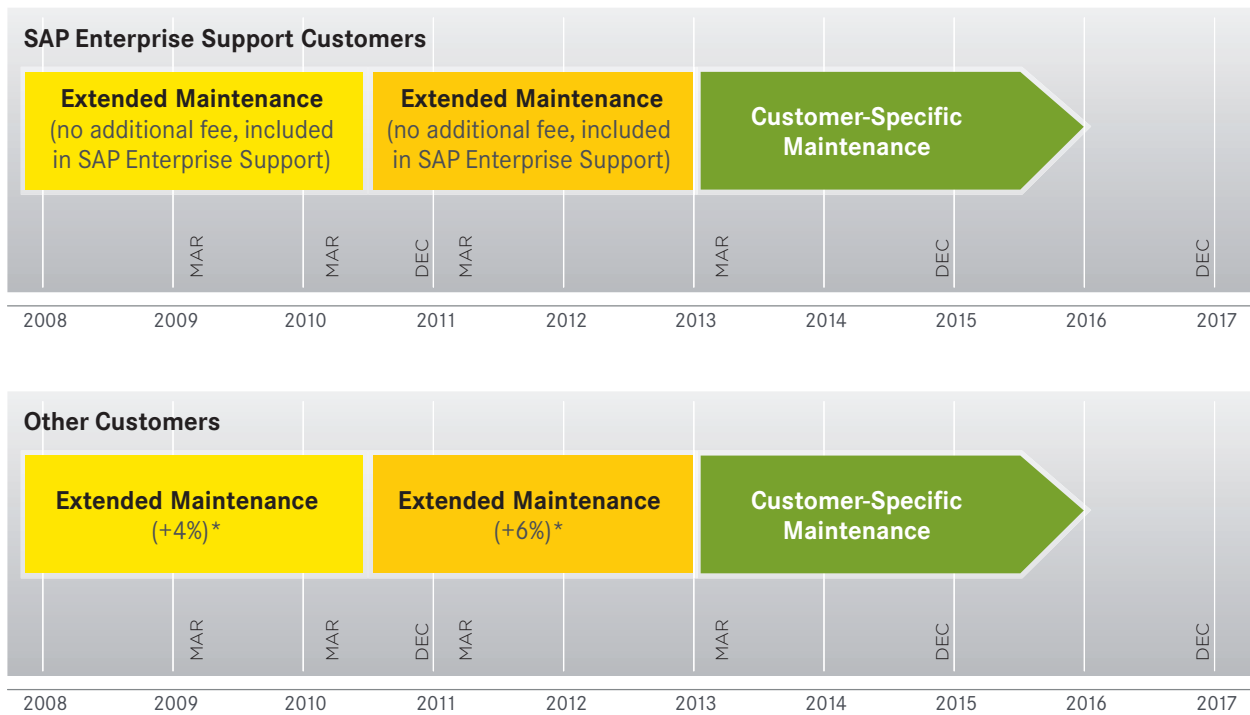
The remainder of this white paper is designed to give you information you need to help you make the best decisions for your business and derive the maximum possible value from the enormous investment you have already made in your SAP system. Let’s look at possible strategic roadmaps for customers running specific SAP releases.

<sup>16</sup> Clayton M. Christensen, *The Innovator’s Dilemma, First HarperBusiness Essentials edition, 2003.*

## Considerations for Older and Newer SAP Releases

Let's look in a bit more detail at the situation facing SAP customers on R/3 4.x, and then consider customers on newer SAP releases: ECC 6.0 and earlier, Business Suite 7 and BW 3.5.

### Customers on SAP R/3 4.x



Source: "Upgrading to SAP ERP: Frequently Asked Questions for Customers of SAP Software," SAP AG, 2010.

Mainstream Maintenance for SAP R/3 4.6C ended in December 2006, with Extended Maintenance offered until the end of March 2013.

- For SAP Enterprise Support customers, extended maintenance for SAP R/3 4.6C is included in SAP Enterprise Support.
- For customers on other support models, an additional fee applies (an additional 6 percent per year from January 2011 to March 2013). SAP customers should carefully consider what they are getting in return for these expensive maintenance fees.

Beginning in April 2013, SAP will provide Customer Specific Maintenance for SAP R/3 4.6C. Note that prices could increase beyond 22 percent based on consumer price index (CPI) adjustments. And note that Customer Specific Maintenance does not include:

- Support Packages
- Tax, legal and regulatory updates (SAP offers to build customer-specific legal change packages at extra cost to the customer)
- Major technology upgrades
- Customer-specific problem resolution

As SAP itself points out, Customer Specific Maintenance can carry certain potential consequences for the customer:

- Reduced flexibility for your technology stack
- Risk of being out of legal compliance
- Risk of extra charge for problem resolutions
- Risk of getting no problem resolution<sup>17</sup>

### Thinking of Upgrading to Business Suite 7?

Extended Maintenance for SAP R/3 4.x ends in March 2013, and customers on these releases may be considering upgrading to Business Suite 7. However, getting to Business Suite 7 from early releases is likely to be complex and costly; there is no direct upgrade path to HANA and other new SAP technologies; and many customers struggle to find sufficient business value to justify the upgrade to Business Suite 7. And subsequently upgrading from Business Suite 7 to SAP's next-generation offerings will be even more complex and expensive.

Most organizations running these early releases have heavily modified their SAP systems with application customizations, standalone custom programs, and entire bolt-on applications that address their unique business requirements. If you are considering upgrading to SAP Business Suite 7 you will want to carefully evaluate the totality of your customizations and weigh the cost of redoing them all under a new architecture.

If you are an SAP customer on one of these mature releases, your options are:

- **Pay full price (22 percent plus CPI increases) for Customer Specific Maintenance** – and receive the attendant reduced service levels.
- **Upgrade to SAP Business Suite 7 or continue down the Enhancement Pack road** – but with the awareness that upgrading may not deliver the business value to justify the cost.
- **Move to third-party support** where you will have more time (and more money) to weigh all of your options carefully.

<sup>17</sup> Dr. Uwe Hommel, "Customer Specific Maintenance: What does it mean?," SAP AG, [http://www.sap.com/korea/services/pdf/AGS\\_Customer\\_Specific\\_Maintenance.pdf](http://www.sap.com/korea/services/pdf/AGS_Customer_Specific_Maintenance.pdf), accessed May 15, 2012.

### Customers on SAP ECC 6.0 and Earlier, SAP Business Suite 7 and SAP BW 3.5

SAP Business Suite 7 went GA in 2009 with its core functionality for ERP, PLM, SRM, SCM and CRM. The first set of Enhancement Packages (EHP 1) designed to be applied across Business Suite 7 core applications has been available since May 2011; Enhancement Packages 2–6 have been released beginning in November 2011.

Mainstream Maintenance for these releases has been extended to the end of December 2020, with annual fees laddering upward to 22 percent.

Key points:

- These SAP releases are “current,” stable, functionally complete and widely used.
- Going forward, analysts believe the likelihood of your receiving material enhancements from SAP on top of these latest SAP releases is very low.

If you are an SAP customer on one of these releases on Mainstream Maintenance, you are paying full price for annual support. Your options are:

- **Stay completely current** by implementing all Enhancement Packs and moving aggressively in the direction of SAP’s initiatives in in-memory computing, mobile delivery, and cloud services. As explained at length in this white paper, this is a high-cost, high-risk approach.
- **Take a “middle path” of selectively implementing** only SAP-delivered functionality that will have a verifiable ROI. In this scenario, you will still be paying the vendor’s premium price for support and receiving the same lackluster quality of support.
- **Move to third-party support** where you will have more time (and more money) to weigh all of your options carefully, and will enjoy the most ultra-responsive support in the industry plus fixes for your customizations at no extra charge.

Let’s step back from specific releases to consider how the current software vendor support model may be putting organizations running any SAP release at risk.

## The Software Vendor Support Model Is Expensive and Outdated

### Closing of Support Window Is #1 Motivator for Upgrading — Not ROI or New Functionality

“Vendor-imposed end-of-support deadlines were one of the driving forces for considering an upgrade for 95 percent of the respondents who are considering upgrades.”

– R. “Ray” Wang, “Enhancement Packages Improve SAP Upgrade Value,” *Forrester*, May 29, 2008

Organizations upgrade and keep their SAP software current for various reasons including perceived ROI, new business functionality, a desire to move to SOA or some other new technology, and a desire to stay on the SAP-approved path to future applications and technology platforms. But these are all secondary reasons. What’s the main reason? According to analysts, the number-one reason for considering an upgrade is facing the end of maintenance support.

To appreciate the absurdity of this situation, imagine you have bought a new car that is now three years old. The automobile dealer’s warranty runs out (“the support window closes”) after three years, and the dealer informs you that you are now required to upgrade to a new car. In the real world, of course, you have the freedom to take your car to your local independent mechanic and receive more value for your dollar as well as more personalized service; third-party enterprise software support can provide a similar value to SAP licensees approaching their Maintenance End Date (MED).

“We believe ERP software has matured as a product thus delaying the necessity for upgrades and mitigating the need to pay for upgrade rights.”

– Peter Goldmacher, *Cowen & Company*, “Maintenance Revenue: High Margin or High Risk?,” September 2009

### Fairness and Relevance of Vendor Support Model Questioned

The big software vendors have enjoyed a virtual monopoly on support services for their products, and with today’s 90 percent profit margins for the vendor on its support operations, for every 10 support dollars you pay the vendor, the vendor spends only one dollar on actual support. Customers are coming to the conclusion that the vendor support model is at best dated – and at worst obsolete and grossly unfair to the enterprise software license.

And industry analysts agree: you are spending too much on enterprise software annual support and receiving limited value in return. Ongoing maintenance costs typically consume 80 percent of IT budgets, which constrains IT effectiveness and limits innovation.<sup>18</sup>

<sup>18</sup> “Most IT organizations are allocating 80 percent their budgets to ‘keep the lights on’ expenses. The other 20 percent of IT spending is for activities that grow and transform the business.” *Gartner, “Gartner’s Top Predictions for IT Organizations and Users, 2012 and Beyond: Control Slips Away,” November 23, 2011, p. 18.*

### **Innovation Is Coming from Smaller, More Agile Firms**

“Despite hundreds of billions wasted on failed research and development projects, most market influencers would agree that enterprise software vendors have produced a dearth of innovation over the past decade ... Innovations came from the consumer tech side and next-generation solution providers.”

– R. “Ray” Wang, *SoftwareInsider*, October 4, 2010

### **Customer Frustration Over High Cost of Upgrading**

“Of those users questioned 70 percent still felt that the cost of upgrading was too high, particularly at a time when many organisations are facing reductions in IT budgets.”

– *SAP UK & Ireland User Group Survey*, 2009

## Software Vendor Support Model Does Not Address Majority of Issues

Yet despite its high cost and outrageous vendor profit margins, the software vendor support model doesn’t address the most important issues impacting your mature SAP software. For example, standard vendor support programs do not support customized code; however, 65 percent of all issues submitted to Rimini Street relate to code modified by the customer. Simply put, today’s vendor support model is irrelevant to the majority of support issues submitted. In stark contrast, Rimini Street’s coverage of the client’s customized code at no additional charge is another example of the kind of value that is driving SAP licensees to third-party support in record numbers.

### Is SAP Support Putting Your Business at Risk?

After decades of maturation, the industry is now re-assessing the value and fairness of an irrelevant vendor support model that may be putting your business at risk. Consider the real, major financial and business risks you run when you remain with today’s outdated vendor support programs:

#### **Risk: Vendor Lock-In Limits Flexibility**

Every Enhancement Package and upgrade you deploy may further lock you into SAP’s application and technology stack offerings. Every enhancement and upgrade may add technology stack components to your infrastructure, and may commit you further to the vendor’s future systems through the adoption of proprietary technology from the vendor. This severely limits your flexibility down the road in choosing the next-generation systems that best fit your needs. In effect, whether you know it or not, you are picking a winner before the race even starts.

#### **Risk: New Platform Development Is Uncertain**

SAP’s suggested roadmap forces expensive upgrades and maintenance fees until you deploy SAP’s next-generation solutions. But remember there is a significant risk in early adoption or commitment to unproven new platforms: not all ERP vendor development, especially on new platforms, is a success. Organizations that commit to unproven new platforms by early adoption are incurring significant risk.

#### **Risk: Expensive Enhancement Packages and Upgrades Limit Innovation**

SAP’s suggested path of “continuous” change forces you to stretch limited resources and pay expensive maintenance fees until you eventually deploy your next-generation SAP system. ROI comes from real business value, not perceived benefit. As the system owner, you can take control back from the vendor by exploring your support choices and aligning your business to answer the question: What is our future roadmap for our SAP implementation?

## Rimini Street Support vs. SAP Support

Standard Support Program Feature	Rimini Street	SAP
Named, Regional Primary Support Engineer for Each Client	■	
24/7 Support with Guaranteed 30 Minutes or Less Response	■	
Global Tax, Legal & Regulatory Updates	■	■
Installation & Upgrade Process Support	■	■
Configuration Support	■	■
Operational Support	■	■
Application & Repository Fixes	■	■
Documentation Fixes	■	■
Customization Fixes	■	
Performance Support	■	
Interoperability Support	■	
More Than 50 Percent Annual Cost Savings	■	
Flexible Coverage Periods & Payment Terms	■	

## Next Steps: You Have a Choice of Annual Support Providers

### Choice #1: Remain on SAP Support and Follow SAP's Strategic Roadmap

The following table sums up the previous discussions, with our comments on each component of SAP's roadmap:

Choice #1: SAP Roadmap for You	Description
<p><b>"More Innovation"?</b></p>	<p>SAP recommends staying current with SAP "innovations," which it categorizes into "evolutionary innovations" and "breakthrough innovations."</p> <p><i>SAP does not have a stellar track record for innovation. If you choose to go down the SAP path now, you are gambling on choosing the winner just as the real race for next-generation solutions among SAP, Oracle and more modern cloud and mobile vendors is just getting started.</i></p>
<p><b>"Less Disruption"?</b></p>	<p>Noting that customers wish to avoid cost, time and resource drains while adopting new innovations, SAP claims that it will deliver innovations "continuously and non-disruptively."</p> <p><i>SAP's roadmap for your business is best characterized not as "continuous and non-disruptive delivery of innovation" but rather as "continuous disruption and expense resulting from early buy-in to one software vendor's agenda, with highly uncertain ROI."</i></p>
<p><b>"Long-Term Predictability"?</b></p>	<p>As proof of its claim that SAP is "the future-proof choice," SAP touts the fact that it has extended its Mainstream Maintenance for core applications of SAP Business Suite 7 by five years, through December 2020.</p> <p><i>The market success of SAP HANA and SAP's other initiatives, as well as their potential bottom-line benefit to your company, are not, in fact, predictable. What is predictable – as predictable as death and taxes – is that you will pay increasing annual maintenance fees for the next eight years and continue to receive the lackluster support from SAP that you have already become accustomed to.</i></p>

“Our decision to go with Rimini Street for our support needs was simple. They offered us a level of care at or above what we were currently seeing with SAP and Oracle at a fraction of the price.”

– Jesse Mitchell, Wenger Manufacturing

## Choice #2: Move to Rimini Street Support, Realize Immediate Value, and Plan Your Strategy on Your Own Terms

Hundreds of world-class organizations are saying “No” to SAP’s outmoded support model and are exercising their right to select the annual support provider that best fits their needs and budget.

Third-party support from Rimini Street replaces your annual support program from the software vendor. Rimini Street provides all your needed bug fixes so you can continue to cost-effectively run your SAP applications for the next decade or longer with no required upgrades. SAP customers choose third-party support from Rimini Street for:

- **Substantial cost savings** – guaranteed savings of 50 percent over vendor annual support fees.
- **Premium, relevant, cutting-edge service model** – guaranteed ultra-responsive support and premium features – such as support for customizations, interoperability and performance tuning – all at no additional cost
- **Greater strategic flexibility** – Rimini Street can help you avoid costly upgrades, extend the life of your current, stable SAP release, and reduce risk as you position yourself for the next proven technology platform.

Many organizations utilize third-party support as a key aspect of their application strategy, leveraging the savings from third-party support to address real business problems around their SAP systems while evaluating new application platforms at their own measured, deliberate pace – not according to the vendor’s release timeline and agenda.

If you, on the other hand, choose to move down the path of total commitment to the vendor and its support program now, you may be putting your future business options at risk. If you simply accept the vendor’s roadmap for your IT future, you may incur substantial additional costs and lose most of your strategic flexibility, because you may find yourself inextricably enmeshed in the vendor’s technology stack, applications and support programs for the foreseeable future.

“The packaged software maintenance model is broken. Don’t reward software vendors for it by staying on their upgrade treadmill at their arbitrary 18 or 22 percent a year of software ‘license value.’ ...”

– Vinnie Mirchandani, *Deal Architect*,  
September 26, 2010

“Customers can save millions of dollars if they have a viable third-party alternative to applications support and can postpone the move to Fusion. This is a huge opportunity for Rimini Street and massive problem for Oracle.”

– Peter Goldmacher, *Cowen & Company*,  
“*Industry Outlook: What If the HP Board Isn’t Incompetent?*,” October 19, 2010

### Recommendations for SAP Licensees

- **Move to third-party support** – Wait until SAP’s next-generation offerings are better defined and generally available; defer enhancements and upgrades for now; save your maintenance fees and the costs of continuously implementing new software; and run your SAP apps with third-party support from Rimini Street.
- **Maximize the value of current releases** – Extend the longevity of your established SAP applications and don’t take enhancements or upgrades that have zero business value.
- **Avoid forced upgrades due to vendor support timelines** – But know that you can upgrade to currently available versions of SAP under Rimini Street Support if you wish.
- **Use your savings from third-party support** to address real business problems around your SAP system such as ongoing innovation and ever-changing business requirements.
- **Do a thorough ROI study of SAP’s new offerings as they become available**, compare them to other available solutions, and select the best next-generation system for your business once it has been fully built, deployed and tested.

“The impact on Color Spot’s business from switching to Rimini Street Support? Zero impact. For me it’s basically business as usual, except I have more money in my pocket.”

– *Eric Robinson, Director of IT,  
Color Spot Nurseries*

## Appendix

### Rimini Street Client Spotlight: Leaving SAP Support Does Not Mean Abandoning SAP

Getting off the vendor’s support program does not mean shutting down your relationship with the vendor. Rimini Street client Color Spot Nurseries’ Director of IT Eric Robinson answers the question “How has switching to Rimini Street affected your relationship with SAP?”: “Color Spot’s relationship with SAP has changed in that we no longer have an SAP account team. However, we are a licensed user just like everyone else and we plan to buy additional product licenses from SAP, such as CRM, just like everyone else. With SAP we had 10 SAP Account Executives in 10 years, and consequently I never had a chance to build a real relationship with any of them – so nothing has changed at all in that respect. I still have access to SAP Service Marketplace to perform necessities like registering objects and adding developers – and even looking at OSS notes (without the ability to download).”

Benefits of Rimini Street Support:

- **Mission-critical savings.** Color Spot has exceeded its cost reduction goals through significant reduction in support fees.
- **Personalized, expert support.** Rimini Street provides meaningful consultative dialogue with an experienced Level 3 engineer dedicated to go above and beyond to achieve client success.
- **Ultra-responsive service.** Color Spot Nurseries realizes 24/7/365 coverage with guaranteed 30-minute-or-less response.
- **Deep SAP Expertise.** The Rimini Street team has years of proven SAP software support experience.

