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SAP SPECIALTY PRACTICE

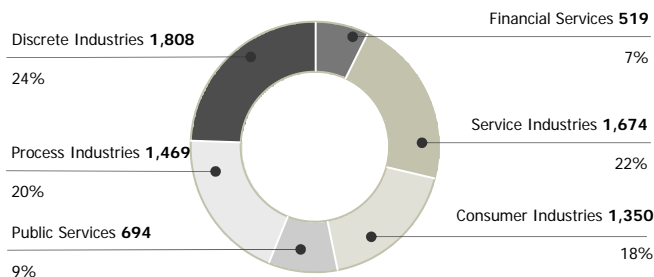
Celera Partners has a dedicated SAP executive search practice helping clients leverage their SAP investments and enhance their position within the SAP ecosystem. SAP marketing claims “the best-run businesses run SAP.” According to SAP’s own market share assessment, in 2005 it increased its commanding global peer group market share by 7% over the year to 62% with continued impressive market share gains anticipated through 2006-2008. SAP has twelve million users across 100,600 installations with more than 29,800 customers in 120 countries. SAP is the world’s largest enterprise application software company serving 25 five industry sectors boasting a vast ecosystem that includes 1,500 partners with over 180,000 partner certificates. SAP specializes in providing its customers with solutions for end-to-end business processes that aim to integrate people, information, and processes within the company and beyond to foster growth, drive innovation and create value.

SAP’s Dominant Market Position –

SAP’s software solutions are ubiquitous at worldwide enterprises. SAP’s dominant market position within the Service, Consumer, Process, and Discrete Industries is particularly noteworthy. In the A&D sector, twenty of the top twenty five Defense firms worldwide run SAP. SAP has 2,085 CPG Industry customers worldwide: eight out of ten in the food segment and nine out of ten in the beverage, personal care, apparel and dairy/tobacco use SAP. SAP virtually owns the Life Sciences sector: nineteen out of the top twenty global pharmaceutical companies run SAP; six of the top ten Biotechnology companies use SAP; and seven of the top eleven Medical Device and Supply companies run SAP. SAP dominates the Energy sector with more than 1,500 customers worldwide. 97% of the Oil and Energy companies listed in Fortune 500 use SAP. Nineteen out of the top twenty Downstream companies, fifteen out of the top twenty Upstream, and seventeen out of the top twenty five Utilities companies are SAP customers. With 663 installations in the Professional Service Industry, five out of the top ten U.S. Accounting, eight of the top ten Consulting, eight of the top ten BPO, and ten of the top ten IT services companies use SAP products and solutions. 81% of the Telecommunications sector within the Global 500 run SAP.

It appears highly probable that the best-run companies run SAP.

2004 SAP Revenue Breakdown by Sector
 in € millions | percent



SAP Ecosystem – Partners

There are three categories of partners within the SAP ecosystem: 1) Professional Services 2) Technology companies and 3) an emerging group of specialty companies supporting mySAP all-in-one. The SAP ecosystem plays a vital role ensuring that SAP continues to deepen its software stack covering applications, business intelligence, development tools and infrastructure (see: figure 2 below). SAP has particularly strong partnerships with Microsoft and IBM. There are more than 46,000 SAP installations on Windows, more than all other platforms combined, and 42% of all new SAP installations deployed on SQL Server. IBM DB2 is SAP’s development database of choice with more than 8,000 joint installations worldwide, and IBM’s Business Consulting Services is the largest SAP integrator with more than 9,000 consultants in its SAP practice.

Source: Merrill Lynch, Stack Wars Intensity, 6 December 2005

Services Partners

- Accenture
- Atos Origin
- BearingPoint
- Capgemini
- CSC
- Deloitte
- HP Consulting
- IBM BCS
- IDS Scheer
- Intelligence
- LogicaCMG
- Siemens BS

Technology Partners

- Bull
- Citrix
- Dell
- EMC
- Egenera
- Enterasys Networks
- Fujitsu
- Fujitsu-Siemens
- Hewlett-Packard
- IBM
- Intel
- Lexmark
- Microsoft
- MySQL
- Network Appliance
- Novell
- Oracle
- Palm
- Realtech
- RedHat
- Sharp
- Siemens Communications
- StorageTek
- Sun
- Teradata
- Unisys

mySAP All-in-one Partners

- Answerthink, Inc.
- Bramasol, Inc.
- Bristlecone, Inc.
- Emeritis
- Energys Corp.
- et alia LLC
- 4Point
- Genesis Corporate Solutions
- GEMS
- IBM Global Services
- IDR Business Solutions, Inc.
- Intelligence
- Ki Solutions
- Metamor Enterprise Solutions
- N2 Consulting LLC
- NEXPLICIT
- Osprey
- PremierHR International
- Primonics, Inc.
- Sylogist
- Summit Enterprise Solutions LLC
- Systech Integrators, Inc.

Figure 2.

Industries Supported By SAP Include —

- Aerospace and defense
- Automotive
- Banking
- Chemicals
- Consumer products
- Defense and security
- Engineering, construction, and operations
- Healthcare
- High tech
- Higher education and research
- Industrial machinery and components
- Insurance
- Life sciences
- Logistics service providers
- Media
- Mill products
- Mining
- Oil and gas
- Pharmaceuticals
- Postal services
- Professional services
- Public sector
- Retail
- Railways
- Telecommunications
- Utilities
- Wholesale distribution

Business Solutions and Applications —

SAP provides a comprehensive array of software applications covering: CRM, ERP, Product Lifecycle Management, SCM, Supplier Relationship Management, Mendocino (new Microsoft joint venture), Analytics, Manufacturing, Service and Asset Management, solutions for mobile business and xApps.

SAPs solutions for Small and Midsize Enterprises include mySAP All-in-one and SAP Business One. SAP provides a robust blueprint and technical foundation for open and flexible business solutions with their Enterprise Services Architecture (ESA) and NetWeaver platform.

SAP Services —

Provides a wide range of services, tools and programs to ensure their customers operate at peak levels. These services include: *Active global support* (services for planning, implementation, and operations); *Consulting* (consulting, implementation and technology optimization services); *Custom development* (deliver customized applications); *Education* (transfer knowledge and skills throughout the SAP ecosystem); *Managed services* (outsourcing); *BPO support* (deliver solutions, services and partnerships to ensure that BPO generates business value); *Tools, technologies, and methodologies* (deliver timely information, services and support communication throughout the SAP ecosystem).

SAP Communities —

The SAP User Groups known as ASUG (Americas), DSAG (Germany) and SAUG (Australia) provide customers, partners, analysts, thought leaders and SAP development teams common ground to influence future SAP product and service direction. ASUG has 1,200 corporate and 45,000 individual members, DSAG has 1,700 corporate and 17,000 individual members. Additionally, there are numerous communities serving the needs of Business users and SAP Developers.

Business Challenges & Best Practices —

Best-run companies excel at leveraging IT capabilities that enable key business objectives such as revenue growth, increased profitability, productivity and cash flow gains. Adopting best practices improves alignment between business and IT. Current best practices, regardless of industry segment, typically focus on achieving cost reduction, aligning IT with business strategies, simplifying the enterprise application software portfolio and instituting an effective IT governance model. Most companies are seeking to transform their business models by improving efficiencies around the following business processes: inventory levels, commercial opportunities and lead management, service offerings, high SG&A costs vs. industry best practices, and availability of reliable business information. Most future sales growth is expected to come from indirect channels (Internet, partners, etc) where many companies today lack end-to-end visibility into business transactions and direct relationships with the end customer. Problems and issues are accentuated as one goes further down the value chain—lack of integration of sales/services, products, design, strategy for opportunity management and product life cycle management. Adopting IT best practices is critical to executing and achieving operational excellence, managing strategic alliances and sustaining product innovation.

Celera Partners & Global IT Deployments—

Celera's dedicated SAP practice recruits IT leaders intimately familiar with managing risk in global SAP deployments. Our consultants bring in-depth knowledge of the vast SAP ecosystem from years of direct senior-level industry experience and long-standing relationships with current senior management and alumni from SAP as well as other market leading companies providing SAP related products and services. We excel at finding IT talent that specialize in IT transformation, cost reduction, IT and business strategy alignment, application portfolio simplification, and effective IT governance models. Our executive placements are hired to solve impediments securing a 360° view of the business. They are the current thought leaders and practitioners capable of achieving end-to-end business process integration, instance consolidation management programs and project management.

With pin-point precision, we know where to find candidates with experience solving and creating Business Model changes and achieving operational excellence via IT best practices. Armed with deep industry experience our search consultants identify IT talent focused on process standardization issues important to COOs; achieving efficiencies around timely, accurate information, risk and compliance, optimal cost structure and improved collaboration issues for CFOs; responsiveness issues important to CEOs such as shorten time to react, accelerate change initiatives and take advantage of opportunities; and a host of IT portfolio simplification issues for CIOs.

Celera Partners is a premier organizational strategy and retained executive search firm comprised of top tier strategy consultants, executive search professionals and software technologists. From offices in New York, Philadelphia, Chicago, Dallas, San Francisco, London, Brussels and Madrid, the firm specializes in providing Value Based Selling go-to-market strategy and recruiting services for industry leaders in IT (hardware/software), Telecom/Datacom, Communications-Media, Financial Services, Industrials and Life Sciences. Celera's strategy and executive search consultants have deep domain expertise advising and building senior level general management and technical leadership teams across all functional areas.