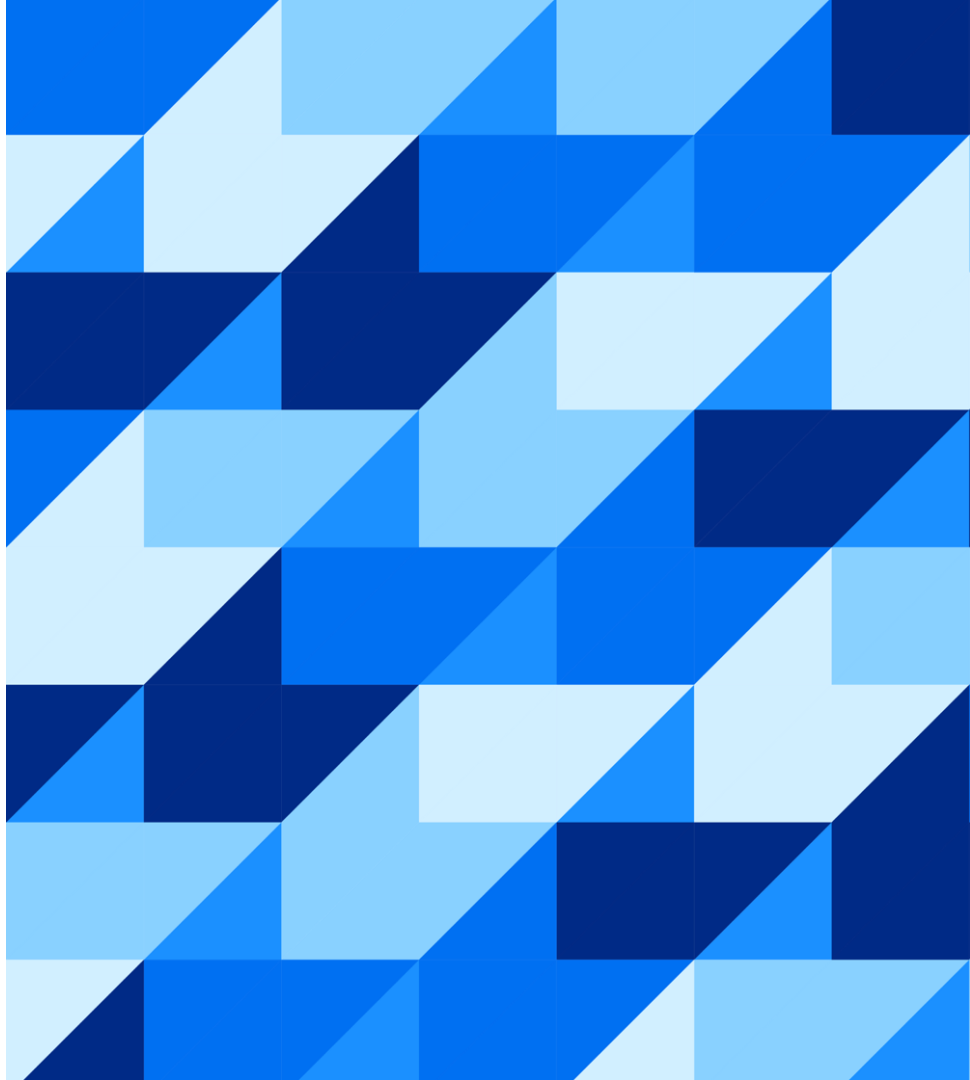


Supercharge your future

Garrett Hogan, SAP
November 21, 2024

Public

FutureIT



The world's largest provider of Enterprise Application Software

Key facts

- €29.52bn total revenue, thereof **€11.43bn cloud revenue**¹
- Only **Fortune 50** global tech company **headquartered in Europe**
- **>100,000** employees across the globe

Customers

- **99 of the 100 largest companies** in the world are SAP customers
- SAP customers generate **87% of total global commerce** (\$46 trillion)
- **SMEs make up for 80%** of SAP's customers

Portfolio

- Solutions for **26 industries** and **12 lines of businesses**
- **2 dedicated offerings** for large and mid (RISE and GROW)
- **AI embedded** across the portfolio

Innovation and ecosystem

- Global **ecosystem** with **>25,500** SAP partner companies
- **SAP.iO**: Support for **>600** external startups
- **Sapphire Ventures**: Invested in **>200** IT start-ups

All figures as of October 18, 2023 – for more information visit [SAP.com](https://www.sap.com)

Strong position in key markets

Worldwide market position by revenue, 2022²



Cloud ERP

- #1** Enterprise Resource Planning
- #1** Manufacturing and Operation Management
- #1** Financial Management Systems (FMS)



Lines of Business

- #1** Procurement
- #1** Supply Chain Management
- #2** Human Capital Management
- #3** Digital Commerce



BTP

- #1** Data Management (Excluding DBMS³)
- #2** Analytics

1. Full Year 2022; 2. Calculations performed by SAP. Gartner®, Market Share: All Software Markets, Worldwide, 2022, April 2023. GARTNER is a registered trademark and service mark of Gartner, Inc. and/or its affiliates in the U.S. and internationally and is used herein with permission. All rights reserved.; 3. Database Management System; 4. SAP internal
Note: SAP is not responsible for the content of third-party research reports.



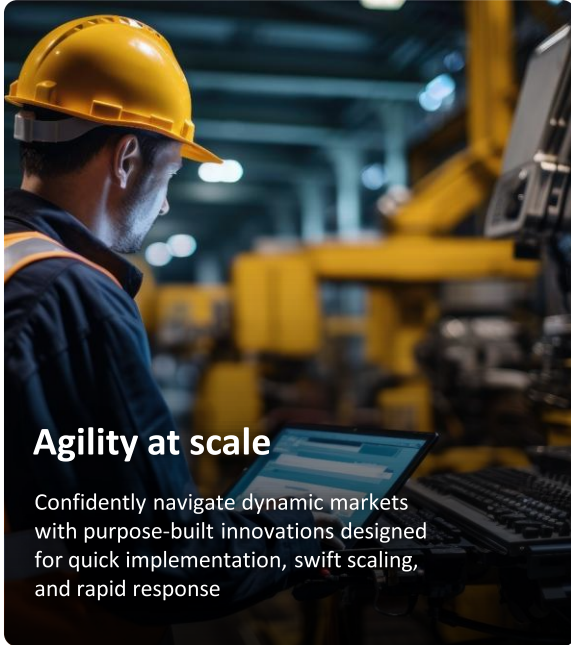
**SAP customers represent
93% of the economy in
North America**



Help the world run better and improve people's lives

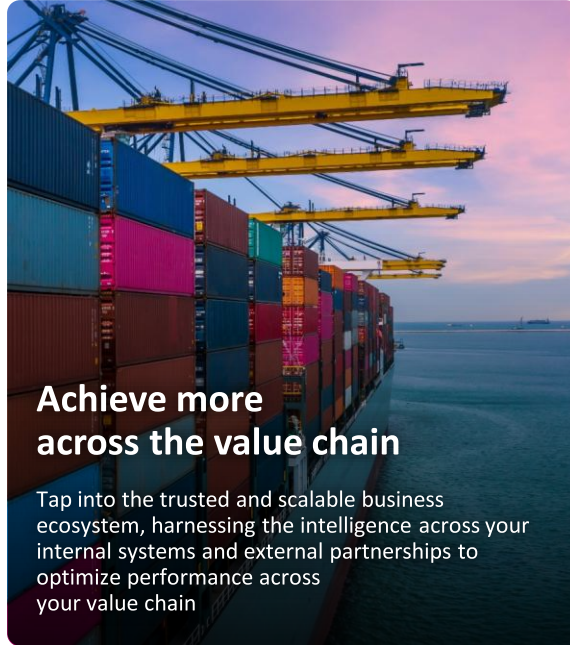
Our vision

We bring out the best in every business



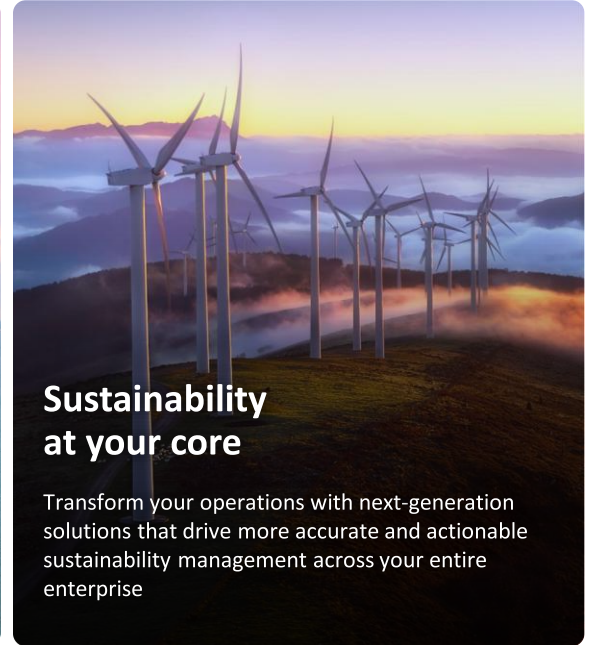
Agility at scale

Confidently navigate dynamic markets with purpose-built innovations designed for quick implementation, swift scaling, and rapid response



Achieve more across the value chain

Tap into the trusted and scalable business ecosystem, harnessing the intelligence across your internal systems and external partnerships to optimize performance across your value chain



Sustainability at your core

Transform your operations with next-generation solutions that drive more accurate and actionable sustainability management across your entire enterprise

SAP's product timeline



SAP R/1

SAP R/2

SAP R/3

SAP Business Suite

SAP S/4HANA + Cloud LoB

Intelligent Enterprise

SAP Business AI

Technology Trends

1970

From Batch to Interaction

1980

Real-time Computing

1990

Client Server Architecture

2000

Internet and Mobile

2010

In-memory Computing

End of 2010

Digital Network and Intelligence

2022+

From Interaction to Outcome

Business Trends

Business Process Reengineering

Globalization

Internet

Industry 4.0

Everything-as-a-service

ESG / Sustainability

Remote Work and Virtual Collaboration

Business Value





*Being able to **quickly transform** a business model requires **systems and processes** that can rapidly adopt **new innovations** – and that's exactly what the **cloud enables**.*

***RISE with SAP** guides our customers on their journey to the cloud and the many benefits it offers.*



Christian Klein

Chief Executive Officer and member of the Executive Board of SAP SE

“Only the cloud provides the **speed** and **agility** our customers need to take their businesses to the next level and **drive innovation.**”

Christian Klein, Chief Executive Officer and member of the Executive Board of SAP SE




SAP's Cloud First Strategy

Our customers require greater agility, so they can transform and grow new businesses and run operations in the most cost-effective way. This is why every company today has a cloud-first technology strategy. Only through the rapid delivery of technology innovation that the cloud enables can customers stay competitive in their industry.

SAP's strategy is also cloud-first and aligned to this, as we are delivering our future innovations with our cloud ERP. This is the only way for SAP to continue delivering market-leading ERP solutions that our customers count on.





New strategic cloud innovations including AI, sustainability, and industry innovations will be delivered only for cloud ERP with RISE with SAP



Cloud ERP Artificial Intelligence – Only in the cloud that we can leverage aggregated and anonymized data via dedicated legal terms with over 30,000 customers as part of our own AI models to optimize the outcome for every customer. We need to stay in control of data flows, integration, and lifecycle management, so that we can deliver the relevant outcome of AI, including reliable performance, in a responsible way.

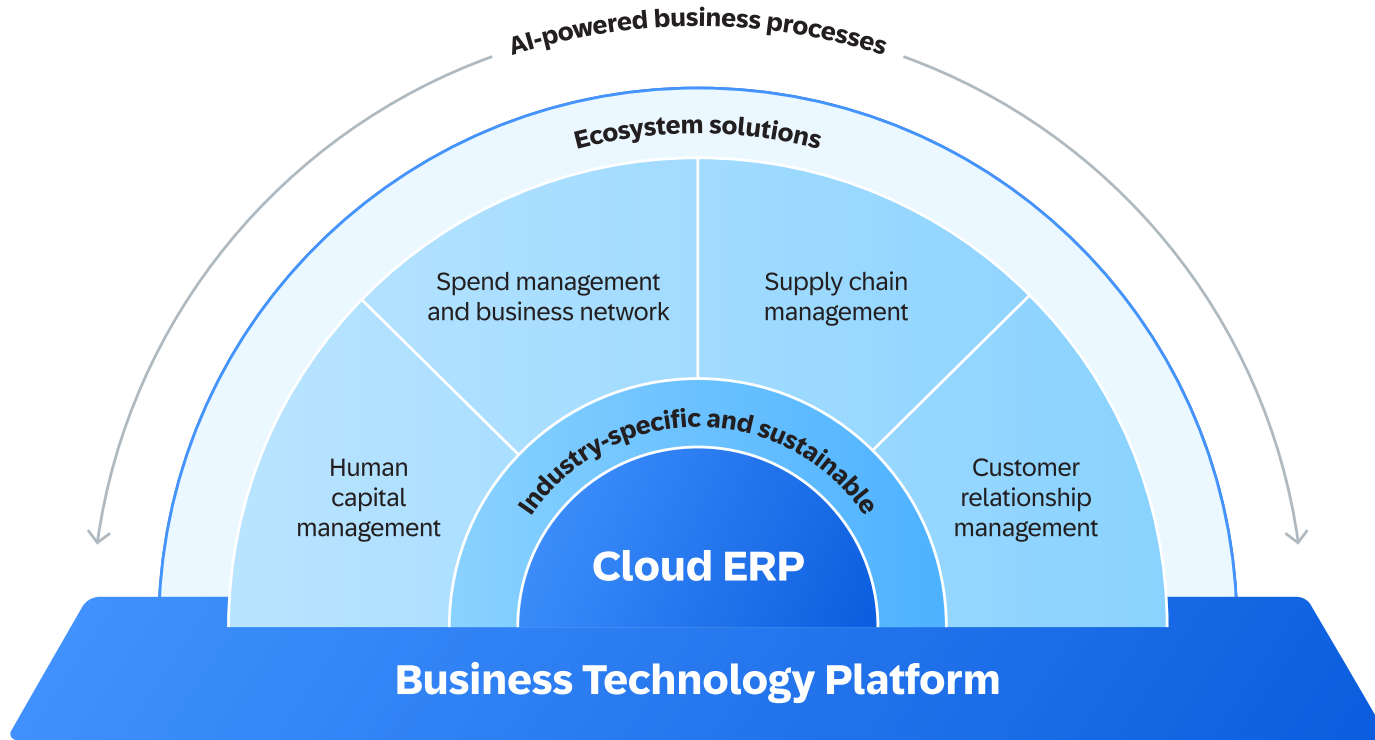


Sustainability – Sustainability is a highly dynamic field and we expect a significant amount of policy and regulatory changes to emerge over the next few years. To keep up with it we need a true cloud model to adjust our software with the changes happening across the globe. Earlier this year SAP shared the vision of a green ledger, which is planned to enable transactional carbon accounting.



Industry Innovation – To combine the value that industry solutions bring and have the ability to innovate, we have decided to take a modular approach and build new, differentiated industry capabilities (like Industry Cloud) on SAP BTP, a modern cloud platform. Industry capabilities are not isolated, they are integrated into all end-to-end processes.

SAP's Portfolio turns our vision into reality



Dedicated ERP & Platform offerings for all organizations



Large enterprise customers

Brownfield ERP cloud migration

SAP S/4HANA Cloud, Private Edition + BTP

Mid-market customers

Greenfield ERP implementation

SAP S/4HANA Cloud, Public Edition + BTP











Versuni



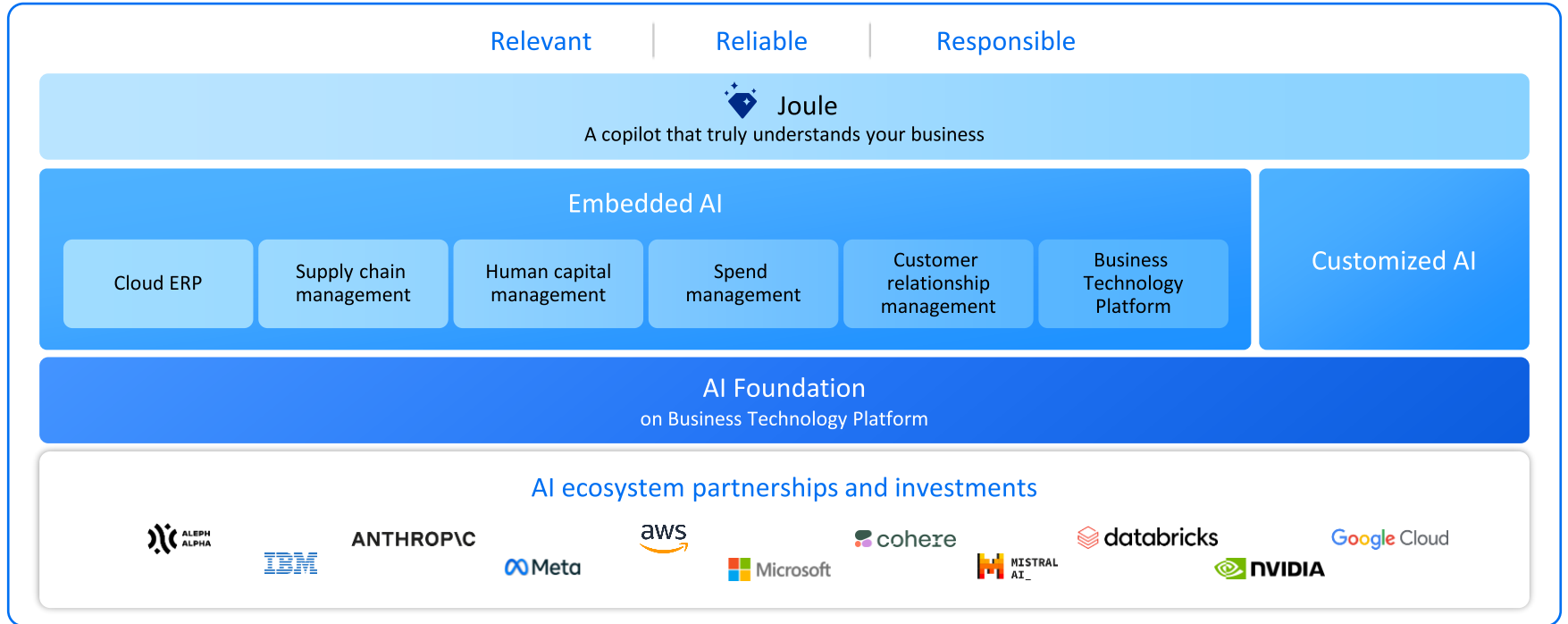
HANES
Brands Inc



SAP S/4HANA Cloud – Modular Application Portfolio

	Procurement 	Supply Chain 	Manufacturing 	Sales 	Service 
Modular Cloud LoB Solutions	<ul style="list-style-type: none"> Guided buying Supplier management Business network 	<ul style="list-style-type: none"> Integrated business planning Global batch traceability Logistics business network Transportation management Extended warehouse management 	<ul style="list-style-type: none"> Digital manufacturing 	<ul style="list-style-type: none"> E-Commerce Sales automation Customer data Marketing Customer service 	<ul style="list-style-type: none"> Service cloud Field service management Customer relationship management
SAP S/4HANA LoB Solutions	<ul style="list-style-type: none"> Central procurement Sourcing and contract (extended) 	<ul style="list-style-type: none"> Advanced warehousing Advanced transportation Advanced order promising Service parts distribution 	<ul style="list-style-type: none"> Ext. Production planning & scheduling Ext. prod. engineering & operations Environment, health, and safety 		
SAP S/4HANA Cloud Private Edition Core Enterprise Management	<ul style="list-style-type: none"> Operational procurement Sourcing and contract Supplier management Procurement analytics Invoice management 	<ul style="list-style-type: none"> Inventory Warehousing Delivery and transportation Order promising Logistics cross topics Circular economy logistics 	<ul style="list-style-type: none"> Production engineering Production planning Production operations/options Order management Manufacturing insights 	<ul style="list-style-type: none"> Order and contract management Sales force support Solution Business Management 	<ul style="list-style-type: none"> Service master data and agreement Service operations and processes Service parts management
SAP S/4HANA LoB Solutions	<ul style="list-style-type: none"> Accounting and financial close Financial operations Cost mgmt. and profitability analysis Enterprise risk and compliance 	<ul style="list-style-type: none"> Enterprise portfolio and project management 	<ul style="list-style-type: none"> Maintenance management 	<ul style="list-style-type: none"> Time sheet management Organizational structure management Travel management 	<ul style="list-style-type: none"> Application lifecycle management Intelligent business processes Business technology platform Extensibility framework Sustainability solutions Industry specifics
SAP S/4HANA LoB Solutions	<ul style="list-style-type: none"> Adv. accounting, financial close Adv. financial operations Treasury management Commodity management Real estate management Subscription billing and revenue mgmt. 	<ul style="list-style-type: none"> Extended enterprise portfolio and project management Product lifecycle management Product compliance 	<ul style="list-style-type: none"> Resource scheduling Spatial asset management (linear asset management) 	<ul style="list-style-type: none"> HR administration Time management Payroll, reimbursement and rewarding Talent mgmt. and learning management HR strategy and planning 	
Modular Cloud LoB Solutions	<ul style="list-style-type: none"> Governance, risk, and compliance Multi-Bank connectivity Cash application Analytics cloud for planning 	<ul style="list-style-type: none"> Enterprise product development Collaborative project management 	<ul style="list-style-type: none"> Asset performance management Mobile asset management Spatial asset mgmt. (geo framework) Asset collaboration 	<ul style="list-style-type: none"> Core human resources and payroll Time and attendance management Talent management Human capital analytics 	
	Finance 	R&D 	Asset Management 	Human Resources 	Cross-topic 

SAP Business AI is embedded across our portfolio

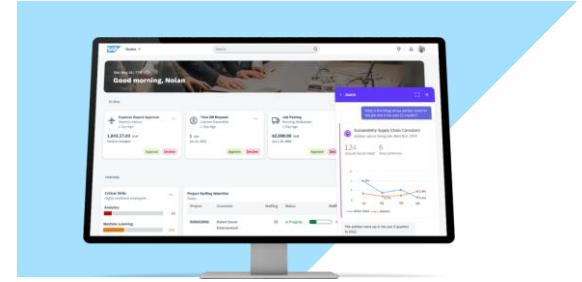


“ With SAP’s rich history and business process expertise, it is **uniquely positioned** to deliver AI that helps customers better leverage data to achieve measurable business outcomes.”

*Ritu Jyoti, IDC, Group Vice President,
Worldwide Artificial Intelligence and Automation
Research Practice Global AI Research Lead*

Business Technology Platform

■ SAP Business Technology Platform (SAP BTP) enables customers and partners to **extend and personalize SAP applications, integrate and connect landscapes**, and unleash business users to **connect processes and experiences, make decisions with confidence, and drive business innovation**.



Featured Solutions

Application Development and automation

Solutions including low-code and pro-code offerings for professional developers and business experts drive innovation across the company.

Exemplary brand names:

- SAP Build Code
- SAP BTP, ABAP environment

Extended planning and analysis

Extended planning and analysis (xP&A) solutions bring people and plans together to increase agility and performance.

Exemplary brand names:

- SAP Analytics Cloud

Data and analytics

SAP data and analytics solutions provide organizations with a modern, open cloud architecture, making the most out of the value of SAP and non-SAP data.

Exemplary brand names:

- SAP HANA Cloud
- SAP Datasphere

Integration

SAP's integration platform-as-a-service (iPaaS) allows enterprises to quickly integrate on-premise and cloud-based processes, services, applications, events, and data.

Exemplary brand names:

- SAP Integration Suite

Artificial Intelligence

Connect finance, supply chain, procurement, sales and marketing, human resources, and IT with built-in AI for your core business processes.

Exemplary brand names:

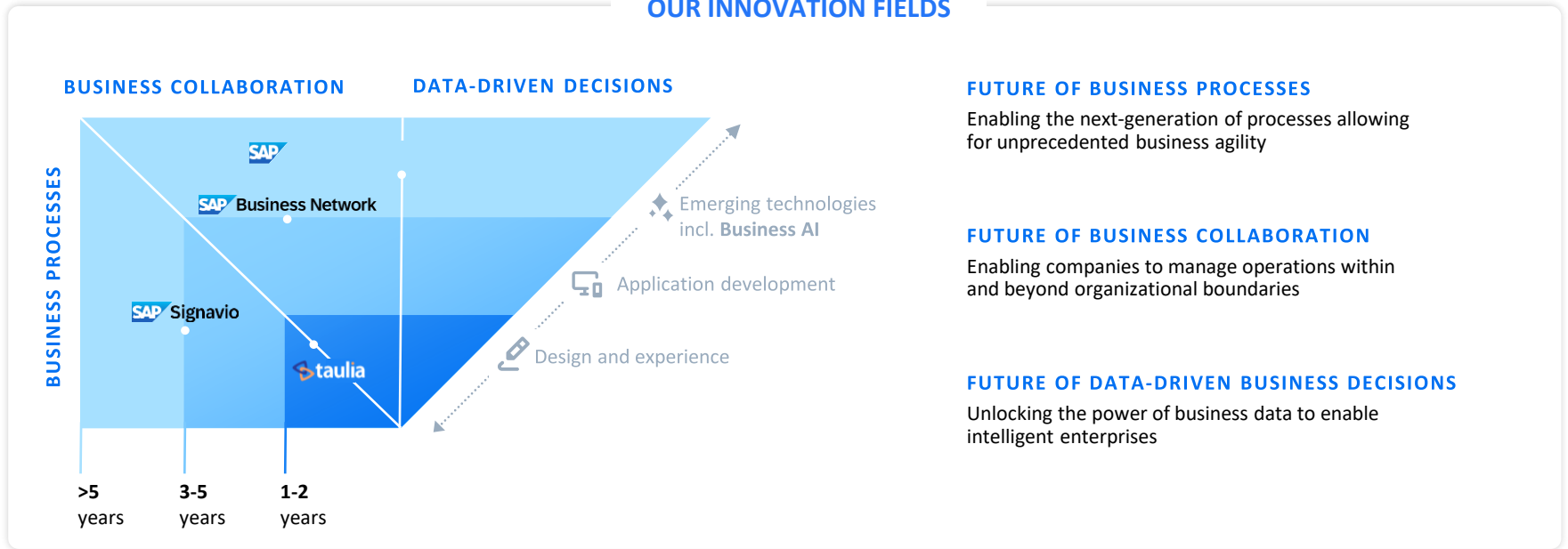
- Joule (AI copilot)

Our innovation fields guide our future

Business-driven innovation that creates real-life customer value

Grounded in **technology**. Powered by a trusted **application development**. Delivered through human-centered **design and experiences**.

OUR INNOVATION FIELDS



FUTURE OF BUSINESS PROCESSES

Enabling the next-generation of processes allowing for unprecedented business agility

FUTURE OF BUSINESS COLLABORATION

Enabling companies to manage operations within and beyond organizational boundaries

FUTURE OF DATA-DRIVEN BUSINESS DECISIONS

Unlocking the power of business data to enable intelligent enterprises



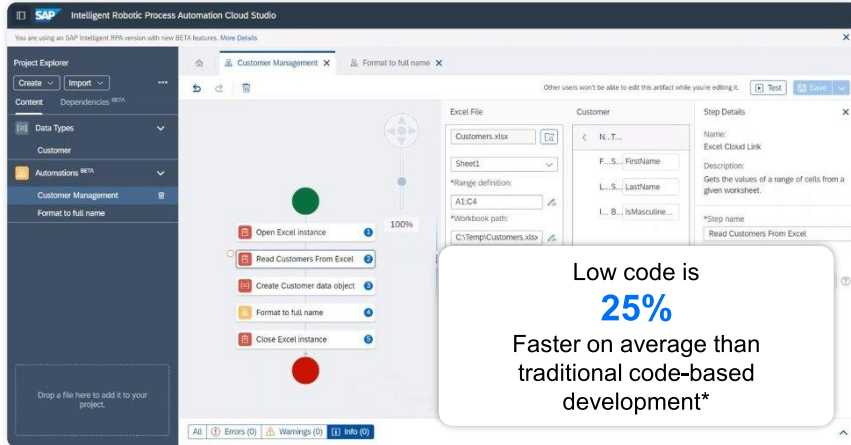
SAP innovation fields

Future of business processes

SAP Build Process Automation

Enable everyone to design

With SAP Build Process Automation, the creation of enterprise apps, designing business sites, and creating automation becomes a drag and drop exercise.

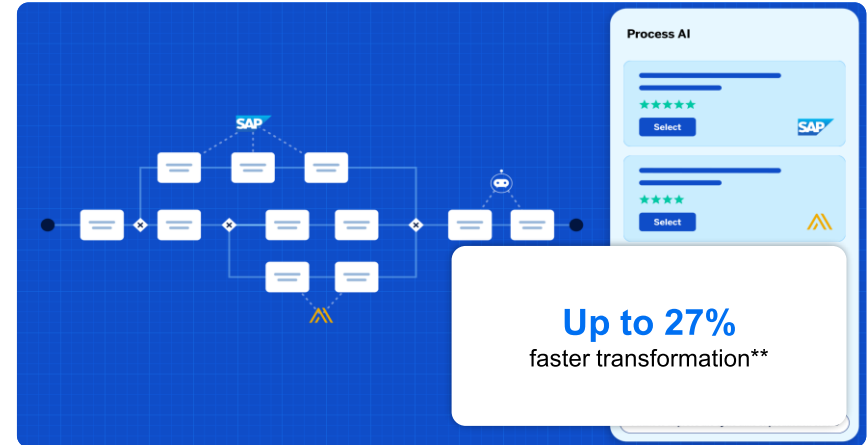


Low code is
25%
Faster on average than
traditional code-based
development*

SAP Signavio Process AI

AI to map and optimize processes

Use Signavio which is trained to read and interpret your current business processes. Giving you an optimized process complete with models, documentation and KPIs.



**Conservative assumptions based on 50+ years of SAP transformation projects



SAP innovation fields

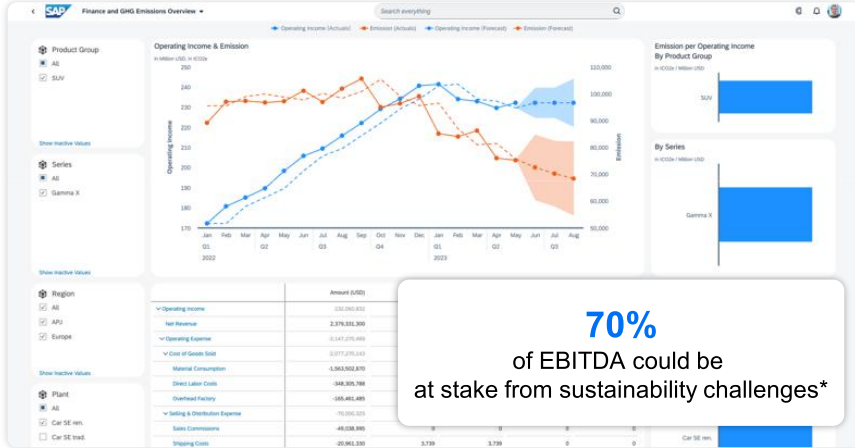
Future of data-driven business decisions

Green Ledger

(as part of Cloud for Sustainable Enterprises)

Track carbon footprint in real-time

Green Ledger will allow you to weigh your carbon footprint with your financial data to understand your carbon impact in real time.



70%
of EBITDA could be
at stake from sustainability challenges*

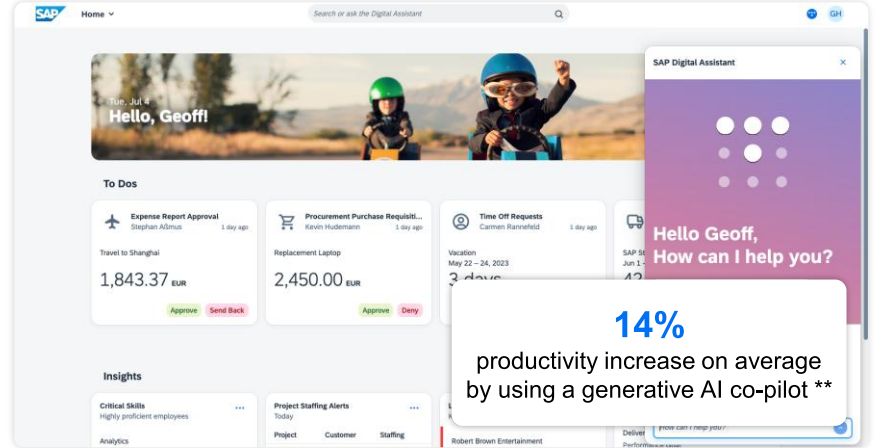
*<https://www.mckinsey.com/~media/McKinsey/Business%20Functions/Sustainability/Our%20Insights/Profits%20with%20purpose/Profits%20with%20Purpose.ashx>

Joule

(SAP Digital Assistant)

GenAI for your business

Just ask Joule (SAPs digital assistant) to pull your report or interpret a large data set for you. Joule is fed with all of YOUR business data making it personally relevant to you.



14%
productivity increase on average
by using a generative AI co-pilot**

**<https://www.nber.org/papers/w31161>

Thank you.

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