



Winning Growth Opportunities for SAP Partners

Strategies to Thrive with SAP

SAP Partner Ecosystem Revenue Growth and Profit

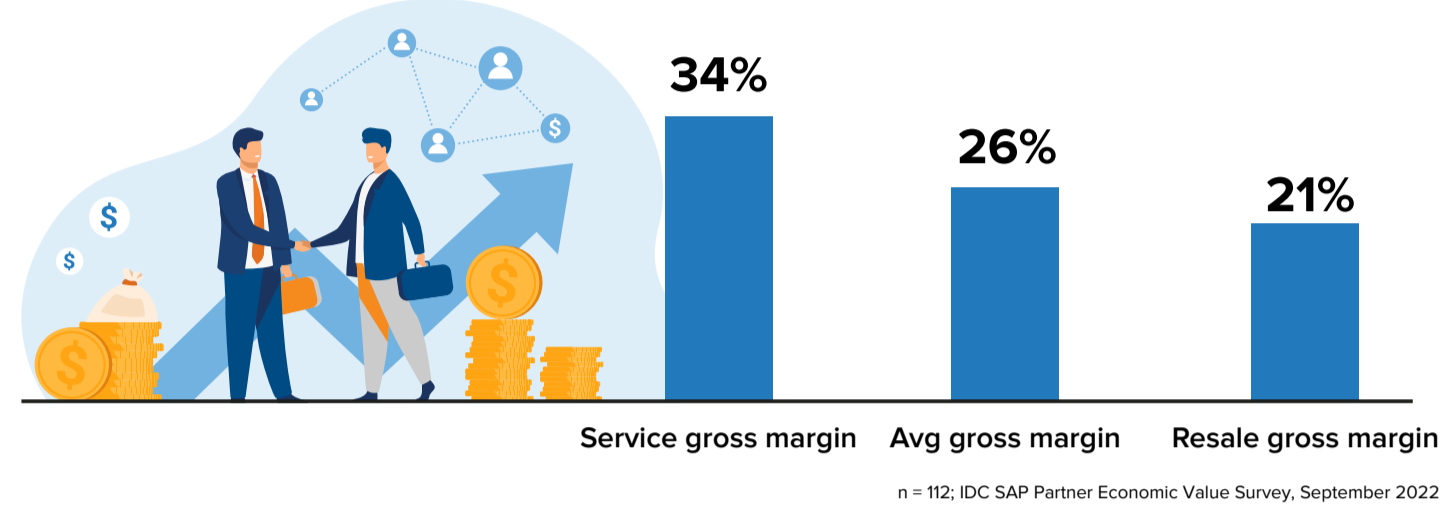
Partners Fully Engaged with SAP



SAP Partners Bullish on Revenue Growth



Healthy Margin in SAP-Related Business



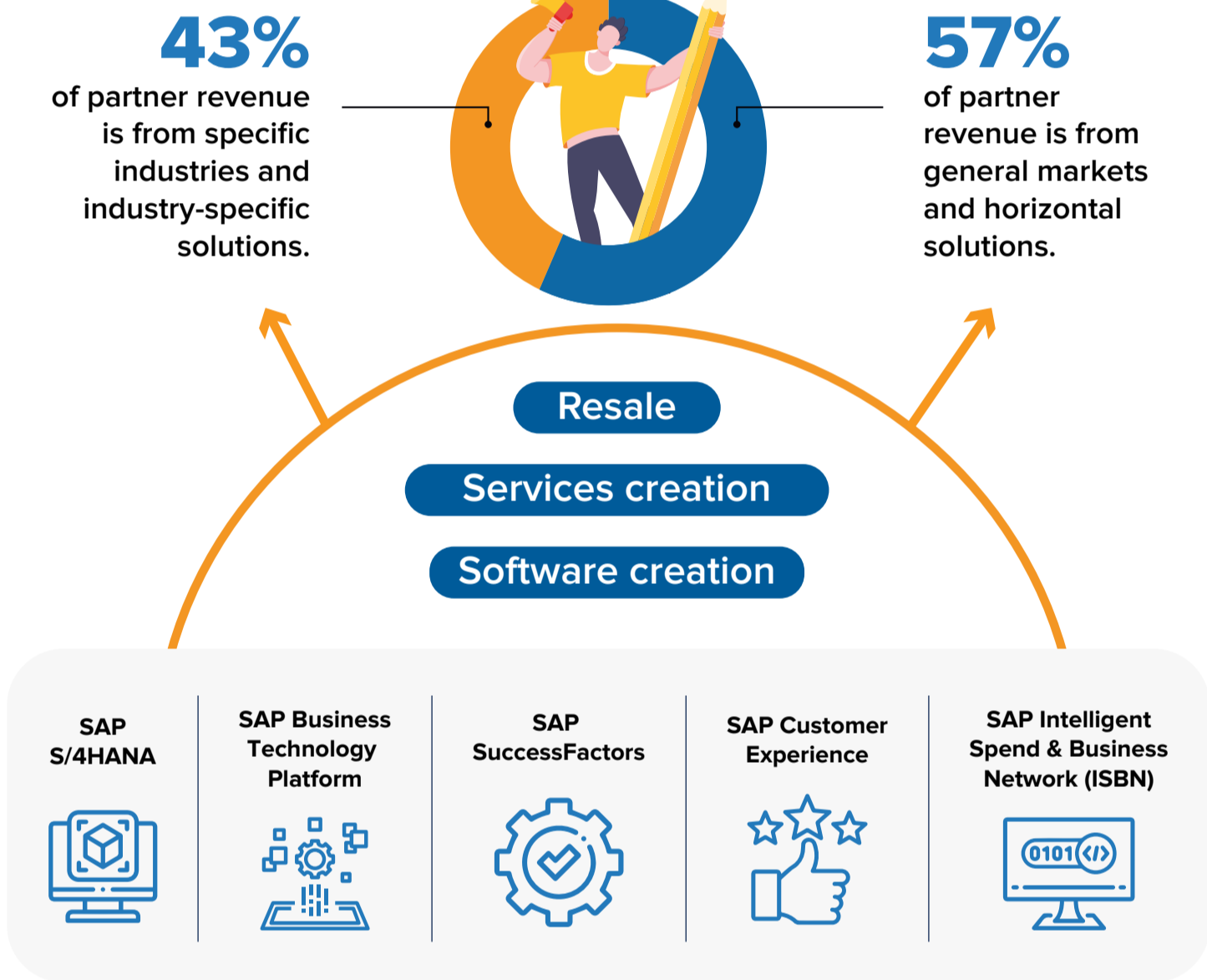
Increased Intellectual Property (IP) Investment is Growth Accelerator for SAP Partners

SAP partners investing in creating proprietary software and services are expected to outpace other partners

Partners investing more than 20% of revenue in IP see 60% higher revenue growth than partners that don't invest in IP.

SAP Partnership and Success

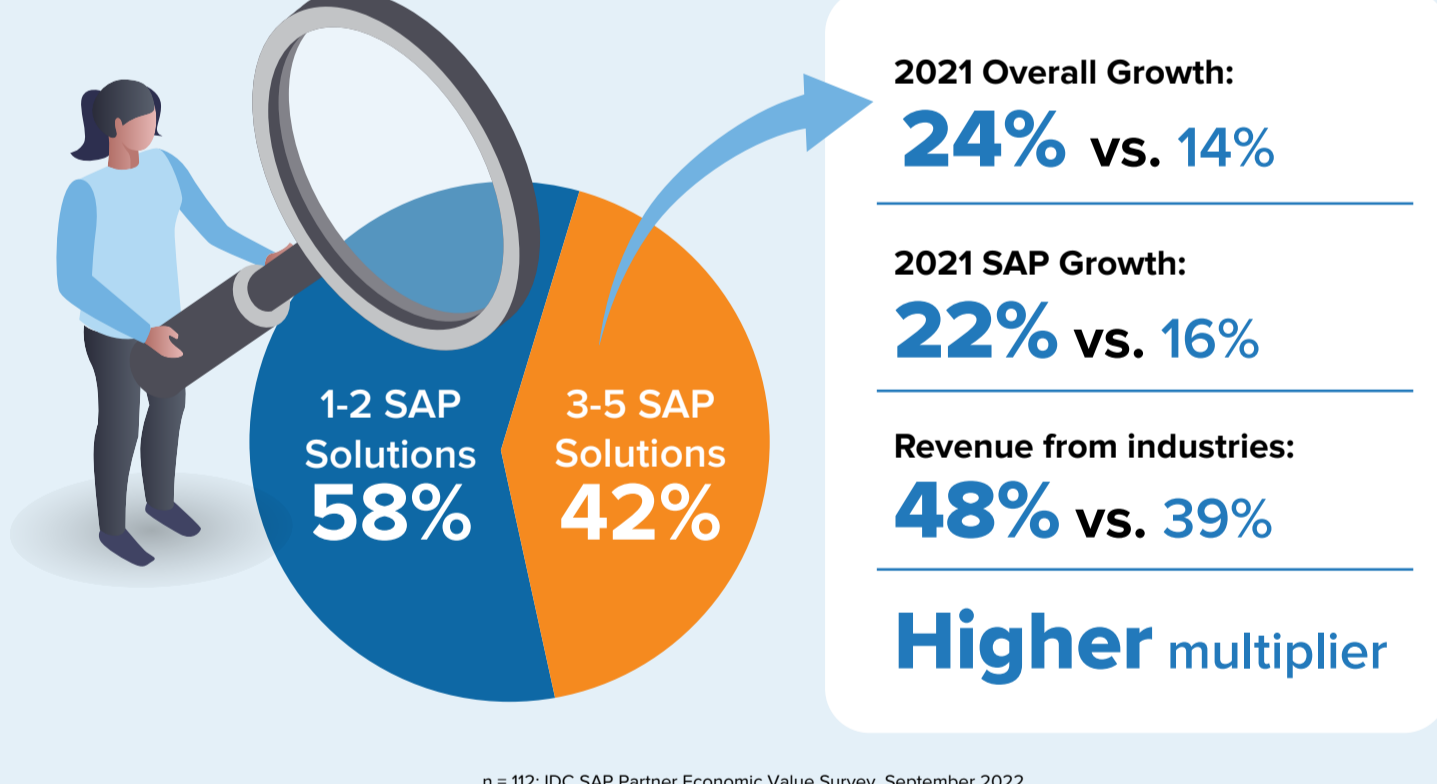
Relevant Industry Focus Drives Higher Economic Value



Partners Investing in Multiple SAP Solutions Stand Out

Ratio of Partners Actively Investing in SAP Solutions

Partners with 3-5 Solutions vs. 1-2 Solutions



SAP Partner Economic Value

SAP Partners with a Diverse Practice Realize Higher Growth



Partners with an SAP multiplier of **\$5+** have diversified businesses

Have a higher ratio of their own software revenue and less from resale.

\$5+

SAP Multiplier Partners have Successful Businesses



Market Spend in Services, SaaS, PaaS and IaaS Driving Partner Opportunity

\$1.2 TRILLION

Spend for services in 2023

(support, consulting, professional services, managed services, business process outsourcing)

5-year CAGR of 4.3%

