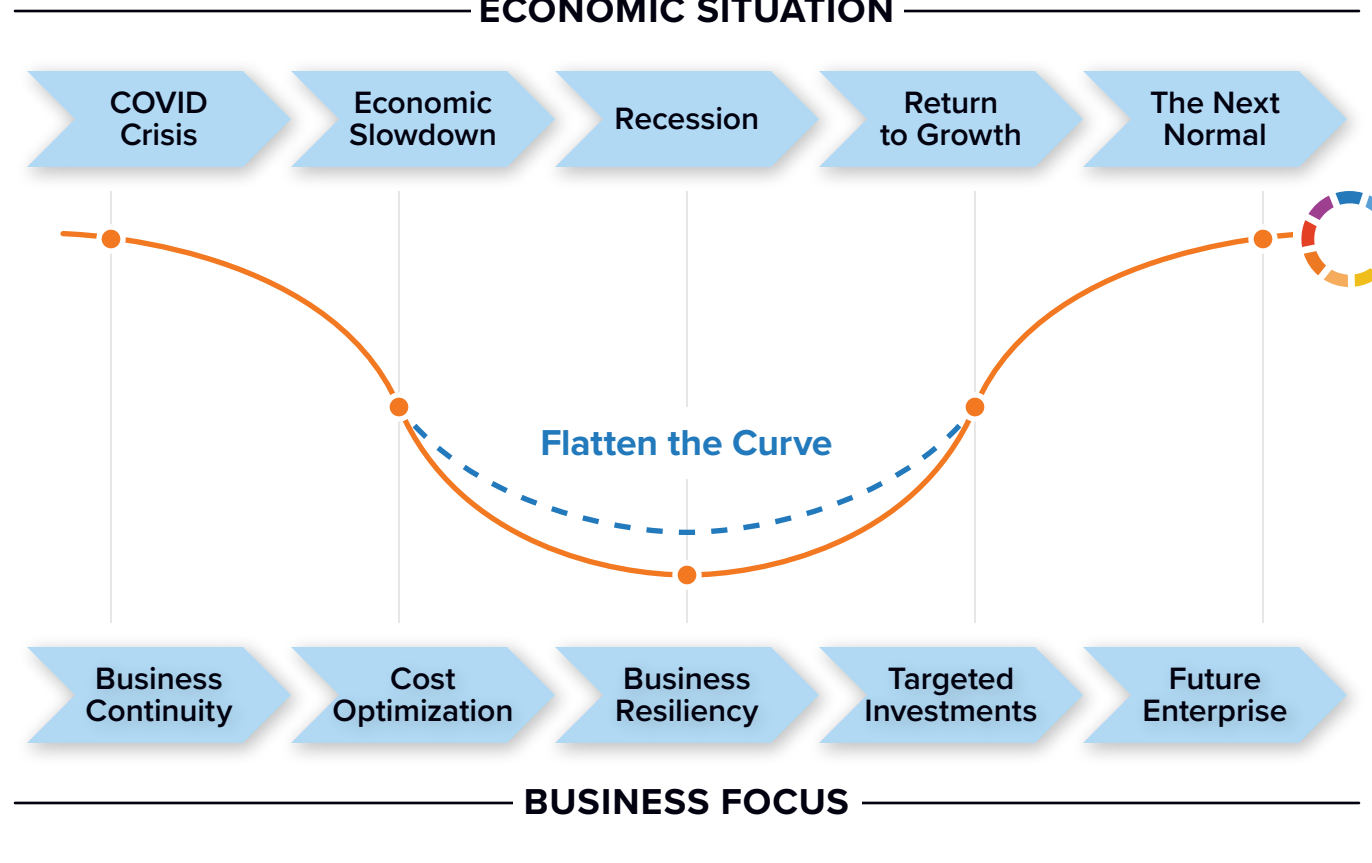


Partner Opportunity in a Changing World

How Partner Opportunity Expands as the SAP Ecosystem Transforms

Technology Enables Transformation to Next Normal

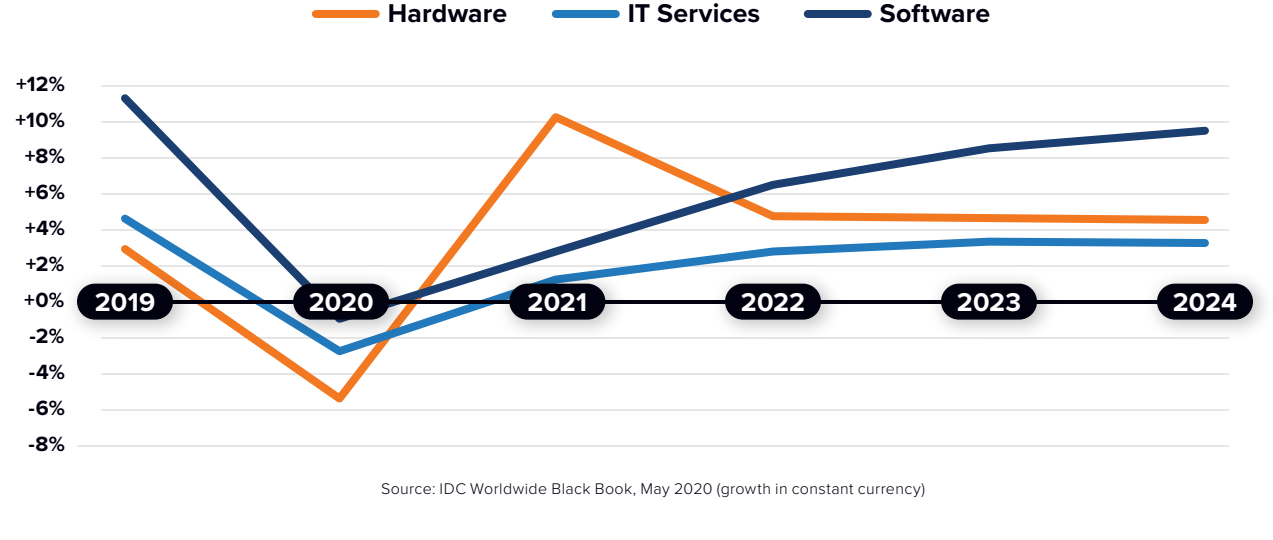
The Five Stages to Enterprise Recovery



THE FUTURE ENTERPRISE

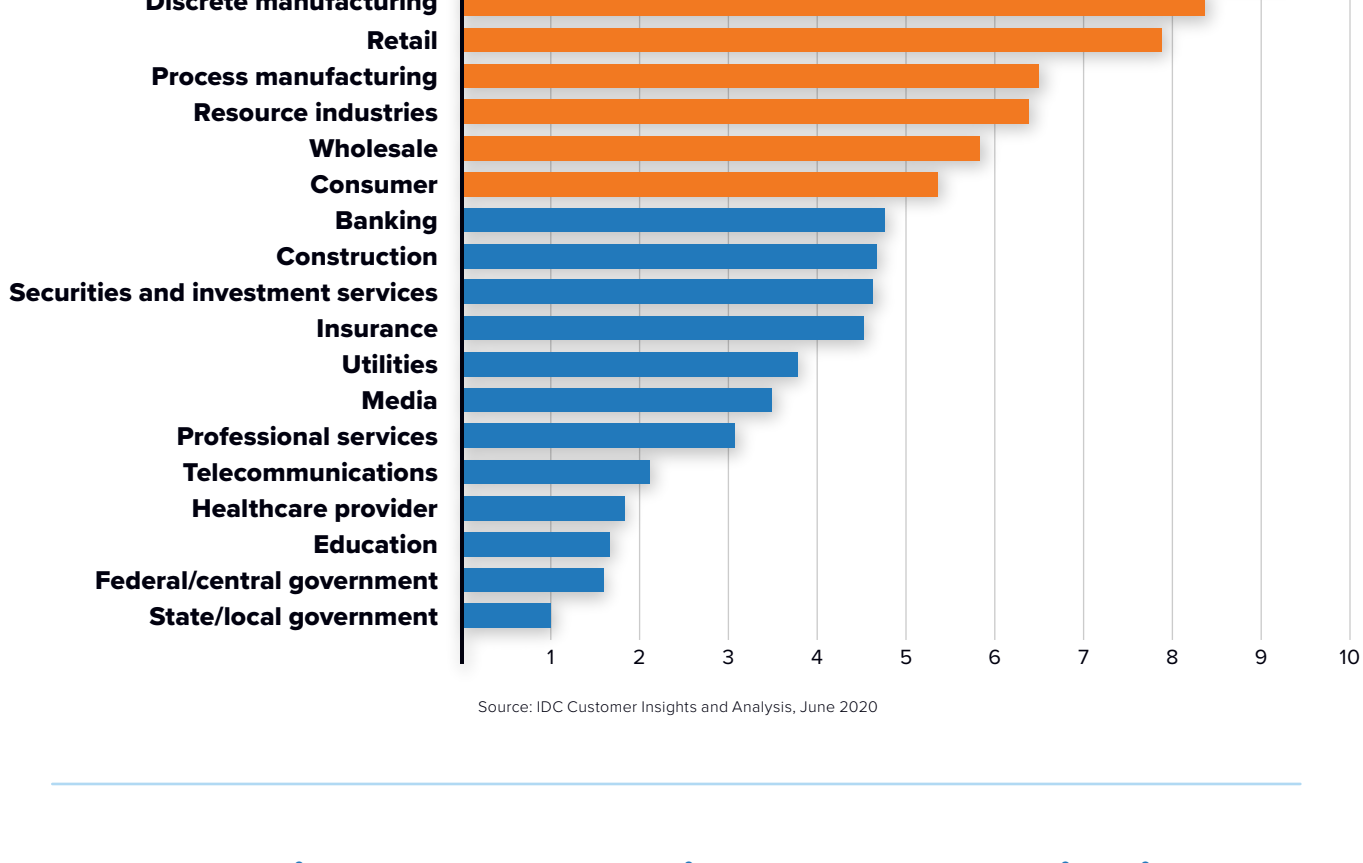
IDC's vision of the Future Enterprise is an organization that is completely digitally transformed. The COVID-19 pandemic has underscored the importance of digital transformation and the need to flatten potential recessionary curves by leveraging digital transformation through the five stages of recovery.

Recovery: Worldwide IT Spending 2019–2024



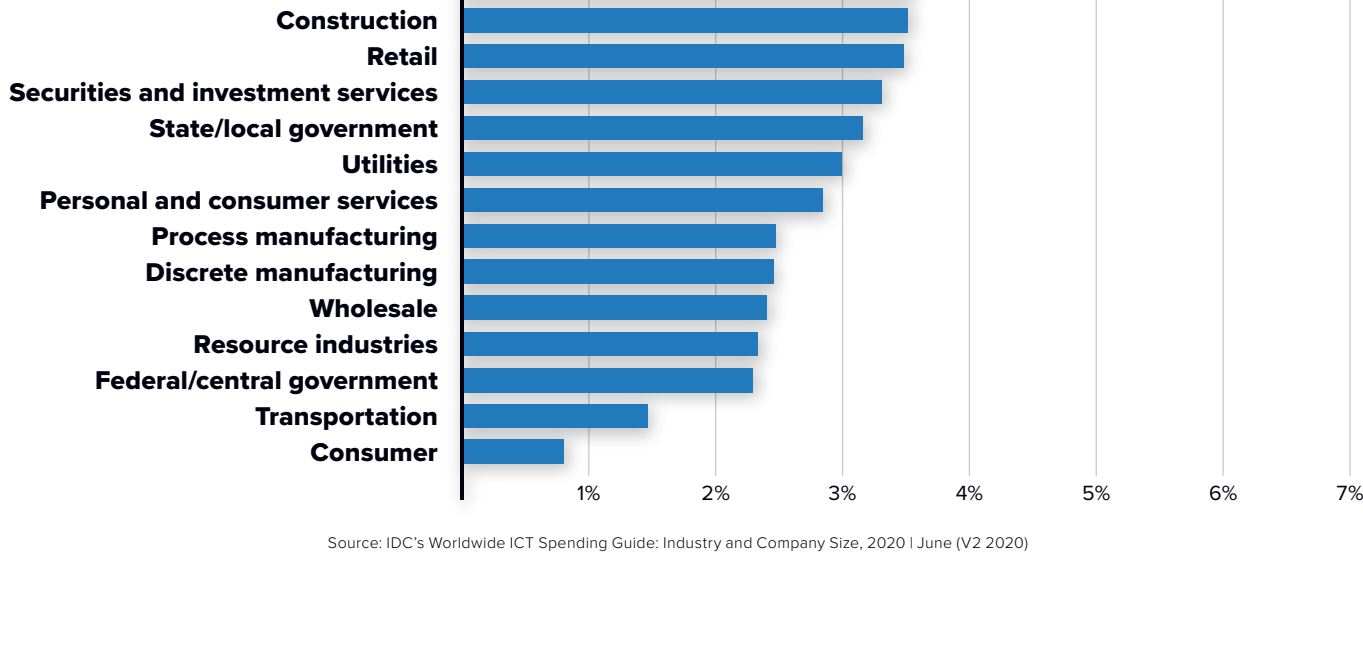
IDC's COVID Industry Impact Index

Impact 1–10, where 1 = least impacted and 10 = most impacted



Worldwide Total Information and Communications Technology (ICT) 5-year CAGR (2019–2024)

Percentage



The SAP Partner Economy Expansion

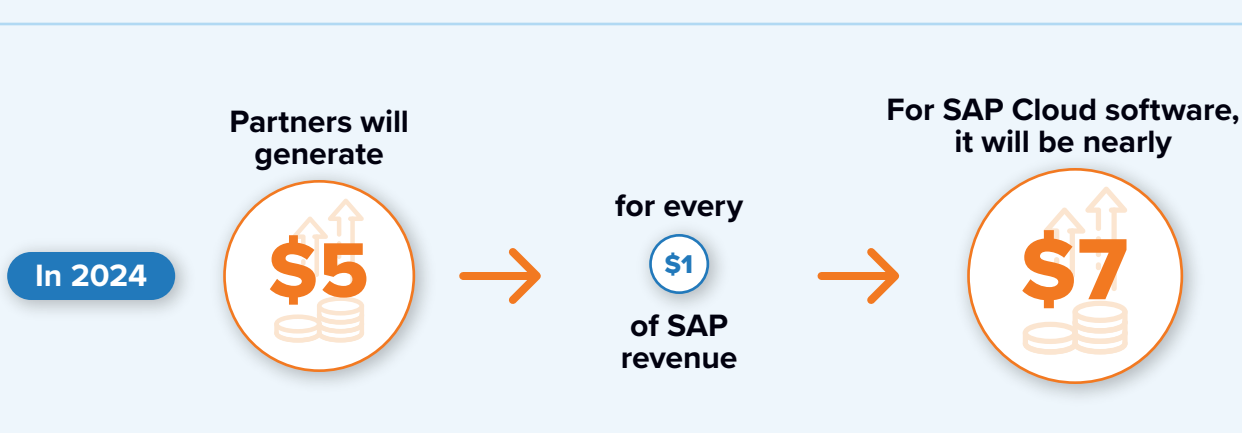
In 2024

Based on IDC forecast models, the SAP partner opportunity will **EXPAND TO \$260 BILLION.**

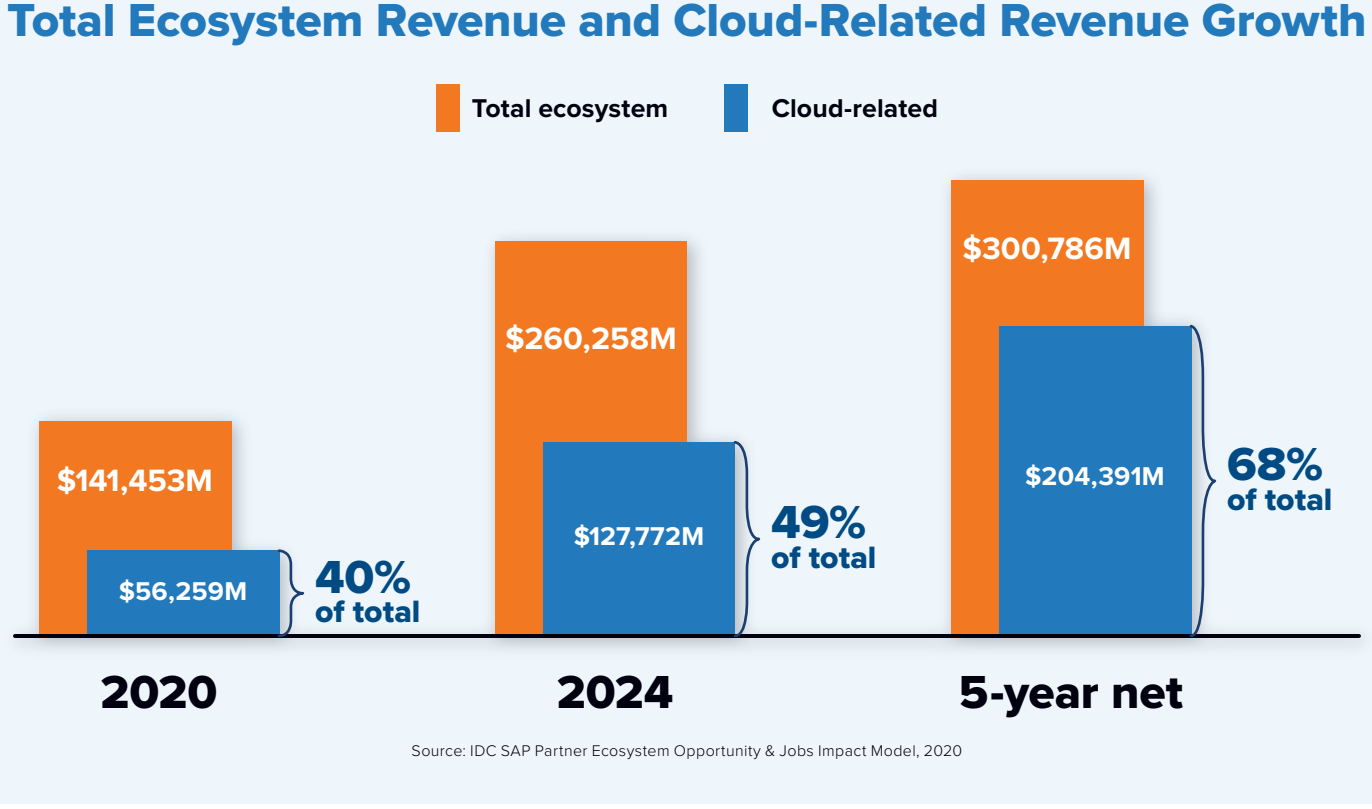
This growth is underpinned and driven by SAP Cloud growth.



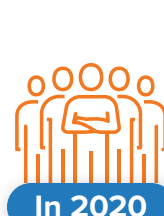
SAP-related cloud-based revenues will be **49% CLOUD** and **51% ON-PREMISE** but **68% of the total \$ opportunity 2020–2024.**



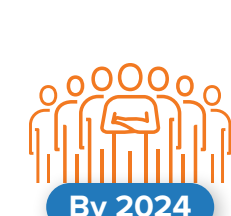
Total Ecosystem Revenue and Cloud-Related Revenue Growth



SAP Ecosystem Expansion Impact on Jobs



In 2020



By 2024

Based on IDC ecosystem modeling, the SAP ecosystem currently employs **1 MILLION WORKERS**

With IDC's forecasted growth of SAP revenues, that number will **GROW TO 1.6 MILLION**



Accelerated workforce growth will be with consultants. **OVER 280,000 NET NEW CONSULTANT ROLES** will be created from 2020-2024.

Extrapolating total worker roles into hours worked, the SAP ecosystem opportunity will equate to **MORE THAN ONE BILLION BILLABLE HOURS** between now and 2024.



For existing partners to learn more, visit [SAP PartnerEdge](#)

To learn more about partnering with SAP, visit [sap.com/partner](#)