

SAPPHIRE Orlando

Investor Conference



Henning Kagermann
Co-CEO, SAP AG

May 6, 2008

The background of the slide is a photograph of two business professionals, a woman and a man, walking from left to right. They are dressed in professional attire (suits and a dress). The image is intentionally blurred to convey a sense of motion and activity. The background wall is made of large, light-colored rectangular panels.

Strong Share Gains in Q1 2008

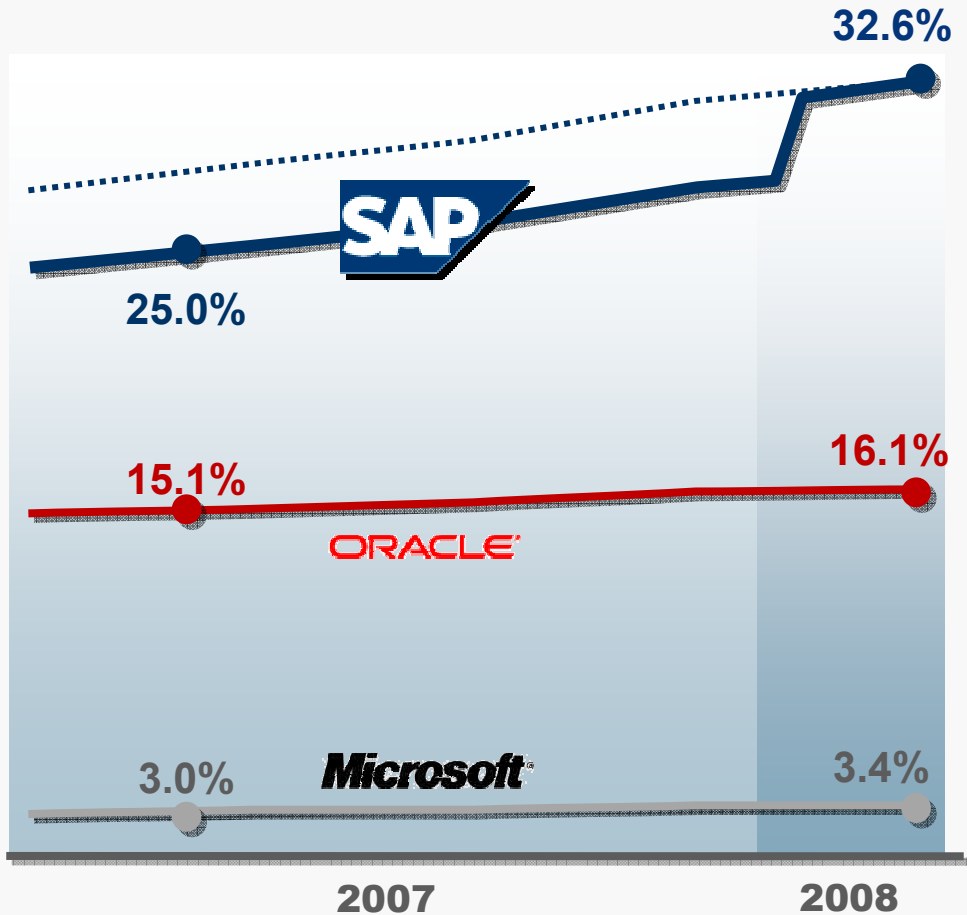
Continued Strong Share Gains

Organically and Through Acquisition



SAP Global Share

\$37.4bn Market¹




Q1 2008:
SAP gained share in all regions

- +0.9 PP (organically)
- +3.3 PP (acquisition)

Year on year 7.6 PP

¹ Relevant Enterprise Application Software & Software Related Services Market

A blurred photograph of two business professionals, a woman in a grey suit and a man in a dark suit, walking from left to right in a modern office hallway. The background is a light-colored wall with large rectangular panels. The floor is also light-colored with a grid pattern.

Business Beyond Boundaries

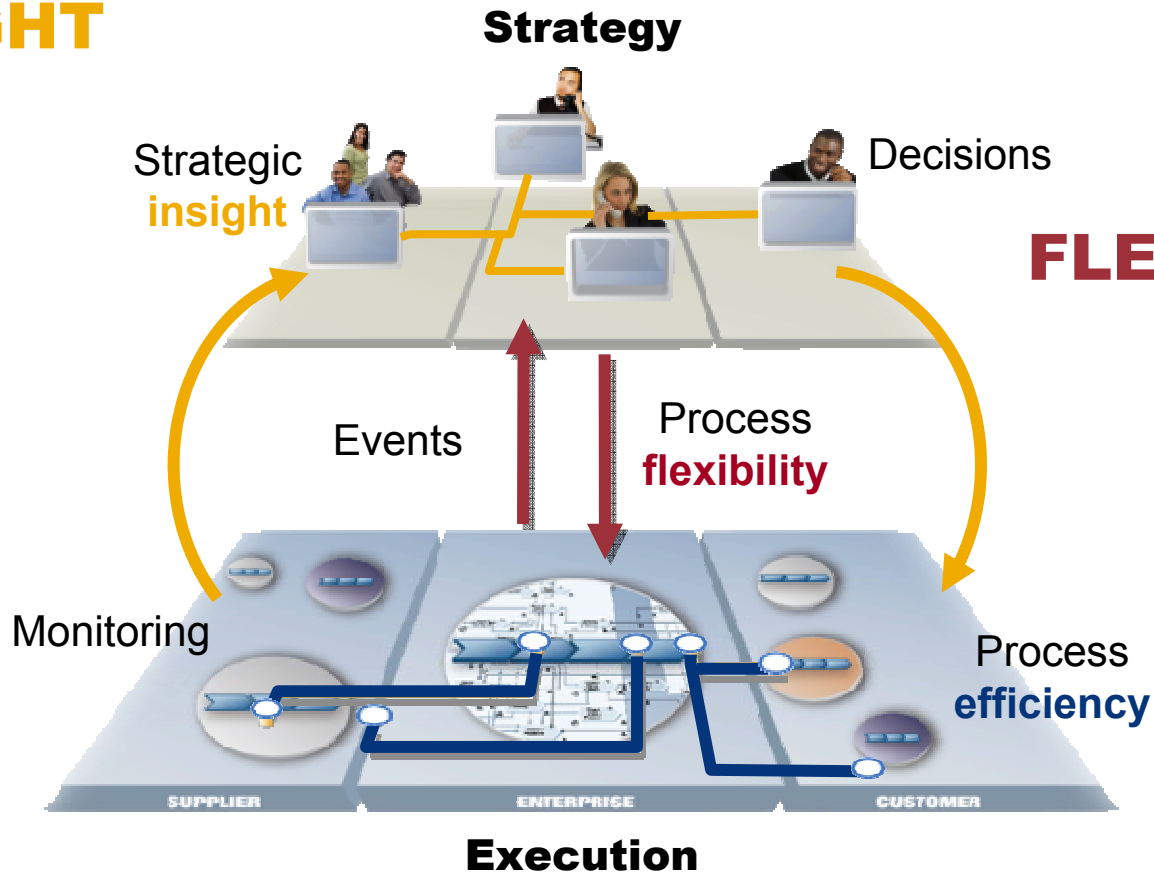
Keynote Summary

With Enterprise SOA Delivered: What's Next?

Closed Loop Business Performance Optimization



INSIGHT



FLEXIBILITY

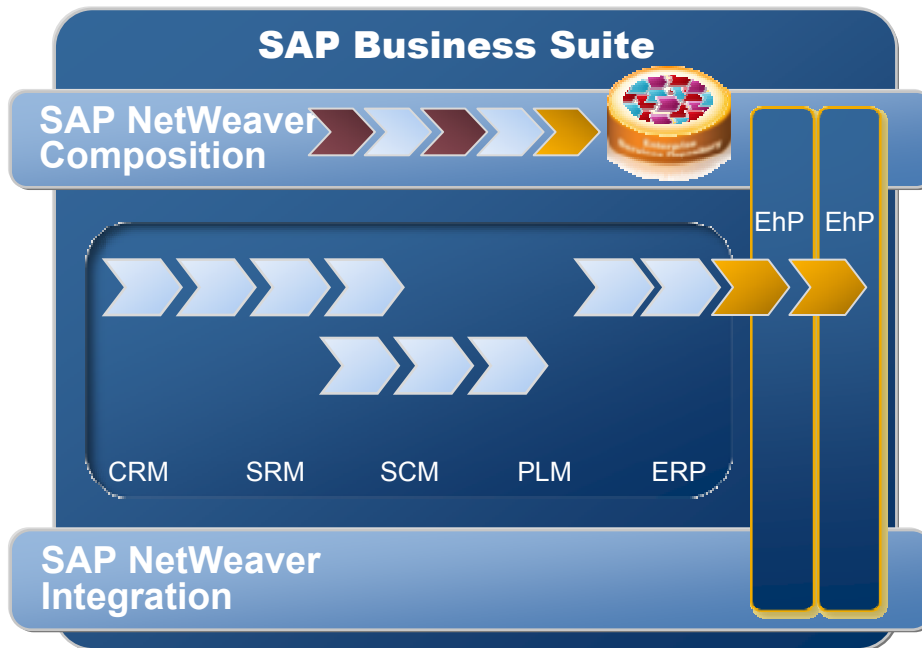
EFFICIENCY

SAP Business Suite: 2008 and Beyond

Easier to Consume, Continuous Innovation



SAP Business Suite: Cross-industry and service-enabled



- More end-to-end **industry processes**
- Harmonized **user interface**
- Embedded **analytics**
- Embedded **search**
- Continued **SOA enablement**

“

The implementation [of the Enhancement Package] was even **simpler than a support package.**“

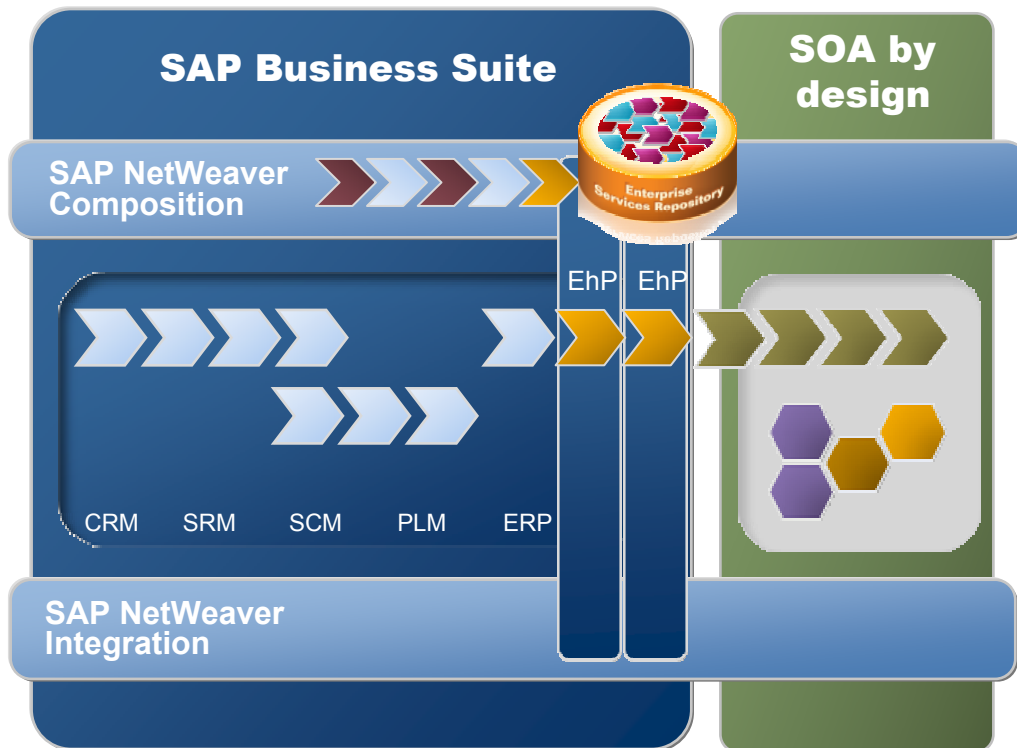


SAP Business Suite: 2008 and Beyond

Innovation Via Side-by-Side Deployments



Accelerated innovation via **side-by-side** deployments



SAP NetWeaver 7.1

- Composition Environment
- Process Integration
- Master Data Management
- Mobile
- Adaptive Computing Controller

Process extensions (planned)

- Collaborative supplier mgmt
- Collaborative product design
- Collaborative corporation

Closed Loop Business Performance

Optimization for SAP Customers



FLEXIBILITY

INSIGHT

Business Objects

Enterprise Performance Mgmt

Governance, Risk and Compliance Mgmt

Information Discovery and Delivery

Information Management Foundation



Performance Management

Risk Mitigation

Business Insight

Trusted Data & Semantics

SAP NetWeaver
Composition Environment

SAP Business Suite

Operational Performance Mgmt

Compliance Mgmt



Embedded Analytics

SAP NetWeaver
Business Warehouse, Master Data Mgmt,
Business Intelligence Accelerator

EFFICIENCY

Any structured and unstructured data, any service

Business Process Management: 2008 and Beyond

Convergence of Models, Services & Events



FLEXIBILITY

SAP NetWeaver Composition Environment

Process Analysis

Executable Process Models

Ad-hoc User Collaboration

Business Events

SAP NetWeaver Process Integration (Event & Service Bus)

Common design governance

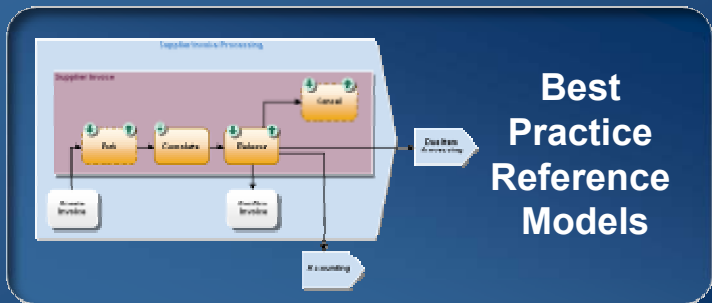


Enterprise Services

Business Objects

Analytics

SAP Business Suite



Best Practice Reference Models

Third Party

Existing Business Logic

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Mid-Term Strategy

SAP's Growth Strategy

Mid-Term Goals



Established Business

The foundation of SAP's business – highly profitable, organic growth

- Further double-digit software and software related service revenue growth at constant currencies, continuously outperform market
- Further operating margin expansion

SAP Business ByDesign

Organic entry into untapped market, innovative volume business model

- Alternative deployment options
- **2008: ~€100 million accelerated investments**
- **2009: No more accelerated investments**
- **Mid-term Revenue potential of ~US\$1bn**

Business User Solutions

New business around Business Objects, an SAP company

- **2008:** Organizational integration and product road map
- **2008-2010:** Grow significantly faster than established business

Leverage new business investments for the established business

Aiming to rapidly move new business operating margins to levels achieved in the established business

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John Schwarz
CEO, Business Objects, an SAP Company
Member of the Executive Board, SAP AG

May 6, 2008

Market Leadership in Business Performance Optimization



- Most comprehensive **EPM solutions**
- Most complete **GRC capabilities**
- Broadest **BI adoption**
- Leader in BI and information **on demand**
- **Unified** information
- **Intuitive** user experience
- Works with any **technology platform** and **business application**