Investor & Financial Analyst Conference

SAPPHIRENOW 2012

May 15, 2012 I Orlando, FL

SAPPHIRENOW Investor & Analyst Conference

1:05 – 1:10 EST   **Welcome & Introduction**
Stefan Gruber, Head of Investor Relations

1:10 – 1:30 EST   **SAP Business Suite: Customer-Driven Innovation in the Core**
Bernd Leukert, EVP Applications Continuous Innovation and
Corporate Officer

1:30 – 1:55 EST   **Winning in Mobile, Analytics, and Database & Technology**
Sanjay Poonen, President and Corporate Officer, Global Solutions
Steve Lucas, Global Executive Vice President and General
Manager, Database & Technology

SAPPHIRE**NOW** Investor & Analyst Conference

1:55 – 2:05 EST **SAP's Winning Strategy for the Cloud**
Lars Dalgaard, Founder and CEO, SuccessFactors, and
Member, SAP Executive Board

2:05 – 2:15 EST **Break**

2:15 – 2:30 EST **HANA – SAP's Flagship In-Memory Platform**
Vishal Sikka, Executive Board Member, Technology & Innovation

2:30 – 3:00 EST **Executive Q&A Session**
Bill McDermott, Co-CEO and Executive Board Member
Jim Hagemann Snabe, Co-CEO and Executive Board Member
Werner Brandt, CFO and Executive Board Member
Vishal Sikka, Executive Board Member, Technology & Innovation

Safe Harbor Statement

Any statements contained in this document that are not historical facts are forward-looking statements as defined in the U.S. Private Securities Litigation Reform Act of 1995. Words such as "believe," "estimate," "intend," "may," "will," "expect," and "project" and similar expressions as they relate to the Company are intended to identify such forward-looking statements. The Company undertakes no obligation to publicly update or revise any forward-looking statements. All forward-looking statements are subject to various risks and uncertainties that could cause actual results to differ materially from expectations. The factors that could affect the Company's future financial results are discussed more fully in the Company's filings with the U.S. Securities and Exchange Commission (the "SEC"), including SAP's most recent Annual Report on Form 20-F filed with the Securities and Exchange Commission. Readers are cautioned not to place undue reliance on these forward-looking statements, which speak only as of their dates.

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Market trends and customer requirements

Cloud
Business opportunities through cloud offerings

Consumerization
Business users driving corporate IT decisions

Big Data
Data volume for enterprise applications is
doubling every 18 months

Mobility
Smart-phones outsell PCs
By 2013, mobile devices will be the primary
method of internet access worldwide

Social
Technology allows people to be more connected
than ever

New Business Models
Big Data and mobility open opportunities for new
business models that customer need to adopt

Cost efficiency
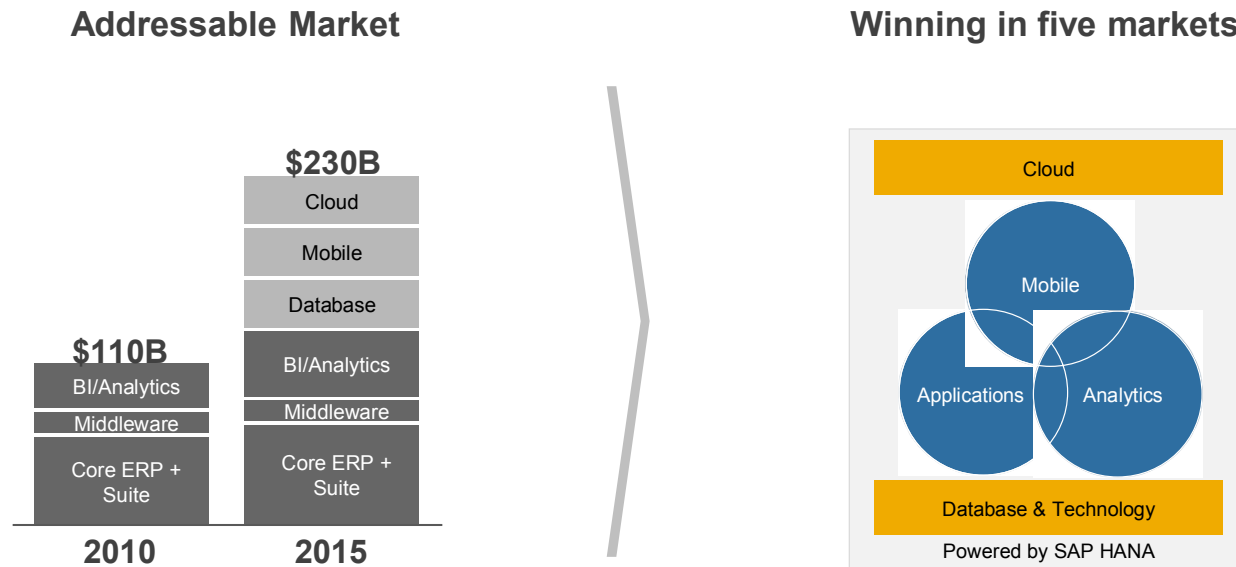Customer have to manage TCO tightly

Simplification
Companies want simpler infrastructure
Users expect intuitive software

Investment Security
Customers require investment security
according to their planning horizons

Doubling SAP's addressable market – through innovation

Addressable Market

Winning in five markets

$110B
- BI/Analytics
- Middleware
- Core ERP + Suite

$230B
- Cloud
- Mobile
- Database
- BI/Analytics
- Middleware
- Core ERP + Suite

2010   2015

Cloud

Mobile

Applications   Analytics

Database & Technology

Powered by SAP HANA

SAP Business Suite: The foundation of innovation

Evolution

Breakthrough

2015

December 2020

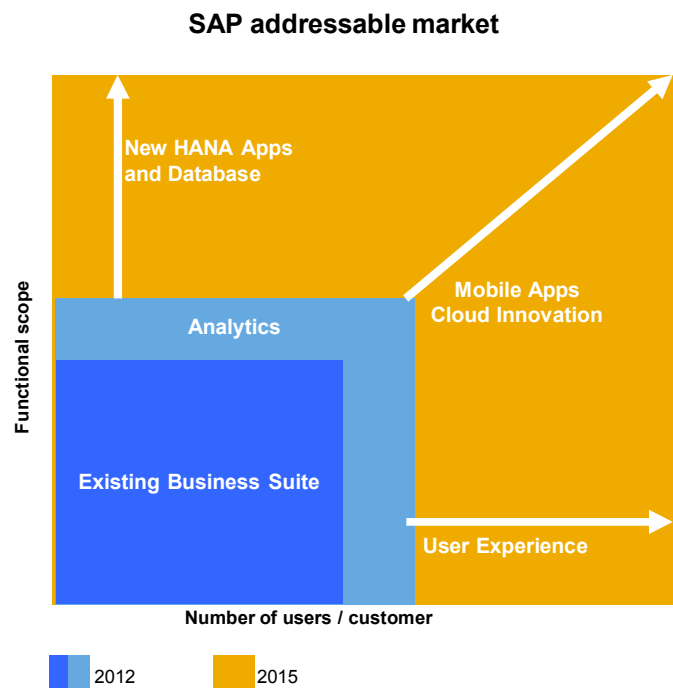**More Innovation**   **Less Disruption**   **Long-Term Predictability**

- SAP Business Suite – innovating around a consistent, stable core, helping to drive growth of SAP's other solutions
- SAP is the only applications company market delivering innovations on a quarterly basis without disruption to the customer
- Long-term planning security for our customers is unrivaled in the software industry
- SAP continues to optimize its core for lower TCO and faster deployment, through rapid deployment solutions for example
- Long-term vision: SAP HANA to become foundation of SAP applications
- User experience innovations extending user base

More innovation leads to growth in the core

SAP addressable market

New HANA Apps
and Database

Functional scope

Analytics

Mobile Apps
Cloud Innovation

Existing Business Suite

User Experience

Number of users / customer

2012   2015

Growth opportunities:

- Enhancements to existing apps

- New apps

- Pull through demand from mobile and cloud

- Leadership in analytics

- Regional growth in emerging markets

SAP Analytics: Decision revolution

Market leader in BI, Performance Management and Analytic Applications according to Gartner and IDC
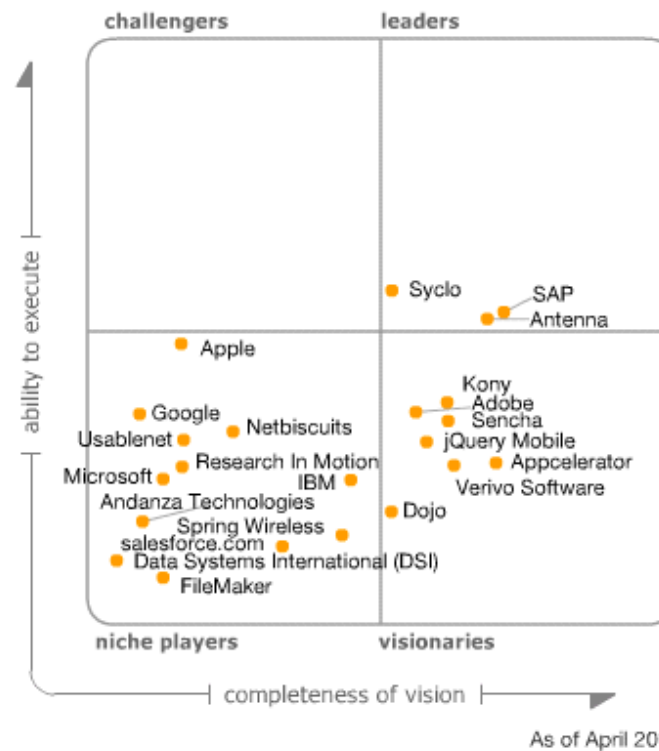
Roadmap execution with the delivery of BI4.0, EPM 10.0 and GRC 10.0

Continued innovation with SAP Visual Intelligence and SAP Predictive Analysis extending addressable market

Mobility

Cloud

$10.66

Align

BI

Collaboration

GRC

EPM

Inform

Adapt

Predictive
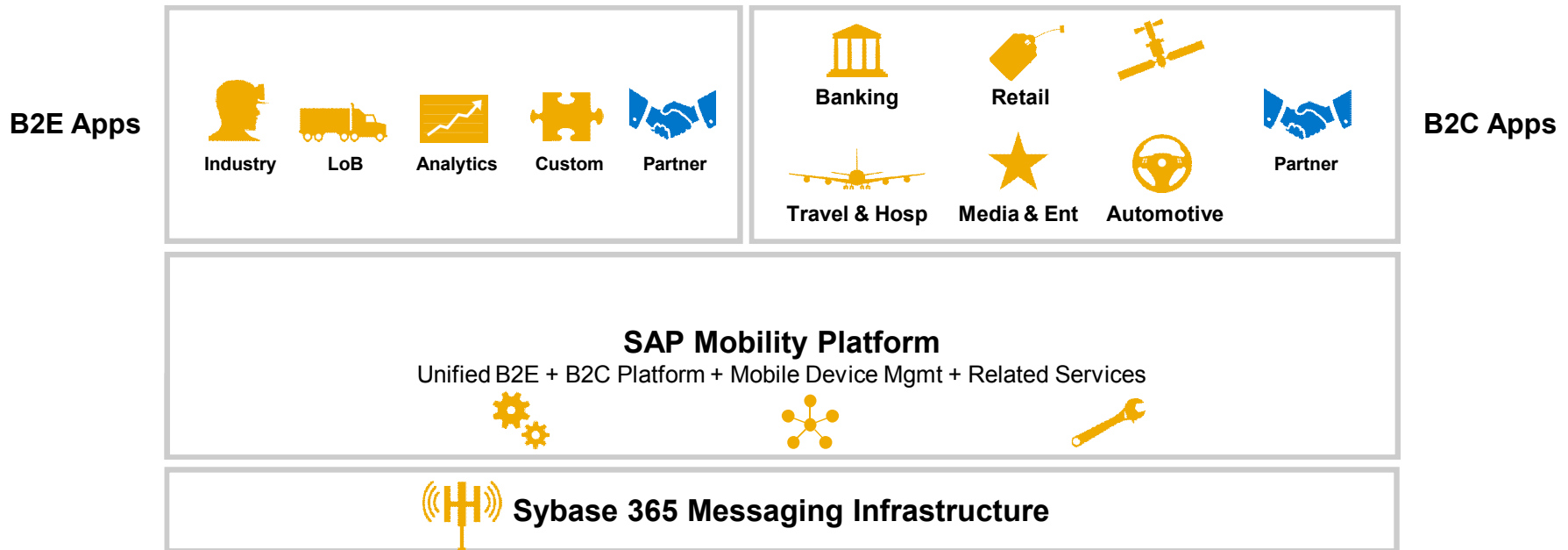
HANA

Predictive
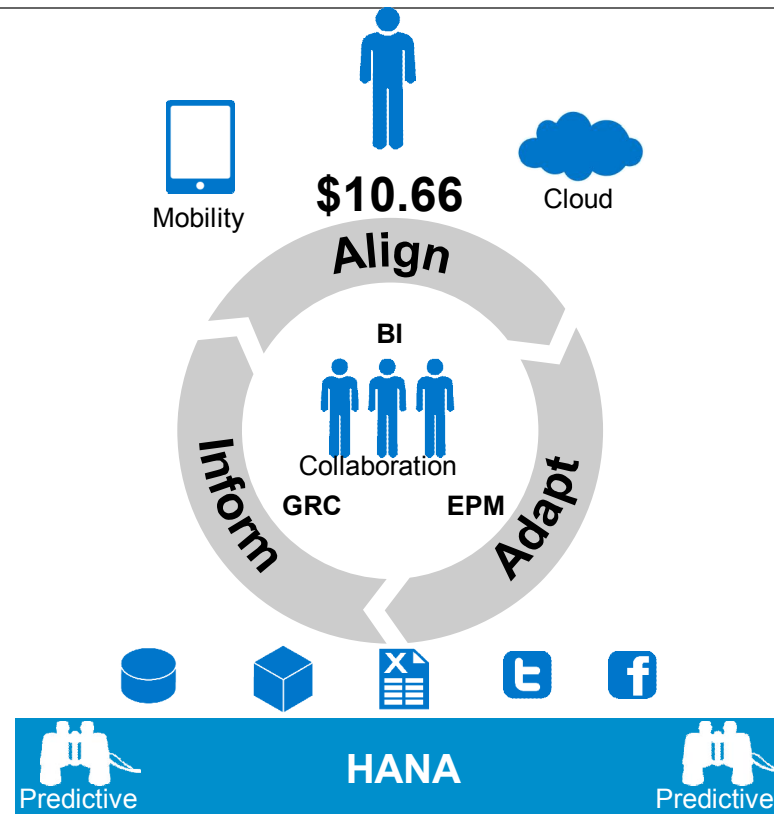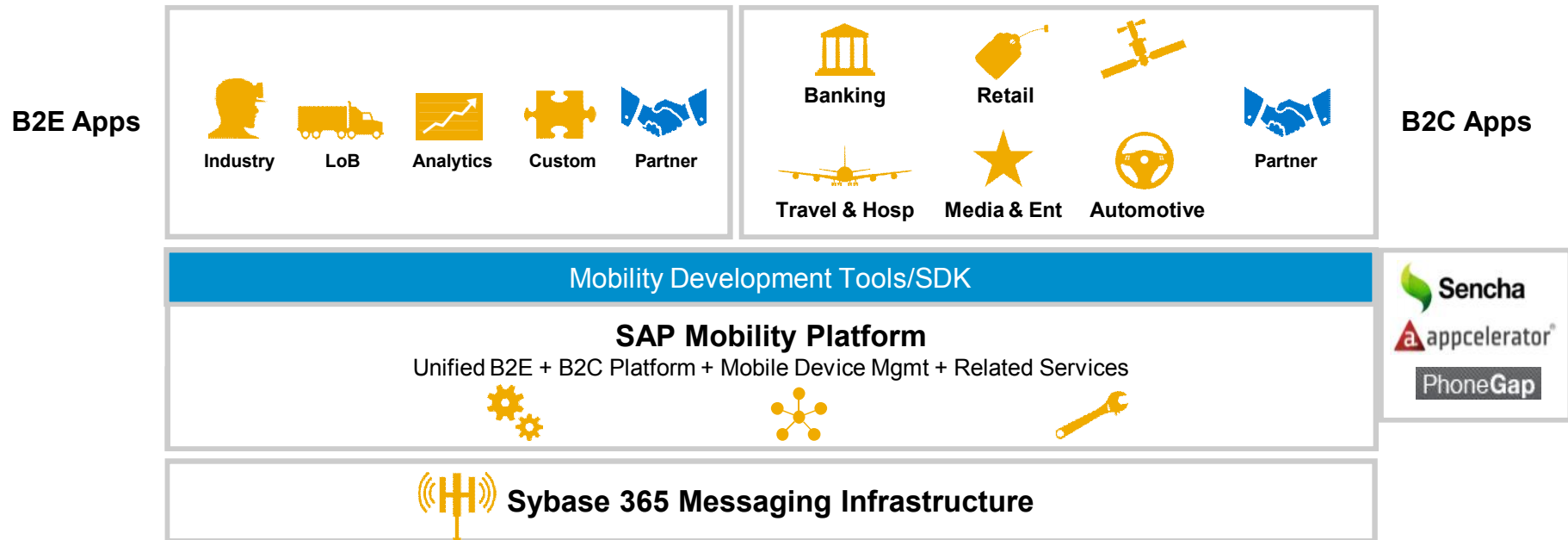
Market leadership in mobility

- **#1 in vision**

- **#1 in execution**

SAP's mobile portfolio – build, buy and partner strategy
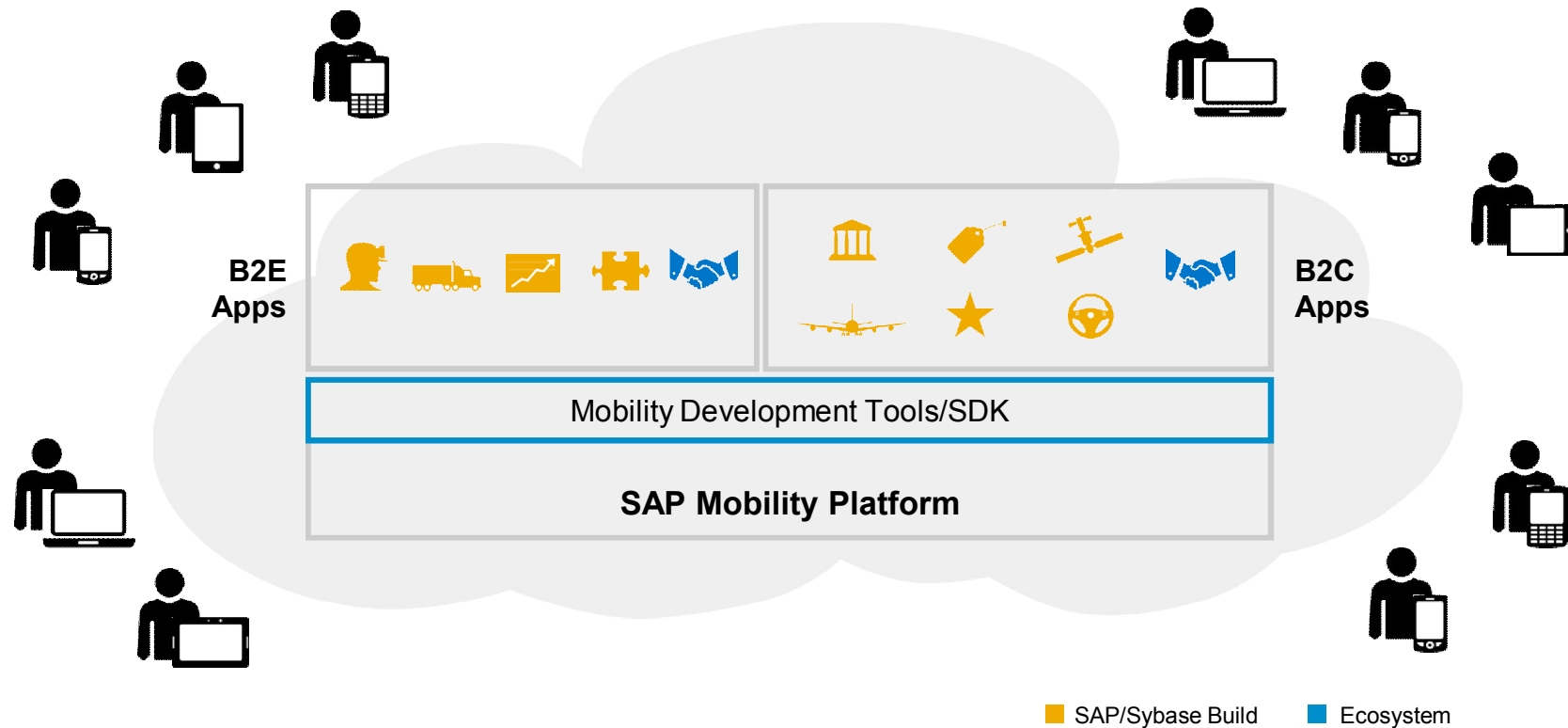
Industry's most comprehensive enterprise mobile portfolio

B2E Apps

Industry	LoB	Analytics	Custom	Partner

B2C Apps

Banking Retail

Travel & Hosp Media & Ent Automotive Partner

SAP Mobility Platform
Unified B2E + B2C Platform + Mobile Device Mgmt + Related Services

Sybase 365 Messaging Infrastructure

■ SAP/Sybase Build ■ Ecosystem

SAP's mobile portfolio – build, buy and partner strategy

1 Platform, 1,000s of Applications, 1M+ Developers

B2E Apps

Industry · LoB · Analytics · Custom · Partner

B2C Apps

Banking · Retail · Partner

Travel & Hosp · Media & Ent · Automotive

Mobility Development Tools/SDK

SAP Mobility Platform
Unified B2E + B2C Platform + Mobile Device Mgmt + Related Services

Sencha
appcelerator®
PhoneGap

Sybase 365 Messaging Infrastructure

■ SAP/Sybase Build ■ Ecosystem

SAP's mobile portfolio – also available in the cloud

B2E Apps

B2C Apps

Mobility Development Tools/SDK

SAP Mobility Platform

■ SAP/Sybase Build   ■ Ecosystem

Sample priority of mobile apps & suites

Mobile Field Service & Asset Management

Mobile Retail Execution & Direct Store Delivery

Mobile Consumer Solutions
Banking / Telco / Utilities / CP / Retail

CRM Mobile Suite

Content Mobile Suite

Healthcare Mobile Suite

Procurement Mobile Suite

Mobile Travel and Expense Management

Productivity Mobile Suite
Configurable / Extensible Workflow
HCM / FIN / SCM

Mobile BI/Analytics

Announcing acquisition of Syclo:
The leader in mobile asset management and field service apps

- Over 600 Customers in 39 countries
- Analysts rate as Best-in-class for Mobile EAM & Field Services
- Deep industry & business process knowledge in industries
- Any ERP system, network, device (optimized for SAP, Maximo)
- Elegant configuration and deployment approach
- Support for Sybase Unwired Platform (SUP)
- Unmatched integration expertise to complex systems

Winning in Database & Technology

Steve Lucas, EVP, SAP Database & Technology

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SAP

Accelerate

Database &
Datawarehouse

Simplify

Enterprise Information
Management

Adapt

Platform,
Middleware & Cloud

Collaborate

Content & Portal

"SAP & Sybase – A
Marriage Made in Database
Heaven. SAP will enable
customers to acquire a
combination of leading
relational database and
application software from
the same vendor."

Carl Olofson, VP Research IDC

"Customers that use SAP
applications are more likely
to find that SAP Data
Services offers a strong
integrated framework to
support data integration; it
supports database and
application.
migration efforts as well as
traditional analytical use
cases."

*Enterprise ETL Wave,
Forrester, February 27, 2012*

"No vendor has articulated
a comprehensive vision
such as SAP's, linking in-
memory technology,
application platforms and
cloud architecture."

*SAP Throws down the Next-
Generation Architecture
Gauntlet with HANA,
Gartner 13/10/11*

"50% increase in
productivity with enterprise
workspaces"

Valero

SAP Data Management Portfolio

SQL Anywhere

Embedded

Mobile and Embedded Database

Sybase IQ

Open EDW

Open Analytical Database, Best TCO

Sybase ESP

Continuous Intelligence

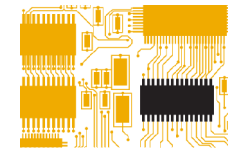**Insight into Streaming Data**

Sybase ASE
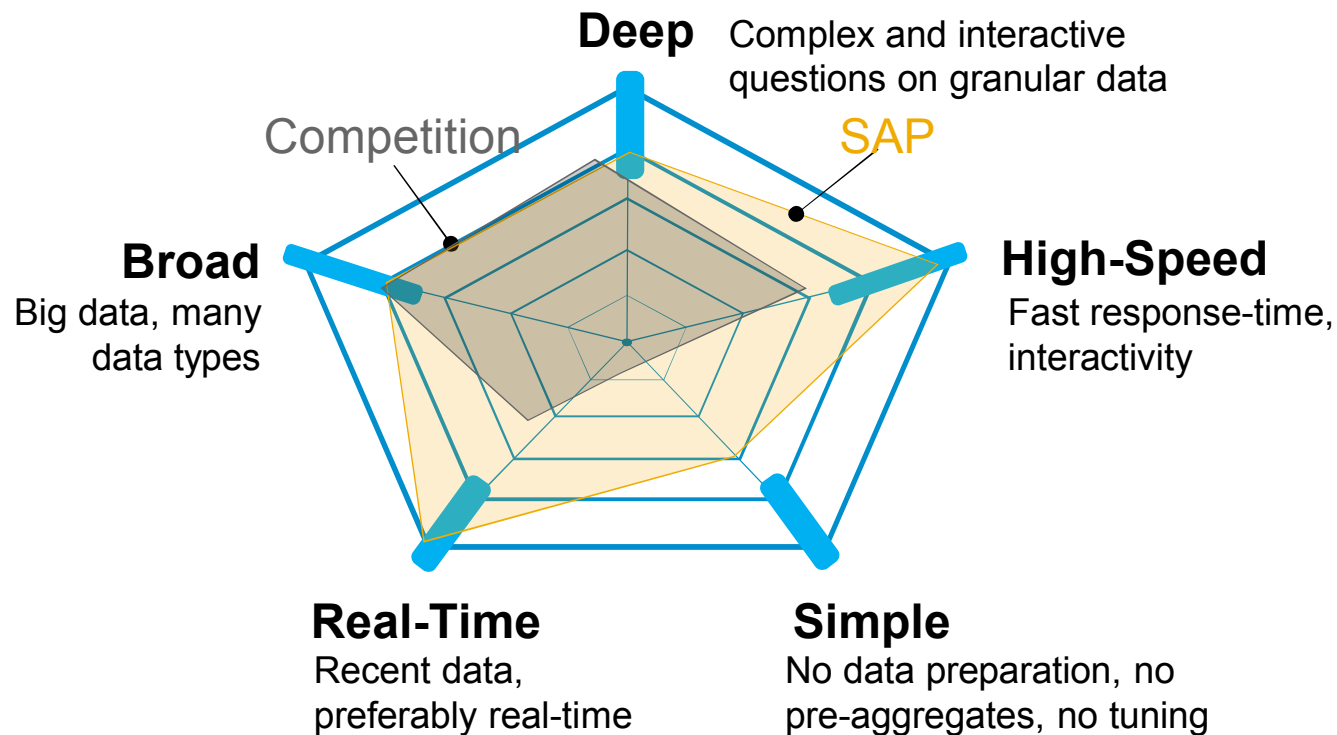
Transactions

Transactional Database, Best TCO

SAP HANA

Real-time Business

Next-Gen Platform for Real-time Business

Why is the SAP Real-time Data Platform better?
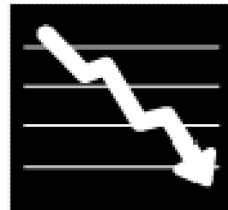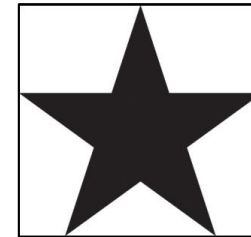## 5 dimensions of differentiation against competition

Deep Complex and interactive
questions on granular data

Competition   SAP

Broad
Big data, many
data types

High-Speed
Fast response-time,
interactivity

Real-Time
Recent data,
preferably real-time

Simple
No data preparation, no
pre-aggregates, no tuning

Database & Technology
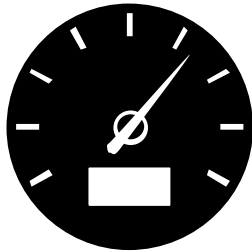
Fastest

Growing

Lowest

TCO

Best

Innovation

Q&A

Winning in Mobile, Analytics, and Database & Technology

Sanjay J. Poonen, President & Corporate Officer, Product Go-to-Market & Mobile Division
Steve Lucas, Global Executive Vice President and General Manager, Database & Technology

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