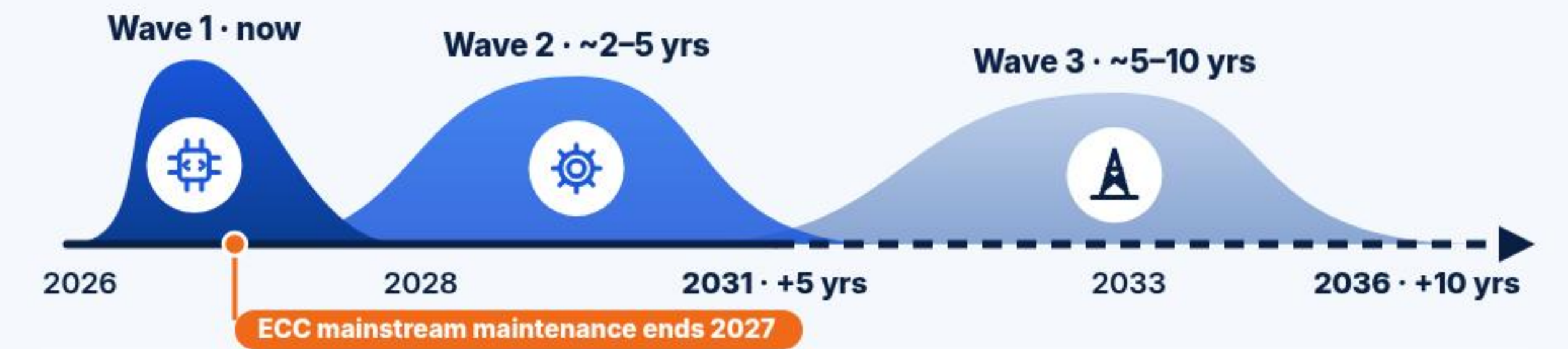


Which SAP clients will be the last to hit the AI tsunami?



Operations AI ≠ ERP AI — e.g. Aramco: **\$1.8B** AI value in 2024 (company-reported).

Projection based on current adoption data — trend, with exceptions.

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What partners should do →

WAVE 1 · NOW



Software, electronics, telecom, finance, pharma

First phase: Partners should **IMMEDIATELY** do this

- 1 Bring AI into your own delivery now:** AI-assisted ABAP / code remediation, testing and migration.
- 2 Offer AI use cases on SAP** (SAP Business AI, Joule), not just go-lives.
- 3 Get master data AI-ready.** AI on messy data goes nowhere.
- 4 Move fast,** or these clients will go to AI-native vendors.

WAVE 1

WAVE 2

WAVE 3

Eurostat 2025: 62.5% of EU information & communication enterprises already use AI (EU average 20.0%).

Gartner, Feb 2025: 63% of organisations lack, or are unsure they have, the right data-management practices for AI.



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WAVE 2 · NEXT



Utilities, refining & chemicals, machinery, automotive

You should start this... then adopt, and start becoming a partner in their AI journey

- 1 **Start pilots now:** one or two focused AI use cases.
- 2 **Adopt AI in your delivery,** so every project gets faster.
- 3 **Be their AI partner,** not just the SAP implementer.
- 4 **Build the data foundation** before they scale.

WAVE 1

WAVE 2

WAVE 3

DSAG Investment Report 2025: 68% of responding SAP user companies (DACH) rate AI as high or medium relevance, up from 28% in 2024.

243 respondents; the 2025 sample skews larger, so only partly comparable.



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WAVE 3 · LATER

A Upstream oil & gas, mining, farming, construction, PSU

You have time to build capability and use cases based on other clients

They are less likely to leave for a new vendor for AI.

- 1 Use the time:** build skills and proven use cases with Wave 1 & 2 clients, then bring them here.
- 2 Lead with stability:** the long relationship is your edge.
- 3 Start from their operations AI,** then bring it into ERP.
- 4 Mind the clock:** ECC mainstream maintenance ends 2027.

WAVE 1

WAVE 2

WAVE 3

Operations AI ≠ ERP AI: Aramco reports \$1.8B of AI-driven value in 2024 (company-reported). Eurostat 2025: construction 10.8% vs EU average 20.0%.

SAP: ECC mainstream maintenance to end of 2027; optional extended maintenance 2028–2030.



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