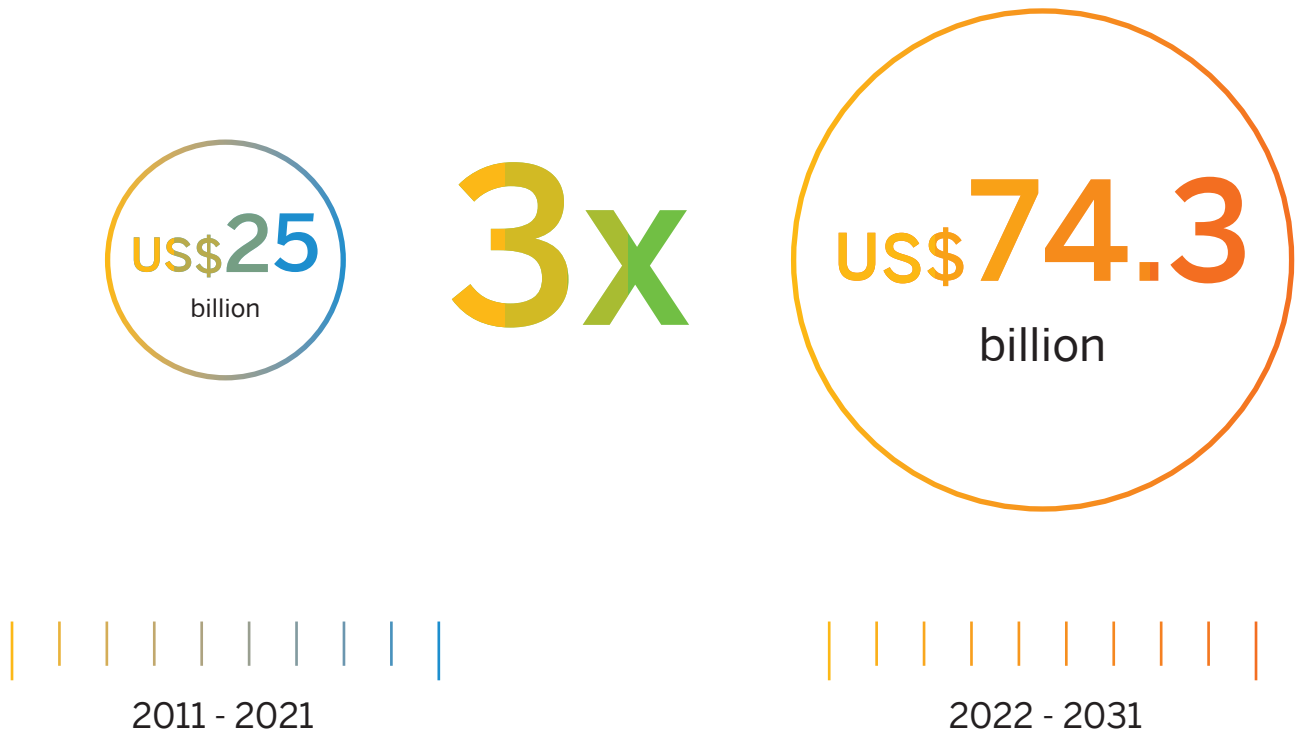


## Economic Value Created For SAP Türkiye Customers

The total productivity gains achieved by SAP Türkiye customers using ERP solutions were US\$25 billion in the 2011-2021 period.

With the digitalization and widespread of cloud computing, the total productivity gains of SAP Türkiye customers will nearly triple in the next 10 years, reaching US\$74.3 billion.



Source: Value Lifecycle Manager (VLM), CBRT Sectoral Company Accounts Statistics, PAL calculations

## Multiplier Effect on Employment

For each employee in SAP Türkiye, 52 SAP consultants are employed in the ecosystem consisting of SAP partners and SAP customers.



## Significant contributions to IT sector employment in Türkiye

Employment in the SAP ecosystem corresponds to 9% of Türkiye's IT sector total employment.

SAP Türkiye employees	250
SAP specialists at business partners	5,517
SAP specialists at enterprises that use SAP	7,350
<b>Total</b>	<b>13,297</b>

## Share of Exports in SAP Partners' Revenue

SAP partners derive approximately 11% of their total revenue from exports originating SAP solutions.

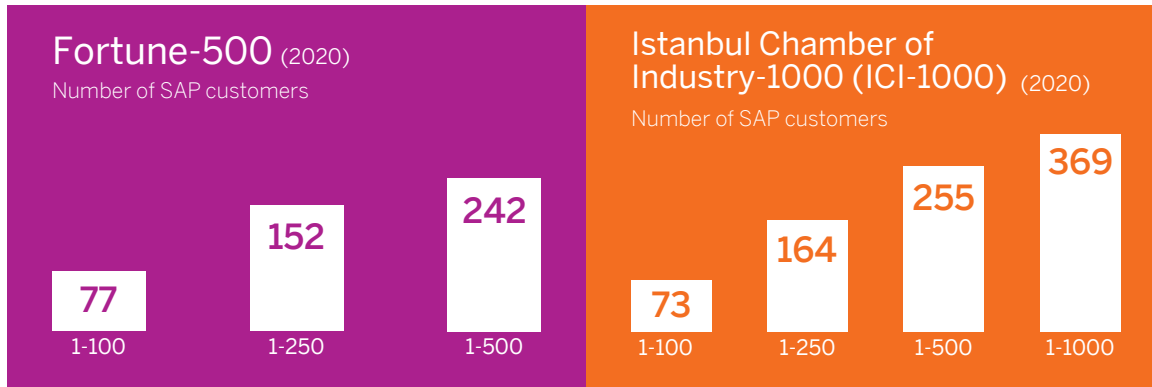
**11%**



Source: TÜBİSAD (Türkiye Informatics Industry Association) ICT sector reports, SAP Partner and Customer surveys, PAL calculations

# SAP Customers in the Turkish Economy

SAP customers in the Fortune-500 and Istanbul Chamber of Industry-1000 (ICI-1000) lists, 2020



Source: ICI-1000 and Fortune-500 lists, SAP data, PAL analyses

## Size of SAP customers in the Fortune-500 Türkiye list, 2020

	Total Value	Share of Fortune-500	Share within Türkiye
Revenue	1.3 trillion ₺	69%	13%
Exports	US\$51 billion	76%	30%
Number of employees	845,000	66%	5%

Source: Fortune-500 list, PAL analyses

## Size of SAP customers in the ICI-1000 list, 2020

	Total Value	Share of ICI-1000	Share of the Turkish manufacturing sector	Share within Türkiye
Revenue	977 billion ₺	66%	32%	9%
Exports	US\$37 billion	71%	23%	22%
Number of employees	309,000	53%	7%	2%

Sources: ICI-1000 list, PAL analyses

# Productivity and profitability differences of SAP customers compared to other companies (2020)

## Fortune-500 Türkiye

**1.5x**

Revenue per employee

**1.9x**

Profit per employee (EBITDA)

**+2.8** percentage point

Profitability (EBITDA/Net revenue)

## Istanbul Chamber of Industry-1000 (ICI-1000)

**2x**

Revenue per employee

**2.3x**

Profit per employee (EBITDA)

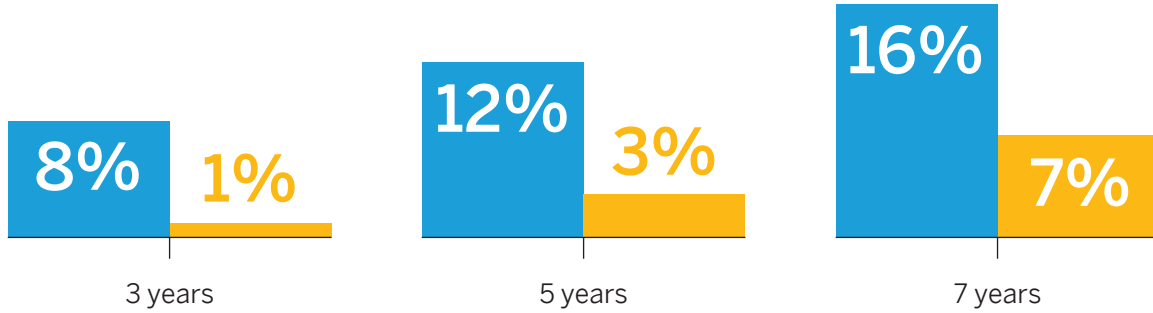
**+1** percentage point

Profitability (EBITDA/Net revenue)

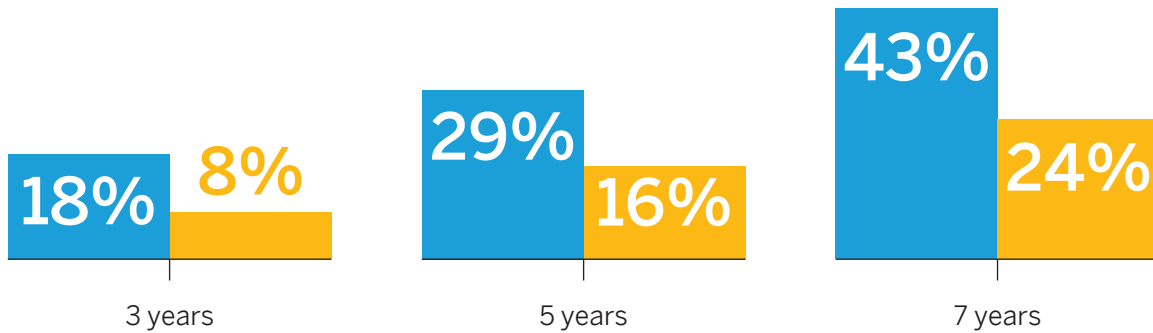
Source: Fortune-500 Türkiye and ICI-1000 lists, PAL Analyses

# Growth and Productivity Impacts of SAP Transformation

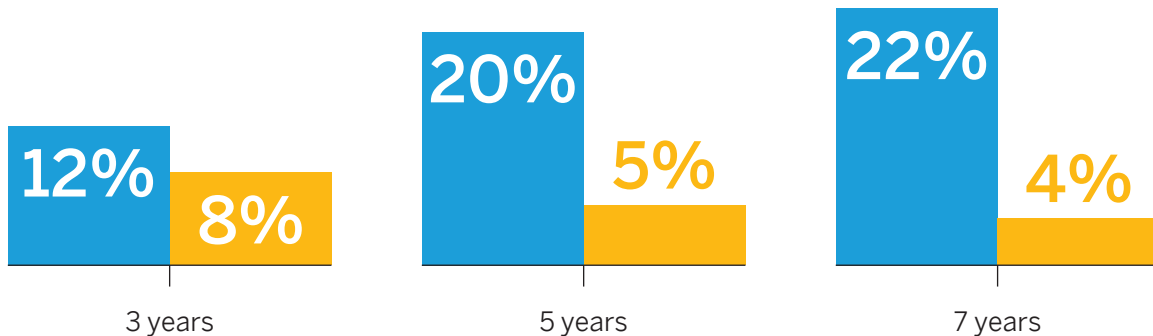
Changes in real net sales (revenue) per employee (ICI-1000)



Changes in real net sales (revenue) (ICI-1000)



Change in real value added per employee (ICI-1000)



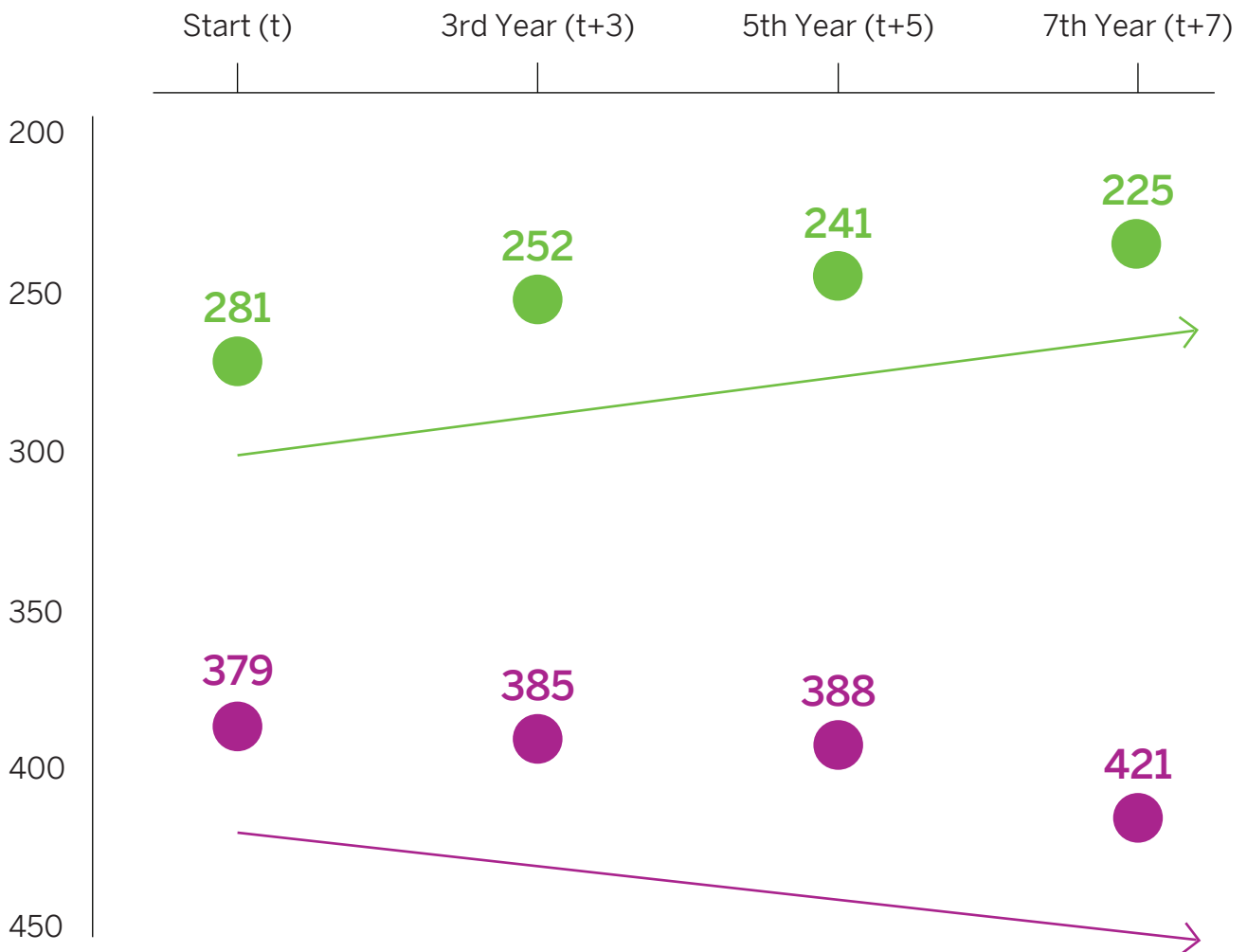
**SAP ERP customers:** Consists of 52 companies that were included in the ICI-1000 list in the year they started using SAP and for the next seven consecutive years, and that completely shared the information on the number of employees, turnover and value added in these years.

**Control Group:** A control group of 52 companies was formed for the SAP ERP user group. Each SAP ERP user that was selected, matched with a non-SAP user that had closest real value added per employee in the starting year. Data completeness and continuity conditions also apply here.

The impact of the SAP transformation was analyzed by comparing the performance indicators of these two company groups.

## Average rankings in the ICI-1000 list

While the companies that started using SAP ERP moved their average rank up 56 places in the ICI-1000 list in the 7-year period, there was a decline in the average rank of companies that were not SAP customers in the same period.



**SAP ERP customers:** Consists of 52 companies that were included in the ICI-1000 list in the year they started using SAP and for the next seven consecutive years, and that completely shared the information on the number of employees, turnover and value added in these years.

**Control Group:** A control group of 52 companies was formed for the SAP ERP user group. Each SAP ERP user that was selected, matched with a non-SAP user that had closest real value added per employee in the starting year. Data completeness and continuity conditions also apply here.

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PAL exercised independent editorial control over the report, which PAL and  
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# SAP Türkiye Economic Impact Analysis

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the entire report  
via QR code.

