

# The Salesforce Economy: Germany Powered by AI Cloud Solutions



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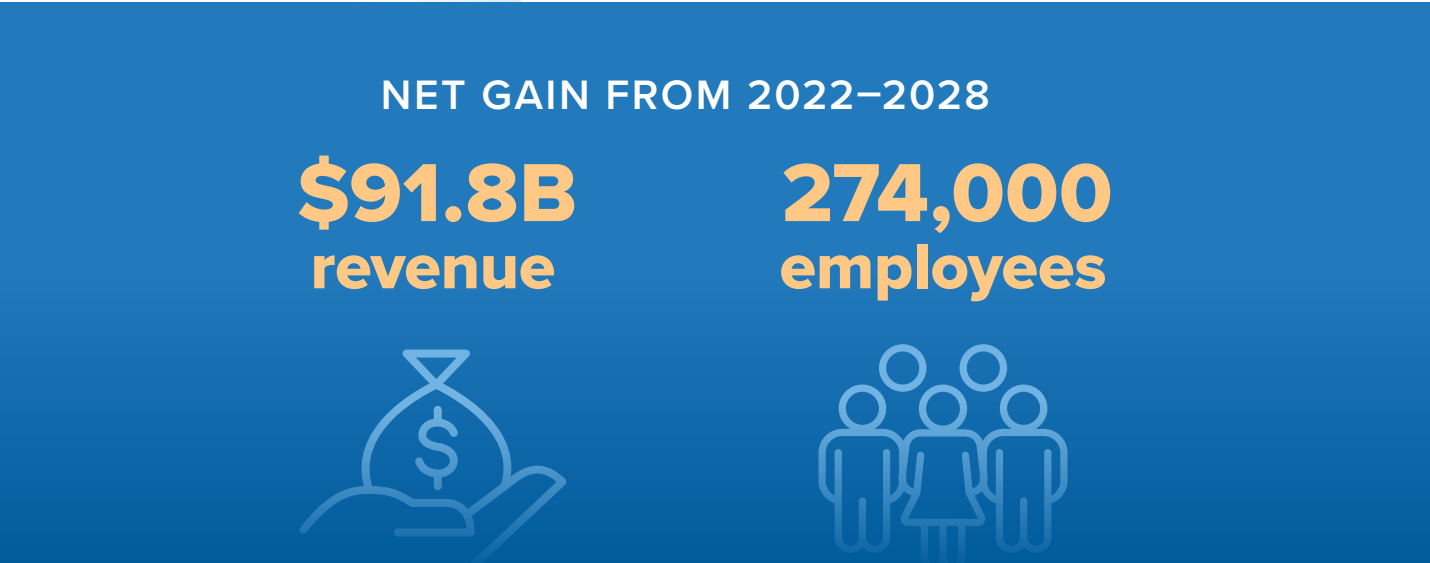
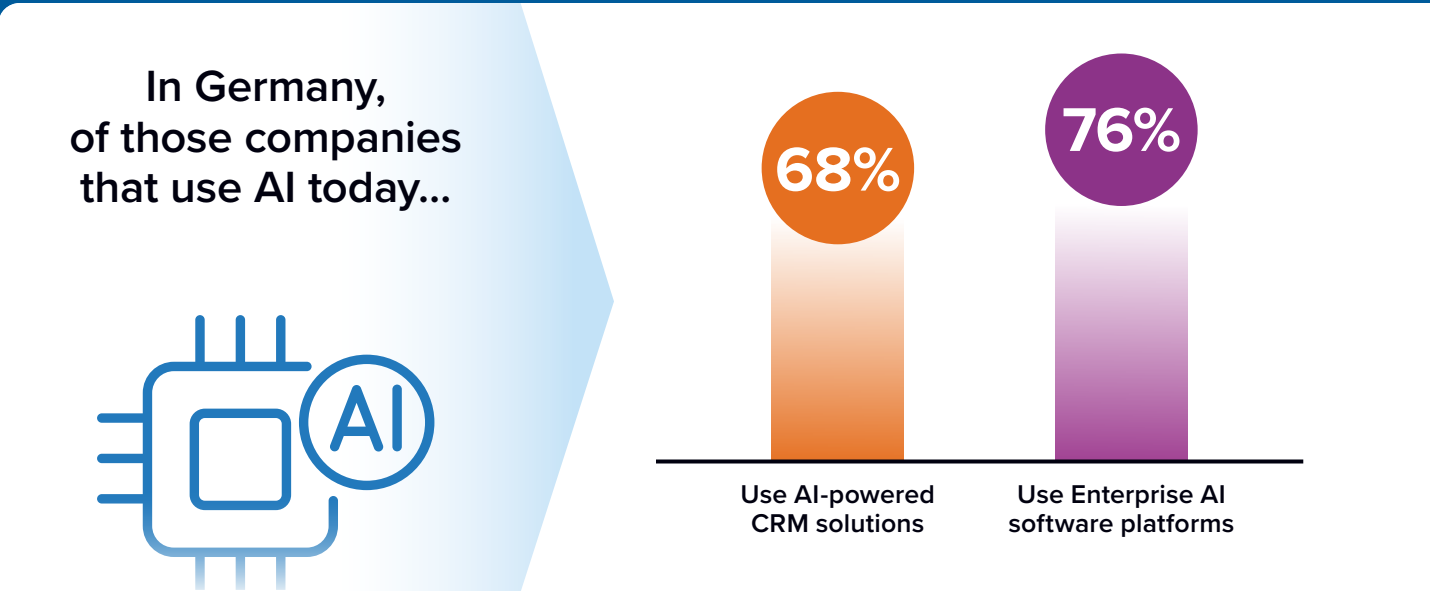
# In This Country Impact InfoBrief

This InfoBrief forecasts the **economic impact of Salesforce and its ecosystem of partners and customers on the economy of Germany.**

It also draws on insight from an IDC Global AI survey conducted in September 2023.

- ▶ **AI will transform everything in the coming years, including beachhead solutions** that will drive significant economic spinoffs.
- ▶ **CRM applications have been identified** for early AI implementation.

This is a country addendum to the IDC White Paper *Salesforce Economic Impact: Salesforce AI-Powered Cloud Solutions Will Generate \$948 Billion in New Revenues for Customers by 2028*, December 2023.



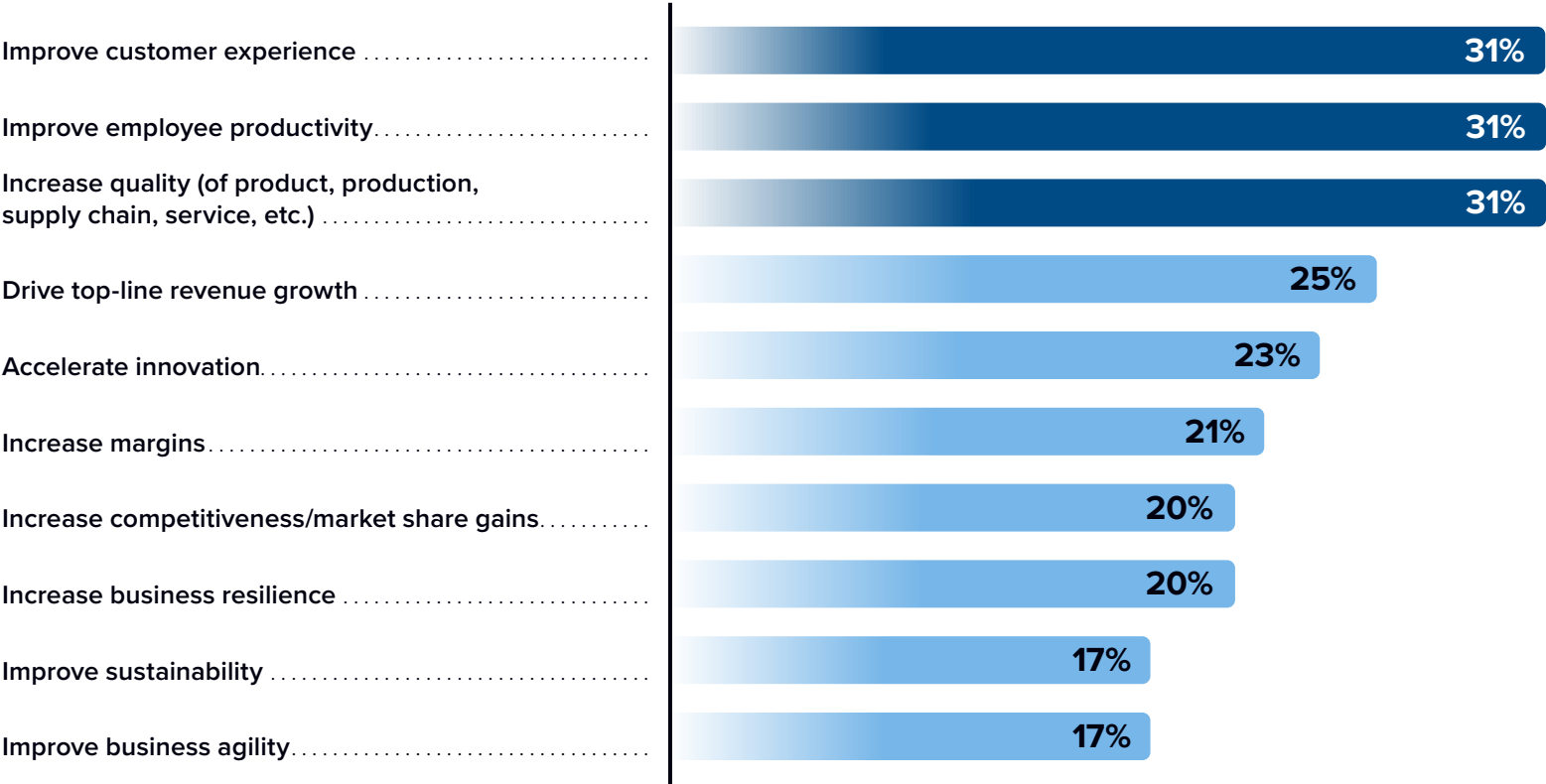


# Drivers

AI-powered applications will multiply operational efficiency and customer experience benefits.

What are the primary business drivers for using AI-powered cloud solutions for your projects/initiatives?

(% of Germany respondents)



**WORLDWIDE**

**Top 3 Business Drivers**

- 1 Improve employee productivity
- 2 Improve customer experience
- 3 Increase quality (of product, service, production, supply chain, etc.)

Notes: Managed by IDC's Global Primary Research Group. Data not weighted. Use caution when interpreting small sample sizes. Multiple dichotomous table; totals will not sum to 100%. n = 71 (all Germany respondents); Source: IDC's *Salesforce Economic Impact Survey*, September 2023

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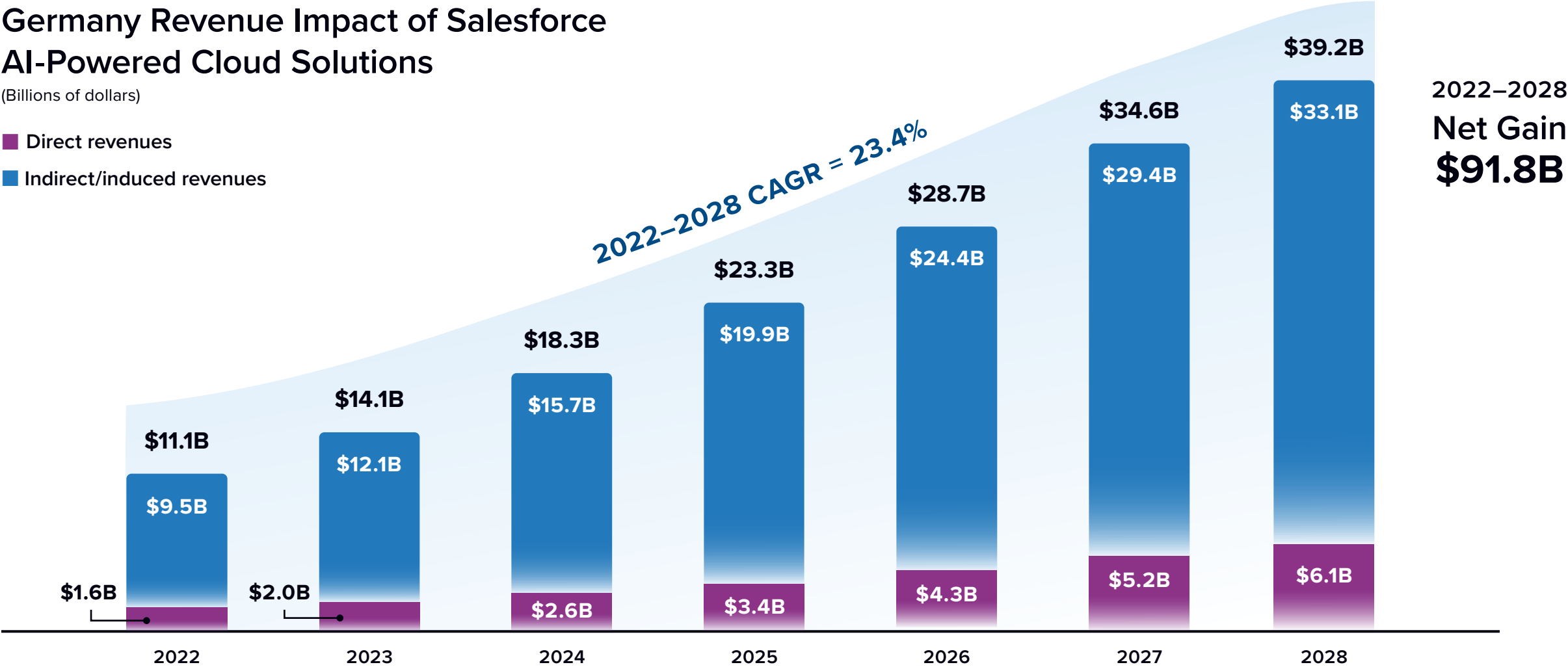


# Revenue Impact

## Germany Revenue Impact of Salesforce AI-Powered Cloud Solutions

(Billions of dollars)

- Direct revenues
- Indirect/induced revenues



For an accessible version of the data on this page, see [Supplemental Data](#) in the Appendix. [Key Definitions in Support of Figures](#) can be found in the Appendix.

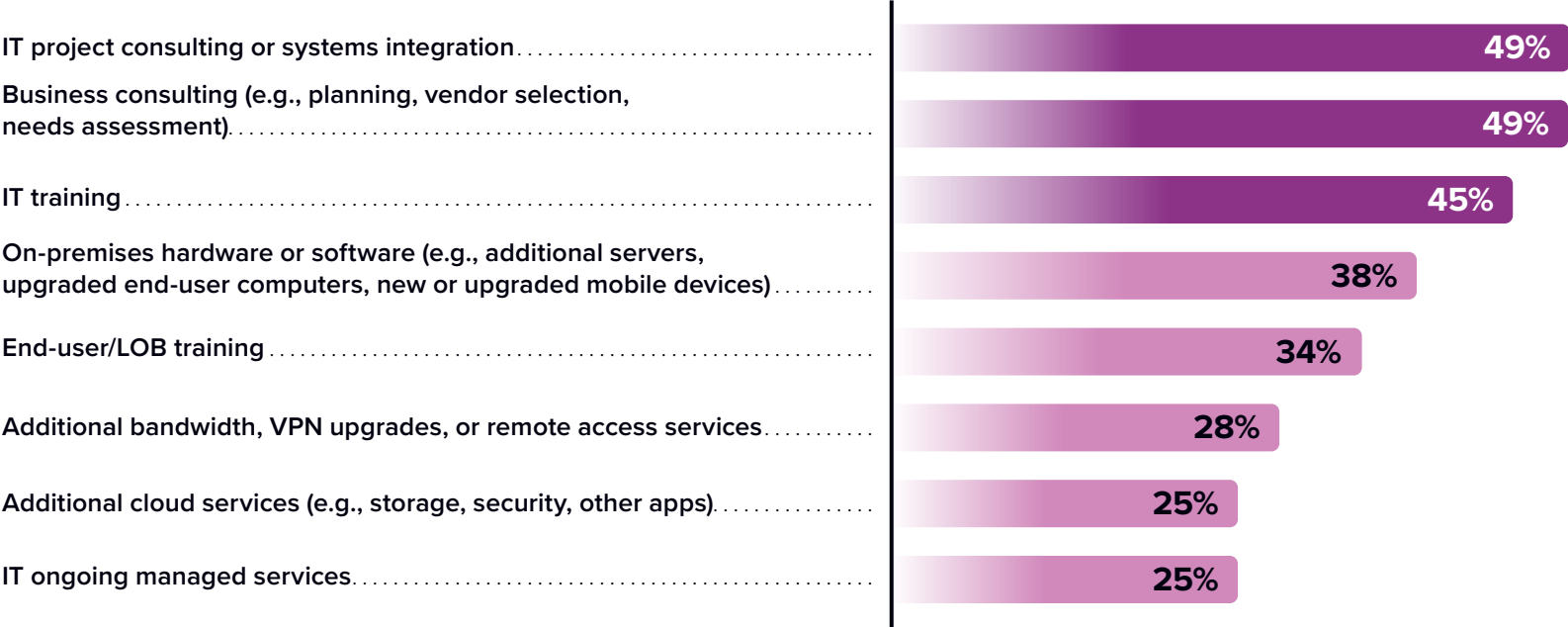


# Ecosystem Impact

AI drives significant opportunity for the partner ecosystem to help customers on their AI-powered journey.

Thinking about your organization’s most recently implemented AI-powered cloud solutions, in addition to the basic cloud subscription, what other services or products did you need for a fully functional implementation?

(% of Germany respondents)



**WORLDWIDE**  
**Top 3 Services**

- 1 IT project consulting or systems integration
- 2 Additional cloud services (e.g., storage, security, other apps)
- 3 IT training

Notes: Managed by IDC’s Global Primary Research Group. Data not weighted. Use caution when interpreting small sample sizes. Multiple dichotomous table; totals will not sum to 100%. n = 71 (all Germany respondents); Source: IDC’s *Salesforce Economic Impact Survey*, September 2023

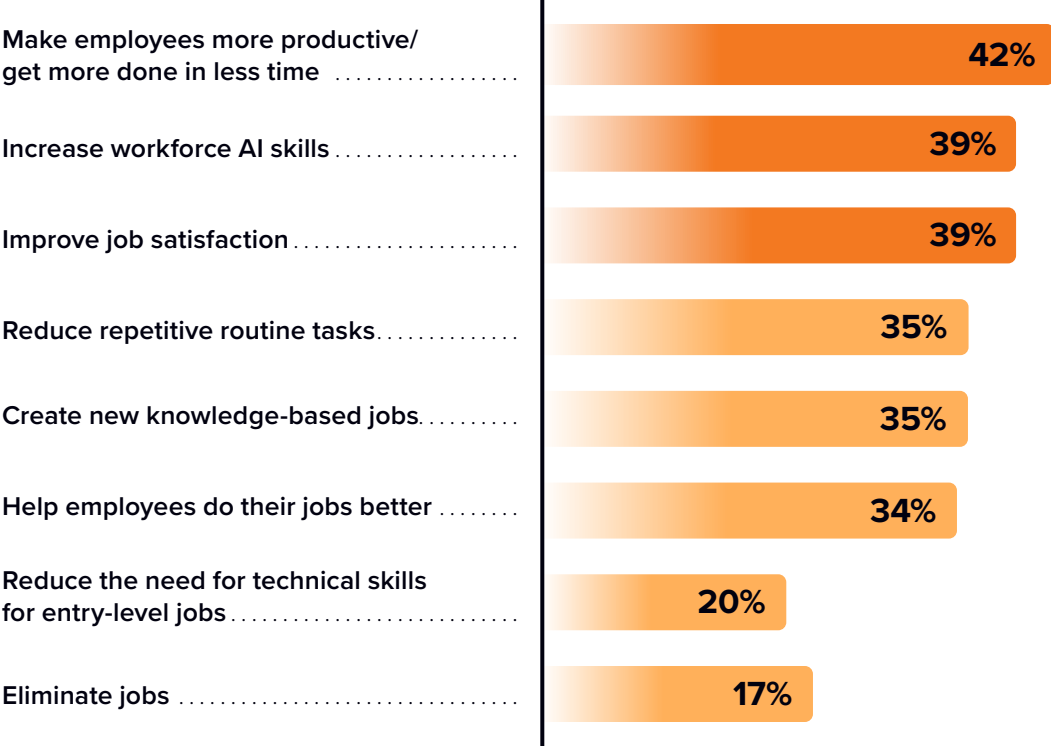


# Jobs Impact

The way we work will change but also drive new categories of roles to be hired.

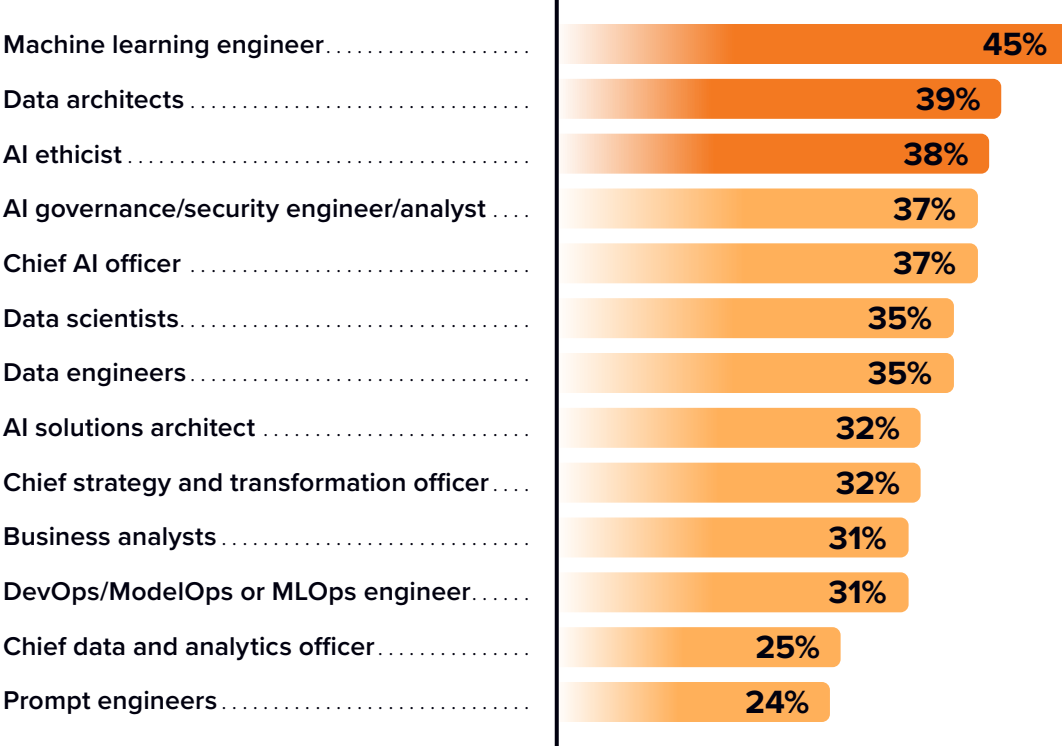
## In Germany, how will AI-powered cloud solutions impact your organization in the next 12 months?

(% of Germany respondents)



## In Germany, what AI roles do you plan to hire in the next 12 months?

(% of Germany respondents)



Notes: ModelOps/MLOps is the discipline of operationalizing models in production, scaling them, and so on. Managed by IDC's Global Primary Research Group. Data not weighted. Use caution when interpreting small sample sizes. Multiple dichotomous table; totals will not sum to 100%. n = 71 (all Germany respondents); Source: IDC's *Salesforce Economic Impact Survey*, September 2023

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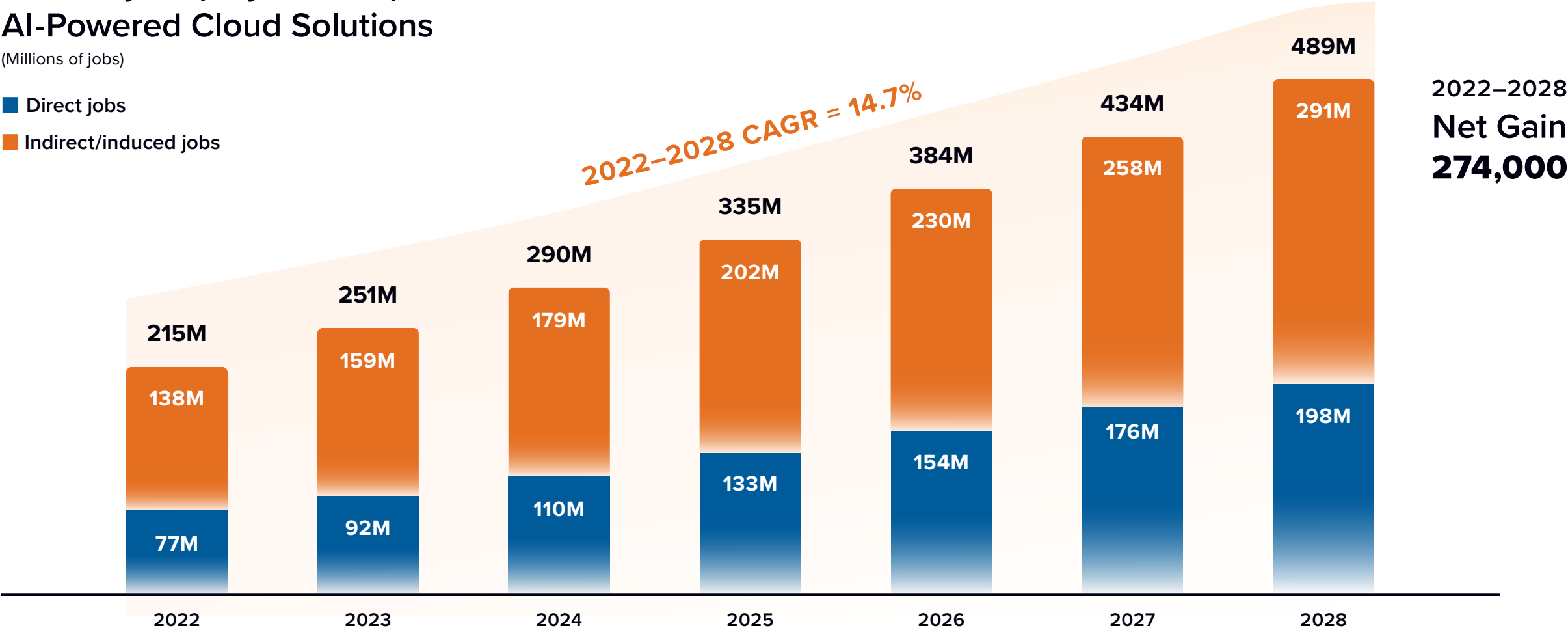


# Jobs Impact (continued)

## Germany Employment Impacts of Salesforce AI-Powered Cloud Solutions

(Millions of jobs)

- Direct jobs
- Indirect/induced jobs



For an accessible version of the data on this page, see [Supplemental Data](#) in the Appendix. [Key Definitions in Support of Figures](#) can be found in the Appendix.



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# Challenges

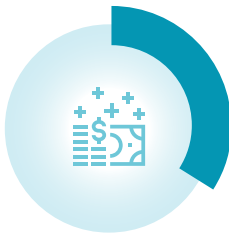
### What are the 3 biggest challenges your organization faces in implementing AI-powered cloud solutions technology?

(% of Germany respondents)



**42%**

AI governance and risk management



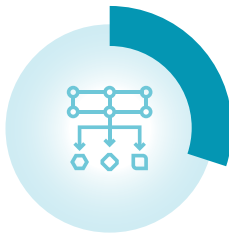
**34%**

Cost of the solutions



**30%**

Lack of skilled employees (data scientists, data engineers, or AI modelers)



**30%**

Understanding/transparency of algorithms



**23%**

Lack of adequate volumes of quality training data



**15%**

Trustworthiness/bias in data



**15%**

Ethics considerations



**13%**

Access to computing resources



**7%**

Difficulty selecting the right algorithms



**7%**

Unclear decision criteria for the solutions

Notes: Managed by IDC's Global Primary Research Group. Data not weighted. Use caution when interpreting small sample sizes. Multiple dichotomous table; totals will not sum to 100%. n = 71 (all Germany respondents); Source: IDC's *Salesforce Economic Impact Survey*, September 2023

# Appendix: Supplemental Data

The tables in this appendix provide accessible versions of the data for the complex figures in this document. Click “Return to original figure” below this table to get back to the original data figure.

SUPPLEMENTAL DATA FROM PAGE 5

Germany Revenue Impact of Salesforce AI-Powered Cloud Solutions 2022–2028

(Billions of dollars)

	Direct revenue	Indirect/induced revenue	Total
2022	\$1.6B	\$9.5B	\$11.1B
2023	\$2.0B	\$12.1B	\$14.1B
2024	\$2.6B	\$15.7B	\$18.3B
2025	\$3.4B	\$19.9B	\$23.3B
2026	\$4.3B	\$24.4B	\$28.7B
2027	\$5.2B	\$29.4B	\$34.6B
2028	\$6.1B	\$33.1B	\$39.2B

[Return to original figure](#)

[Key Definitions in Support of Figures](#) can be found in the Appendix.

# Appendix: Supplemental Data (continued)

SUPPLEMENTAL DATA FROM PAGE 8

## Germany Employment Impacts of Salesforce AI-Powered Cloud Solutions 2022–2028

(Millions of jobs)

	Direct jobs	Indirect/induced jobs	Total
2022	77M	138M	215M
2023	92M	159M	251M
2024	110M	179M	290M
2025	133M	202M	335M
2026	154M	230M	384M
2027	176M	258M	434M
2028	198M	291M	489M

[Return to original figure](#)

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# Appendix: Key Definitions in Support of Figures

## IDC's Economic Impact Model (EIM)

IDC's EIM is an internal model that gathers inputs from its own market research on IT spending, cloud computing investments, AI spending, and vendor market share. The EIM also incorporates data from external sources on GDP, population, disposable income, and labor forces. Using research-driven algorithms, the model forecasts regionally specific revenues generated by organizations' use of cloud computing.

IDC then takes those revenues and computes using research on GDP, gross output and disposable income per worker, and number of jobs supported by those revenues in the current year. IDC uses standard growth rate ratios between revenue growth and job growth to quantify job creation in future years. Typically, if revenues grow  $x\%$  a year, commensurate job growth will be  $0.5-0.7$  times  $x$ . In other words, new jobs grow more slowly than revenues.

## The Salesforce Economy and the Benefits of AI-Powered Cloud

As a major vendor of cloud services and AI-powered cloud applications, Salesforce accounts for a significant share of the benefits to the general economy from cloud computing.

To compute the Salesforce-specific share of revenues and jobs created by the use of cloud computing, IDC relies on unpublished estimates of Salesforce's future revenues as a percentage of the revenues of all cloud vendors.

IDC's own estimates of additional cloud services delivered by the ecosystem are included in the compute.

- **Direct Impacts (direct jobs and direct revenues)** are those created in the Salesforce and ecosystem base.
- **Indirect Impacts (indirect jobs and revenues)** are those created in the supply chain and in the customer base from the use of cloud computing.
- **Induced Impacts (induced jobs and revenues)** are the effects induced from the increase in SFDC and its ecosystem revenue. They refer to the impact due to economic stimulus coming from increased households' income. People will spend their wages in the economy, thus generating additional revenues.
- **AI-powered cloud solutions** are AI technologies (Classic and Generative AI) infused across cloud services.
- **Net gain** in jobs is the difference from year-end 2022 to year-end 2028. For revenue, it is the aggregate difference from each year to 2028.

.....  
Business revenues are those created in the Salesforce customer base from the use of cloud computing. They do not equate directly to GDP.

Revenues from recent Salesforce acquisitions have been folded into the historical view of Salesforce revenues as well as forecasts.

The direct jobs created by the use of AI-powered cloud applications are from spending in the region/country studied. The assumption is that those jobs will also be located in that region/country, but that may not always be the case.

# About the IDC Analysts



## Ritu Jyoti

Group Vice President,  
Worldwide Artificial Intelligence and Automation  
Research Practice, Global AI Research Lead, IDC

Ritu Jyoti is Group Vice President, covering worldwide artificial intelligence and automation research with IDC's Software Market Research and Advisory Practice. Ritu is responsible for leading the development of IDC's thought leadership for AI research and managing the research team. Her research focuses on the state of enterprise AI efforts and global market trends for rapidly evolving AI and machine learning innovations and ecosystem. She also leads insightful research that addresses the needs of AI technology vendors and provides actionable guidance on how to crisply articulate their value proposition, differentiate, and thrive in the digital era.

[More about Ritu Jyoti](#)



## Dave Schubmehl

Research Vice President,  
Conversational Artificial Intelligence and  
Intelligent Knowledge Discovery, IDC

Dave Schubmehl is Research Vice President for IDC's Conversational Artificial Intelligence and Intelligent Knowledge Discovery research. His research covers information access and artificial intelligence (AI) technologies around conversational AI technologies including speech AI and text AI, machine translation, embedded knowledge graph creation, intelligent knowledge discovery, information retrieval, unstructured information representation, knowledge representation, deep learning, machine learning, unified access to structured and unstructured information, chatbots and digital assistants, and rich media search in SaaS, cloud, and installed software environments. This research analyzes the trends and dynamics of the Text and Audio AI software markets and the costs, benefits, and workflow impact of solutions that use these technologies.

[More about Dave Schubmehl](#)

# About the IDC Analysts (continued)



**Alan Webber**  
Program Vice President,  
Customer Experience, IDC

Alan Webber is Program Vice President for Digital Strategy and Customer Experience. In this role, Alan leads IDC's Customer Experience research program and supports IDC's Chief Marketing Officer research efforts. Specific areas of research interest for Alan are the impact that technology changes have on how business and customers engage and interact, the digital transformation of the customer experience, and the impact of algorithms and analytics.

[More about Alan Webber](#)



**Carla La Croce**  
Senior Research Analyst,  
Data and Analytics, Europe, IDC

Carla La Croce is a senior research analyst for IDC's European Data and Analytics team. She develops qualitative and quantitative research on IT strategies for EMEA vertical markets, with direct involvement in IDC Spending Guides (Big Data and Analytics, Artificial Intelligence, Robotics) and is part of the Intelligent Business Execution (IBE) practice. She also leads the Macroeconomic Center of Excellence, where she works on economic impact analysis and European recovery plans, and manages a database of macroeconomic indicators (such as GDP and inflation). La Croce also supports IDC's consulting and forecast activities in the region.

[More about Carla La Croce](#)

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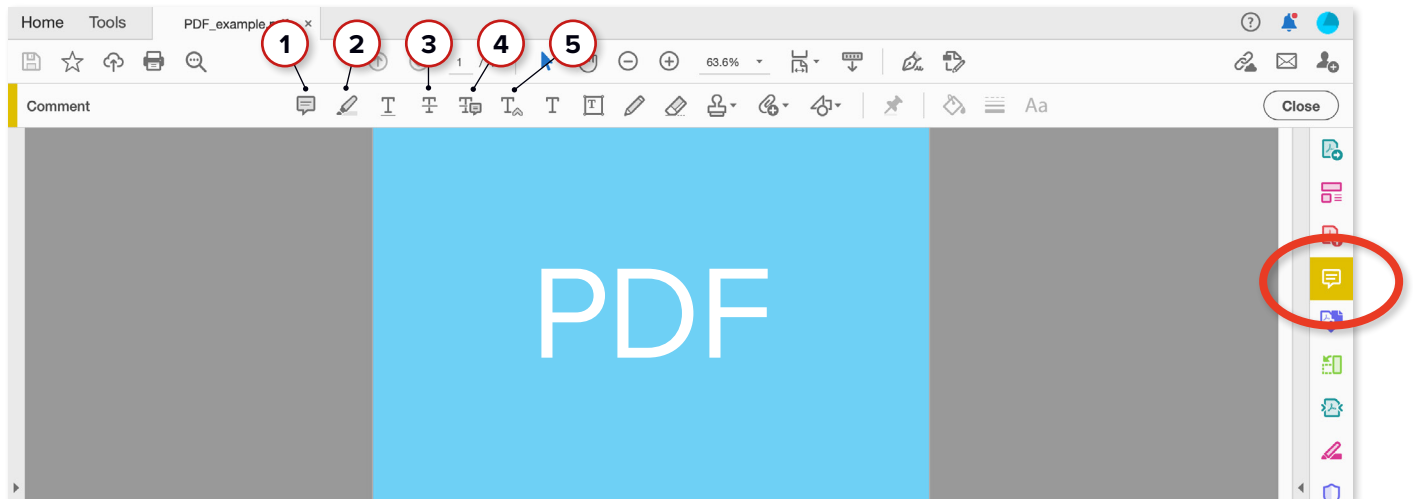
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