

ASUG

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120,000+ SAP Professionals

Key Insights From The **ASUG Community**



Artificial Intelligence

Role of AI in Advancing Company's Data Strategy



Q. To what extent do you see AI (including emerging capabilities such as autonomous or “agentic” AI) playing a role in advancing your organization’s data strategy?
(n=175)

6% selected ‘Don’t know/not sure’

Barriers to AI Expansion and Adoption within SAP Landscapes



Q. What are the **biggest barriers** preventing your organization from actively adopting or expanding AI within its SAP landscape? What is holding your organization back? (Please select up to **three**.) (n=142)
4% selected 'Don't known/not sure' Note: Measured Adopters (n=62), Intentional Adopters (n=55)
*Chart excludes data under 25%
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AI Adoption Mindsets Are a Grouping of Organizations Based on Their Overall Approach to AI Within Their SAP Landscape



Measured Adopters
Validating value before scaling



AI value is being explored through pilots and controlled investment before scaling.



Intentional Adopters
Deliberate AI value pursuit



AI investments are deliberate and value-oriented, guided by strategy or priority use cases.



Reactive or Deprioritizing
AI not driving decisions today



AI is driven by external pressure or is not a current organizational priority.

Q. Which statement best describes your organization's overall approach to AI within its SAP landscape? (n=142) 3% selected 'Don't know/not sure'

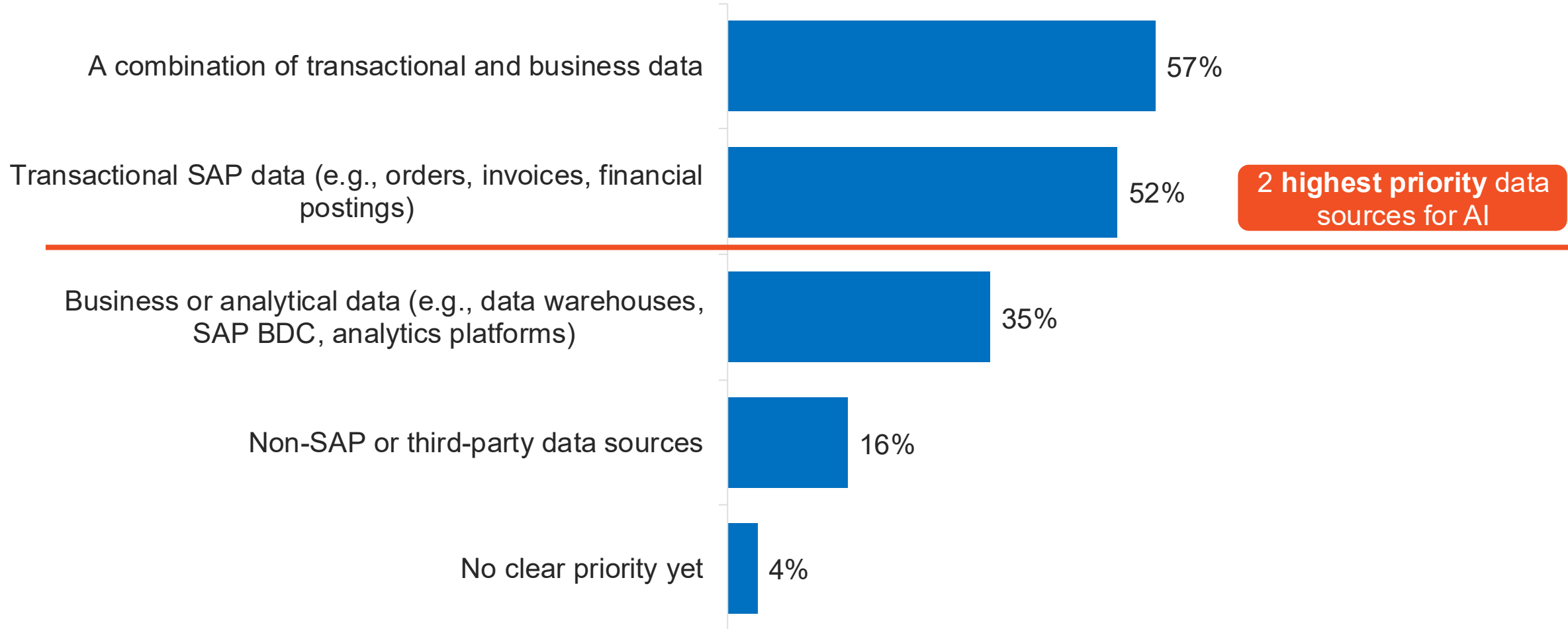
AI Adoption Mindsets Shape How Organizations Advance AI ^{ASUG}

AI adoption phase	Total
Building foundational knowledge	39%
Piloting or experimenting with AI use cases	41%
Planning to implement in next 6 months	12%
Planning to implement in 6-12 months	15%
Planning to implement in the future (more than 1 year from now)	10%
Actively deploying AI in select areas	24%
Enterprise-scale rollout	10%

Q. Which best describes your organization's current stage of AI or generative AI adoption in your SAP landscape? (Please select all that apply.) **at the 95% confidence level.*

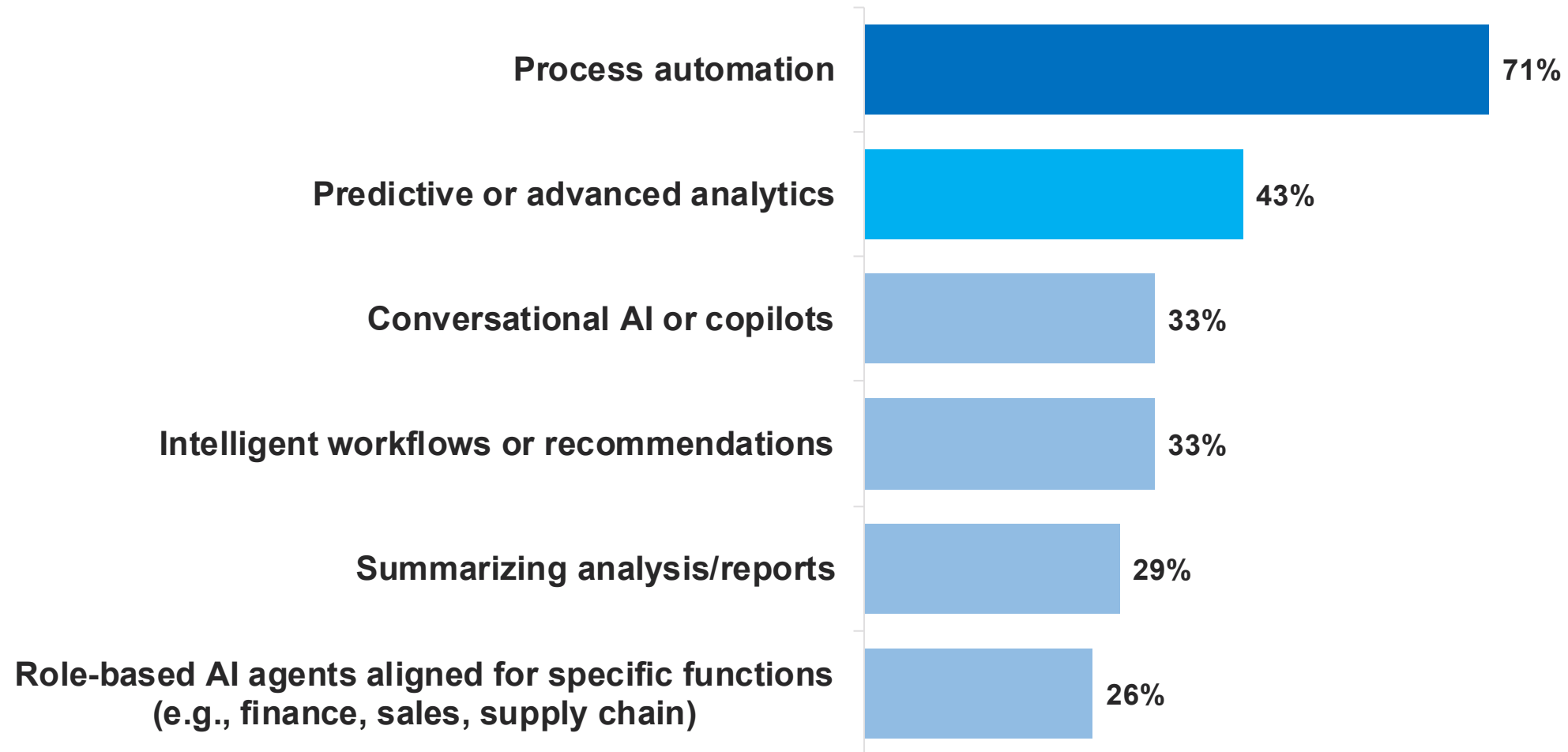
Q. Which statement best describes your organization's overall approach to AI within its SAP landscape? 3% selected 'Don't know/not sure' Note: Data for Reactive or Deprioritizing mindset group not shown due to small sample size (n=21), Data for respondents unsure about their organizations' approach not shown, data for 'Not currently pursuing AI' not shown

Highest Priority Data Sources for AI Usage



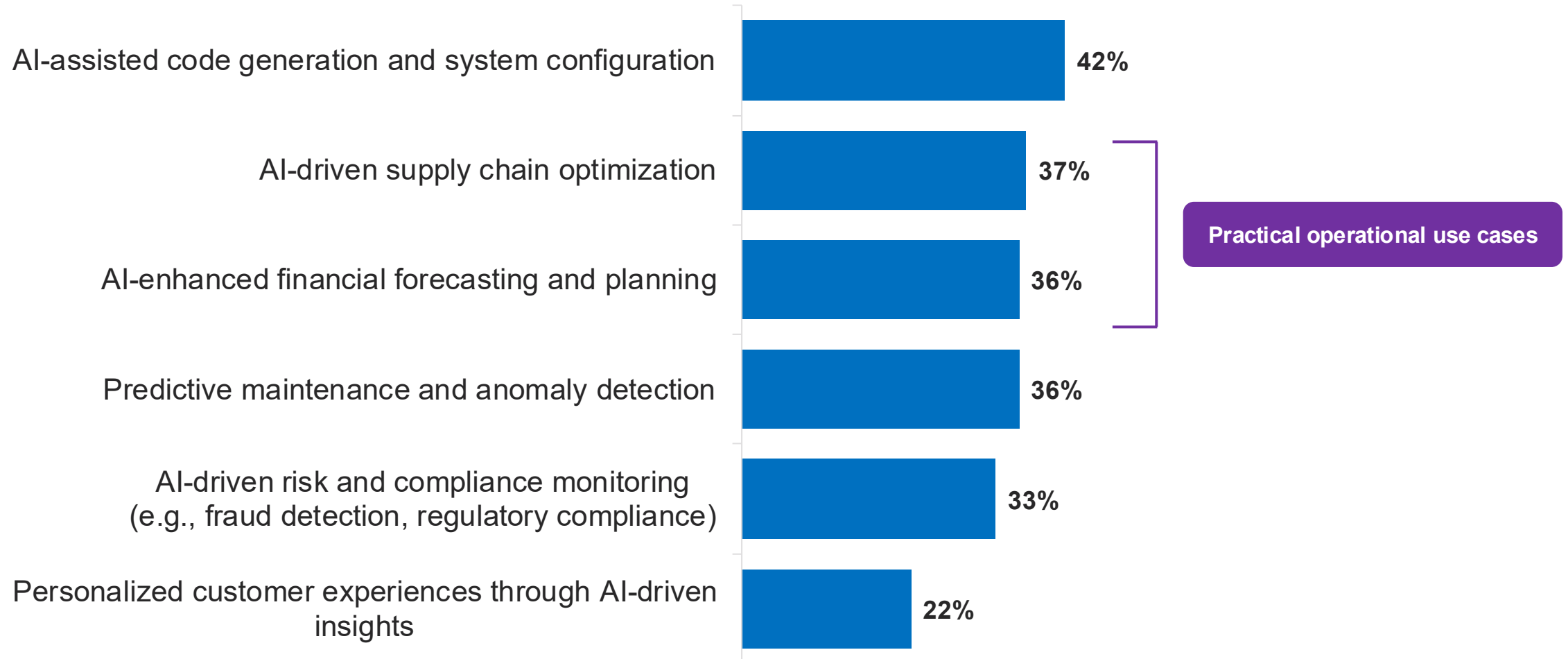
Q. [If currently pursuing AI] When thinking about AI capabilities in your SAP environment, including AI agents, which **data sources** are the **highest priority for AI to use?** (Please select up to **two**.) (n=129)
5% selected 'Don't know/not sure'

Highest-Priority AI Use Cases for Organizations



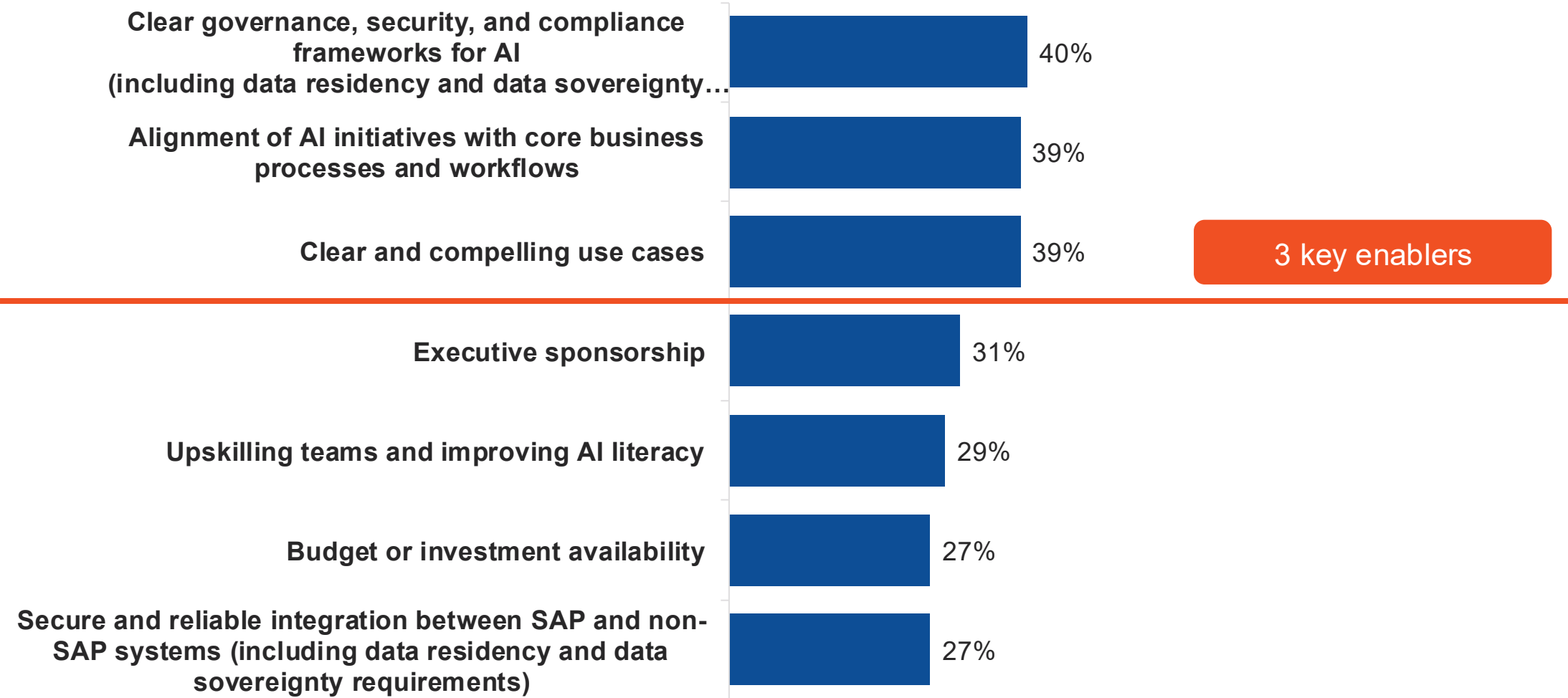
Q. [If currently pursuing AI] Which AI use case types are the **highest priority** for your organization today? (Please select all that apply.) (n=129)
2% selected 'Other', 2% selected 'Don't know/not sure' Note: Measured Adopters (n=60), Intentional Adopters (n=53)

Most Relevant AI Use-Cases Within Organization's SAP Landscape



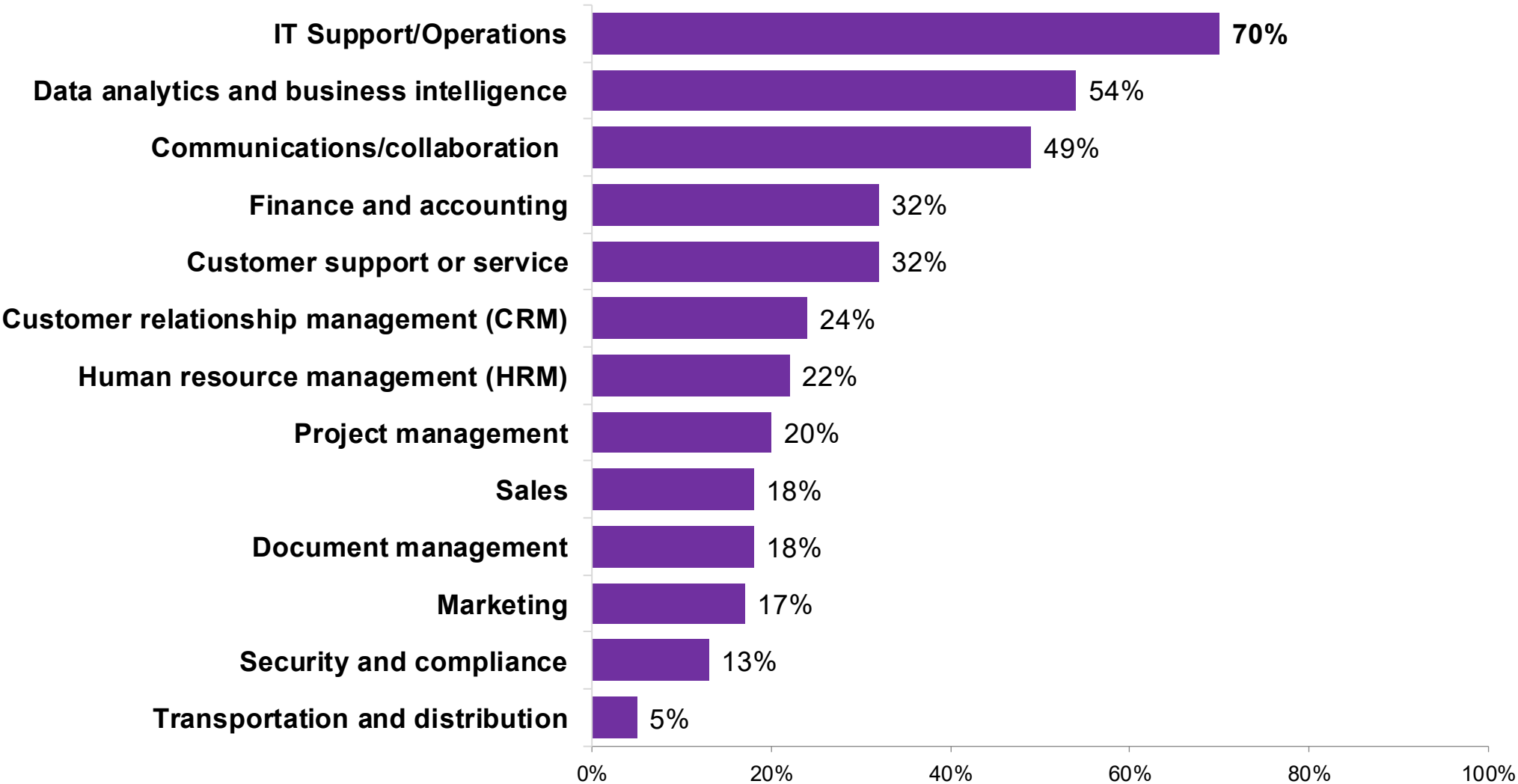
Q. [If currently pursuing AI] Looking more specifically at your organization's SAP landscape, which **AI use cases** are or will be **most relevant**? (Please select all that apply.) (n=129)
2% selected 'Don't know/not sure'

Key Enablers Required to Adopt or Expand AI within SAP Landscapes

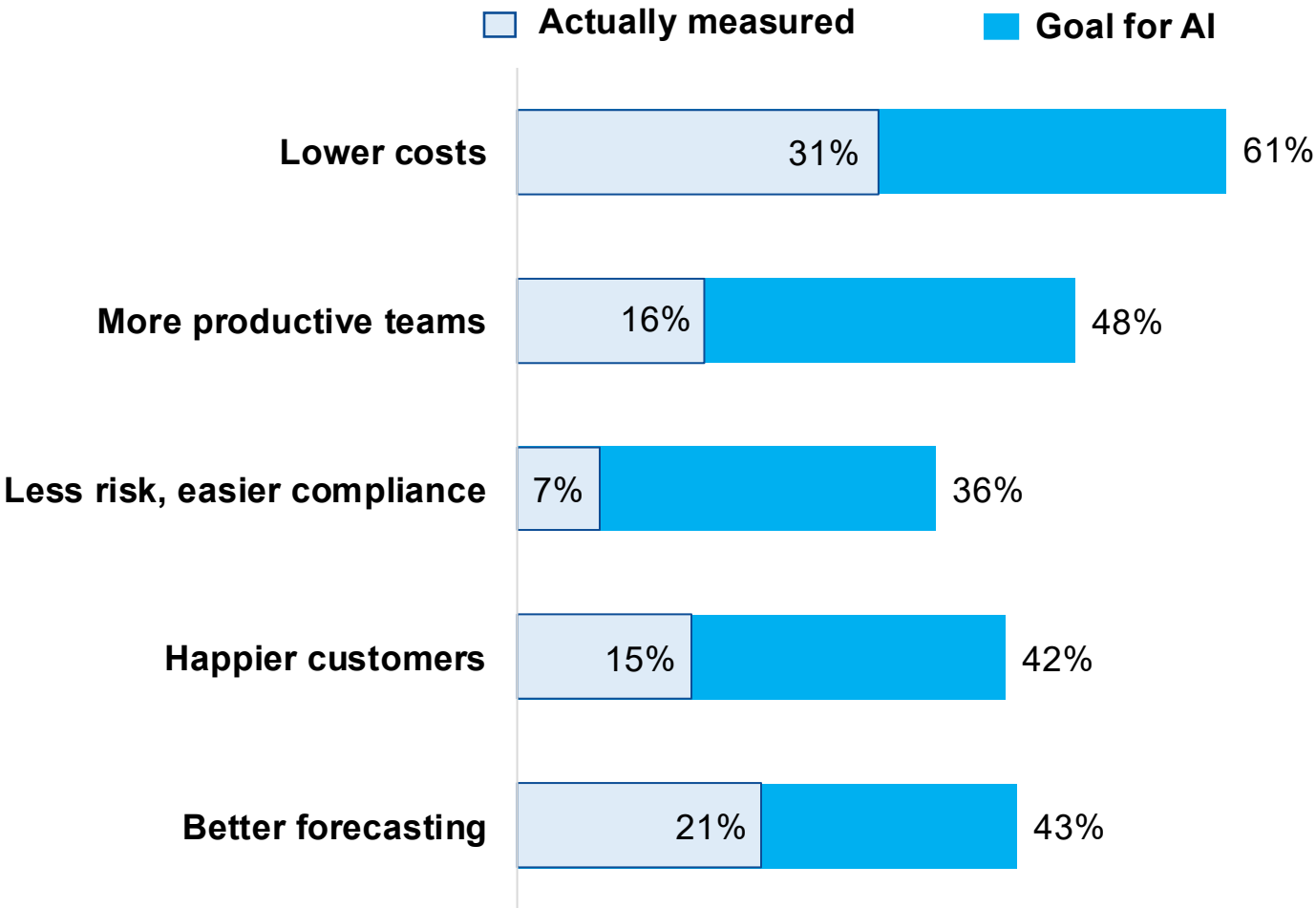


Q. What do you see as the **key enablers** required to adopt or expand AI within your SAP landscape? (Please select **up to three**.) (n=142)
1% selected 'Other', 3% selected 'Don't know/not sure' Note: Measured Adopters (n=62), Intentional Adopters (n=55)

Functions Currently Using AI at Organizations



What Companies Want From AI... and What They Actually Measure



Q. Which **business outcomes** is your organization aiming to drive with AI in its SAP environment today? (Please select all that apply.)
Q. Out of the business outcomes you selected, **which are currently being measured** to assess the impact of AI? (Please select all that apply.)

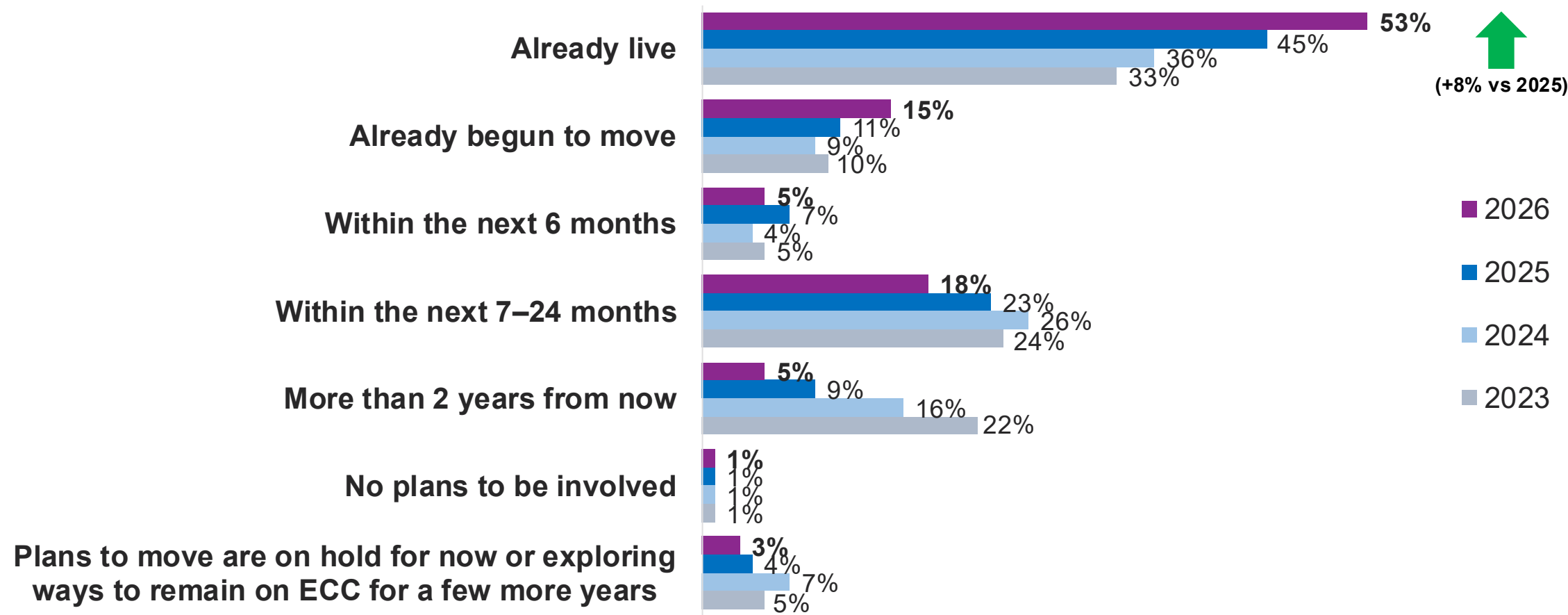
How Success and ROI from AI Initiatives are Currently Evaluated

ROI/Success Metrics	Total (n=72)
Productivity or time savings	63%
Process efficiency improvements	53%
Cost savings	50%
Improved decision quality	24%
Revenue growth	24%
Risk reduction or compliance improvements	17%

Q. [If organization currently tracking ROI/business value of AI initiatives] How is success or ROI from AI initiatives currently evaluated at your organization? (Please select up to **three**.)
Q. Which statement best describes your organization's overall approach to AI within its SAP landscape? 3% selected 'Don't know/not sure'

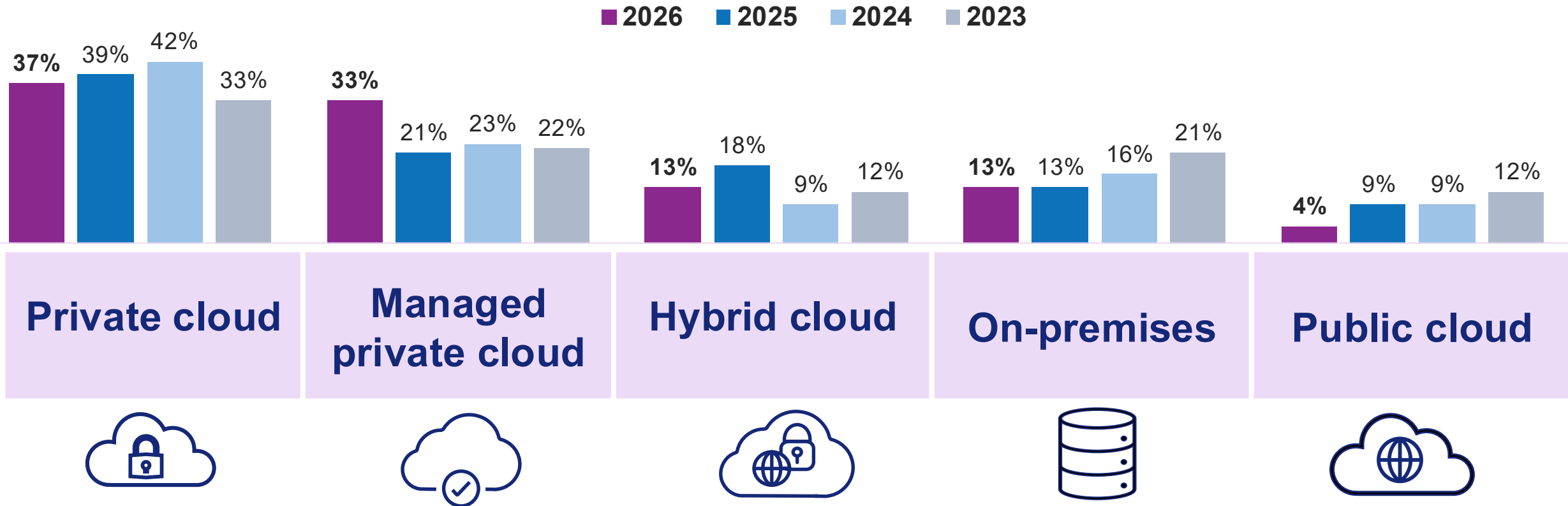


SAP S/4HANA Implementation Plans, 2023 to Today



Q. What are your plans, if any, to implement SAP S/4HANA? (2026 n=207, 2025 n=176, 2024 n=227, 2023 n=208)

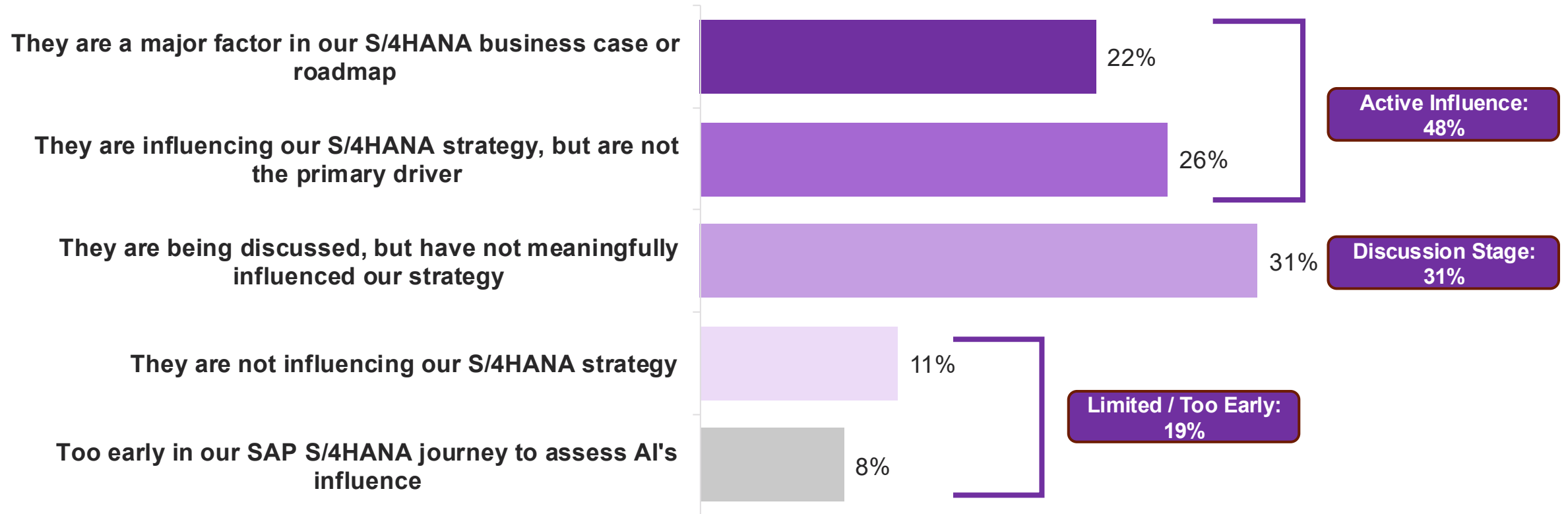
SAP S/4HANA Hosting Environments



Q. [If Live, In the Process of Moving, or Moving within next 2 years] Where does your organization run, or will it run, its SAP S/4HANA environment(s)? (2026 n=178, 2025 n=146, 2024 n=171, 2023 n=163)

Note: Data and sample sizes rebased to exclude respondents who selected 'Don't know/not sure'

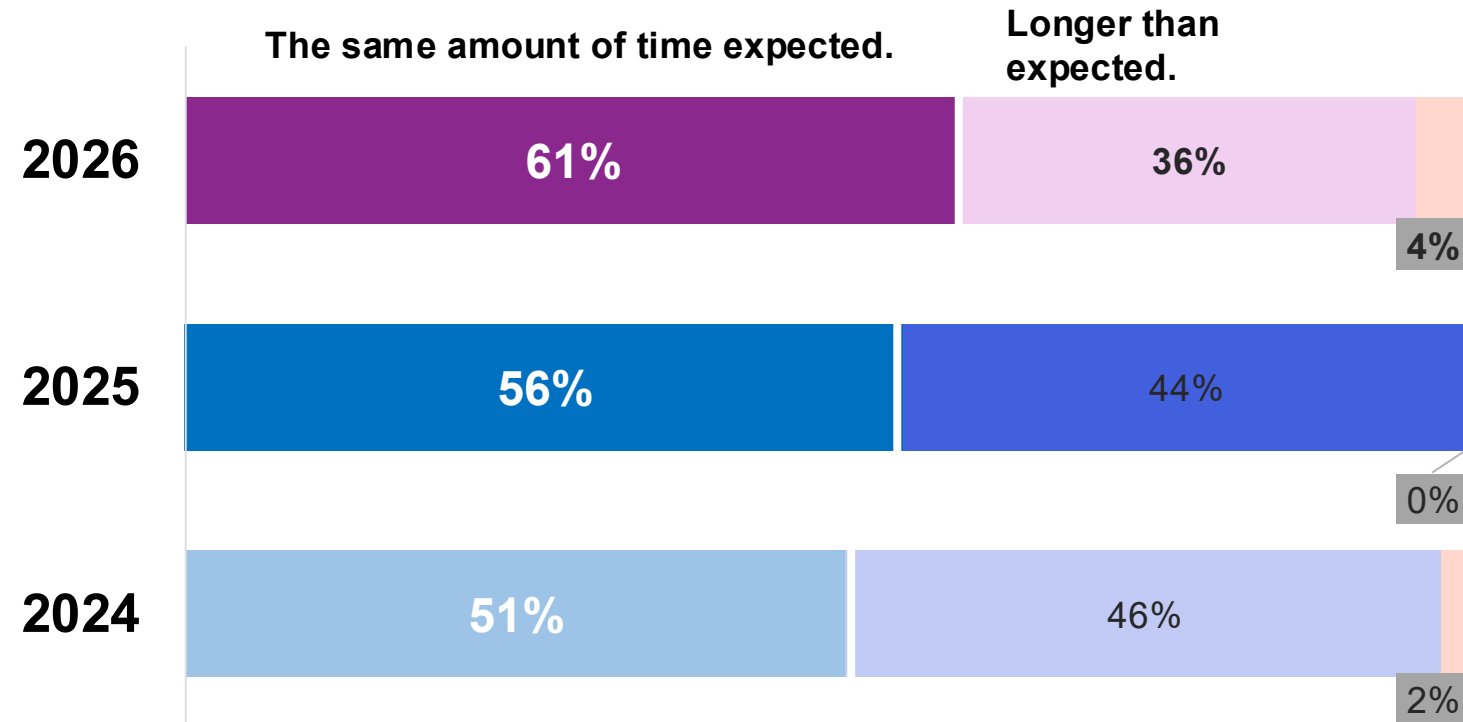
Influence of SAP AI Capabilities on S/4HANA Strategy



Q. To what extent are SAP's AI capabilities influencing your organization's SAP S/4HANA strategy? (n=194) 2% selected 'Don't know/not sure'

Average time to go live on S/4HANA and How S/4HANA implementation projects compare to expectations

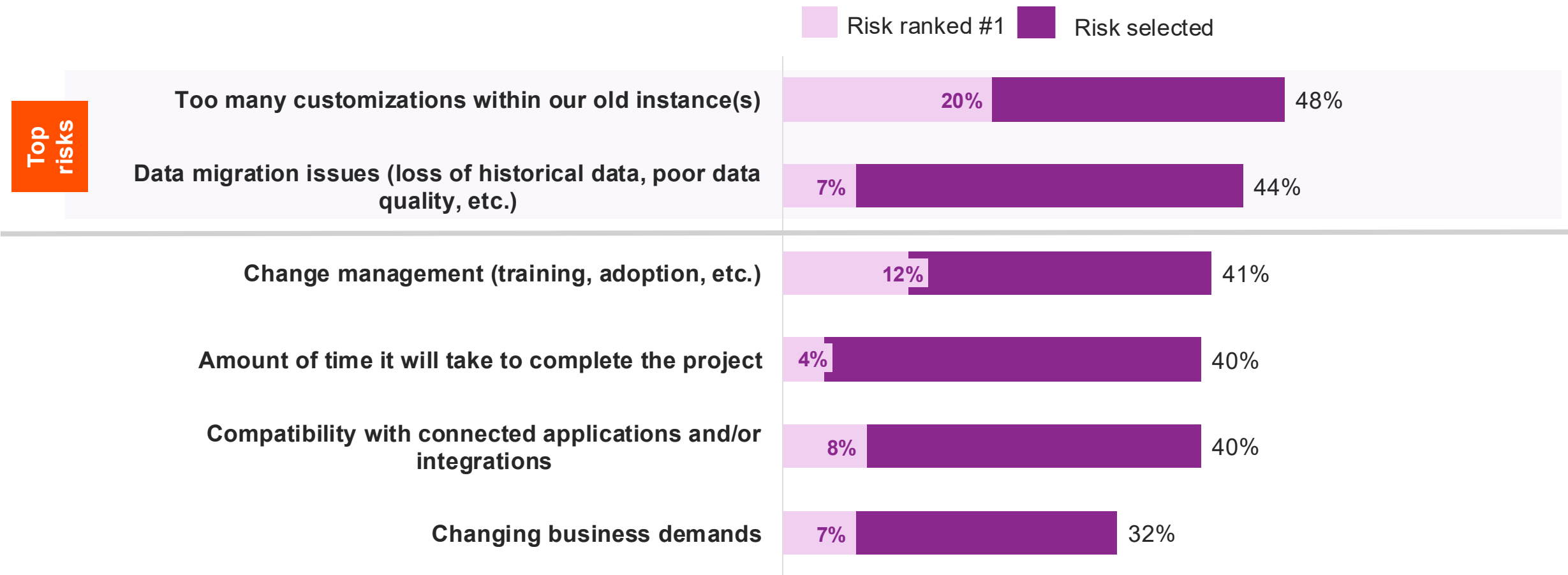
Average S/4HANA Implementation / Deployment Time:



Q. Approximately how many months did the implementation/deployment of SAP S/4HANA take at your organization? Please consider time spent from the start of planning to implement SAP S/4HANA (directly after the business case was approved) until the first instance of SAP S/4HANA went live at your organization. (2026 n=105, 2025 n=70, 2024 n=80)

Q. Did your SAP S/4HANA implementation/deployment project take... (2026 n=107, 2025 n=70, 2024 n=82)

Risks Experienced, and Top Ranking Risks, When Moving to SAP S/4HANA



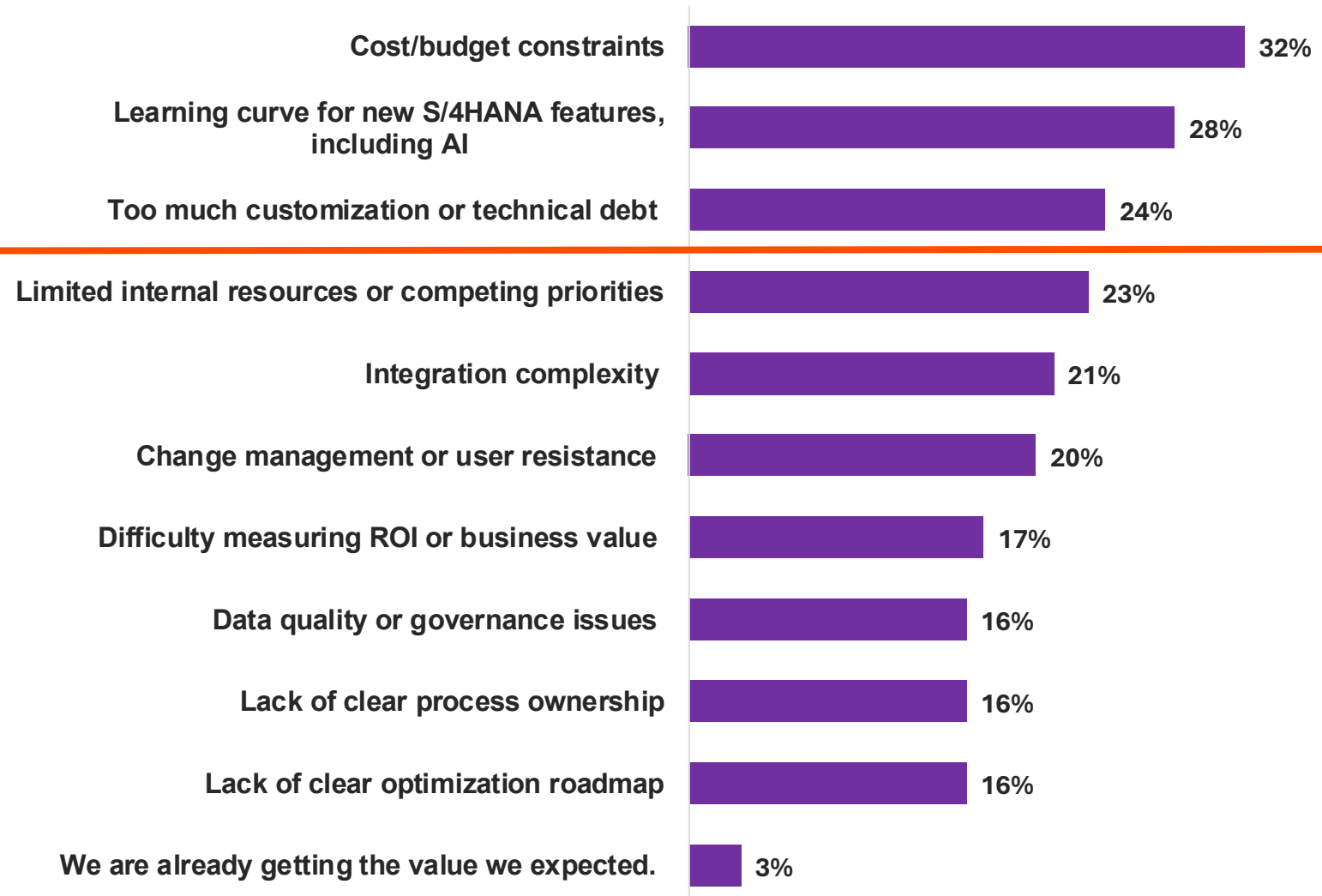
Q. [If 'We are already Live' or 'We have already begun to move'] What risks do you or did you experience dealing with as part of the move to SAP S/4HANA? (Please select all that apply.) (n=136); 2% selected 'Other' ; 7% did not experience any risks

Q. [If 'We are already Live' or 'We have already begun to move'] Out of all the SAP S/4HANA migration risks your organization experiences, please select the #1 risk. (n=127)

Note: Risks categorized into groups for respondents (System, Organization, Migration Process, Other) Note: Newcomers (n=66), Pros (n=40)

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Biggest Barriers Preventing S/4 Value Realization



Choose up to 3

Q. [If 'We are already Live'] What are the **biggest barriers** preventing your organization from getting more value from SAP S/4HANA? (Select up to 3.) (n=107)
 7% selected 'Don't know/not sure' ; 7% selected 'Other'
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The Top Barriers Organizations Face and the Levers They Say Matter Most

Biggest barriers to value

Choose up to 3

- 32% Cost/budget constraints
- 28% Learning curve for new S/4 features, including AI
- 24% Too much customization or technical debt
- 23% Limited internal resources or competing priorities
- 21% Integration complexity

What matters most to realize value

Choose up to 3

- 37% Streamlining or redesigning business processes
- 31% Adopting new S/4HANA functionality
- 27% Reducing customizations or moving toward clean core
- 23% Improving data quality or governance
- 21% Better analytics and reporting access

Q. [If 'We are already Live'] What are the **biggest barriers** preventing your organization from getting more value from SAP S/4HANA? (Select up to 3.) (n=107)
Q. [If 'We are already Live'] What has been **most important to realizing value**. (Select up to 3.) (n=107)

After go-live, companies most want help knowing where to apply AI

Support for identifying where and how to apply SAP Business AI, Joule, or AI agents within S/4 36%

Guidance on which S/4 capabilities to adopt next 31%

Data quality, governance, or reporting support 22%

Clean core/customization reduction guidance 22%

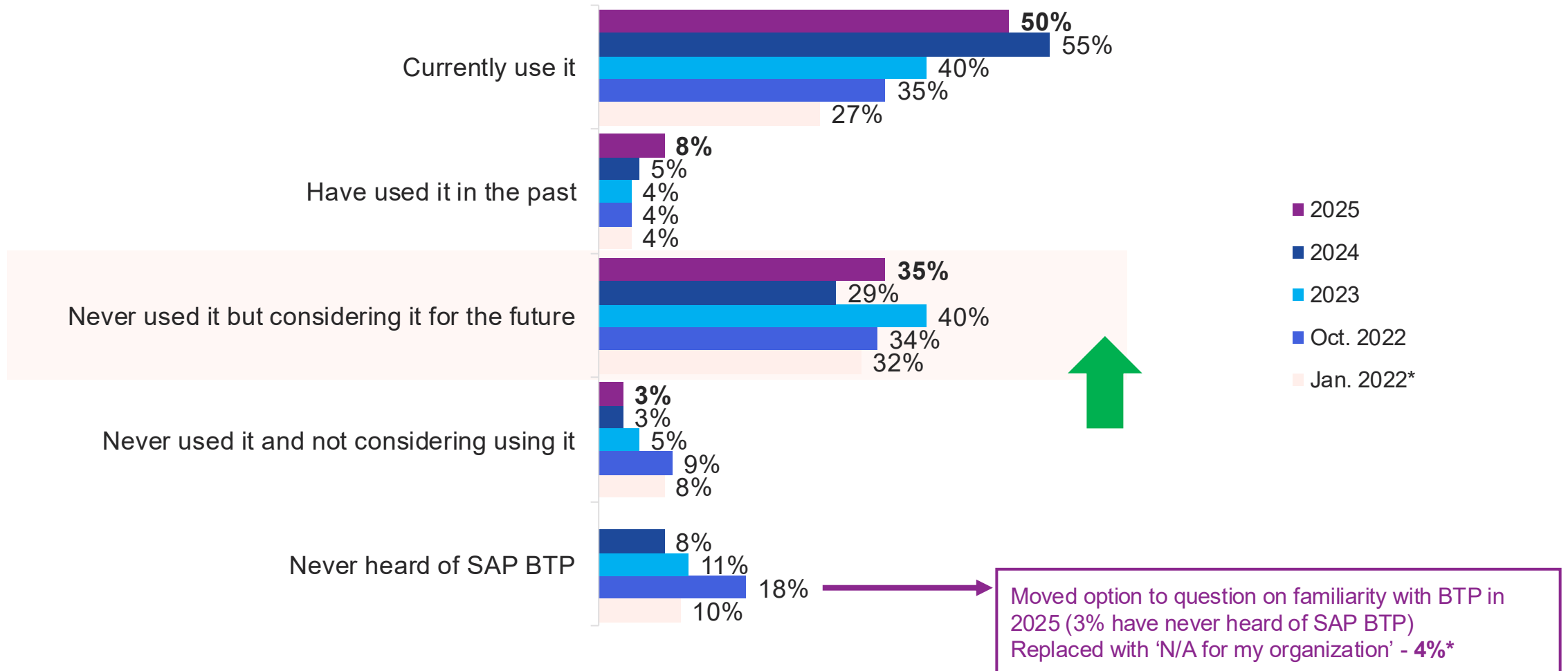
Integration support across SAP and non-SAP systems 22%

Q. [If 'We are already Live'] What type of support would be **most valuable** as your organization works to optimize SAP S/4HANA and **realize value after go-live**? Select up to three. (n=107)
5% selected 'Don't know/not sure' 1% selected 'Other'



SAP Business AI Platform (BAIP – previously BTP)

Familiarity and Usage of SAP BTP

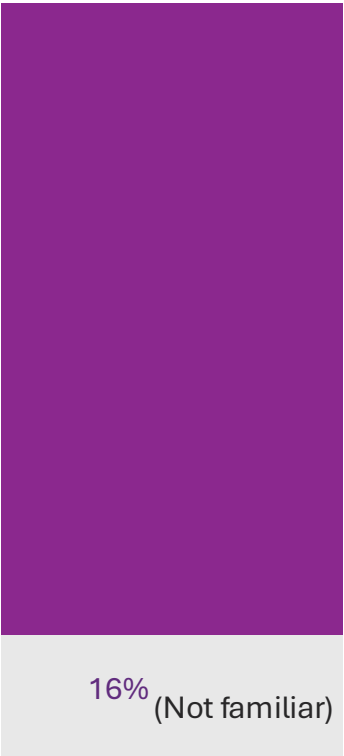


Q. Please tell us your familiarity and usage with SAP Business Technology Platform (BTP). (% in chart showing 'Usage') (n=157 (2025), n=154 (2024), n=196 (2023), n=209 (Oct. 2022), n=103 (Jan. 2022)) **Note:** In Jan. 2022, 19% selected 'Don't know/not sure', option not included in Oct. 2022

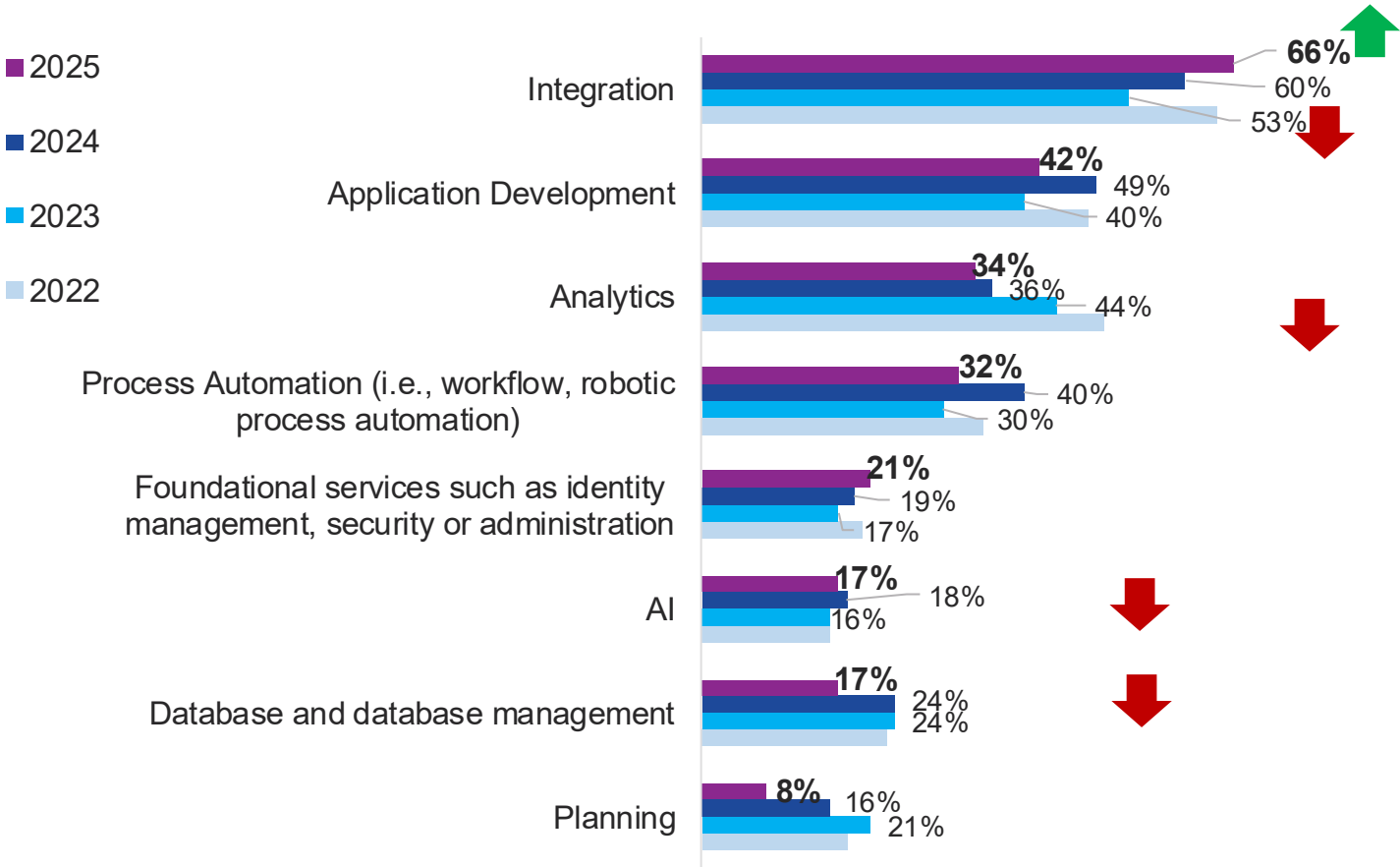
***Scale updated in 2025 to include 'N/A' and move 'Have never heard of SAP BTP' to question on familiarity**

Overall BTP familiarity surges, but knowledge of individual components lags.

84%
Familiar
with SAP
BTP

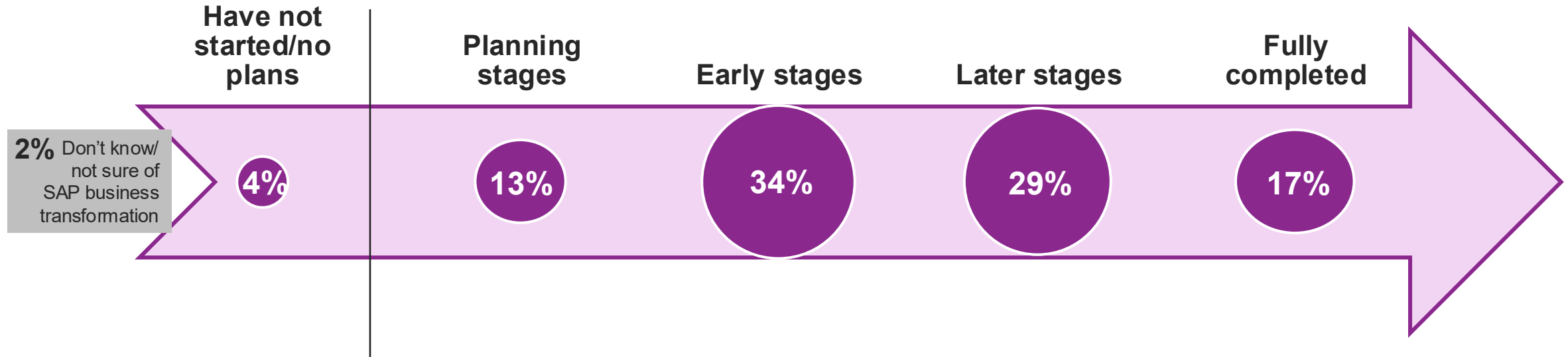


Familiarity with SAP BTP components



Q. Please tell us your familiarity and usage with SAP Business Technology Platform (BTP). (% in chart showing 'Familiarity')
Note: For consistency with 2024, data and sample size rebased to exclude respondents who have never heard of BTP, 3% (n=145 (2025), n=141 (2024))
Q. [If respondent had heard of SAP BTP] Which of the following technologies that make up SAP BTP are you most familiar with? (Please select all that apply). (n=145 (2025), n=141 (2024), n=175 (2023), n=172 (2022))

Business Transformation Plans



Q. Where is your organization right now in its SAP business transformation journey?* (n=180 (2025), n=161 (2024) who are *live, in the process of moving, planning, or deciding to move to SAP S/4HANA*)

Almost everyone knows SAP BTP by name — far fewer know what's inside it

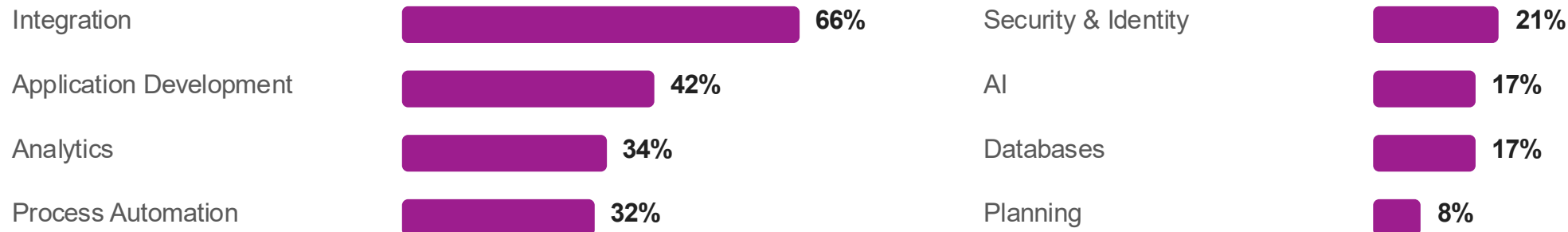
84%

say they are familiar with SAP BTP overall
(up strongly from last year)

66%

know Integration — the best-known single piece of BTP.
Every other piece is known by fewer than half.

Which parts of BTP people actually know (2025)



Source: 2025 survey of 145 SAP customers who had heard of BTP. BTP = SAP Business Technology Platform, SAP's toolkit for building, connecting and automating software.

Importance of Achieving a Clean Core in Decision to Leverage SAP BTP

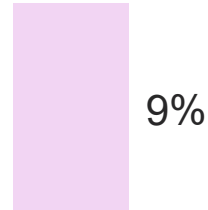
Very important – this was or is key to our decision to leverage.



Somewhat important – this was or is being considered in our decision but not optimized for.



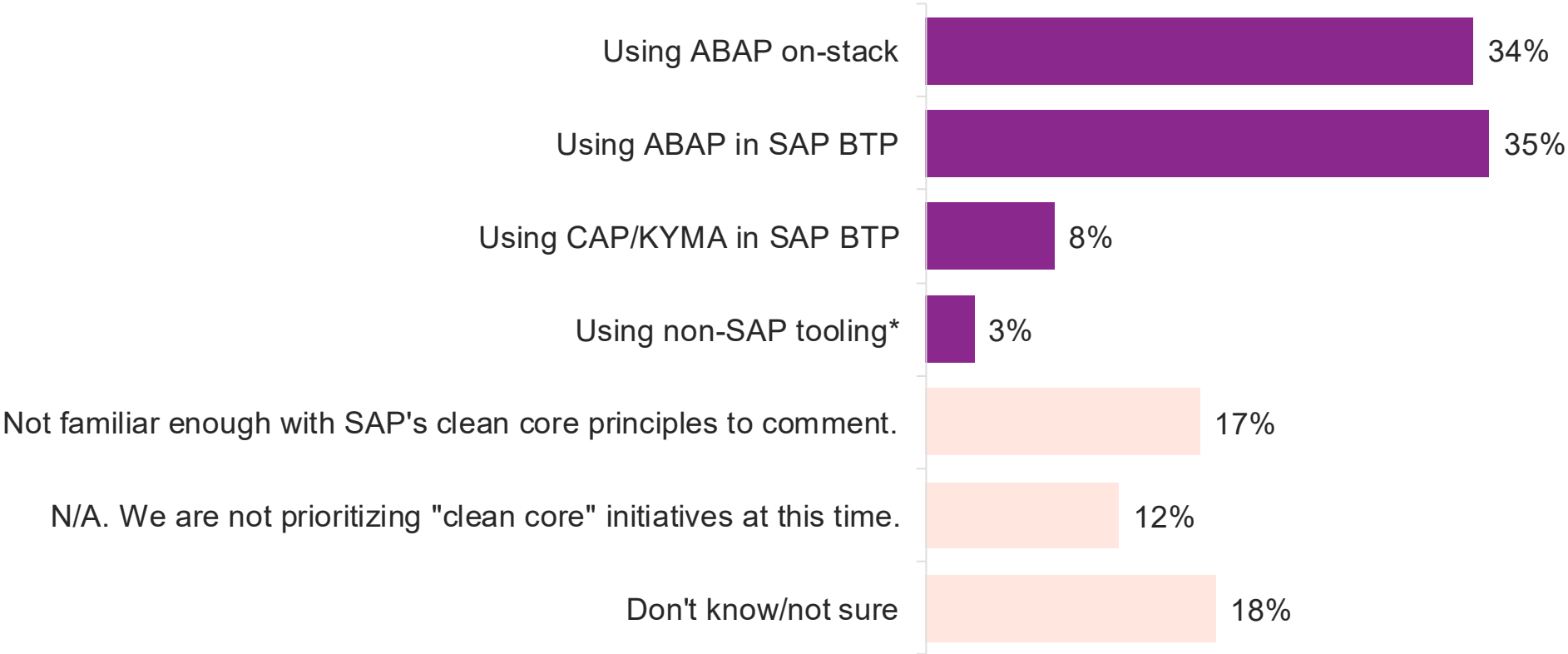
Not important – this did not or will not play a role in our decision to leverage.



Q. [If respondent is currently using or considering using SAP BTP and familiar with how SAP BTP enables “clean core”] How important is or was the goal of achieving a “clean core” in your organization’s decision to leverage SAP BTP? (n=57 (2025), n=62 (2024)) Note: Data consistent with 2024 (94% selected very/somewhat important)

Most organizations rely on ABAP both on-stack and within BTP for custom development.

How Organizations Develop Custom Use Cases:



Q. How is your organization approaching the development of custom use cases in light of SAP’s clean core principles? (Please select all that apply.) (n=145)



Data Transformation

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Current Data Strategies



Formalized
(Enterprise-embedded strategy)



27%



Scaling
(Defined but fragmented execution)



41%



Emerging
(Strategy in development)



22%



Planning
(Intent without execution)



6%



**No formal data strategy
and no plans to create
one**

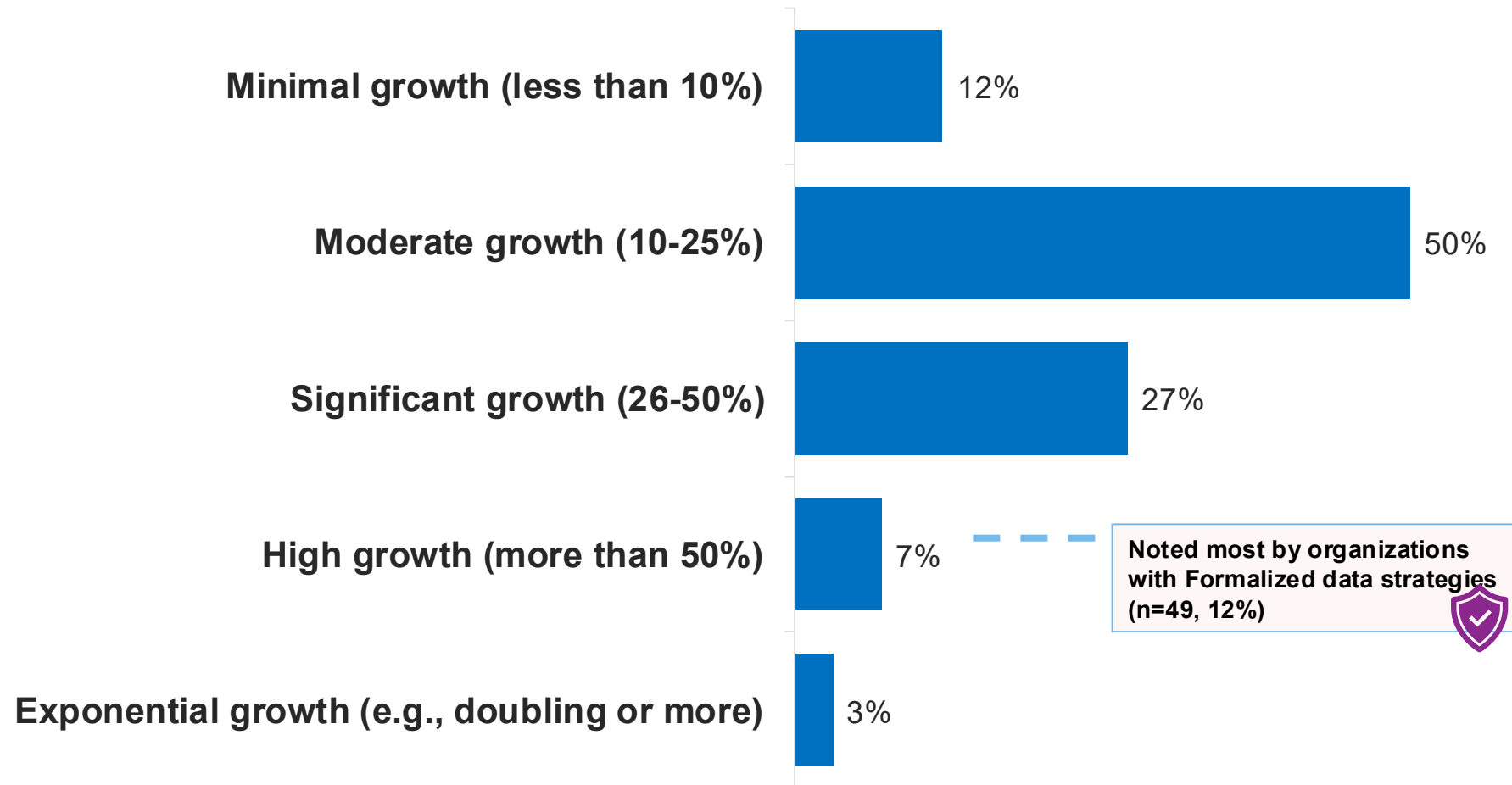


1%

Q. Which best describes your current data strategy (a **defined approach** to how data is **governed, integrated, and used** across the organization)? (n=179)
2% selected 'Don't know/not sure'; 1% selected 'Other'

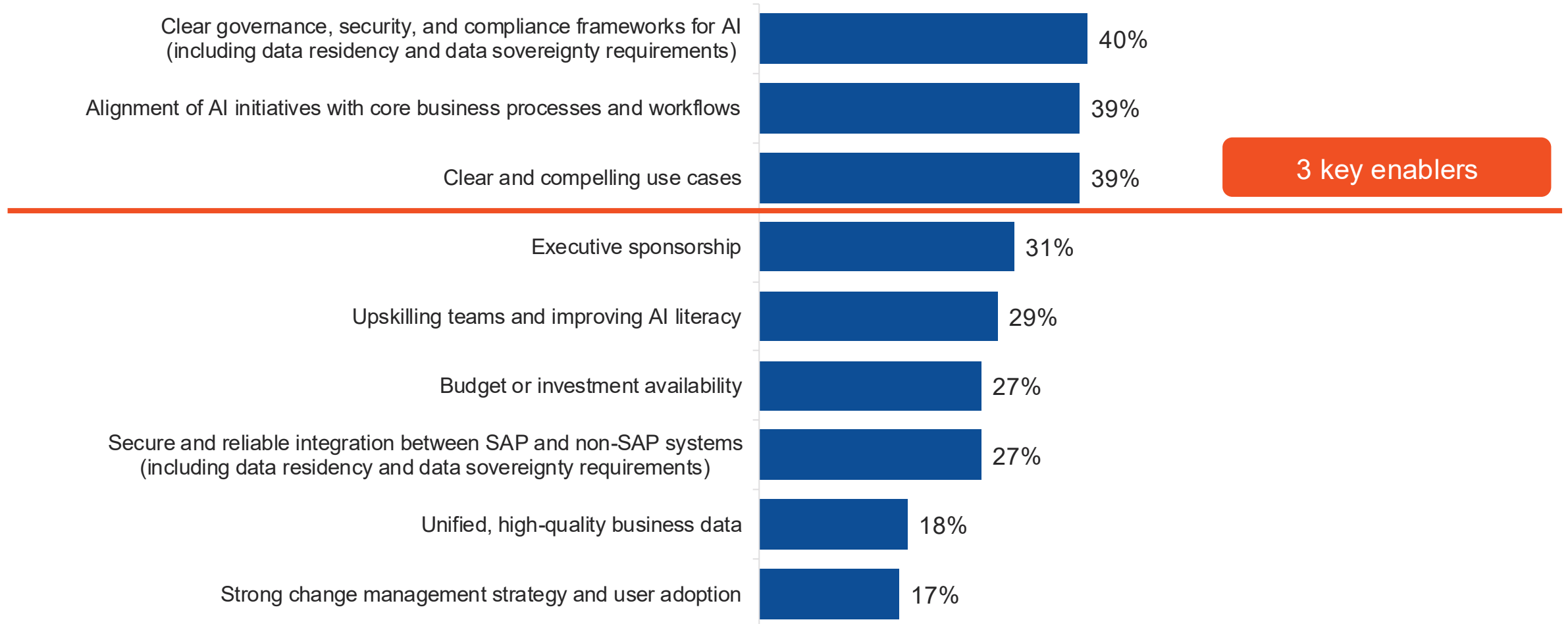
Anticipated Growth of Organization's Data Estate Over the Next 3-5 years

(Data Estate = Overall footprint of an organizations' data)



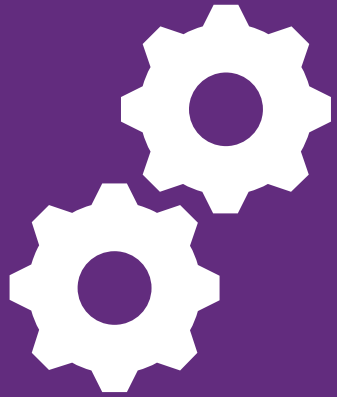
Q. How much do you expect your organization's data estate to grow over the next 2–3 years? A **data estate** refers to the **overall footprint of your organization's data, including the number of data sources, systems (SAP and non-SAP), integrations, and governance requirements.** (n=175)

Key Enablers Required for AI Adoption within SAP Landscapes



Q. What do you see as the **key enablers** required to adopt or expand AI within your SAP landscape? (Please select **up to three**.) (n=142)

1% selected 'Other', 3% selected 'Don't know/not sure' Note: Measured Adopters (n=62), Intentional Adopters (n=55)



Automation

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Familiarity and Usage with Embedded Payments and/or Banking

Awareness is broad. Real expertise and everyday use are still thin on the ground.

1 **72%**

are familiar with embedded payments or banking

2 **Under 10%**

say they are deeply familiar with it

3 **33%**

use embedded payments or banking today

WHY IT MATTERS

Another 22% are considering it for the future, and 63% of that group is already familiar — a ready base to build on.

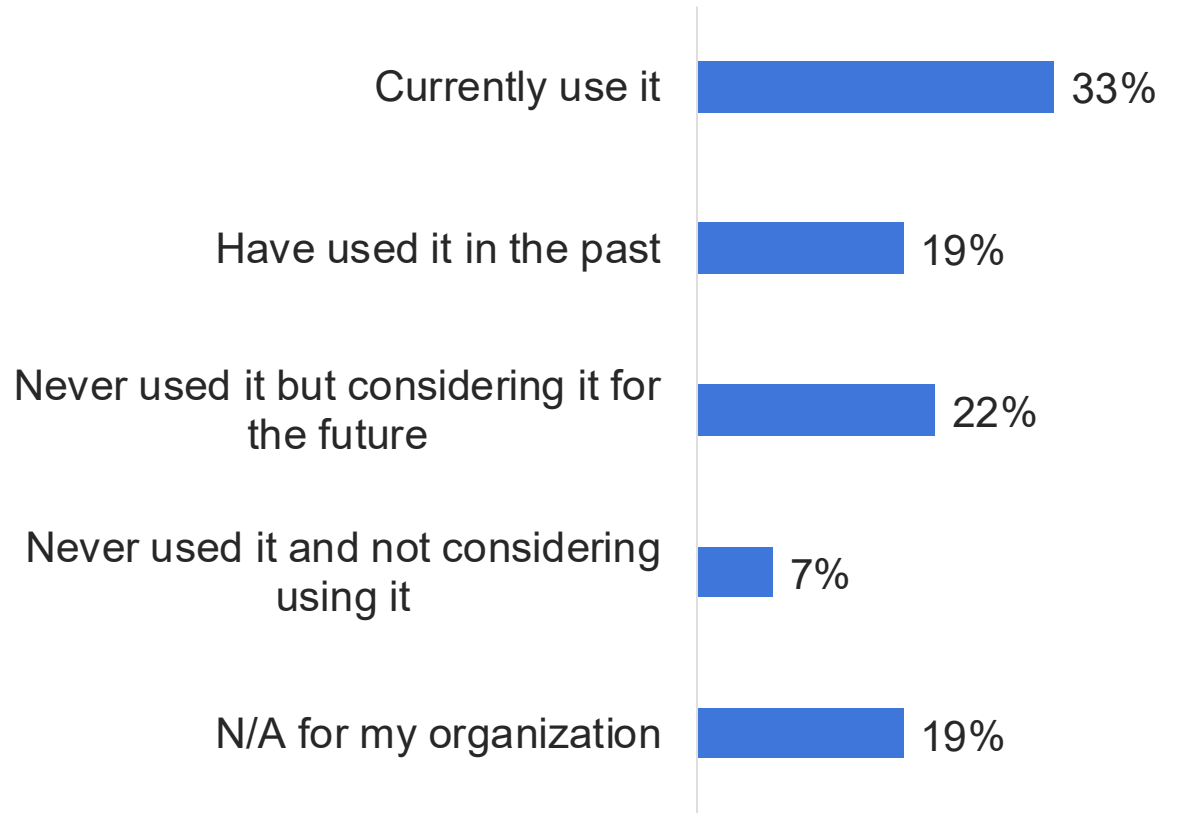
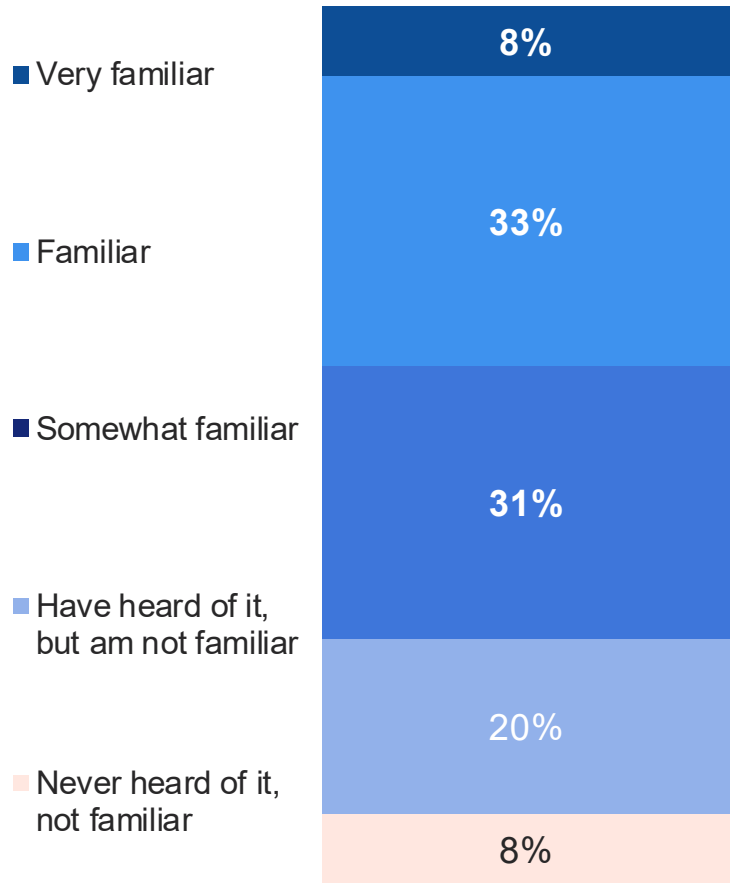
19% used it previously but no longer do, so experience exists in the market without having stuck.

ALSO WORTH KNOWING

Of the 19% who answered N/A, half had only heard of it and 30% had never heard of it at all.

Q. Please tell us your familiarity and usage with...[Embedded payments or banking] (n=107)

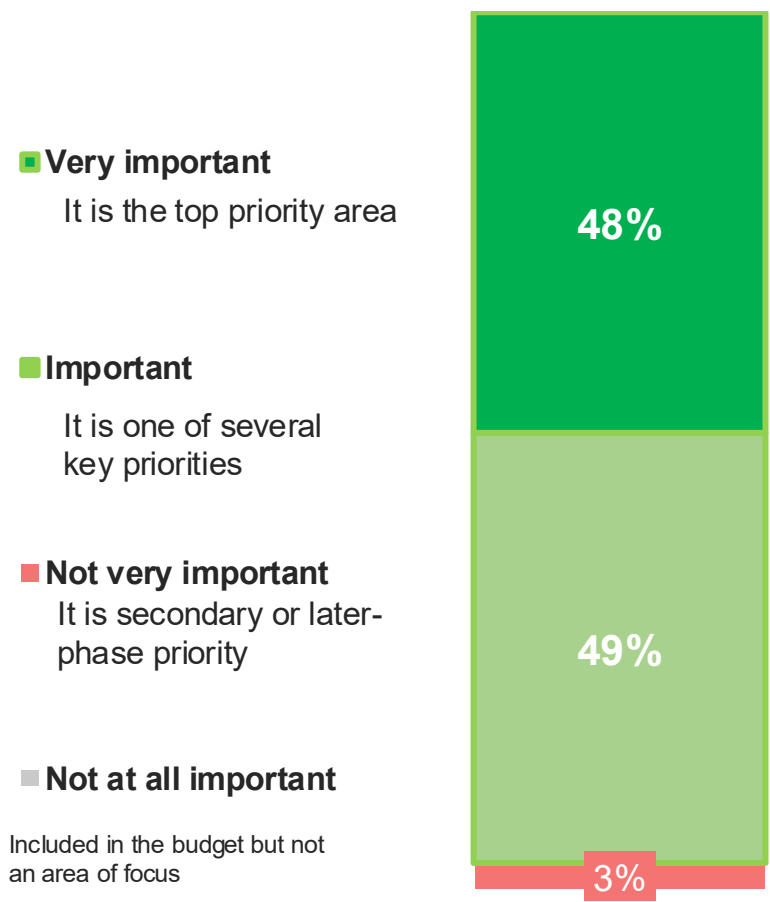
Familiarity and Usage of Embedded Payments and/or Banking



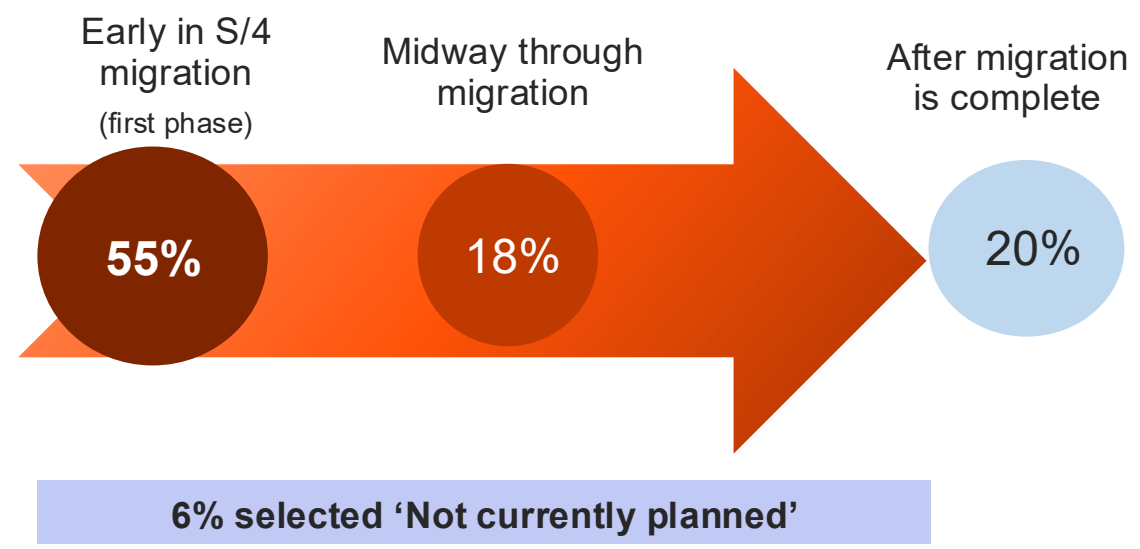
Q. Please tell us your familiarity and usage with...[Embedded payments or banking] (n=107)

Finance change matters, and it starts early

Importance of Finance Transformations

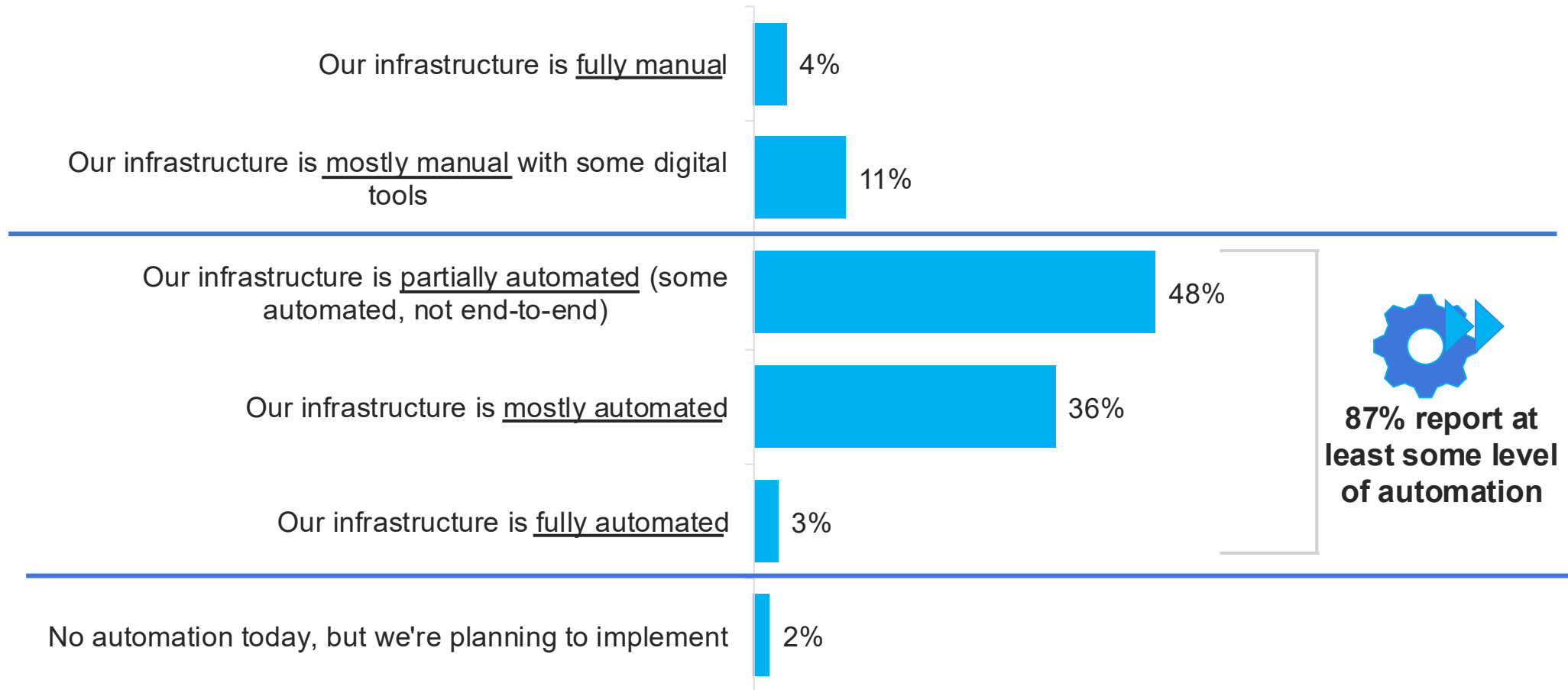


Finance Transformation on S/4 Journeys



Q. [If respondent is budgeting finance transformation alongside S/4HANA migration] How important is finance transformation within your organization's overall S/4HANA journey? (n=65)
Q. [If respondent is budgeting finance transformation alongside S/4HANA migration] When is your organization prioritizing finance transformation as part of the overall S/4HANA journey? (n=65)

The Current State of Organizations' Treasury and Payments Infrastructure

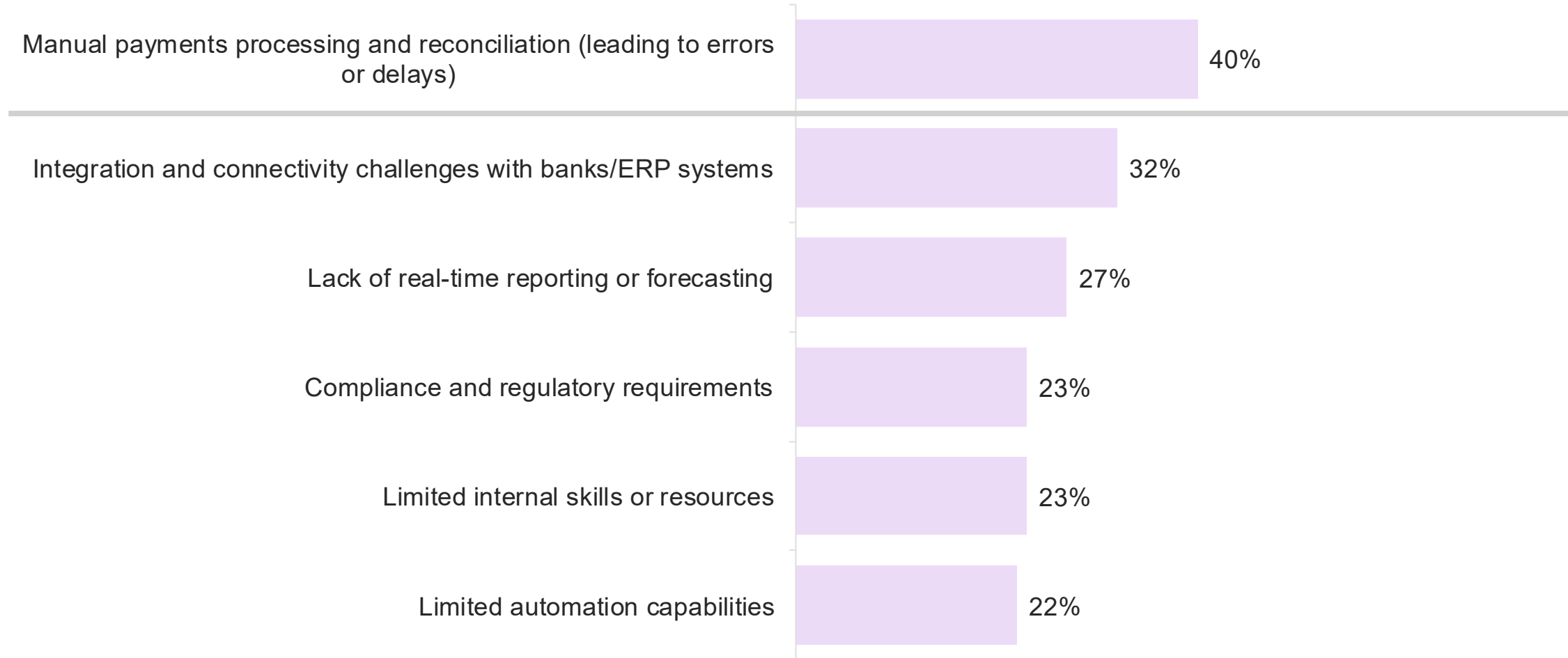


Q. How would you describe the current state of your organization's treasury and payments infrastructure? (Please select all that apply.) (n=107)

Note: 1% selected 'Don't know/not sure'

Respondents were provided the following definition for reference: For the following questions, **automation** refers to the end-to-end integration of treasury and payment processes, including payables and receivables systems, bank connectivity, and the use of automated reconciliation, exception handling, and straight-through processing with minimal manual effort.

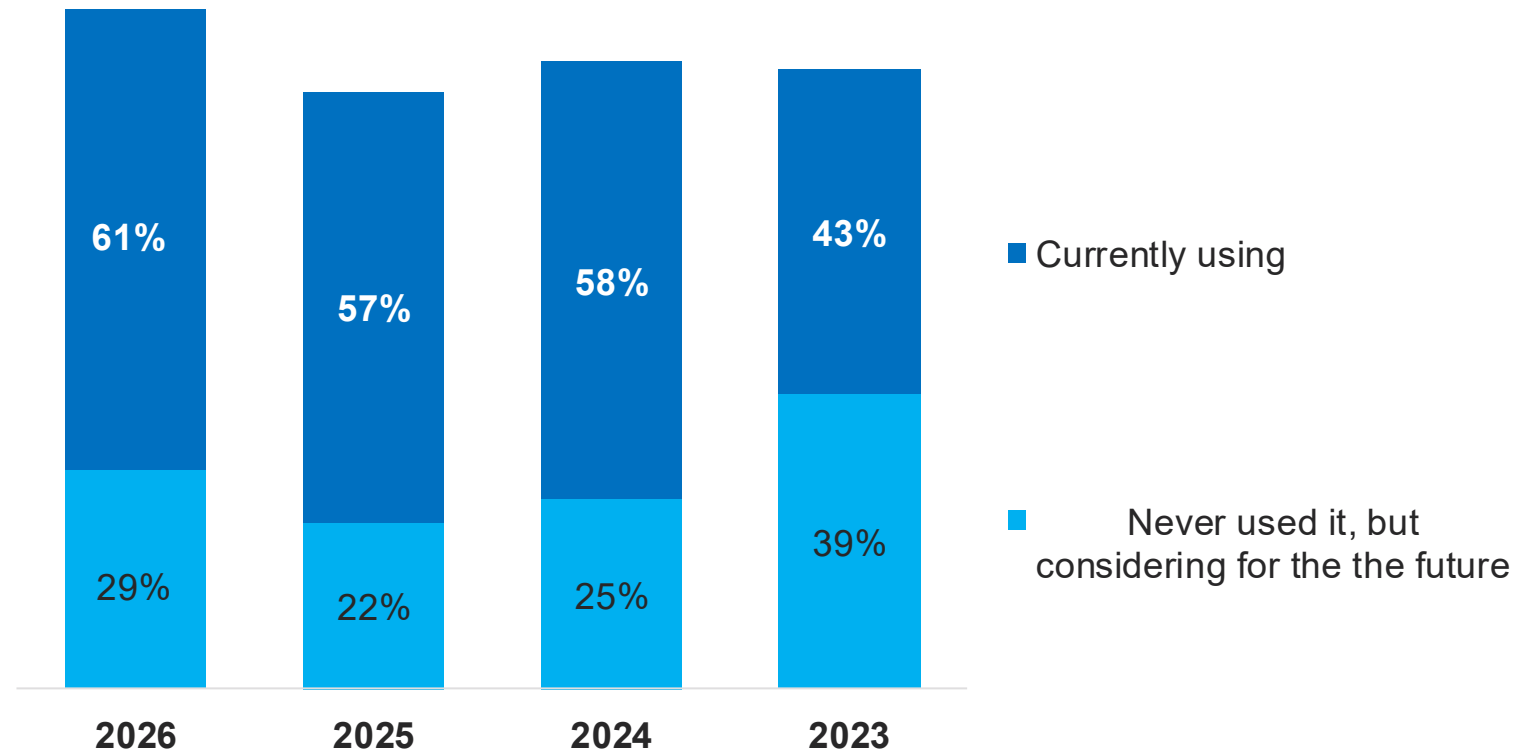
Biggest Pain Points Related to Payments Infrastructure



Q. What are the biggest pain points your organization experiences in its payments infrastructure? (Please select all that apply) (n=107)

Note: 4% selected 'Other' ; 11% selected 'Don't know/not sure' ; 1% selected 'No pain points'

Automation use for SAP migrations/digital transformation processes

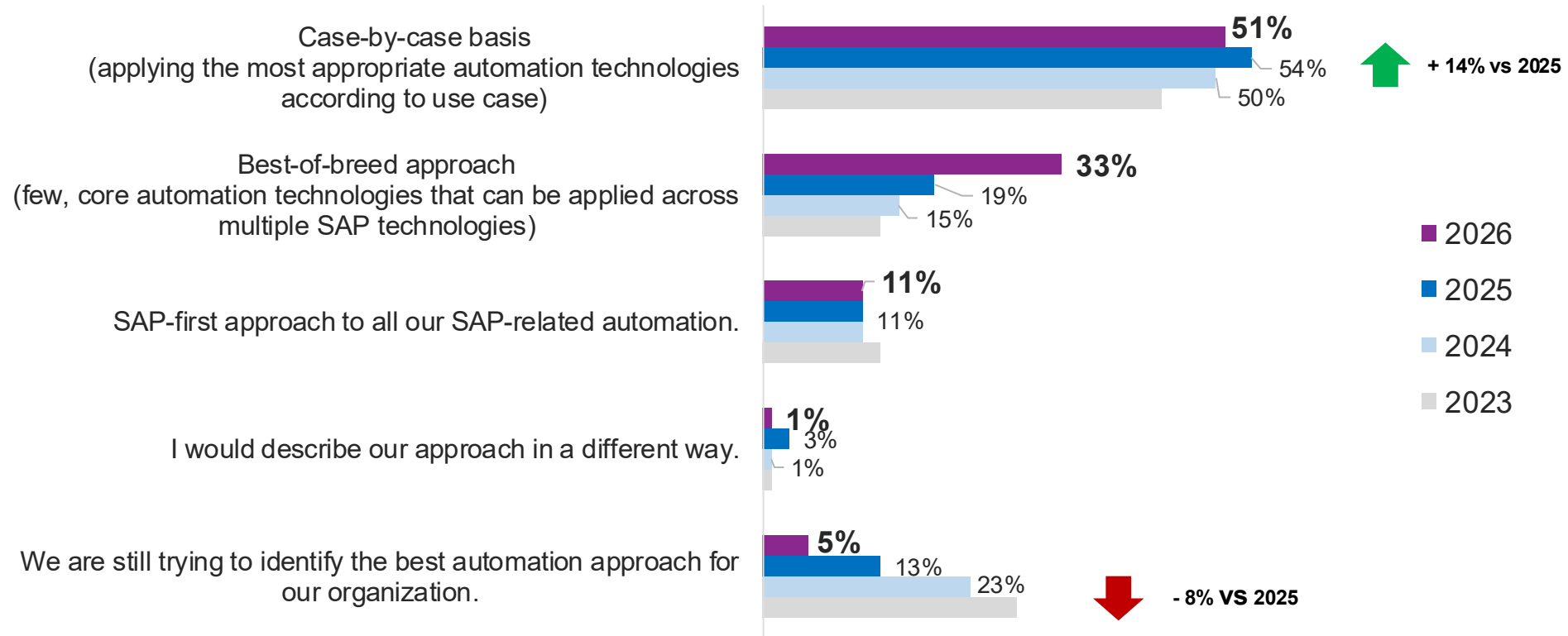


Note: Any respondents who are not currently using or planning to use automation and not currently using or planning to use SAP S/4HANA were terminated from the survey; 96% survey incidence rate

Q. Which of the following best describes your organization's experience with each of the following for SAP migrations/digital transformation processes?

(2026 n=165, 2025 n=172, 2024 n=193, 2023 n=156) **Note:** Data and sample sizes rebased to exclude respondents who selected 'Don't know/not sure', 'Never heard of it', and 'N/A'

Approaches to automation



Note: Any respondents who are not currently using or planning to use automation and not currently using or planning to use SAP S/4HANA were terminated from the survey; 96% survey incidence rate

Q. Which of the following best describes your organization's experience with each of the following for SAP migrations/digital transformation processes?

(2026 n=165, 2025 n=172, 2024 n=193, 2023 n=156) **Note:** Data and sample sizes rebased to exclude respondents who selected 'Don't know/not sure', 'Never heard of it', and 'N/A'

Q. Which of the following best describes your organization's current or planned approach to automation? (2026 n=169, 2025 n=152, 2024 n=201, 2023 n=137)

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Thank you.



**Thank
you for
attending!!**

Atlantic-Canadian Chapter Meeting



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