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SAP STUDY 2026

Architecture. Data. Artificial Intelligence.

How companies design their SAP ERP landscape

May 2026

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Executive Summary

Seven Key Findings from the SAP Study 2026

1. The SAP transformation has entered the implementation phase

The migration to SAP S/4HANA is no longer a strategic project for the future, but an operational reality. About 70% of companies are already in the midst of ongoing transformation projects or have completed their migration. As a result, many organizations are shifting their focus from planning to the actual implementation and stabilization of new ERP landscapes.

2. It’s not just ERP—a cloud platform for business management is also important

SAP Cloud ERP Private is becoming the dominant deployment model for many companies. Traditional on-premises environments continue to lose ground. Companies are seeking progress not so much through radical upheaval, but rather through controlled cloud transformations that continue to accommodate existing processes and customizations. The “ERP comfort zone” consists of private cloud with hybrid or brownfield migration.

3. From the Core ERP Solution to an Integrated Data Platform: The SAP Architecture Is Expanding

The SAP Business Technology Platform (BTP) and the SAP Business Data Cloud (BDC) form a platform architecture for integration, data management, and extensions. The SAP landscape is thus evolving into a technological platform for data, processes, and innovation.

4. AI is also becoming a new driver of value in the SAP ecosystem

Companies primarily expect AI-powered applications and Agentic AI in the SAP context to accelerate processes, reduce costs, and improve problem analysis. At the same time, the results show that widespread adoption remains contingent on certain conditions. In particular, data security and regulatory clarity necessitate the concept of digital sovereignty even for SAP solutions.

5. The actual transformation doesn't begin until after the ERP cloud migration

For many companies, the migration to SAP S/4HANA does not mark the end of their transformation, but rather its starting point. Competitive advantages only emerge once ERP systems are further developed into an integrated digital platform through the integration of cloud architectures, data platforms, and AI-based applications.

6. 2026: The Year of AI Agents

For the first time, AI agents top the list of the most in-demand SAP Business AI Services, accounting for approximately 42 percent, well ahead of the SAP GenAI Hub (27%) and the AI interface Joule (16%). This indicates that by 2026, companies will want to rely on AI-driven agents that can independently perform tasks, initiate processes, and interact with other SAP system components within the SAP system landscape.

7. SAP BDC continues to displace third-party providers

The percentage of companies operating comparable data architectures via platforms such as Snowflake or hyperscalers is falling from 40% to 30%. As a result, BDC adoption is now growing to 60% of companies, further shifting data architecture decisions in 2026 in favor of the SAP-native approach.

Foreword

The transformation of SAP landscapes continues to gain momentum. More and more companies in the DACH region are in the midst of migrating to SAP S/4HANA while simultaneously driving the transformation of their IT architectures toward the cloud, data platforms, and AI-powered applications. What began as an ERP migration is increasingly evolving into a comprehensive platform transformation.



With SAP S/4HANA, the SAP Business Technology Platform (BTP), the SAP Business Data Cloud (BDC), and new AI capabilities, a platform ecosystem is emerging that goes far beyond the traditional modernization of ERP systems. Today, companies are no longer concerned only with migrating their core systems, but with how data, processes, extensions, and AI applications will interact in an integrated cloud architecture in the future.

SAP Cloud ERP—formerly SAP S/4HANA Cloud—in particular continues to serve as the technological foundation for this development. While some companies are still in the midst of their SAP Cloud ERP migration, many that have already completed the migration are shifting their focus to the next step: leveraging the platform's capabilities in integration, data management, and AI.

This study examines how companies in the German-speaking region are currently shaping this transformation. It focuses on key areas of the SAP transformation—including progress in SAP Enterprise Resource Planning (with SAP Cloud ERP, SAP Cloud ERP Private, and SAP S/4HANA On-Premises), the role of the SAP Business Technology Platform (BTP) as an integration and innovation platform, the importance of the SAP Business Data Cloud (BDC) for data-driven architectures, and the increasing use of artificial intelligence in the SAP context.

For this edition, the survey was expanded compared to the 20 previous year. The study is based on a broader sample of companies from Germany, Austria, and Switzerland (D-A-CH), thereby enabling, for the first time, a detailed regional comparison within the German-speaking region. In addition, industry-specific insights were deepened to highlight differences in transformation strategies and technology priorities. Particular attention is given to key industries within the SAP user landscape, including discrete manufacturing (DMI—mechanical engineering, high-tech, and equipment manufacturing), retail, and the food industry. As a result, the findings provide not only a snapshot of current transformation dynamics but also a comparison with the results of last year's study.

Note: Due to the expanded sample size (n=409) and greater regional differentiation, individual values may shift slightly compared to the previous year (n=201). However, the underlying trends and patterns remain comparable and allow for a well-founded assessment of current developments.



SAP S/4HANA Transformation: The Current Status in 2026

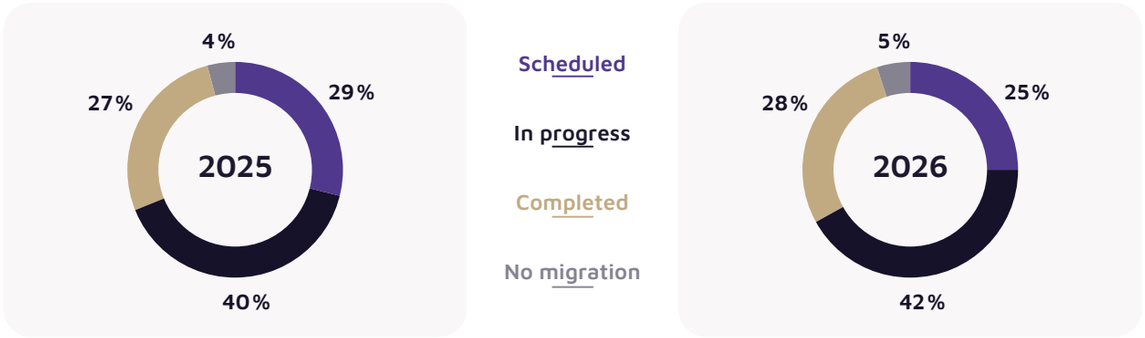
Compared to the previous year, the migration to SAP S/4HANA or to the cloud with SAP Cloud ERP and SAP Cloud ERP Private is currently at a stable level in the D-A-CH region. The pace of transformation is not disruptive. This reflects the reality of complex SAP ERP migrations.

With 42 percent of projects currently being implemented, 28 percent of transformations completed, and 25 percent in the planning stage, the total share of active or already completed projects remains at around 70 percent. Only 5 percent of the companies surveyed still do not plan to make the switch in the foreseeable future. There is thus no structural break between 2025 and 2026. The slight increase in ongoing projects is less a sign of a new wave of migration than a shift in maturity and steady progress in transformation. SAP S/4HANA and SAP Cloud ERP remain on companies' strategic and operational agendas.

Continuity rather than disruption, relevance rather than withdrawal.

Figure 1

Current Status of the SAP S/4HANA Transformation



Sample size 2025: 201 companies | Sample size 2026: 409 companies

The transformation is spreading across market segments

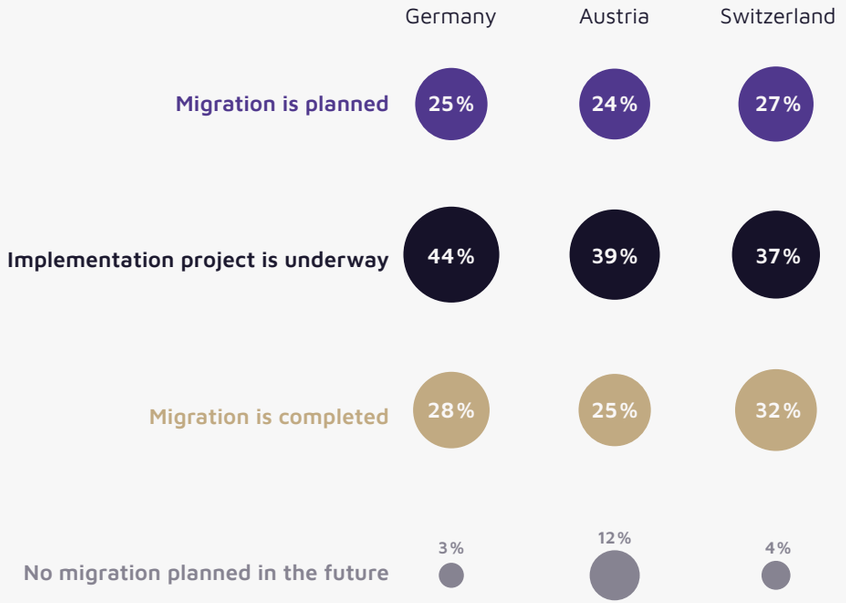
The trend becomes clearer when comparing segments. SMEs (up to 250 employees) are experiencing a noticeable shift toward the implementation phase. The proportion of ongoing transformation projects is rising from 17 percent to 25 percent. This indicates that smaller organizations are increasingly moving beyond the planning phase and tackling their transformation. In doing so, they benefit from lower system complexity, clear governance, and shorter decision-making cycles.

Medium-sized companies (250–1,000 employees) show an increase in completed SAP S/4HANA projects from 23 percent to 28 percent. Enterprises (>1,000 employees) also report an increase in completed transformation projects, from 33 percent to 37 percent. When examining the size categories, a clear pattern of economies of scale emerges: While larger organizations started earlier and are now gradually going live, SMEs are catching up quickly in 2026 due to lower IT complexity. The transformation is thus gradually spreading across the market segments.



Figure 2

Current Status of the SAP S/4HANA Transformation: A Look at the D-A-CH Region in 2026



Sample size: 409 companies

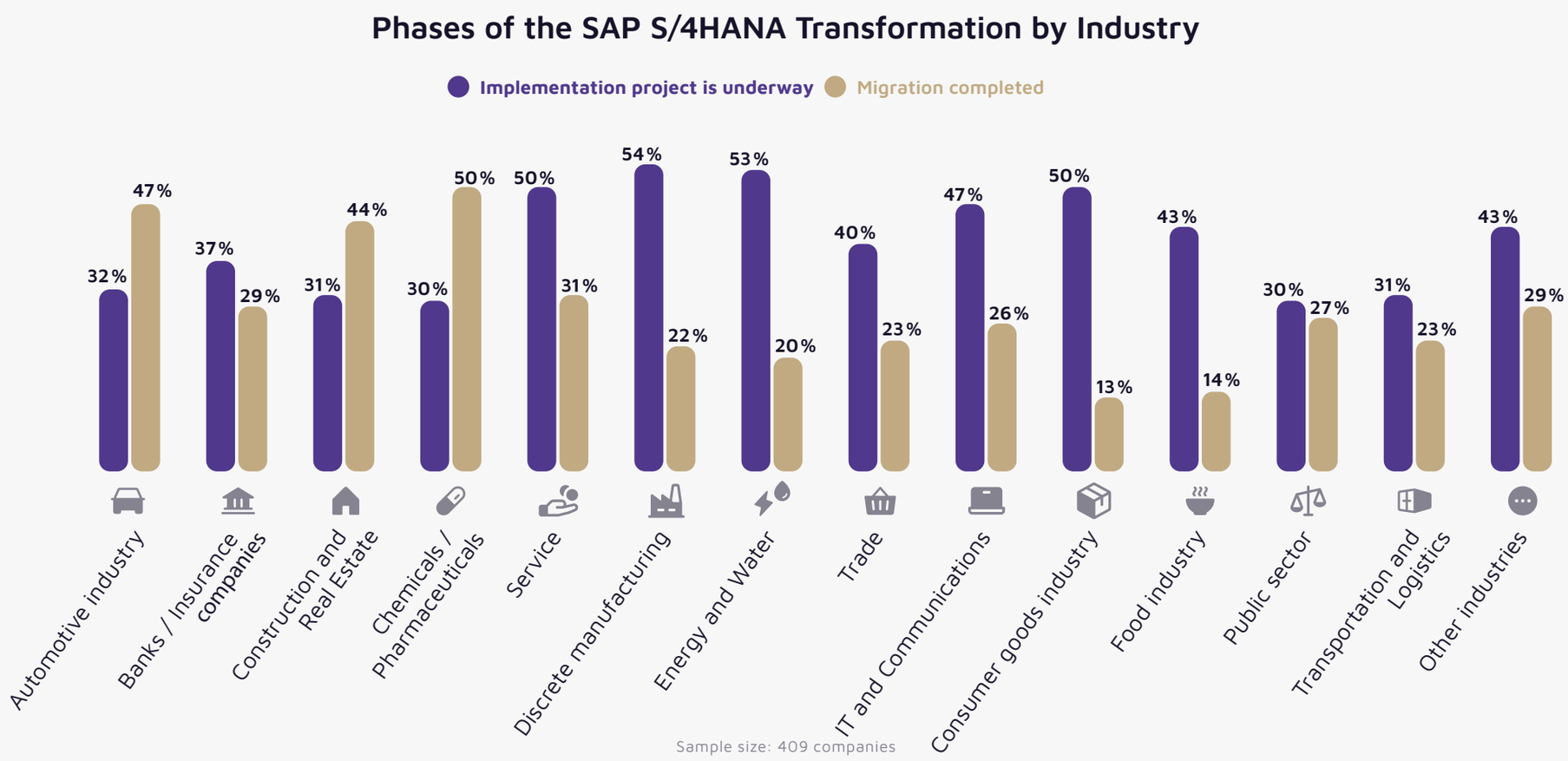
Industries in the midst of transformation—at varying stages of maturity

The figure shows the current status of the ERP migration to SAP S/4HANA across industries, distinguishing between ongoing implementation projects and migrations that have already been completed.

In particular, the discrete manufacturing industry (54%), utilities (53%), and service companies (50%) have a high proportion of active transformation projects, while industries such as automotive (47%) and chemicals/pharmaceuticals (50%) already demonstrate an advanced level of maturity, with an above-average number of completed migrations.

Whether actively engaged in the SAP S/4HANA transformation or already live: Hardly any industry is standing on the sidelines – today, the difference lies less in the if than in the how.

Figure 3





Operating Models and Migration Strategies

Deployment models

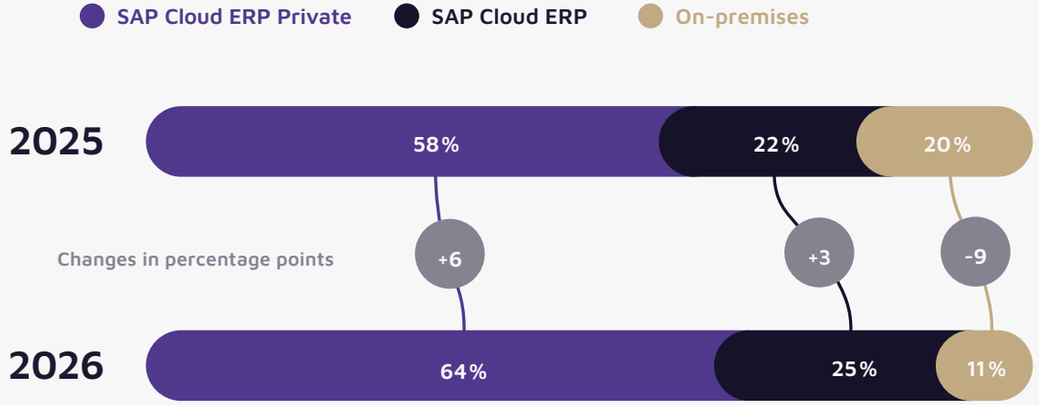
The choice of a deployment model remains a fundamental technological issue in terms of strategic priorities. The results show a clear trend: the private cloud continues to expand its dominant position and is increasingly establishing itself as the benchmark model for operating SAP Cloud ERP.

The 9-percentage-point decline in traditional on-premises operations is not a short-term blip but a structural trend. The impending end of SAP ECC maintenance in 2027, rising operational costs, and demands for scalability and innovation are accelerating the shift away from on-premises operations.

Nevertheless, the direction of this shift is striking: the vast majority is moving to the private cloud—not the public cloud, as SAP itself would prefer. The transformation is taking place steadily and in a controlled manner, not disruptively—even if this involves additional effort. Industrial sectors in particular, such as discrete manufacturing (DMI), the food industry, and players in the supply chains (transport and logistics), continue to clearly favor private cloud models. The reasons are understandable: a high degree of customization, complex production and SCM logic, integration requirements with shop floor and PLM systems, and increasing regulatory frameworks (CSRD/CSDDD). In contrast, the public cloud is growing only moderately, from 22 to 25 percent. This increase signals acceptance, but not the universal dominance that SAP itself would like to see. It continues to be perceived as an industry-specific option—not as a universally applicable target model.

Figure 4

A Comparison of SAP S/4HANA Deployment Models



Sample size 2025: 201 companies | Sample size 2026: 409 companies

Migration strategies

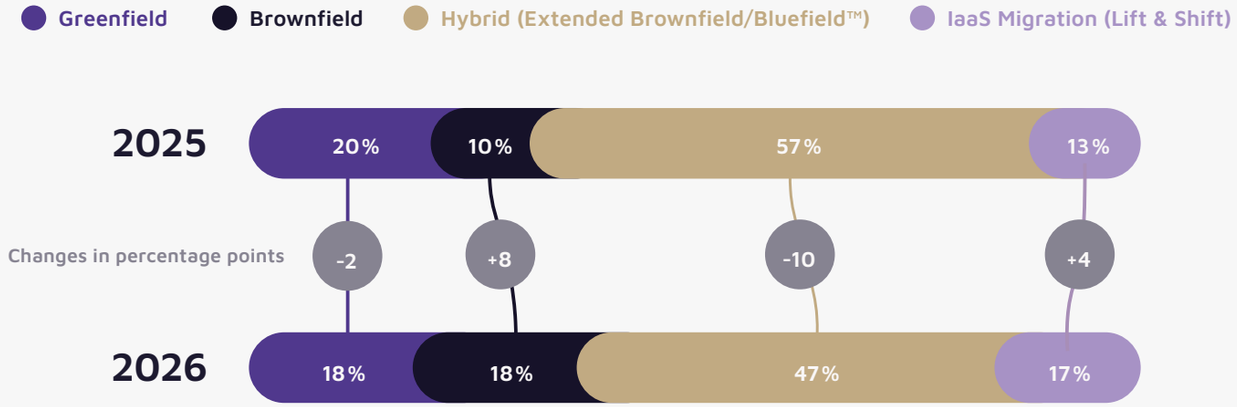
An interesting trend can also be seen in SAP S/4HANA migration strategies compared to the previous year's study. Although the hybrid approach remains the leading strategy despite experiencing the sharpest decline, it is losing ground slightly in terms of preference.

At the same time, brownfield solutions are gaining significant ground (+8 percentage points) and, when combined with the private cloud, could evolve into a new "ERP comfort zone." This approach is particularly popular in the manufacturing sector, where it has seen a significant increase of 13 percentage points compared to the previous year, and is being adopted in one out of every four private cloud transformation projects.

In 2026, the greenfield approach will remain a disruptive choice for companies seeking to fundamentally realign their process landscape. Although slightly down at 18 percent, Greenfield confirms its role as a transformation option for structural realignments, post-merger integrations, or highly fragmented legacy systems—with correspondingly higher resource requirements and a greater scope of change—as it is still the preferred choice in 66 percent of public cloud transformations. IaaS migration via Lift & Shift is growing moderately to 17 percent, underscoring its character as a pragmatic transition and relief strategy. Lift & Shift enables the rapid migration of existing systems to a cloud infrastructure without making immediate process adjustments. This is of interest to all companies facing time pressure during transformation or seeking to stretch their investment budgets. However, in the long term, the advantages of SAP Cloud ERP remain untapped.

Figure 5

A Comparison of Migration Strategies



Sample size 2025: 201 companies | Sample size 2026: 409 companies

Figure 6

A look at the D-A-CH region in 2026

Deployment model	Germany	Austria	Switzerland
SAP Cloud ERP Private	64 %	56 %	75 %
SAP Cloud ERP	27 %	27 %	15 %
On-premises	9 %	17 %	10 %

Migration strategy	Germany	Austria	Switzerland
Greenfield	18 %	24 %	15 %
Brownfield	15 %	28 %	17 %
Hybrid (Extended Brownfield/Bluefield™)	47 %	36 %	57 %
IaaS Migration (Lift & Shift)	20 %	12 %	11 %

Sample size: 409 companies





SAP Cloud ERP Strategy 2026

Implementation Phase: Between expectations and reality

With a large number of SAP Cloud ERP systems currently being deployed or already in productive use, actual project experience is now moving into the spotlight. The evaluation of SAP Cloud ERP differs significantly depending on the two key phases of transformation: implementation and operation.

Industry Overview

One in two companies views the switch to SAP Cloud ERP as a catalyst for innovation due to its modern platform and cloud services. Support for this view is particularly strong in the following industries:

- **Food industry**: 67%
- **Automotive**: 63%
- **Retail**: 57%

In current projects, SAP Cloud ERP is primarily evaluated in financial terms. 42 percent already view cost efficiency as an advantage—including 51 percent in the retail sector—while 34 percent overall cite costs as an obstacle. For 57 percent, concerns about excessive migration costs are a reason not to consider switching to SAP Cloud ERP. Whether this calculation will pay off in the long term, however, remains to be seen. In light of rising maintenance costs, expiring support contracts, increasing demands for innovation speed, and the growing need for integration of data and AI applications, the economic assessment is increasingly shifting in favor of cloud-based platform models, even outside the SAP ecosystem.

This financial ambivalence therefore persists: while efficiency and innovation are expected, ongoing project costs initially dominate perceptions during the transformation. After all, not every company experiences a smooth transition during cloud ERP migration. SMEs (45%) and the utilities sector (63%) in particular perceive the transformation costs as too high.

Assessments of implementation speed are similarly mixed. 44 percent confirm that cloud infrastructures enable rapid implementation of SAP solutions. This view is held primarily by larger midsize companies (>250 employees) (45%), as well as by the service sector (51%), whose highly standardized processes can often be effectively mapped onto cloud structures. However, this finding carries a structural ambivalence. This is because, at the same time, around 30 percent of IT and business decision-makers report excessive migration complexity as a key obstacle. Particularly in the chemical and pharmaceutical industries, where individually developed process landscapes and proprietary system integrations significantly complicate the transition to standardized cloud environments, the figure stands at 44 percent—well above the overall average. This industry example is central to understanding many transformation projects: it is not cloud technology itself that is perceived as a hindrance, but rather the migration of established process and system logics. Data migration, integration architectures, as well as organizational change and change management therefore significantly determine the actual project effort.

Further benefits of the cloud are already becoming apparent, though they are still overshadowed by operational KPIs. For example, 44 percent of companies view access to the cloud itself, as well as to other SAP cloud services, positively. While these benefits are communicated as early as the migration planning phase, they become tangible for the first time during the implementation phase—for example, through direct access to platform services, development environments, or integration functions of SAP BTP. The public sector, in particular, is increasingly recognizing (53%) that cloud platforms can be quickly accessible and can modernize and expand IT environments.

This is another reason why scalability is a key focus. 48 percent of companies already view it as a major advantage during the implementation phase—particularly with regard to future expansions, increasing data volumes, and new areas of application involving AI or data-driven business models, such as those enabled by SAP BDC. The automotive sector (67%), the chemical and pharmaceutical industries (56%), and the service sector as a whole (54%) perceive the scalability of SAP Cloud ERP as a particularly significant advantage.



Digital sovereignty during implementation

Alongside the technical implementation, issues related to data control and data sovereignty are coming into sharper focus during the implementation phase. 38 percent of companies view data security as an advantage of modern cloud architectures, while at the same time 39 percent still express security concerns and 38 percent cite regulatory requirements as an obstacle (e.g., regulations such as KRITIS or NIS2). Digital sovereignty is thus not only understood as a purely technical issue (choice of operating model), but is moving further up the list of decision-making criteria and is an integral part of governance and compliance for all future SAP landscapes.

Different priorities emerge across industries. In the automotive industry, 67 percent express concerns about cloud security. In regulated sectors such as utilities (63%), regulatory requirements have a particularly strong influence on architectural decisions. At the same time, other industries are already recognizing concrete benefits of cloud security architecture; for example, the consumer goods industry (75%) and retail (57%) highlight the advantages of data backup using the cloud.

Overall, it is clear that security and governance issues are closely intertwined with the transformation. Digital sovereignty thus arises not so much from avoiding cloud platforms as from their increasingly controlled integration into security and compliance frameworks.

Industry Overview

45% of SAP customer companies see the deployment of an SAP Sovereign Cloud as an opportunity to further alleviate existing concerns about cloud technologies. This view is particularly prevalent in regulated or highly regulated industries.

- **Utilities sector:** 67%
- **Discrete manufacturing:** 60%
- **Food industry:** 57%

Productive system operation: A retrospective on migration and trust

Once the system goes live, the perspective on cloud ERP changes fundamentally. While the project phase is dominated primarily by investment costs and migration risks, a different set of priorities comes to the fore during day-to-day operations: companies now assess whether the effort involved in the transformation is actually paying off.

Once again, cost perception provides a clear initial indication. Slightly more than half of companies using SAP technologies confirm cost efficiency as a benefit of the cloud in production operations—a noticeable increase compared to the implementation phase. Automated updates, lower infrastructure costs, and reduced maintenance expenses have a positive impact on ongoing operations. This effect is particularly evident in the retail sector: flexible cloud resources and platform processes directly contribute to cost efficiency at one in two retail companies.

Nevertheless, cost remains a highly relevant factor for 39 percent of respondents. However, its significance is now shifting. During implementation, it refers to ongoing project costs; once the system is in productive operation, it is viewed more as a retrospective assessment of the transformation investment. The key question is no longer whether the migration was costly, but whether it makes economic sense in the long term.

51% of companies report that SAP Cloud ERP is cost-effective in productive operation

The situation is similar when it comes to implementation speed. In hindsight, 44 percent confirm that implementation was rapid. At the same time, the actual assessment of the migration's complexity rises to 37 percent. This apparent contradiction is typical of large-scale transformation programs. Technologically, cloud systems can be deployed more quickly—but the real challenge lies in adapting established corporate structures. Processes must be harmonized, data models standardized, and integration architectures rebuilt.

The perceived complexity is particularly evident in the consumer goods, chemical, and pharmaceutical industries (50% | 47%). Production systems, engineering platforms, and logistics solutions are often closely interlinked in these sectors. ERP migration therefore has a direct impact on a company's entire system architecture. Complexity arises less from cloud technology itself than from the integration of industrial system landscapes.

Interim conclusion of both phases (implementation and productive operations)

The SAP Cloud ERP migration is not industry-agnostic. While the cloud is considered a given across all sectors, the value drivers and barriers vary significantly depending on process complexity, the level of regulation, and business model logic.

Overall, it is clear that:

- Various industries face greater challenges with integration and process-specific requirements during implementation.
- Retail-related industries benefit the most operationally from scalability and faster access to modern solutions.
- Regulated industries such as food, utilities, and finance are placing even greater emphasis on security and compliance.

However, cloud operations also bring other advantages to the forefront. The accessibility of cloud systems is becoming significantly more important and is rated positively by half of all companies during the operational phase. Even the complex chemical and pharmaceutical industry appreciates this in 56 percent of cases. The systems become location-independent and fail-safe, user interfaces more consistent, and updates are handled centrally. These effects reduce friction between business units and IT.

In logistics (69%) and retail (46%) as well, this factor has a direct impact on day-to-day operations. Branch networks, decentralized organizations, and omnichannel models benefit greatly from unified access to central platforms and solutions. SAP Cloud ERP is viewed here not merely as infrastructure, but as an integral part of business operations.

At the same time, there is a clear learning curve when it comes to security. Data backup is now seen as an advantage by 47 percent of respondents, while security concerns have declined slightly to 34 percent. As operational experience grows, the conversation shifts: the security discourse becomes concretely measurable and less focused on "if-then" scenarios.

This effect is particularly evident in regulated sectors such as the food industry (48%). In this sector, traceability, quality documentation, and compliance are already central to the system architecture. Cloud platforms are therefore viewed as the infrastructure for fast and secure data exchange as well as long-term data backup.

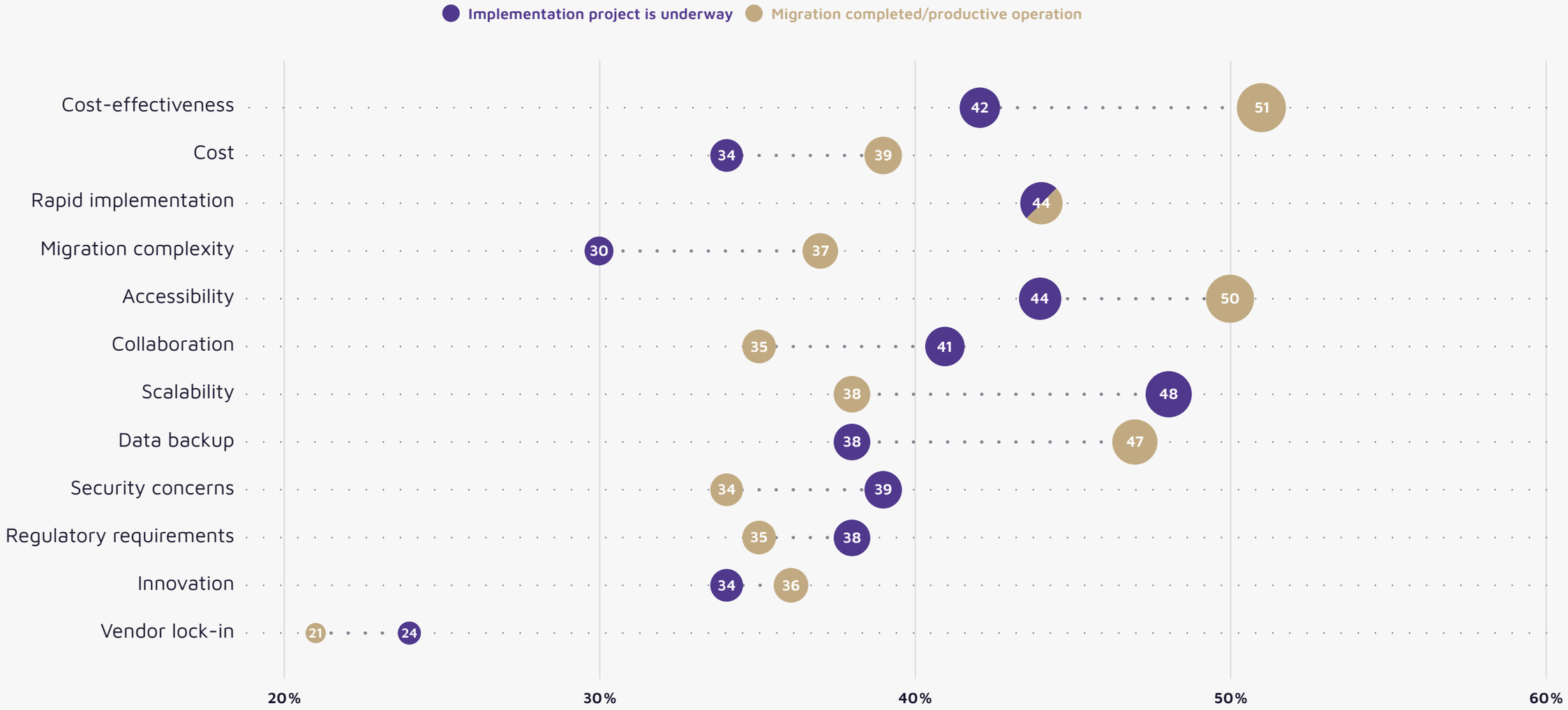
Regulatory requirements, however, remain a significant factor at 35 percent. While they primarily shape architectural decisions during the implementation phase—such as data locations or operating models—they become a permanent control mechanism during ongoing operations. Auditability, documentation requirements, and compliance processes shape the day-to-day operations of these organizations with their cloud models. The utilities sector, which includes KRITIS entities (60%), is driving the overall average particularly high.

What was considered a risk during implementation becomes a strength in operation: security concerns diminish, and data protection improves.



Figure 7

Advantages of and barriers to the SAP Cloud ERP transformation compared between productive operation and implementation phase



Sample size: 365 companies | Filter: Companies with implementation projects or that have completed the migration | Figures in percent



SAP BTP Enables AI- and SAP BDC Integration

In this year's survey again, the SAP Business Technology Platform is perceived significantly less as a mere 'nice-to-have' for extensions and much more as a strategic platform layer through which companies can scale AI, data architectures, and process automation into their cloud ERP landscapes.

Accordingly, interest in SAP BTP features is shifting toward trending technologies that make innovation manageable and interoperable: Artificial Intelligence (51%) and SAP Business Data Cloud (51%) are tied for the top spot, followed by the perennial topics of automation (44%) and integration (40%), which are essential prerequisites for future AI applications. Application Development remains relevant at 31 percent, but is less frequently seen as the primary entry point to SAP BTP.

A clear enterprise effect is evident when it comes to AI: While 39 percent of SMEs with fewer than 250 employees express an interest in AI, that figure rises to 58 percent among companies with more than 1,000 employees. This aligns with the operational reality of large organizations: The more heterogeneous the system landscape and the greater the governance pressure, the more AI is viewed as a platform issue—rather than as an isolated solution within departments.

At the same time, integration is once again gaining importance. This is less of a tool trend and more of an indicator of maturity: once cloud ERP transformations are complete, there is a need within the organization to consistently orchestrate SAP systems, data flows, and process chains. This is precisely where SAP BTP serves as the integration layer that extends the cloud architecture into the overall IT infrastructure.

The importance of automation remains high, but in certain industries it is significantly more "business-driven": in retail, 57 percent agree, while in the finance sector, 55 percent do. Here, process automation is seen as a direct lever for standardization, reducing employee workload, and improving efficiency—with a clear business case. Which key role automation plays in interaction with agentic AI becomes apparent in the further course of the study.

Figure 8

AI and data platforms are the main focus of interest regarding SAP BTP features

	Total	Germany	Austria	Switzerland
Artificial Intelligence (AI)	51 %	52 %	45 %	55 %
SAP Business Data Cloud (BDC)	51 %	56 %	36 %	47 %
Automation	44 %	45 %	45 %	40 %
Integration	40 %	41 %	35 %	41 %
Application Development	31 %	31%	25 %	37 %
Others	4 %	4 %	4 %	5 %
I don't know, N/A	1 %	1 %	1 %	3 %

Sample size: 409 companies | Multiple responses allowed



SAP BDC: An Anchor Point for Data-Driven Business Management

The SAP Business Data Cloud is establishing itself in 2026 as the central hub for data management with SAP systems. More than six out of ten companies view the SAP BDC as an integral part of their data management once the SAP Cloud ERP migration is complete. It is striking that this perception does not emerge only after the project is completed, but takes hold early on: during the Cloud ERP planning phase, the figure stands at 66 percent. The overall average is 60 percent. SAP BDC is thus not a downstream issue, but rather plays a key role in the transformation roadmap from the outset and is intended to enable data-driven decision-making throughout the entire company.

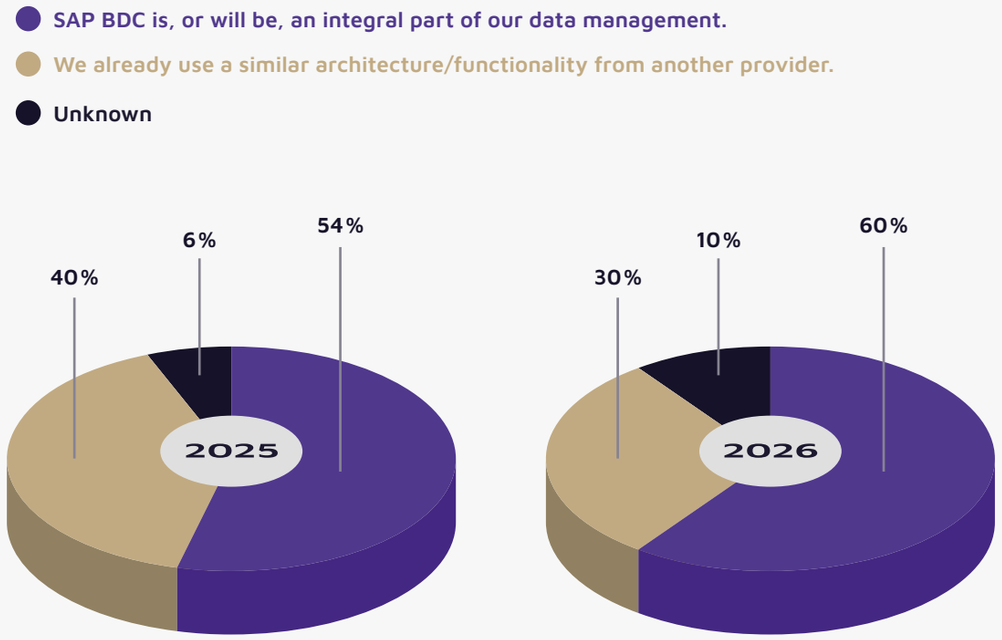
There are clear trends across industries: In retail, 72 percent view SAP BDC as an integral component (2025: 49%), and in the food industry, the figure is as high as 78 percent (no prior-year data available). In the industrial sector, the figure of 58 percent once again reflects industrial reality: Here, IT architectures are often shaped by engineering and OT integrations, which means that data architectures are structured more along domain- and integration-driven lines and are less easily consolidated into a unified target vision. Compared to the previous year, SAP BDC is on a slight growth path in the industrial sector.

The second key benefit of SAP BDC lies in its data integration capabilities: Half of all companies say that SAP Business Data Cloud can help simplify system integration and break down data silos. This represents a slight increase of 4 percentage points over the previous year. Support is growing particularly strongly among SMEs (+28 percentage points). Here, the lack of data integration is increasingly recognized as a problem, and SAP BDC is positioning itself as a simplifying standard solution. This is also driven by greater awareness on the part of SAP Marketing and by project references. The added value is also particularly significant where system heterogeneity and governance requirements are high—typically in larger organizations. This is precisely why approval in the enterprise segment is on the rise, reaching 52 percent (previous year: 46%).

At the same time, there is a growing trend toward consolidation in favor of SAP-aligned data architectures: This year, 30 percent of respondents report using a comparable architecture outside the SAP portfolio. This share has fallen by almost 10 percentage points compared to last year's study and fits with the observation that companies increasingly align their data strategy with the SAP target architecture once Cloud ERP moves into productive operation.

Figure 9

The Role of SAP Business Data Cloud (BDC) in Enterprise Data Management



Sample size 2025: 201 companies | Sample size 2026: 409 companies



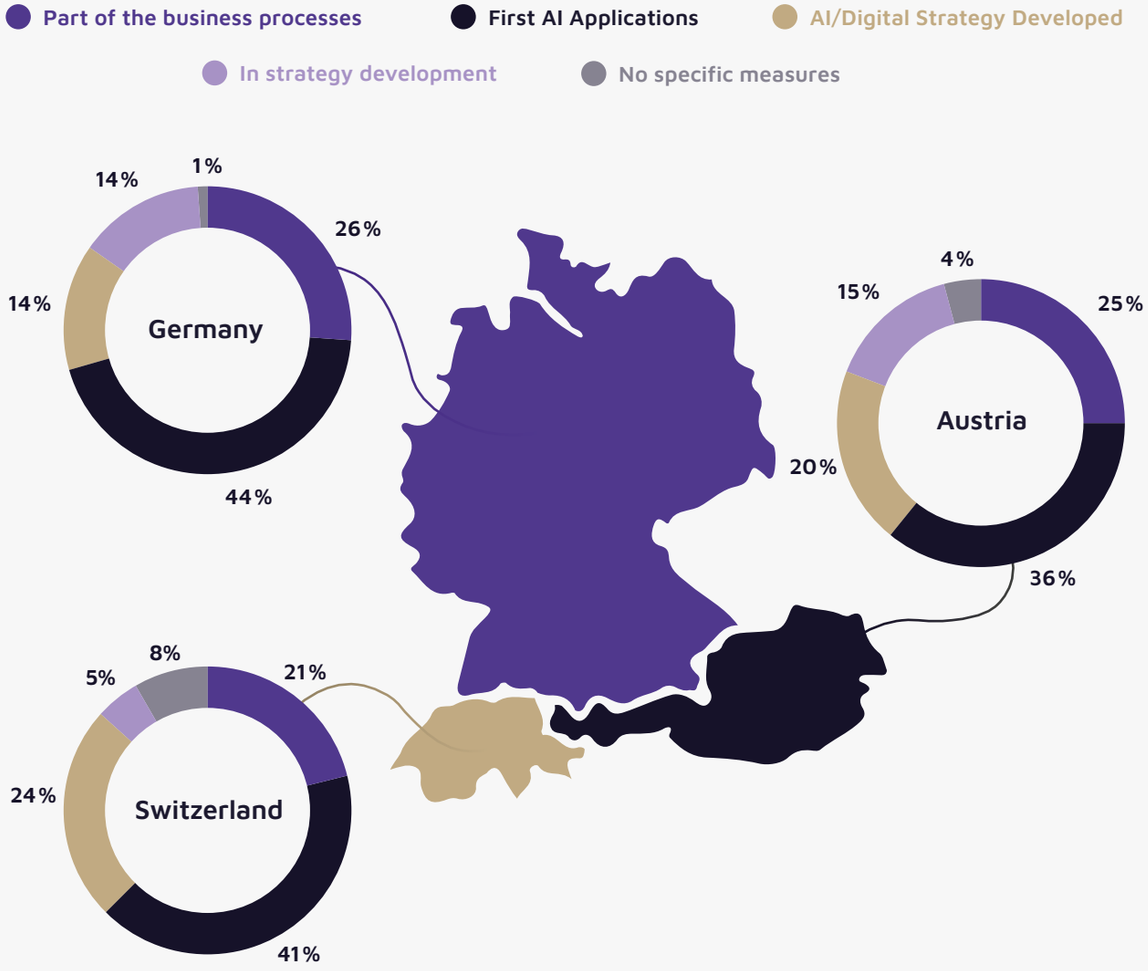
AI Agents: Business-Relevant AI in the Cloud

The role of AI in the SAP ecosystem is shifting from experimental approaches toward a greater demand for business-relevant use cases. More than half of all companies already view SAP solutions as the future technological foundation for integrating new technologies such as AI or RPA (Robotic Process Automation). This view is particularly pronounced in the food industry (63%), in retail, as well as in the financial sector and among utilities (around 57% each).

A look at the level of maturity also shows that AI in a corporate context has already moved far beyond the stage of strategic discussion. 67 percent of companies are either actively using AI or have already firmly integrated it into their business processes. Specifically, this means that one-quarter of organizations (25%) report that AI is already an integral part of their business processes.

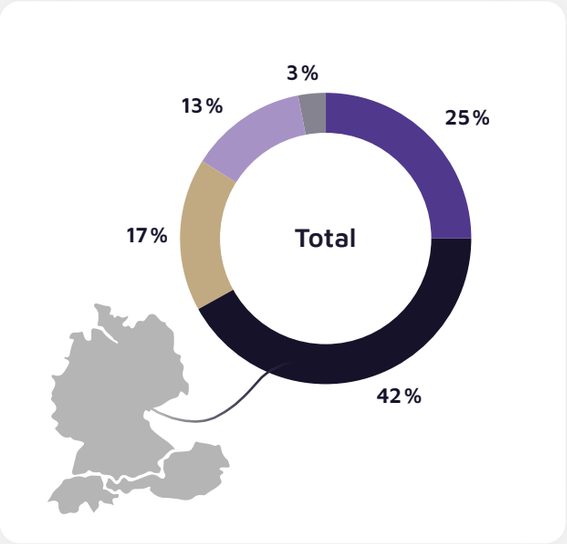
Figure 10

Maturity of AI Adoption in Businesses in the DACH Region



Sample size: 409 companies

This percentage is higher among companies that have completed their cloud ERP transformation (28%) and is significantly higher in the automotive industry (53%). Another 42 percent are already using initial AI applications or services. At the same time, 17 percent of companies are in a phase where they have a detailed AI strategy in place, while 13 percent are currently working on such a strategy. Only 3 percent have not yet launched any concrete AI initiatives. Overall, this confirms a clear picture: AI will remain a strategic priority in 2026, though its operational implementation will occur at varying stages of maturity.



But now the focus shifts to the specific AI capabilities that companies expect from SAP and its partners in 2026. The strongest demand is for AI agents (42%), with particularly high figures in the enterprise segment (46%), the financial sector (55%), and the German market (48%). This is followed by AI-supported planning and analysis functions (41%), AI support for developers (37%), and AI functions integrated directly into SAP products (36%). The latter, in particular, is gaining importance in industrial sectors: in areas such as discrete manufacturing, the automotive industry, and the pharmaceutical industry, interest exceeds 40 percent, and in logistics, it is as high as around 70 percent. Companies increasingly expect AI to be available directly within the cloud ERP system or in connected platform services such as SAP BDC.

Less chat interface, more business process

At the same time, interest is growing in developing in-house AI applications using SAP platform services such as the SAP GenAI Hub (27%), while traditional conversational AI interfaces within ERP cloud systems are a lower priority. Although the AI assistant Joule continues to attract attention (16% interest), it is losing its unique selling point. Many companies have gained initial practical experience with Joule and have so far been cautious in their assessment of its benefits. Companies expect less generic chat interfaces and more specific AI functions that increase efficiency and reduce workload within defined business processes. Against this backdrop, AI agents mark a decisive step forward in the SAP AI ecosystem. While AI has primarily fulfilled supporting functions to date—such as searches, forecasts, recommendations, or analyses—agents represent a new model: AI systems capable of autonomously executing task workflows or creating dashboards within clearly defined business logic.

This presents a strategic challenge for SAP and its partners. The success of the AI strategy will be measured less by individual interfaces or tools and more by the ability to consistently integrate AI capabilities into a wide range of highly customized business processes and make them manageable through platform services such as SAP BTP and SAP BDC.

Figure 11

Prioritized AI Capabilities in the SAP Ecosystem

	Total	Germany	Austria	Switzerland
AI Agents	42 %	47 %	28 %	36 %
Planning and Analysis with AI	41 %	44 %	32 %	41 %
AI Support for IT developers	37 %	36 %	35 %	43 %
Embedded AI Features in SAP-based Products	36 %	37 %	33 %	33 %
Create Own AI Cases with the SAP GenAI Hub	27 %	26 %	21 %	33 %
"Joule" AI Interface	16 %	14 %	21 %	16 %
Others	4 %	3 %	3 %	7 %
I don't know, N/A	3 %	3 %	3 %	5 %

Sample size: 409 companies | Multiple responses allowed



Use of AI in the SAP Solution Environment

Benefits by Region

The use of AI in the SAP environment is increasingly seen as a driver of economic and operational growth in the DACH market. In Germany, the primary focus is on accelerating business processes (51%), followed by cost savings (48%) and reducing the workload on employees (39%).

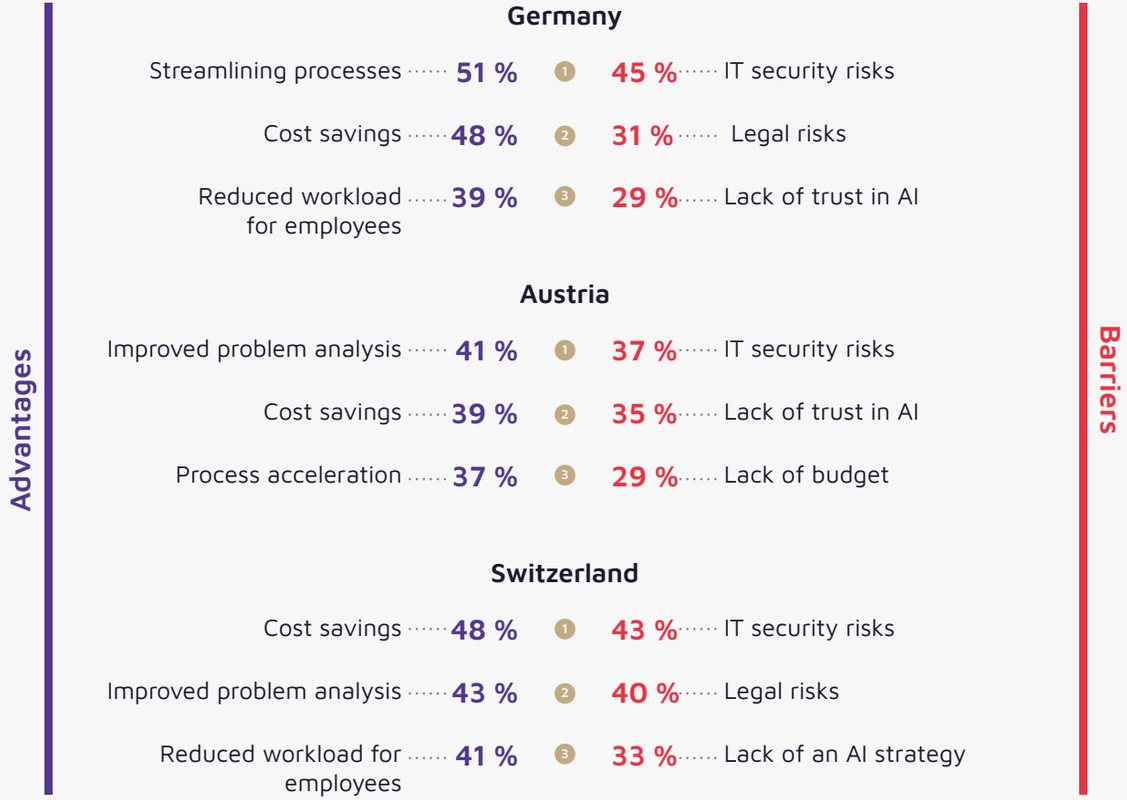
In Austria, the focus is more on analytical skills: Companies see the greatest benefits in improved problem analysis (41%), followed by cost savings (39%) and process acceleration (37%).

In Switzerland, however, economic factors are the primary consideration. Cost savings (48%) rank first, followed by improved problem analysis (43%) and reducing the workload on employees (41%).

Top 3

Figure 12

Regional Advantages and Barriers in the Use of AI with SAP Solutions



Sample size: 409 companies | Multiple responses allowed

Barriers by region

However, these expected benefits continue to be hampered by structural barriers. IT security risks play a central role in all three countries and are the biggest barrier in Germany (45%), Switzerland (43%), and Austria (37%).

Regulatory uncertainties will also be a major concern in 2026: 31 percent of companies in Germany and as many as 40 percent in Switzerland cite legal risks.

In addition, there are differences in the maturity of AI strategies. While a lack of trust in AI is one of the main obstacles in Germany and Austria, the absence of an AI strategy (33%) is cited more frequently as a challenge in Switzerland.

Overall, the results illustrate a typical pattern of transformation: While companies are increasingly recognizing the operational and economic potential of AI in the SAP context, security, governance, and strategy issues are becoming key prerequisites for broader adoption. The successful integration of AI therefore depends not only on technological capabilities, but increasingly also on clear governance structures, regulatory guidance, and organizational embedding.

Appendix: Study Profile

Are you already using an SAP ERP solution (such as R3, ECC, or S/4)?

	Total
Yes, we use an SAP ERP system	**85 %**
No, we don't use an SAP ERP system yet, but we plan to	**15 %**

How many employees does your company have?

	Total
Up to 249 employees	**23 %**
250 to 999 employees	**50 %**
More than 1,000 employees	**27 %**

In which region is your company's headquarters located?

	Total
Germany	**63,3 %**
Austria	**18,3 %**
Switzerland	**18,3 %**

In which primary industry does your company's main business fall?

	Total
Industry	**34 %**
Service	**38 %**
Trade	**9 %**
Finance	**12 %**
Public Administration	**7 %**

Sample size: 409 companies

Further Information

About valantic

valantic is one of the fastest-growing digital consulting, solutions, and software companies on the market. More than 500 blue-chip clients rely on valantic—including 33 of the 40 DAX-listed companies and a large number of international market leaders. With more than 4,300 specialized digitalization experts and net sales of approx. EUR 650 million in 2026(e), valantic is represented in 20 international locations around the globe.

More than 2,000 successful digital transformation projects over the past five years have demonstrated that valantic's experts have a deep understanding of their clients' challenges. From strategy to tangible implementation, they have the necessary expertise to accompany projects from start to finish and ensure their success. In doing so, they combine technological expertise with industry knowledge and a human touch.

valantic consults companies on all aspects of digital transformation, helping them better manage their corporate performance and unlock the potential of data and artificial intelligence. In addition, valantic supports its clients in designing an optimally shaping the customer experience, profitably using core digitalization technologies and optimizing company processes from end to end.

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About techconsult GmbH

For over 30 years, techconsult—as a research and analysis firm—has been a trusted partner for providers and buyers of digital technologies and services. More than 35,000 interviews per year with decision-makers at the business and technology levels, solution users, and technology and service providers form the impartial foundation of our consulting and project activities. This enables buyers to receive support in assessing their digital landscape and strategic planning, as well as in specific sourcing processes, allowing them to make informed decisions based on data-driven facts. In the development and implementation of customized go-to-market strategies, providers benefit both strategically and tactically from the market-oriented support of our analysts and the tc partner network.

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