ASUG Research Reveals: How SAP Customers Are Closing the Data & AI Execution Gap

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The Insights

Background

Microsoft and Intel partnered with ASUG to explore how SAP customers are building data strategies, managing increasingly complex environments, and preparing for AI to support the next phase of data-driven transformation.

Timing

Research fielded in May 2026

Audience

ASUG Members (n=175)



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The Speakers



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RESEARCH HIGHLIGHT · 01

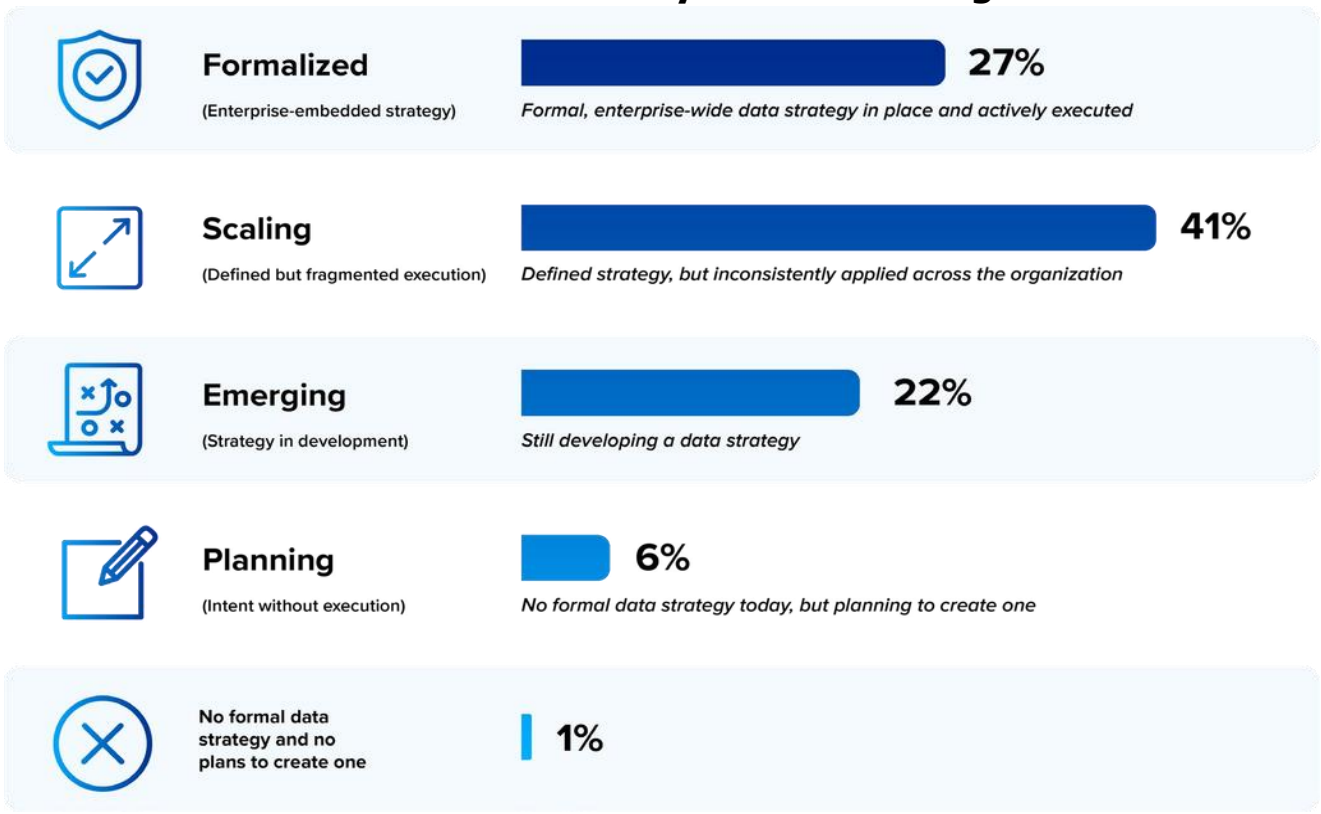
Strategy vs. Execution Maturity

Data strategy is nearly universal, consistent and active execution is what sets leaders apart.

68%

have a defined data strategy, but only 27% run it enterprise-wide.

Execution and Maturity of Data Strategies



What it means: Organizations recognize the need for a data strategy, but the next challenge is applying it consistently across the business.

Q. WHICH BEST DESCRIBES YOUR CURRENT DATA STRATEGY (A **DEFINED APPROACH** TO HOW DATA IS **GOVERNED, INTEGRATED, AND USED** ACROSS THE ORGANIZATION.)? 2% SELECTED 'DON'T KNOW/NOT SURE'; 1% SELECTED 'OTHER'

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THE EXECUTION ADVANTAGE AT A GLANCE

Inside the Formalized-Strategy Advantage

Organizations with enterprise-wide, embedded data strategies pull ahead on key dimensions.



…and they run into fewer barriers advancing data and AI strategy

Barrier	Formalized	Scaling	Emerging	All
Lack of internal skills / resources	**29%**	34%	43%	34%
Data quality issues	**24%**	31%	38%	30%
Lack of integration across systems	**18%**	35%	28%	28%

The bottom line: a data strategy pays off only when it's a formalized practice and embedded enterprise-wide, that maturity is what unlocks AI enablement and clears the barriers to progress.

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RESEARCH HIGHLIGHT · 02

Data Fragmentation and Data Estate Growth

Data growth is accelerating faster than consolidation.

61%

run hybrid data environments that mix centralized and siloed systems, weakening governance and trust through fragmentation.

Top Data Strategy Pain Points Keeping SAP Customers Up at Night

#1
Lack of integration and consolidation across platforms

#2
Data quality/ accuracy issues

#3
Lack of standardization and governance

Expected Data Estate Growth Over the Next 2–3 Years



Q. HOW WOULD YOU CHARACTERIZE YOUR ORGANIZATION'S CURRENT DATA ENVIRONMENT (THE **SYSTEMS AND PLATFORMS** YOUR ORGANIZATION USES TO **STORE, MANAGE, INTEGRATE, AND ACCESS DATA FOR REPORTING AND OPERATIONS**)? (SELECT ALL THAT APPLY) 2% SELECTED 'DON'T KNOW/NOT SURE'; 1% SELECTED 'OTHER'
Q. THINKING ABOUT YOUR ORGANIZATION'S DATA STRATEGY, WHAT IS YOUR BIGGEST PAIN POINT? WHAT KEEPS YOU UP AT NIGHT?
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.**

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AI in Data Strategy: Ambition vs. Readiness

AI is the top priority, but readiness still trails ambition and is highly dependent on execution maturity.

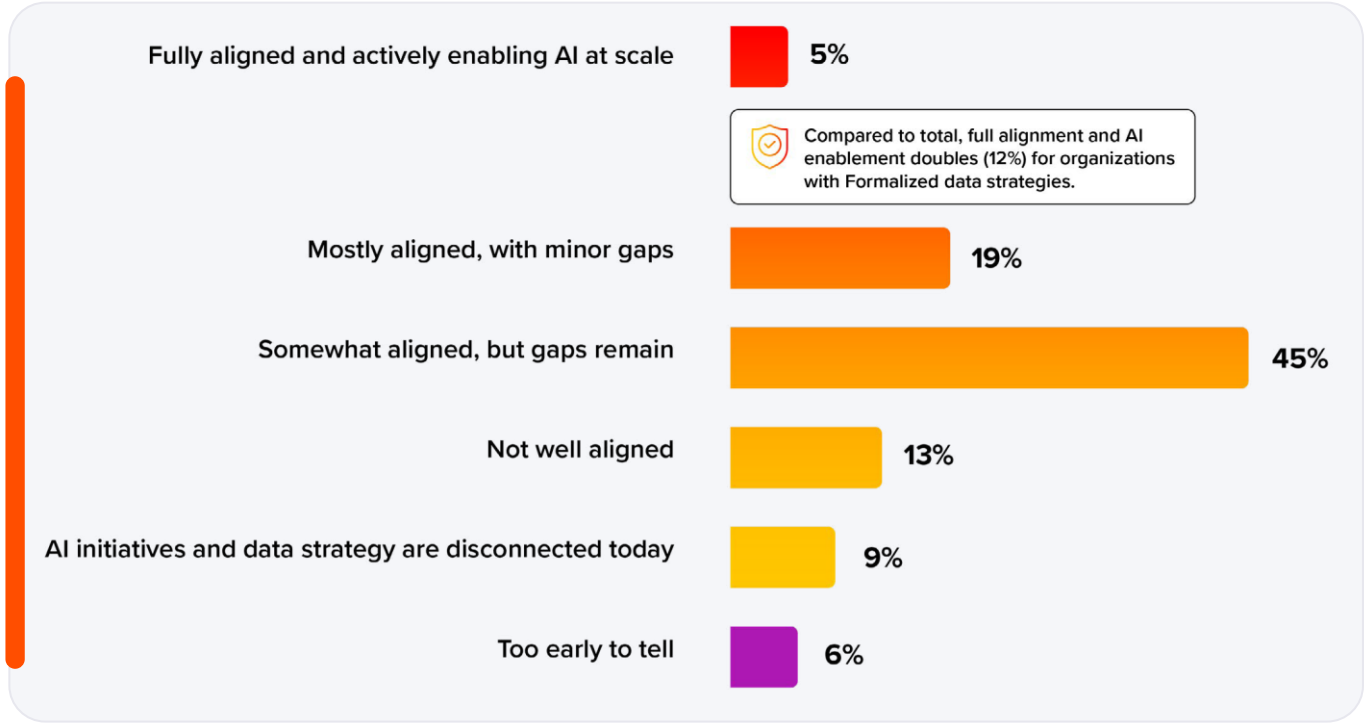
55%

name enabling AI / agentic AI as their top data-strategy improvement priority, yet readiness still trails ambition.

...BY DATA STATEGY MATURITY:

63%	64%	38%
Formalized	Scaling	Emerging

Data Strategy Alignment with AI Initiatives



Q. WHICH AREAS ARE YOU MOST FOCUSED ON IMPROVING IN YOUR DATA STRATEGY OVER THE NEXT YEAR? (SELECT UP TO 3)
Q. HOW ALIGNED IS YOUR ORGANIZATION'S DATA STRATEGY WITH YOUR AI INITIATIVES TODAY? ALIGNMENT REFERS TO **HOW WELL YOUR DATA INTEGRATED, TRUSTED, AND ACCESSIBLE TO SUPPORT AI USE CASES** AND **HELP ADDRESS DATA-RELATED CHALLENGES** (E.G., **IMPROVING DATA QUALITY, CONSISTENCY, AND USABILITY** FOR **AI-DRIVEN INSIGHTS AND AUTOMATION**). 3% SELECTED 'DON'T KNOW/NOT SURE'

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AI in Data Strategy: Barriers to Advancement

As data strategies mature, the nature of AI barriers shift from foundational readiness to the complexity of scaling AI and data initiatives.

Barriers to Advancing AI and Data Strategy Across Maturity Stages

▲ notably higher vs total ▼ notably lower vs. total 3 key barriers for total respondents

BARRIER	TOTAL	FORMALIZED	SCALING	EMERGING
Lack of internal skills/resources	**34%**	29%	34%	**43%** ▲
Security & compliance concerns	**33%**	35%	34%	30%
Unclear use cases or ROI	**31%**	29%	30%	33%
Data quality issues	**30%**	24%	31%	**38%** ▲
Organizational alignment	**30%**	33%	28%	29%
Competing business priorities	**30%**	**39%** ▲	28%	**23%** ▼
Lack of integration across systems	**28%**	**18%** ▼	**35%** ▲	28%
Vendor/tool complexity	**11%**	18%	8%	7%

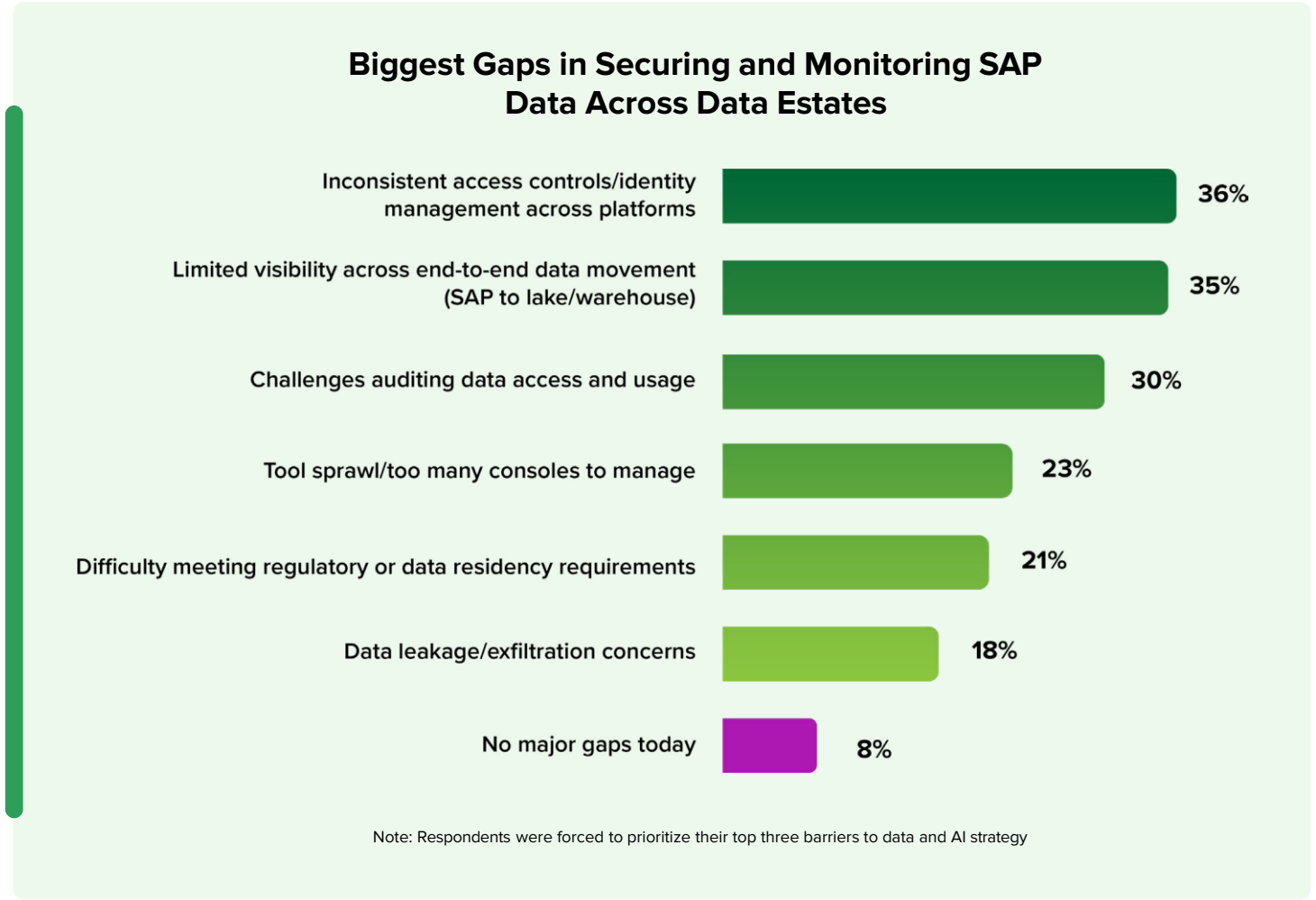
Note: Respondents were forced to prioritize their top three barriers to data and AI strategy

Q. WHAT ARE THE BIGGEST BARRIERS TO ADVANCING YOUR DATA AND AI STRATEGY? (SELECT UP TO 3)

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Security in Data Strategy: Managing Trust and Risk

Visibility is the core gap: organizations can't consistently see who accessed SAP data, where it moved, or how it was used.



Q. WHERE ARE YOUR BIGGEST GAPS IN MONITORING, SECURITY, AND COMPLIANCE FOR SAP DATA ACROSS YOUR BROADER DATA ESTATE? (SELECT ALL THAT APPLY)

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RESEARCH HIGHLIGHT · 04

Security & Confidential Computing Gap

Gaps in access control, visibility, and auditability continue to slow progress, though capabilities like confidential computing can help organizations strengthen trust and control around sensitive data.

96%

of confidential-computing users rate it extremely or very valuable.

Only 16%

use it today

…USAGE BY DATA STATEGY MATURITY:

31%	14%	3%
Formalized	Scaling	Emerging

Confidential Computing Users Experience Fewer Security Gaps

Compared to total respondents, these organizations are:



11% less likely to cite **inconsistent access controls/identity management**



11% less likely to report **data leakage/exfiltration concerns**



10% more likely to report **no major security gaps today**

Q. IS YOUR ORGANIZATION CURRENTLY USING OR EVALUATING CONFIDENTIAL COMPUTING TO SECURELY PROCESS ENCRYPTED DATA?
Q. HOW VALUABLE IS THE ABILITY TO SECURELY PROCESS ENCRYPTED DATA IN EXTERNAL OR UNTRUSTED ENVIRONMENTS (E.G., CONFIDENTIAL COMPUTING) TO YOUR ORGANIZATION?
Q. WHERE ARE YOUR BIGGEST GAPS IN MONITORING, SECURITY, AND COMPLIANCE FOR SAP DATA ACROSS YOUR BROADER DATA ESTATE? (SELECT ALL THAT APPLY)

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Microsoft Fabric & SAP BDC Integration

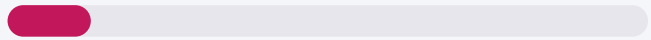
Tools like Fabric, especially when considered alongside SAP BDC integration, can bridge the gap between technical data initiatives and strategic goals by making it easier to connect, govern, and activate SAP and non-SAP data across the business.

82%

of current Microsoft Fabric users rate it extremely or very valuable.

13%

use Fabric for SAP data today



64%

plan or consider SAP BDC integration



Q. HOW VALUABLE DO YOU BELIEVE MICROSOFT FABRIC IS OR WOULD BE FOR YOUR ORGANIZATION?
Q. WHAT IS YOUR ORGANIZATION'S CURRENT AND PLANNED USAGE OF THE FOLLOWING PLATFORMS IN RELATION TO SAP DATA?
Q. WHAT IS YOUR ORGANIZATION'S CURRENT AND PLANNED INTEGRATION OF THE FOLLOWING PLATFORMS WITH SAP BUSINESS DATA CLOUD (BDC), IF AT ALL?

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Advancing Data Strategy

WHAT THE DATA IS REALLY SAYING

Modernization alone does not close the execution gap.

★ **Advancing toward a formal data strategy requires stronger operating discipline:**

- **Clear ownership models**
- **Shared data definitions**
- **Consistent governance routines**
- **Prioritized use cases tied to business outcomes**

Without these foundations, modern platforms can add complexity if teams continue to work from different priorities, processes, or definitions.

MODERNIZATION GOAL:



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The Key Takeaways

Start with the foundation: data investment has to come first.

Across every dimension of this research, including **data strategy, AI, and security**, the organizations **furthest ahead** are those that **invested in getting the basics right: integrated data, consistent governance, and enterprise-wide execution**. Advanced capabilities can accelerate progress, but **only** when the data foundation is strong enough to support them.

1. **Actively execute data strategies to be formalized and enterprise-wide**
2. **Consolidate & govern your data to mature your strategy and prioritize strategic business goals**
3. **Clean, connect, and govern data before scaling AI or working to realize AI value**
4. **Consider confidential computing to combat security and trust barriers for data and AI**
5. **Bridge with Microsoft Fabric + SAP BDC**

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Questions?



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