

ASUG

Research

What SAP Customers Expect from Partners

April 2026

The Best Run SAP Customers, **Run with ASUG**



93%

of Top Spending
US based SAP
Customers are
also ASUG
Members.



Ways to Participate in the ASUG Community

Virtual and In-Person Community Experiences

- ASUG Communities
- Regional ASUG Chapter Events
- ASUG Collective
- ASUG Executive Exchange

Conference Experiences

- SAP for Utilities
- ASUG Tech Connect
- SAP Sapphire & ASUG Annual Conference

SAP News and Insights

- ASUG.com
- ASUG Research
- ASUG Insights and Editorial Content
- ASUG First Five (weekly email)
- ASUG Utilities Newsletter
- ASUG Content Collections

Virtual and Audio Experiences

- ASUG webcasts
- ASUG Talks Podcast



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Team Lead

Partner Success Team

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ASUG Partner Directory is Live!

The searchable directory connects customers with trusted SAP partners by industry, location, and company name, helping them to find experts aligned with their strategies and business goals.

The screenshot displays the ASUG Partner Directory website. At the top, the ASUG logo is on the left, and navigation links for Membership, Topics, Insights, Events, Find Your Community, Partners, and About Us are in the center. On the right, there is a search icon and a user profile for Chris Mitchell. Below the navigation is a large heading "Partner Directory" followed by a welcome message. A search bar contains filters for "Any Topic", "Any Location", and "Any Industry", along with a "Search..." input field. The main content area features six partner profiles, each with a location tag, a company logo, a name, an "About the Company" section, and a "Learn More" link.

ASUG Membership Topics Insights Events Find Your Community Partners About Us


Chris Mitchell

Partner Directory

Welcome to the ASUG Partner Directory! Whether you're looking to collaborate, expand your capabilities, or explore new solutions, this resource helps you easily find partners that align with your SAP strategy and goals. We encourage you to browse profiles or refine your search by industry or location to connect with the partners you need.

Any Topic Any Location Any Industry Search...

Federal Way, Global




Applexus Technologies, Inc.

About the Company
Applexus is a global SAP consulting firm delivering S/4HANA, BTP, and data solutions, driving innovation and measurable business value.

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About the Company
As the preeminent SAP partner, providing your SAP license, right-sizing your infrastructure, and implementation.

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About the Company
AsInt, Inc. is a technology company specializing in digital solutions for the management of industrial asset integrity, reliability, and safety.

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About the Company
AspireHR is a WBENC-certified turnkey HCM systems integrator, technology innovator, and US-based managed services firm and SAP Gold Partner.

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Avantra

About the Company
Avantra is the leading AIOps platform for SAP operations automation.

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About the Company
Avversita allie expertise SAP analytique et approche humaine pour livrer des solutions performantes et durables.

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Recently Published ASUG Research



Marissa Gilbert
ASUG Research Director

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2026 ASUG Pulse of the SAP Customer Research

ASUG Research



Organizational Priorities for 2026: Categorization Overview

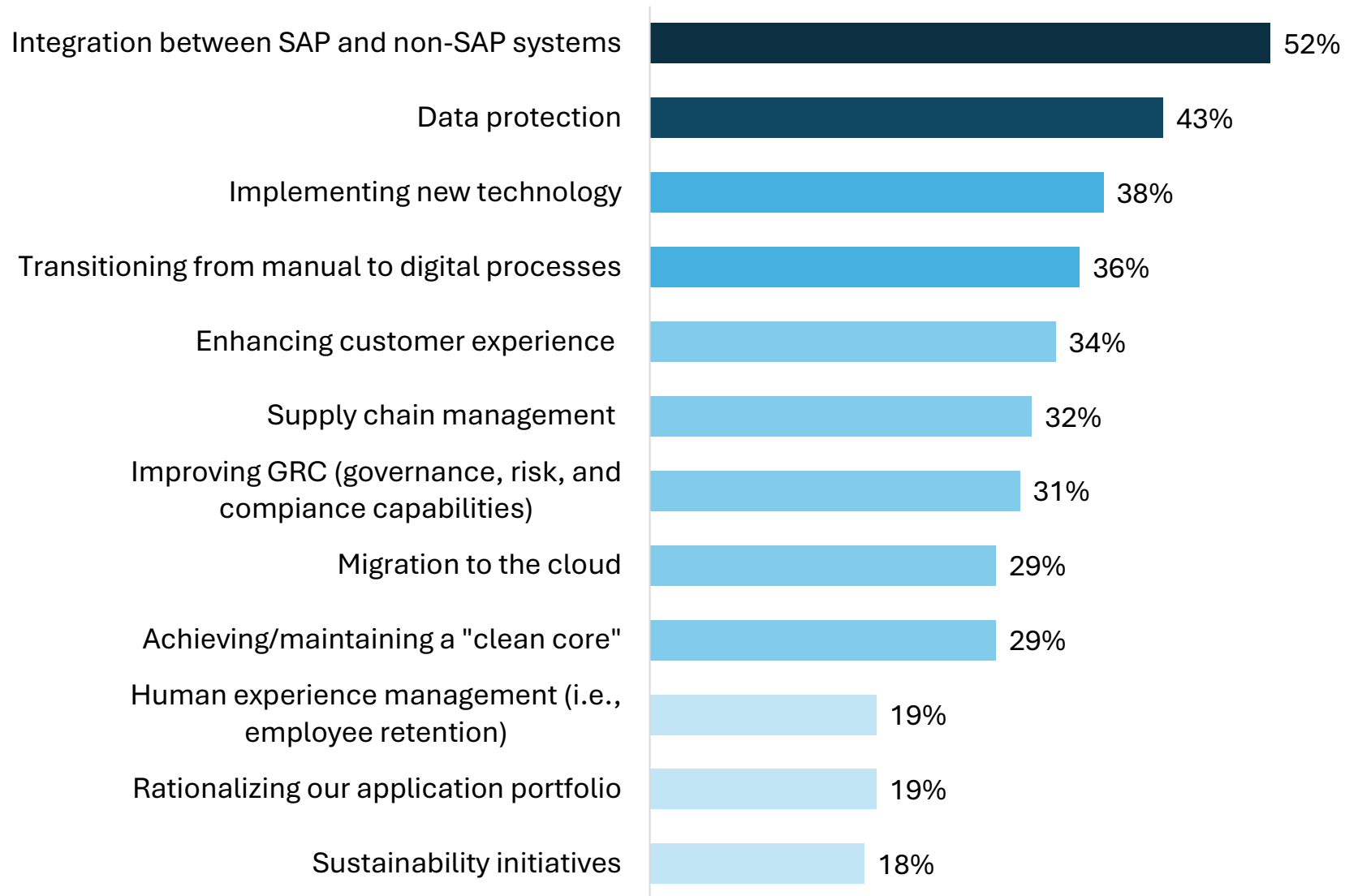


	High Priority My organization is actively focusing on this urgent, immediate action	Sustained Priority My organization focus is ongoing and longer-term, not urgent	Low Priority My organization recognizes the need, but we are not currently taking action	No priority Not important for my organization
SAP S/4HANA	49%	33%	9%	5%
Cybersecurity	49%	37%	6%	2%
Cost optimization	42%	39%	11%	2%
Leveraging AI in our business	38%	30%	20%	6%
Integration within SAP systems (e.g., SAP Business Technology Platform)	35%	36%	17%	5%
Automation	32%	39%	20%	4%
Data analytics	30%	49%	13%	3%
Standardizing business processes	29%	49%	15%	4%
Change management	19%	42%	25%	8%

Q. How would you categorize each of the following priorities for your organization in 2026? (n=663)

Note: Those who selected "Don't know/not sure" their priority level range from **3-7%**

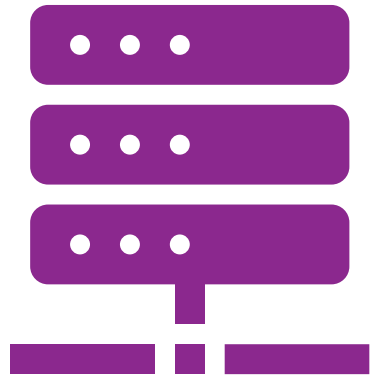
Additional Focus Areas Important in 2026



Q. What other focus areas are **most** important to your organization in 2026? (Please select all that apply.) (n=663), Other (3%), Don't know/not sure (3%)

Skills Most Important to Organizations in 2026

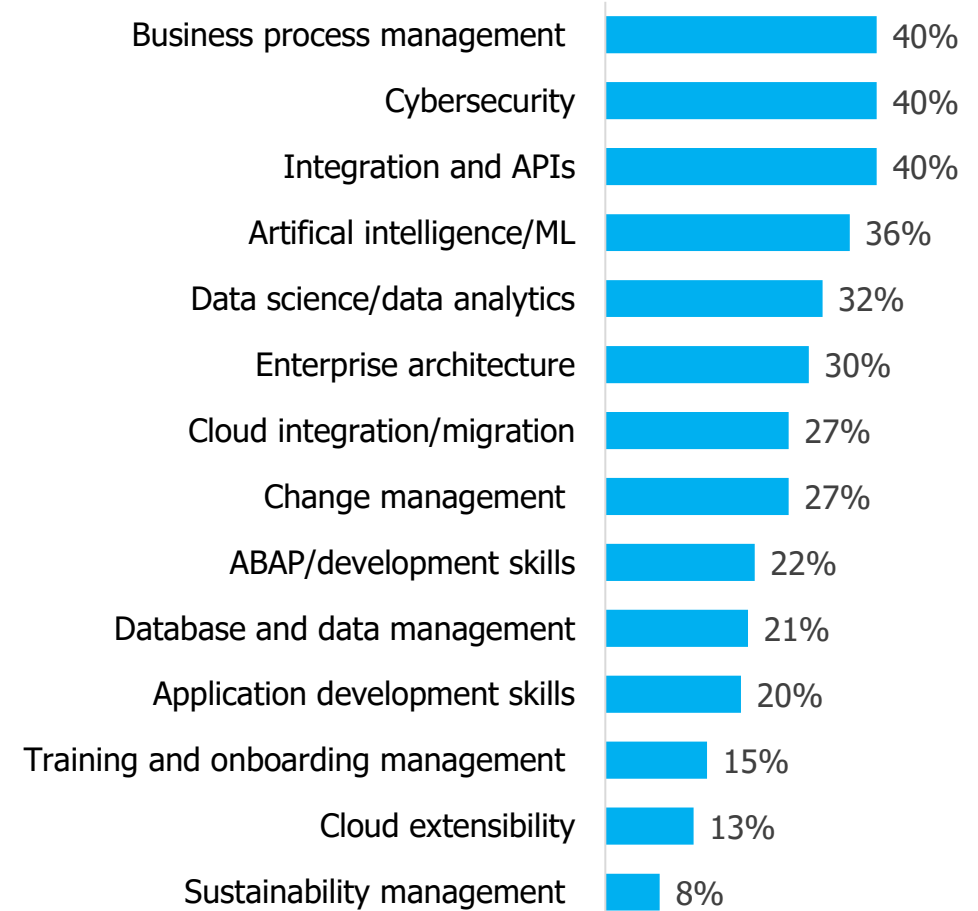
#1 option selected:



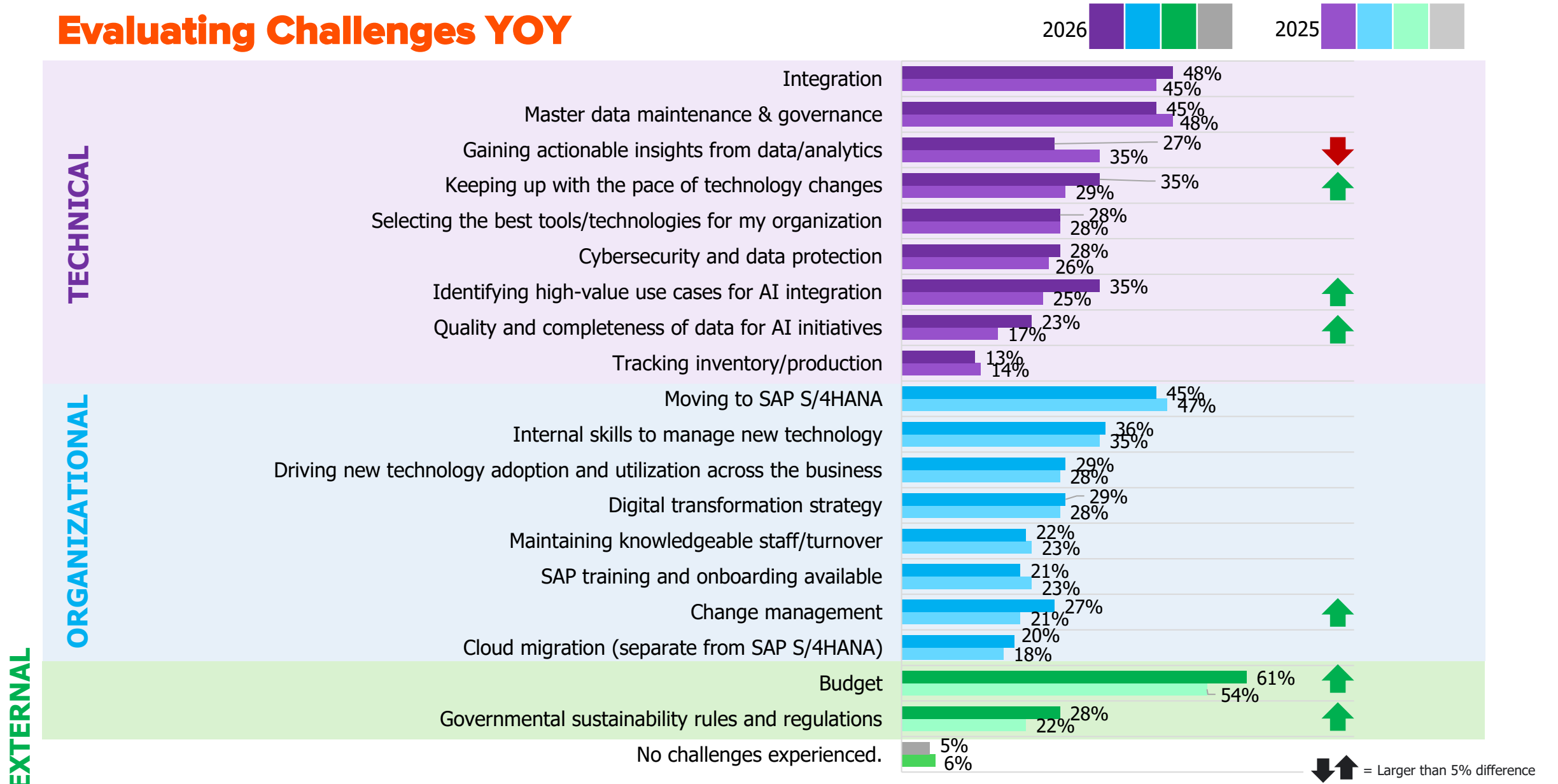
59%
**Selected SAP
S/4HANA
expertise**

(56% in 2025)

All other options selected:



Evaluating Challenges YOY



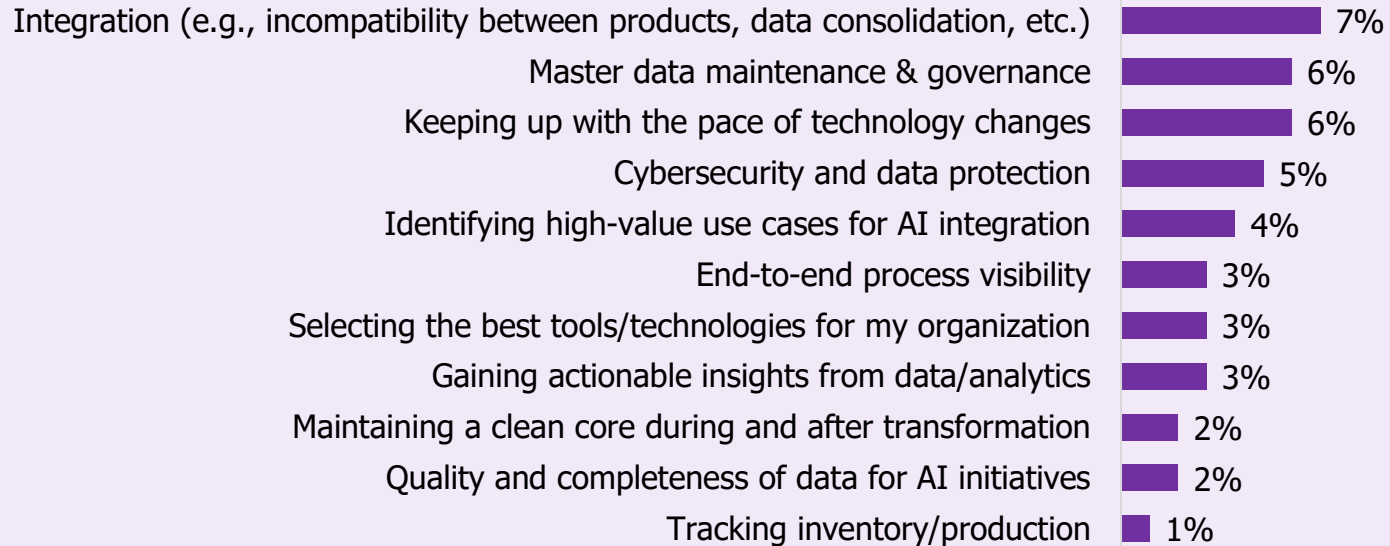
Q. Which of the following **challenges** is your organization currently experiencing? (Please select all that apply for each category.) 2026 (n= 663) ; 2025 (n=787)

Note: 2% selected 'Other' Categories displayed to respondents

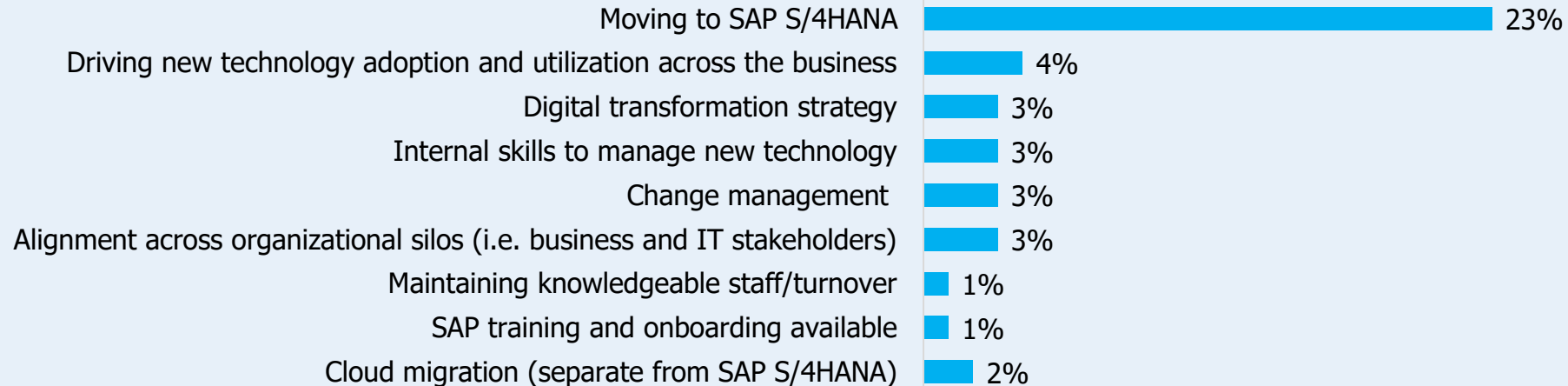
↑ ↓ = Larger than 5% difference

#1 Challenge Selected

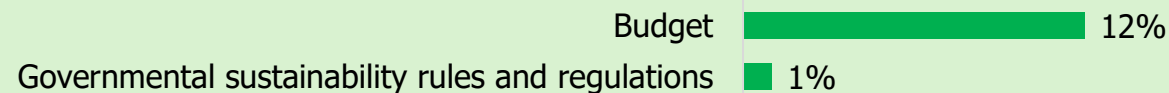
TECHNICAL



ORGANIZATIONAL



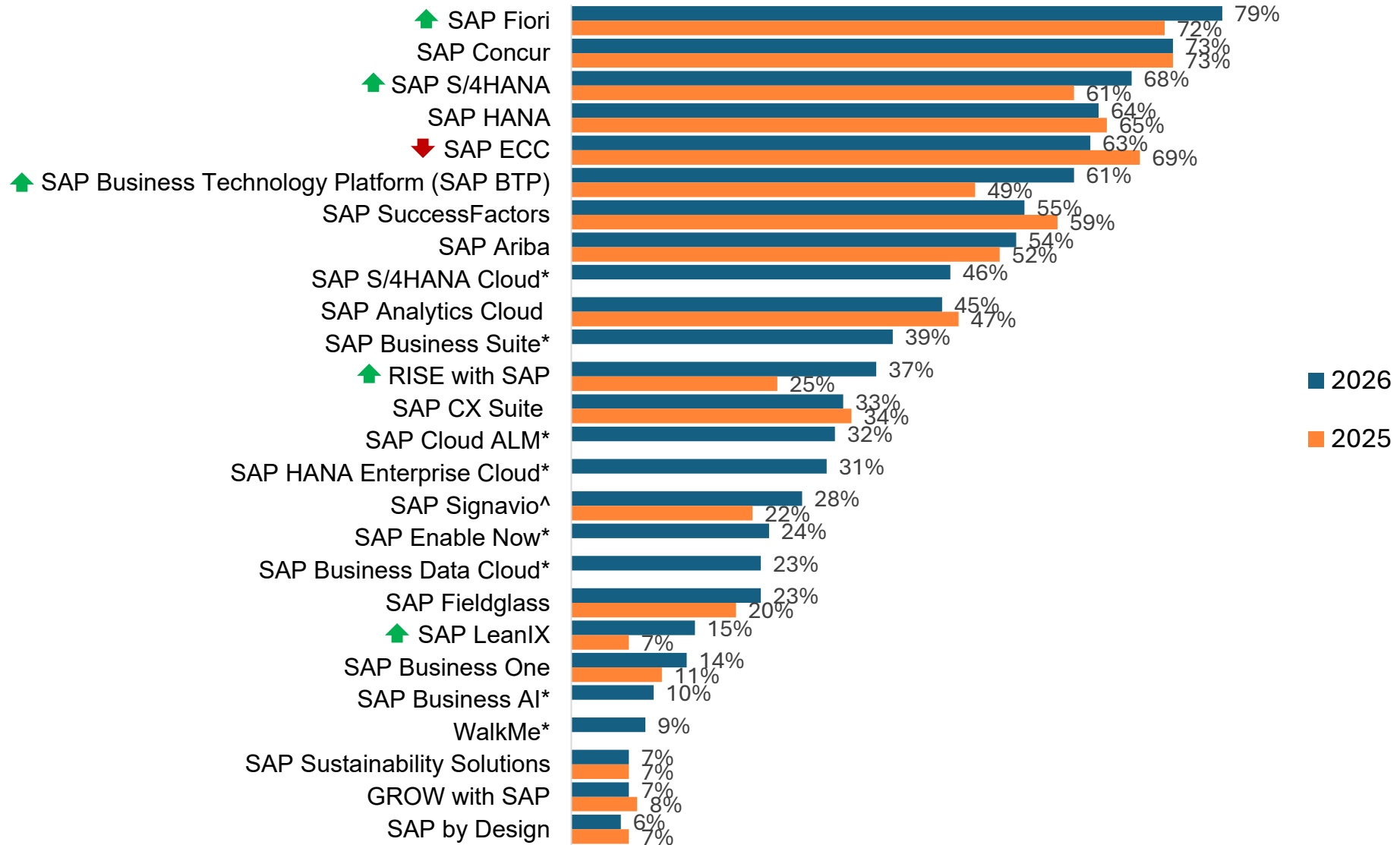
EXTERNAL



Q. Out of all the challenges you selected, please select the #1 challenge your organization is experiencing. If you only selected one challenge, please select it again below. 2026 (n= 629)

*Option added/updated in 2026 ; Categories displayed to respondents

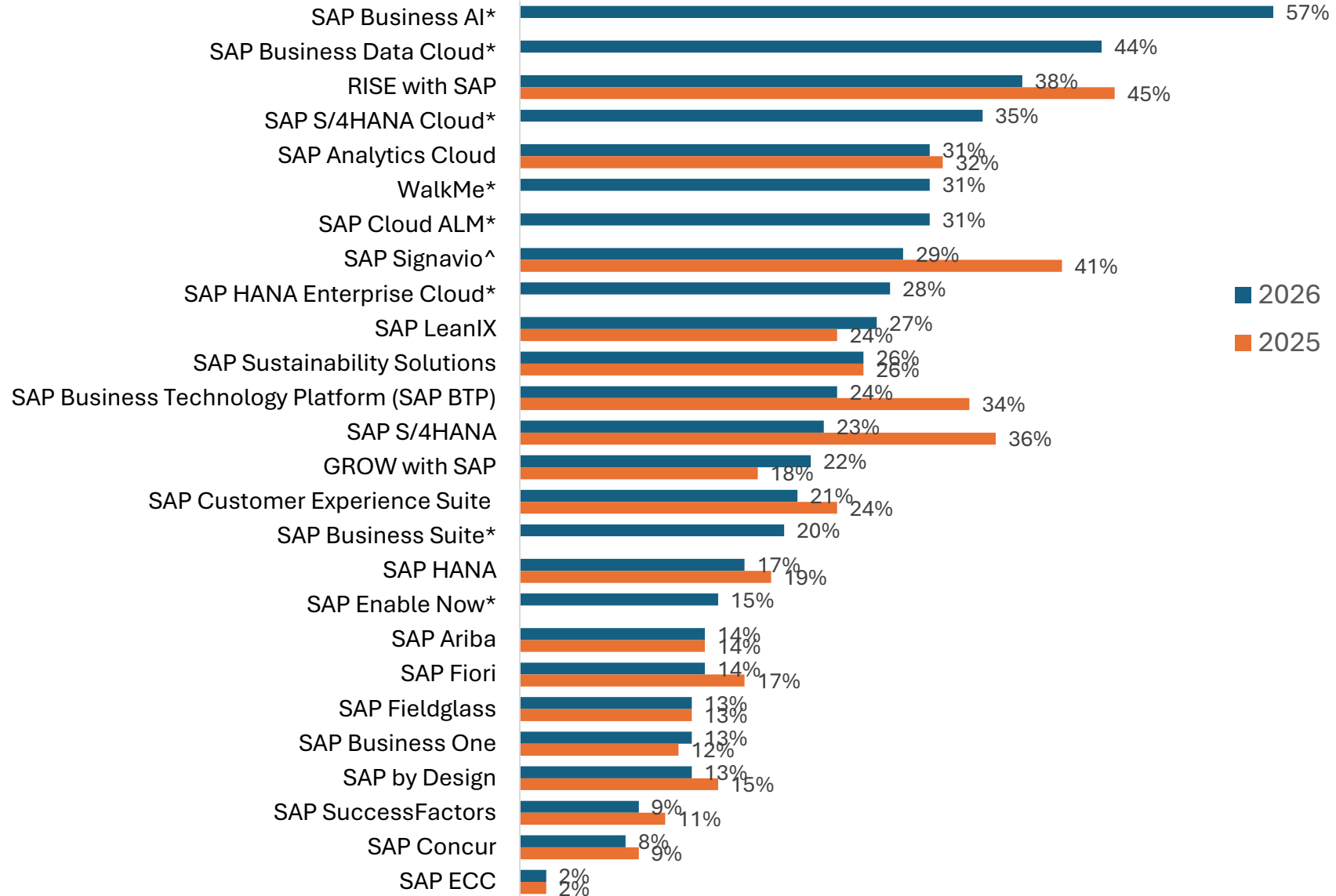
Current SAP Product Use



Q. How would you describe your organization's experience with each of the following SAP products? 2026 (n= 663) ; 2025 (n=787)

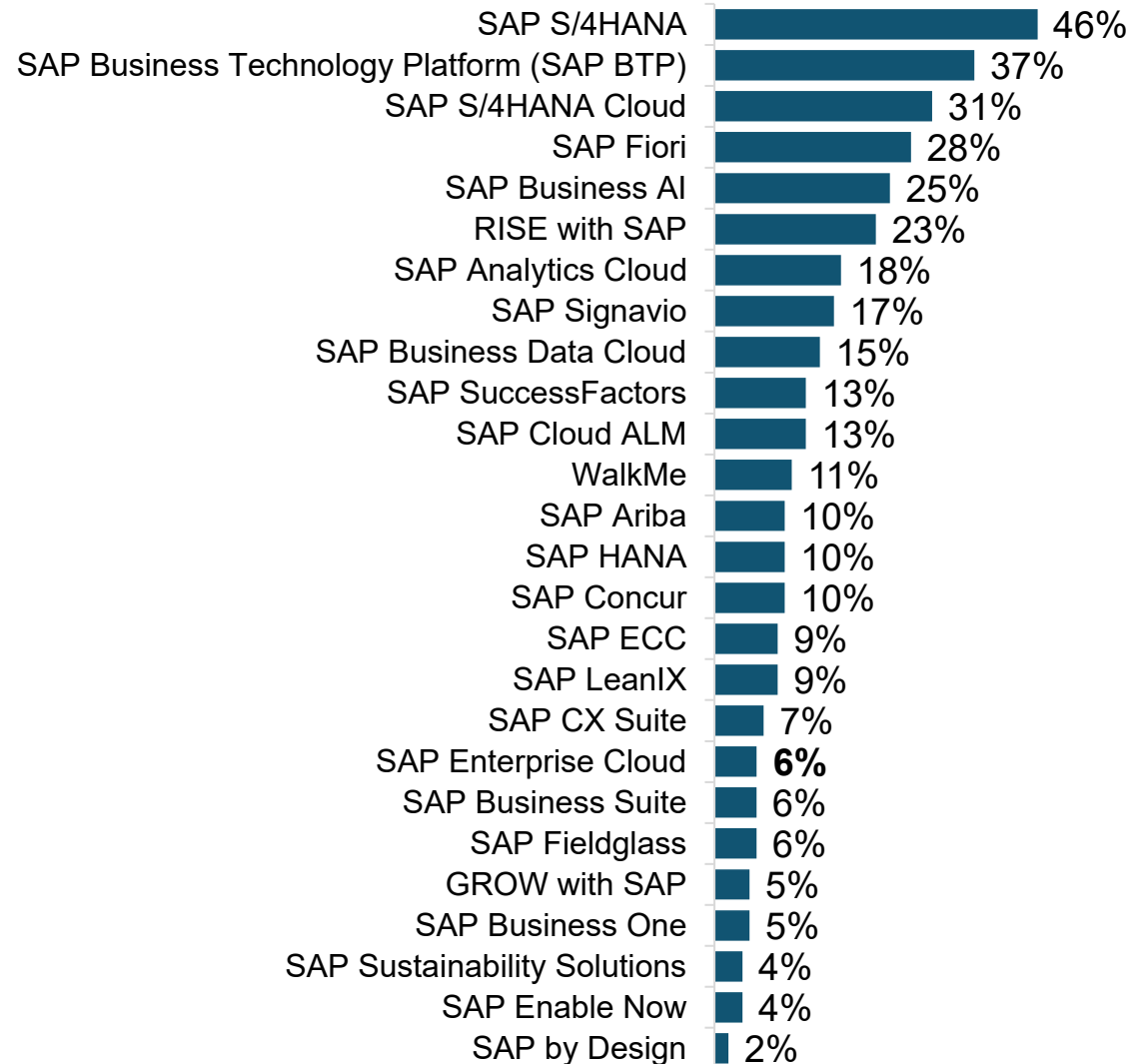
*Option added in 2026 ^Asked as Business Process Management with SAP Signavio in 2025 **Note:** Data adjusted to exclude respondents who did not know their organization's experience with SAP products ; SAP Customer Experience Suite description (SAP C/4HANA, SAP Hybris, SAP Sales Cloud, SAP Marketing Cloud, SAP Customer Data Cloud, SAP Service Cloud, etc.)

SAP Products in Consideration for Future Use



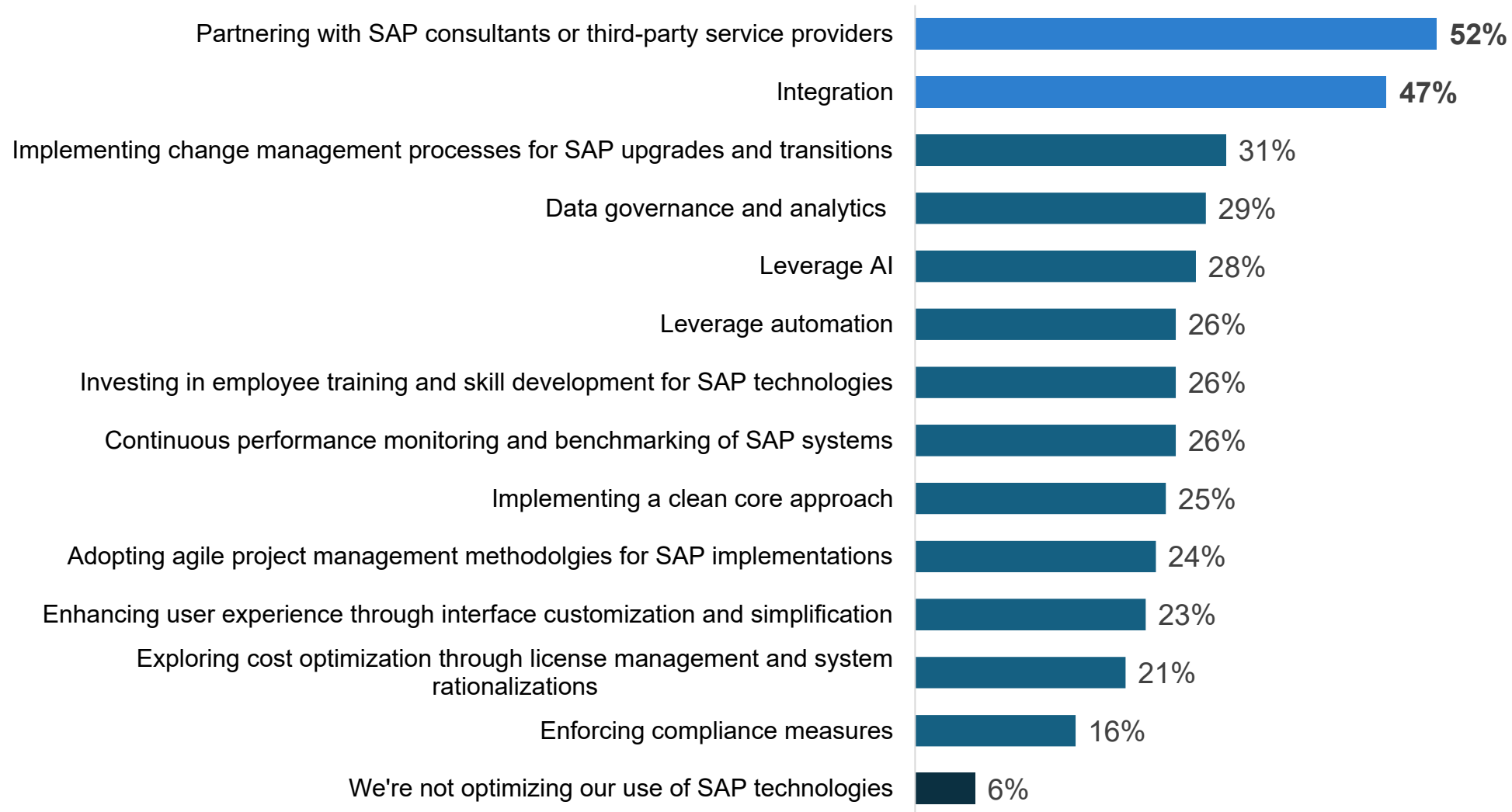
Q. How would you describe your organization's experience with each of the following SAP products? 2026 (n= 663) 2025 (n=787) *Option added in 2026, ^Asked as Business Process Management with SAP Signavio in 2025
 Note: % indicates number of respondents who have never used the product, but are considering it for the future ; Data adjusted to exclude respondents who did not know their organization's experience with SAP products

SAP Products Organizations Want to Explore Further



Q. Which SAP products are you **most interested** in learning more about or improving your organization's utilization of? (Please select all that apply.) (n=639)
 Note: 6% selected 'Other', mentions include Integration Suite, SAP Databricks, SAP Joule AI for Developers, SAP CPI, etc.)

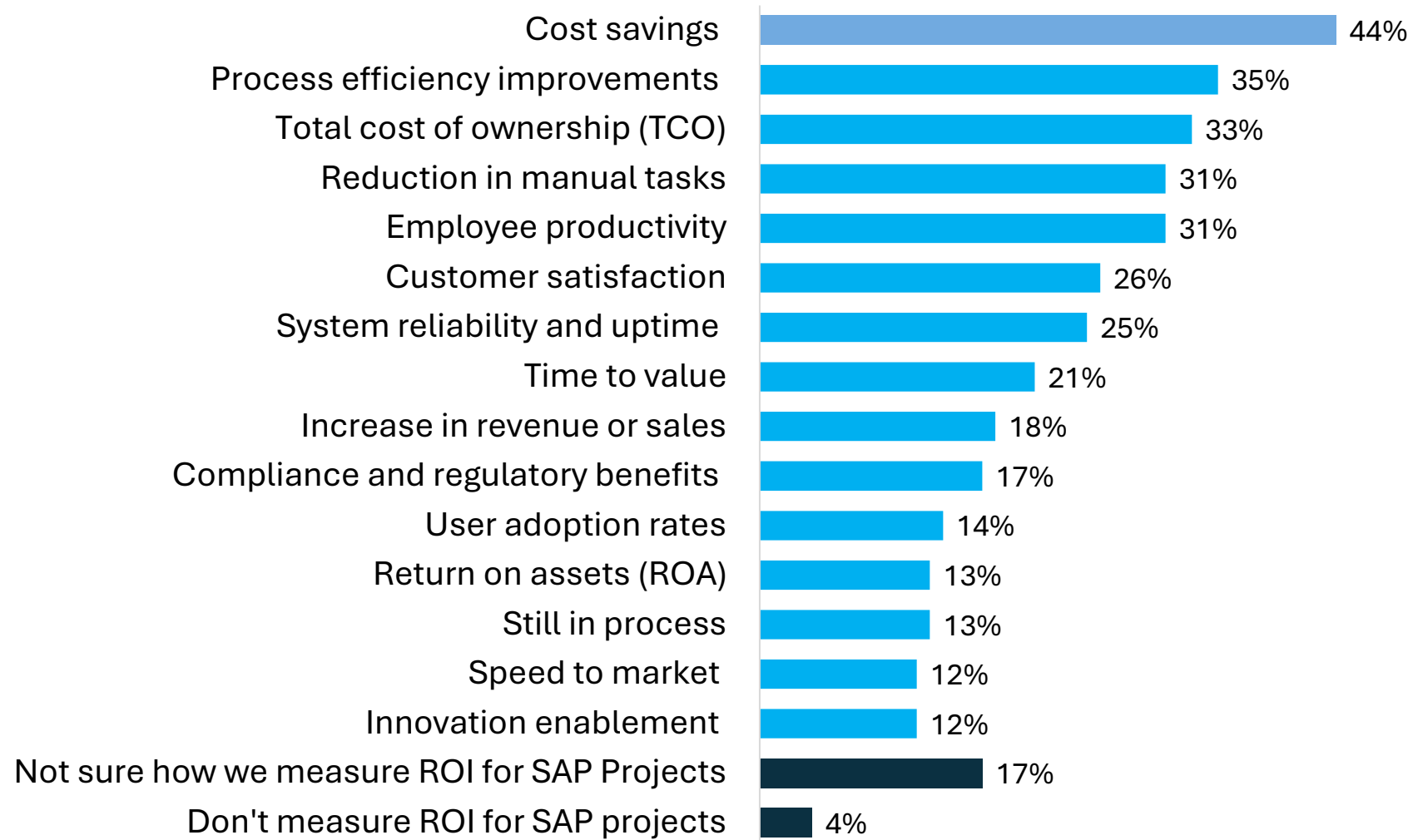
How Organizations Optimize Use of SAP Technologies



Q. How does your organization optimize the use of your SAP technologies? (Please select all that apply.) 2026 (n= 663)

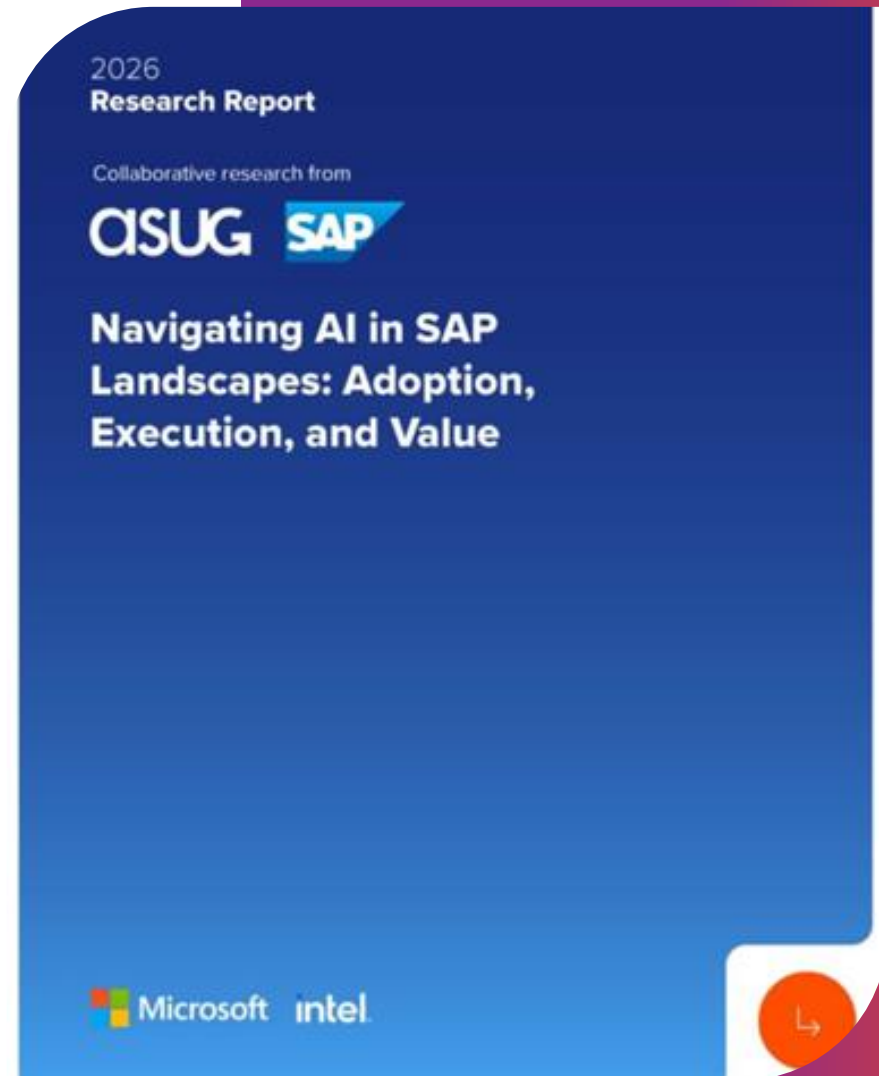
Note: 2% selected 'Other'

How ROI is Measured for SAP Projects

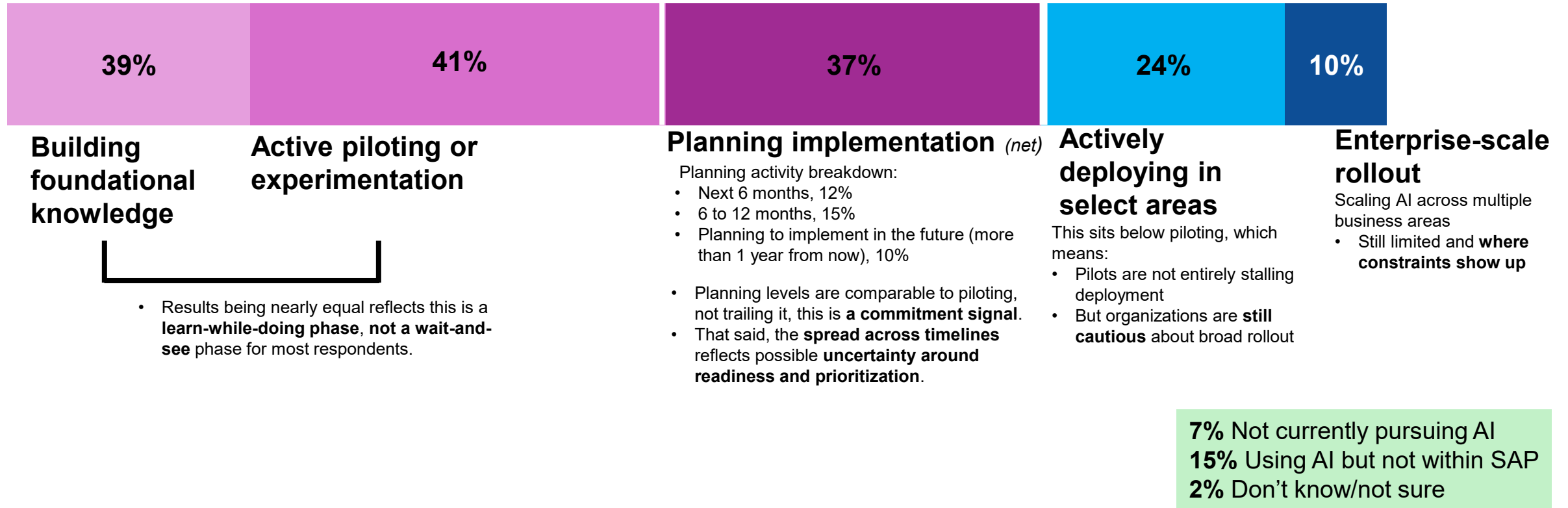


Q. How do you measure ROI for SAP projects? (Please select all that apply.) n= 663, Other (1%)

Are ASUG Members Prepared for AI?



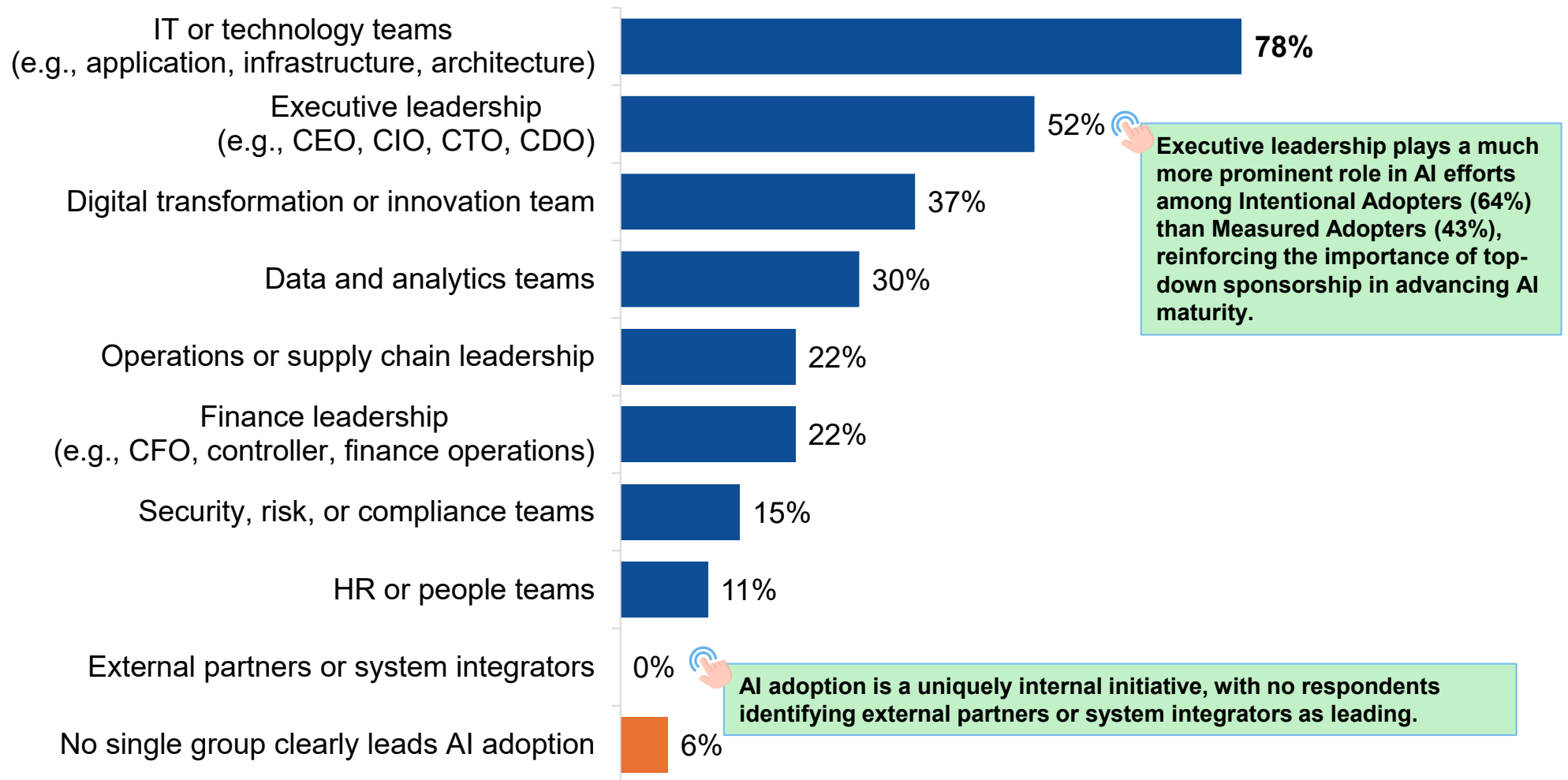
AI adoption in SAP landscapes is advancing, but broad scale is still limited.



Q. Which best describes your organization's current stage of AI or generative AI adoption in your SAP landscape? (Please select all that apply.) (n=181)

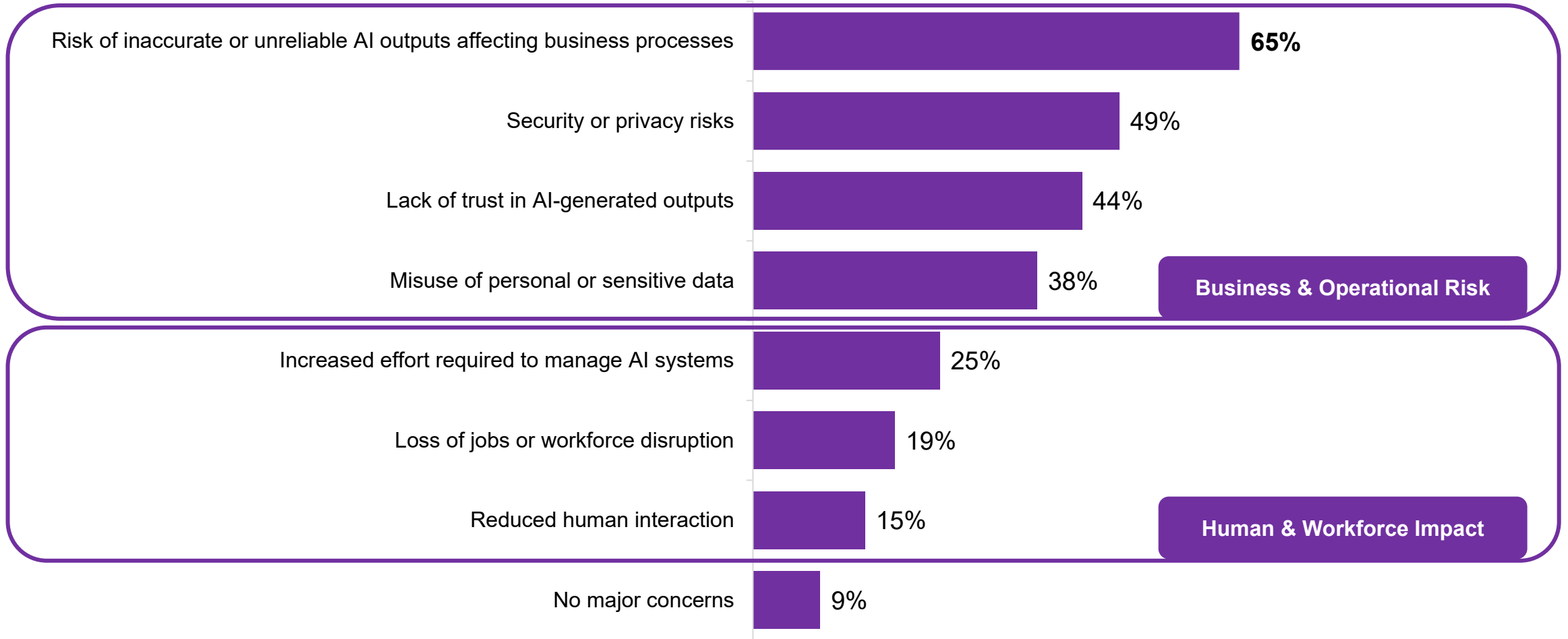
Note: Respondents not currently pursuing AI in SAP or unsure about their organization status were terminated from the rest of the survey.

AI adoption is primarily IT-led, with strong executive involvement.



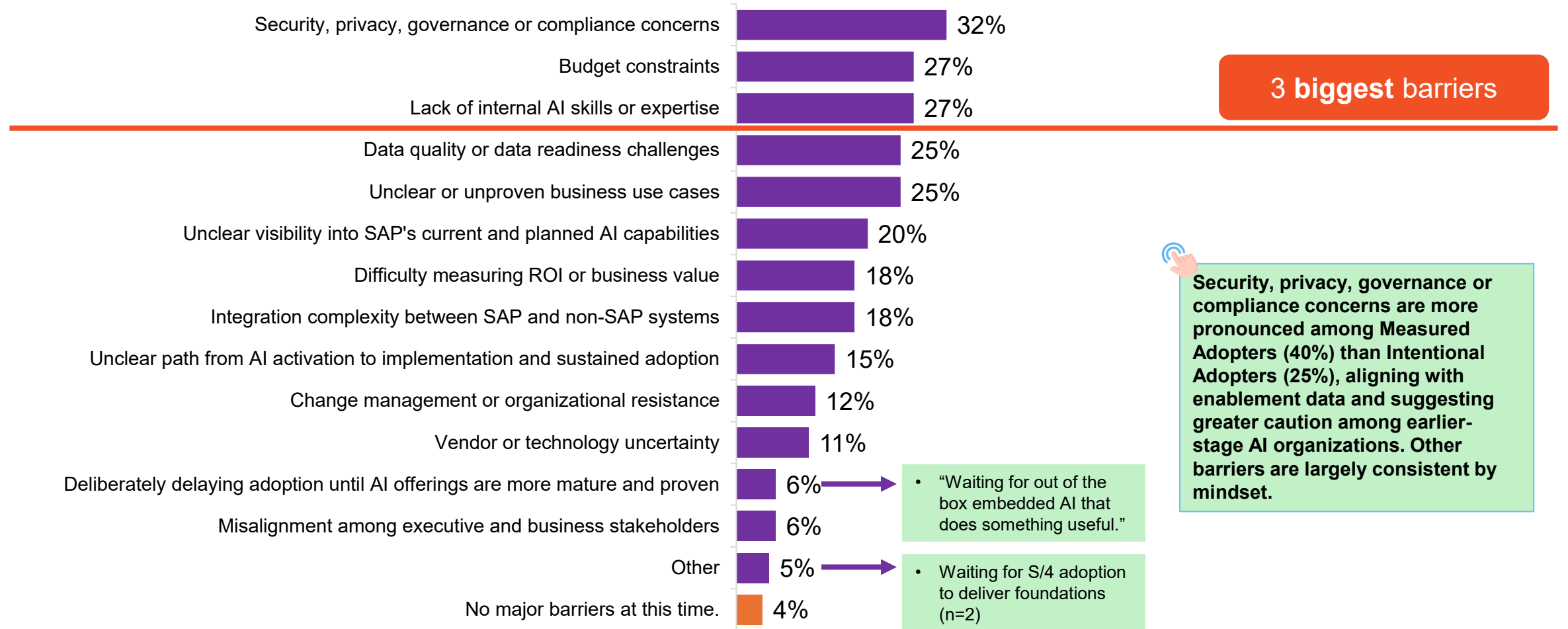
Q. [If currently pursuing AI] Which groups are **actively leading** AI adoption at your organization? (Please select all that apply.) (n=129)
1% selected 'Other', 1% selected 'Don't know/not sure' Note: Measured Adopters (n=62), Intentional Adopters (n=55)

Personal AI concerns center on accuracy, security, and trust rather than workforce impact.



Q. What concerns, if any, do you **personally** have about using AI in business processes? (Please select all that apply.) (n=142)
1% selected 'Other'

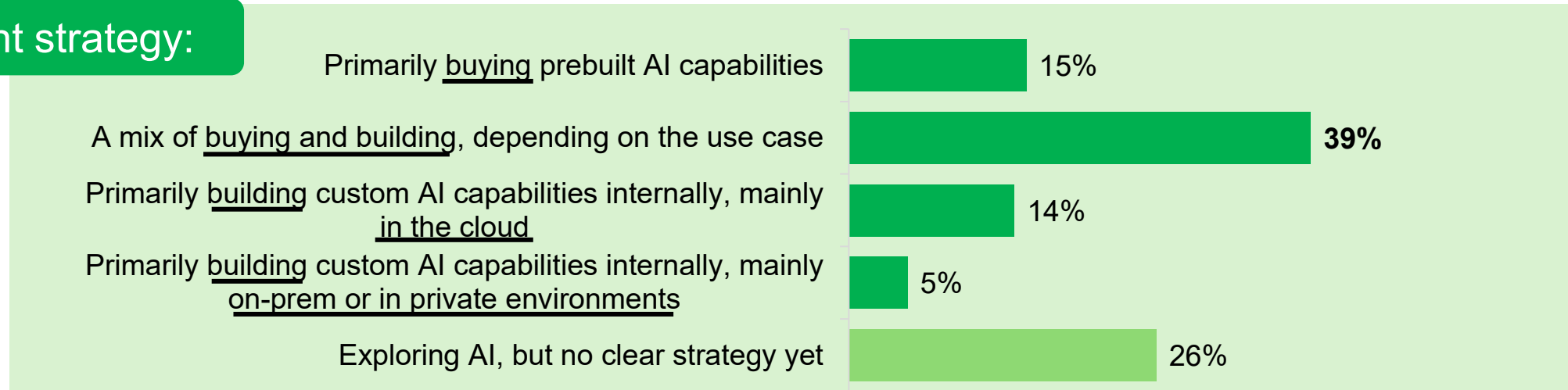
Consistent with personal concerns, governance and security readiness emerge as the biggest barriers to adopting or expanding AI.



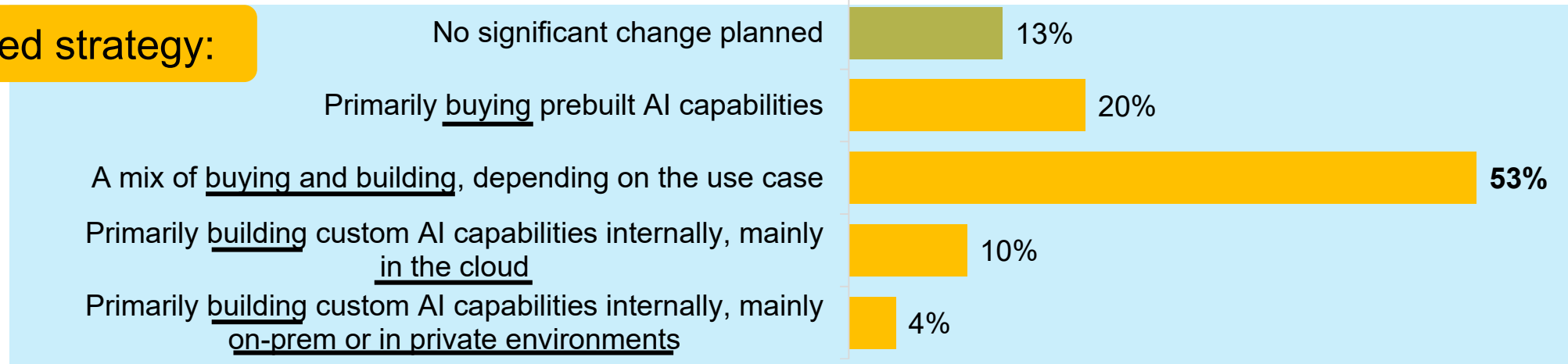
Q. What are the **biggest barriers** preventing your organization from actively adopting or expanding AI within its SAP landscape? What is holding your organization back? (Please select up to **three**.) (n=142)
 4% selected 'Don't known/not sure' Note: Measured Adopters (n=62), Intentional Adopters (n=55)

AI buy-vs-build strategies are use-case driven.

Current strategy:

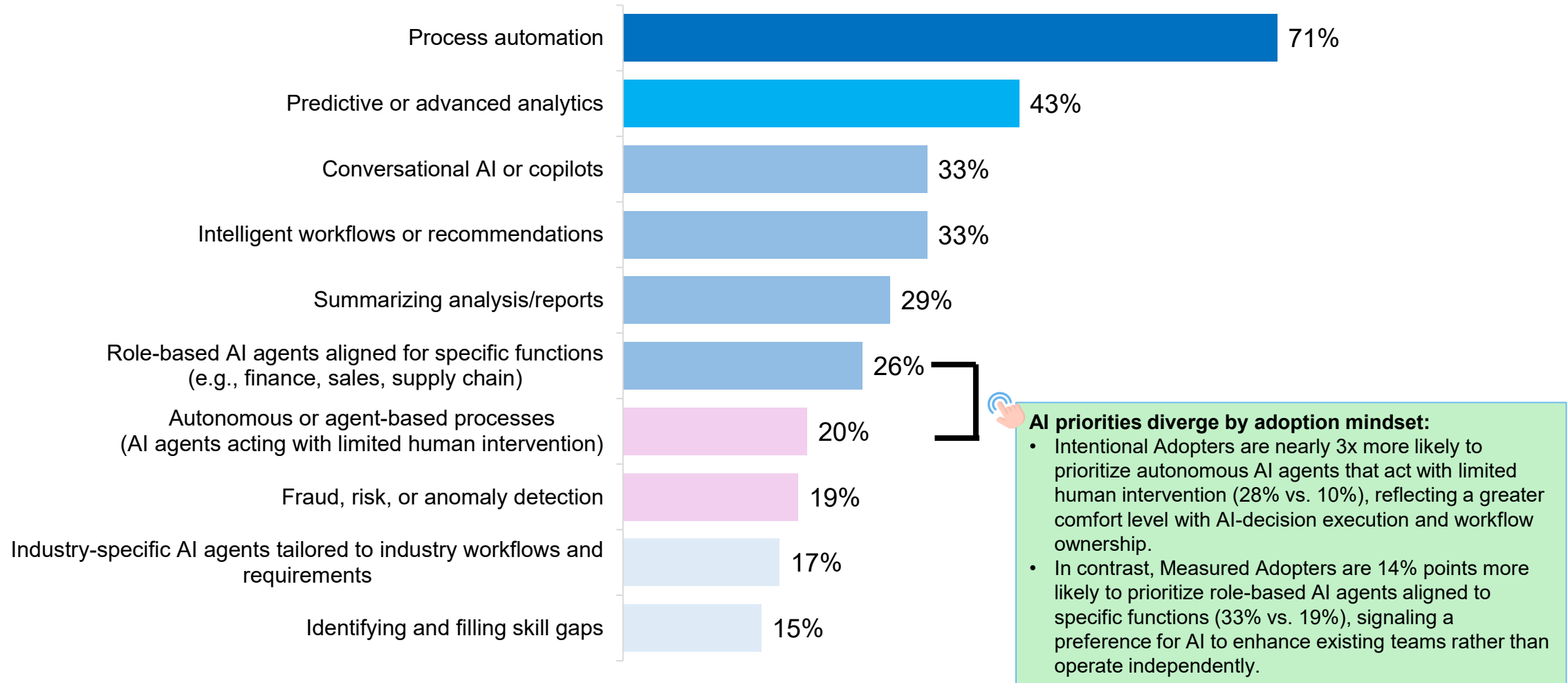


Planned strategy:



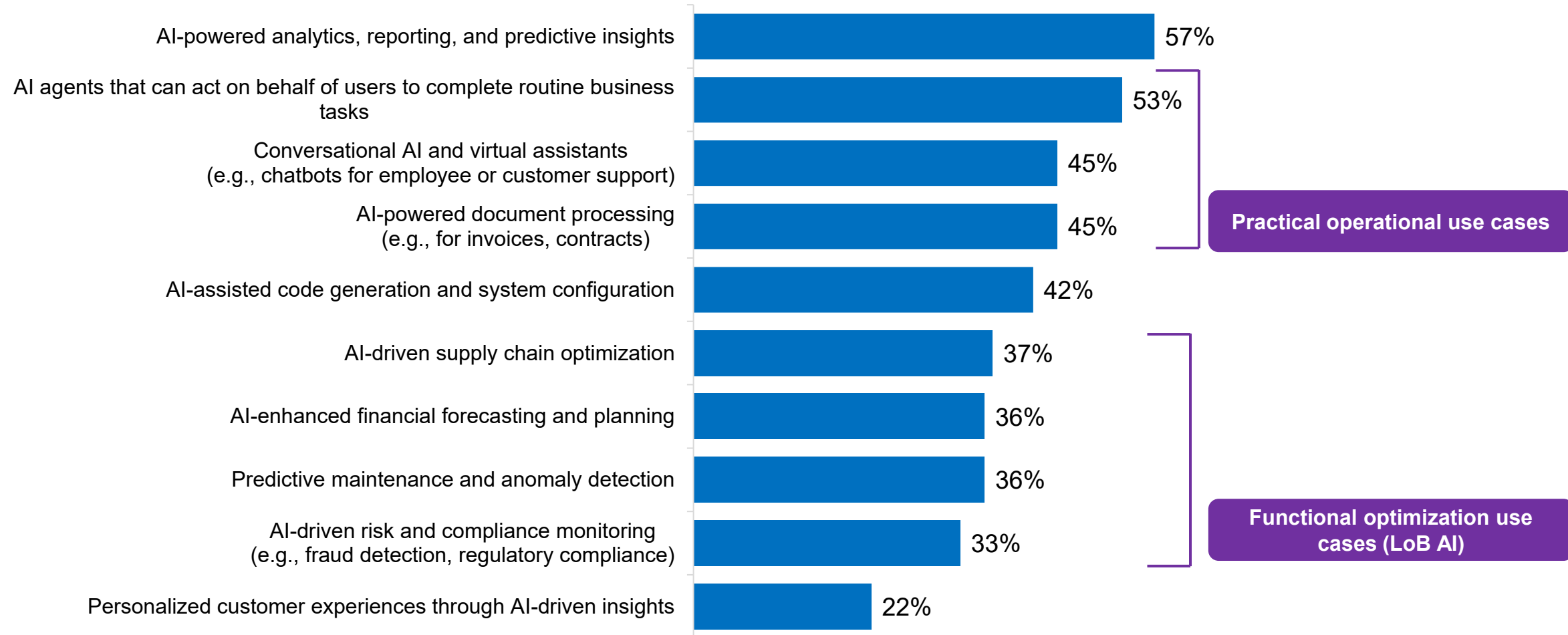
Q. When it comes to AI capabilities in your SAP environment, which best describes your organization's **current or planned strategy**? (Please select one option per group.) Current Strategy (n=110) ; Planned Strategy (n=106) **Note:** Data rebased to exclude any respondents not directly involved in buy/build AI strategy decision or selected 'Don't know/not sure'

Process automation leads AI priorities today.



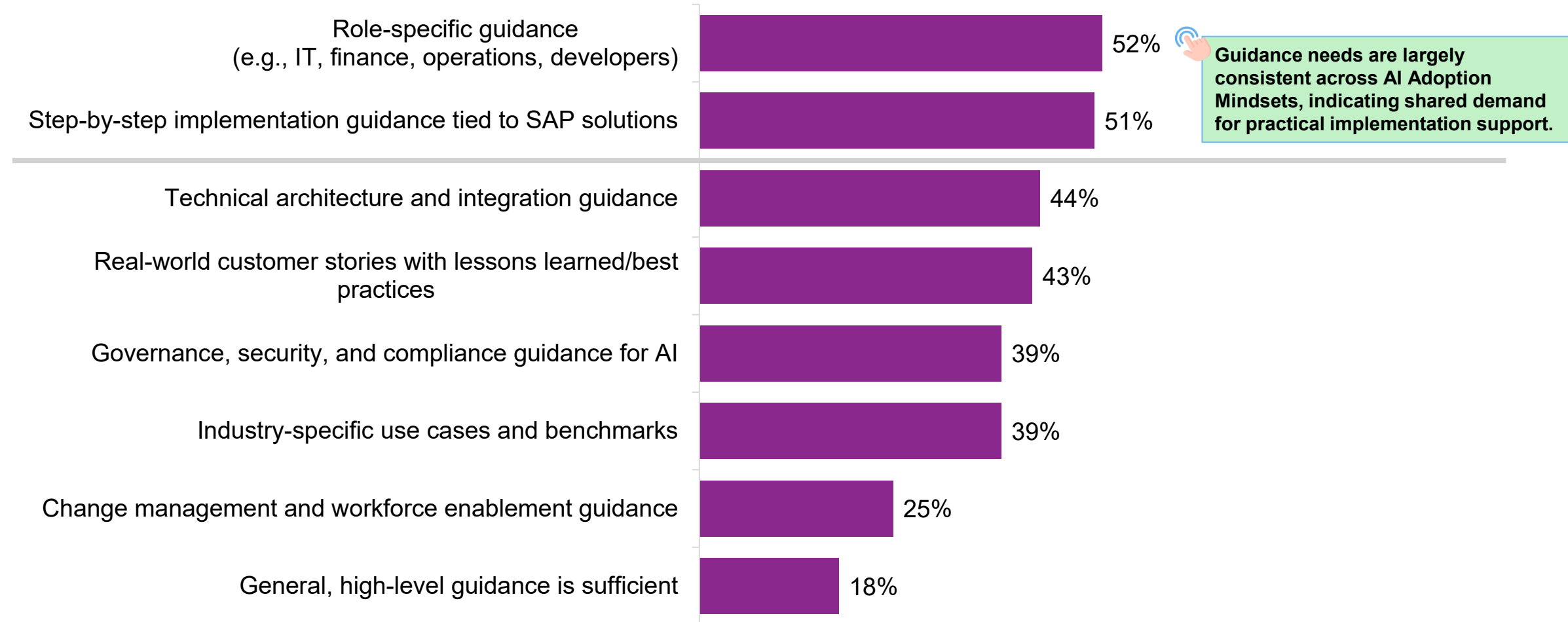
Q. [If currently pursuing AI] Which AI use case types are the **highest priority** for your organization today? (Please select all that apply.) (n=129)
2% selected 'Other', 2% selected 'Don't know/not sure' Note: Measured Adopters (n=60), Intentional Adopters (n=53)

AI use case relevance reinforces an operational-first adoption pattern, with analytics and task automation leading.



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'

Organizations need both role-specific guidance and step-by-step SAP implementation support to move AI initiatives forward.



Q. What type of guidance would be **most valuable** to you in supporting AI adoption within your organization? What would **increase your confidence** to move forward?
(Please select all that apply.) (n=142) 6% selected 'Don't know/not sure' Note: Measured Adopters (n=62), Intentional Adopters (n=55)

The year 2027 is approaching. Are ASUG Members Prepared for the Migration Deadline?

2025
Research Report

ASUG

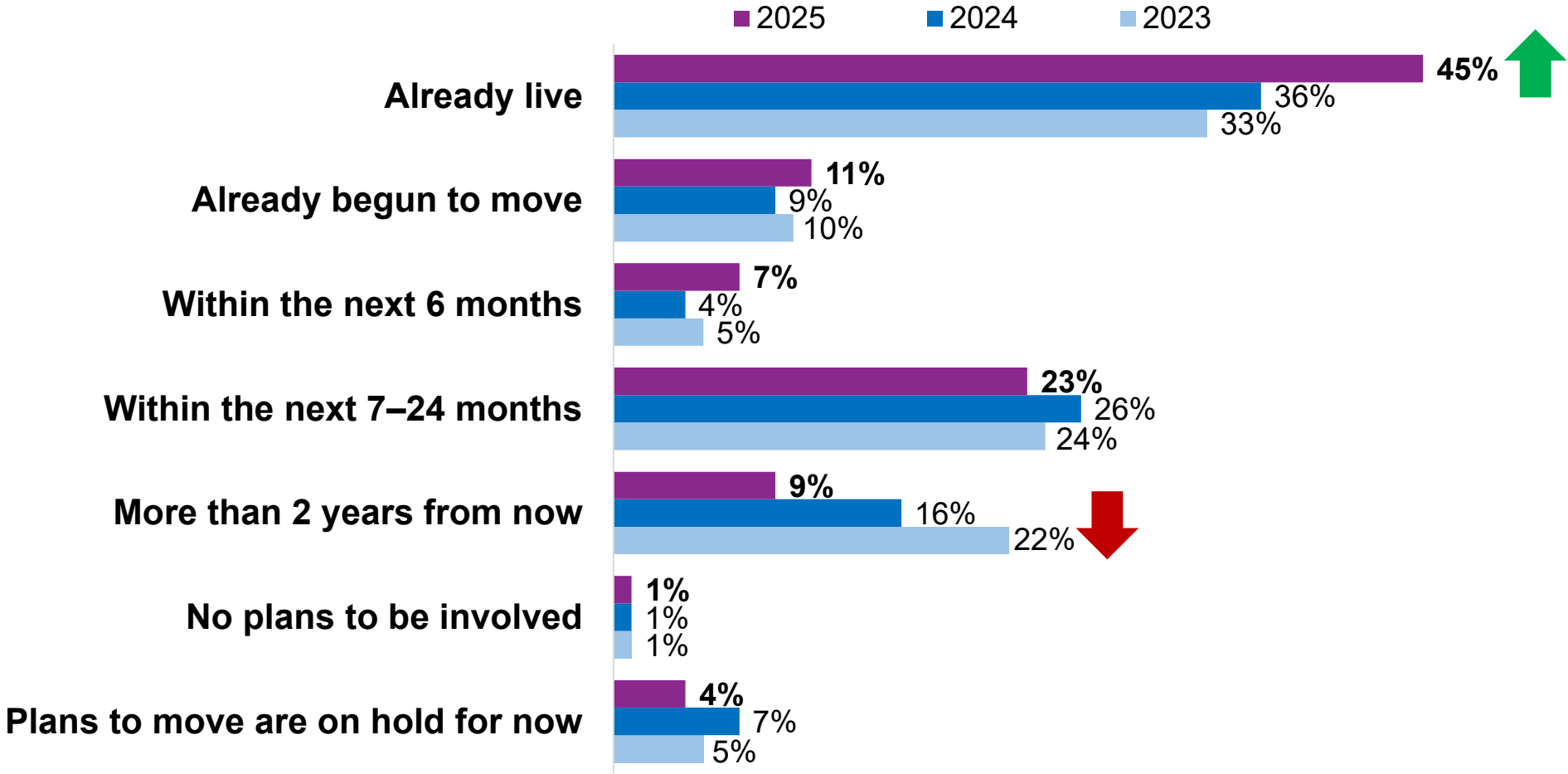
Evolving SAP S/4HANA Journeys: Beyond Deadlines to Measurable Value

As organizations accelerate SAP S/4HANA adoption ahead of the 2027 deadline (which is the end of mainstream maintenance for SAP ECC 6.0 and its related applications), project complexity, partner involvement, and priorities beyond go-live are coming into sharper focus. A recent ASUG survey captured insights from 168 members on their SAP S/4HANA journeys—highlighting how organizations are managing migration risks, cloud strategies, and business value realization within SAP S/4HANA environments. Though SAP S/4HANA adoption and experience are prevalent, the journey from migration to value optimization is still more complex than organizations anticipate. To implement SAP S/4HANA effectively and optimize value, organizations should engage appropriate partners, align early across IT and the business, and incorporate change management throughout the process.

Sponsored by
BearingPoint

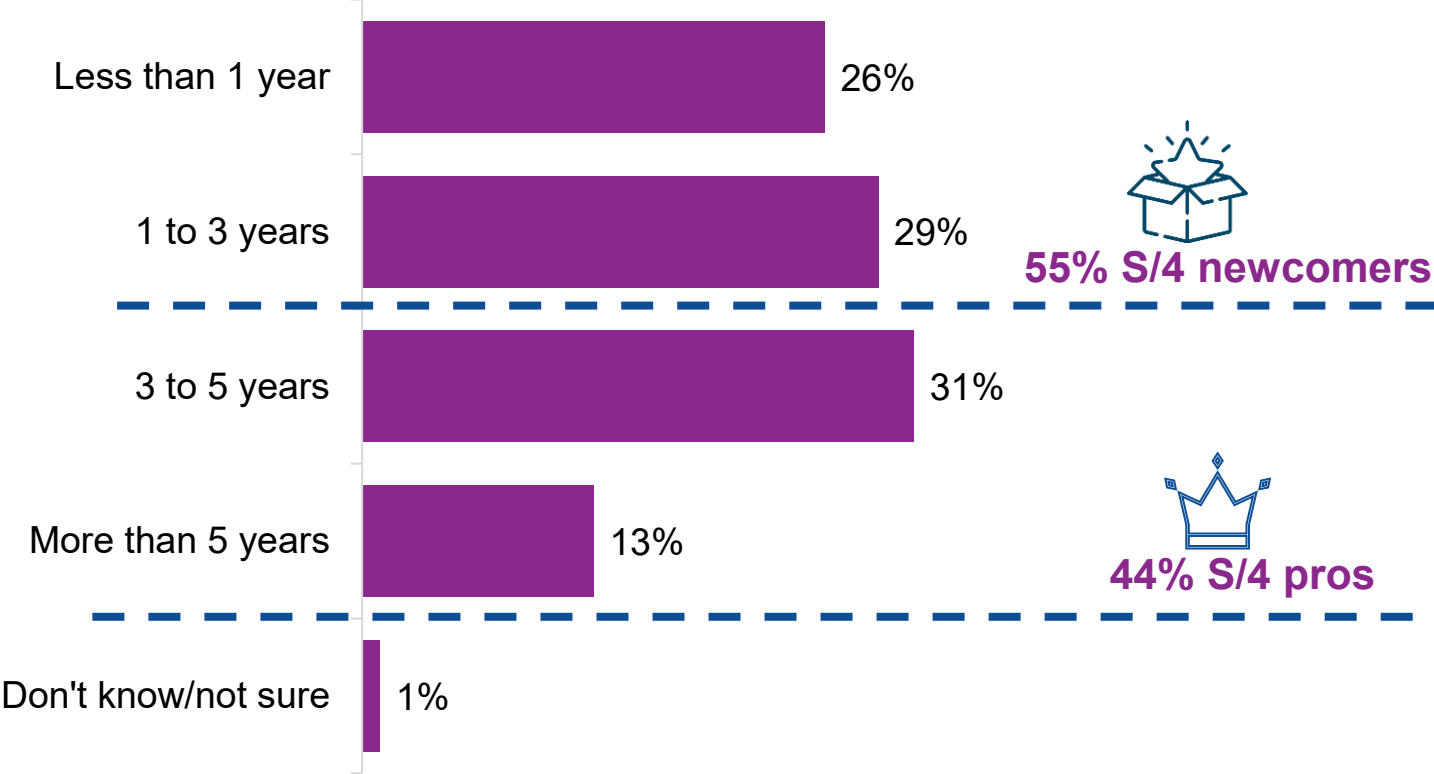
2026 Sponsorship Still Available!

A boom to occur within the next two years with 30% planning their move.



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

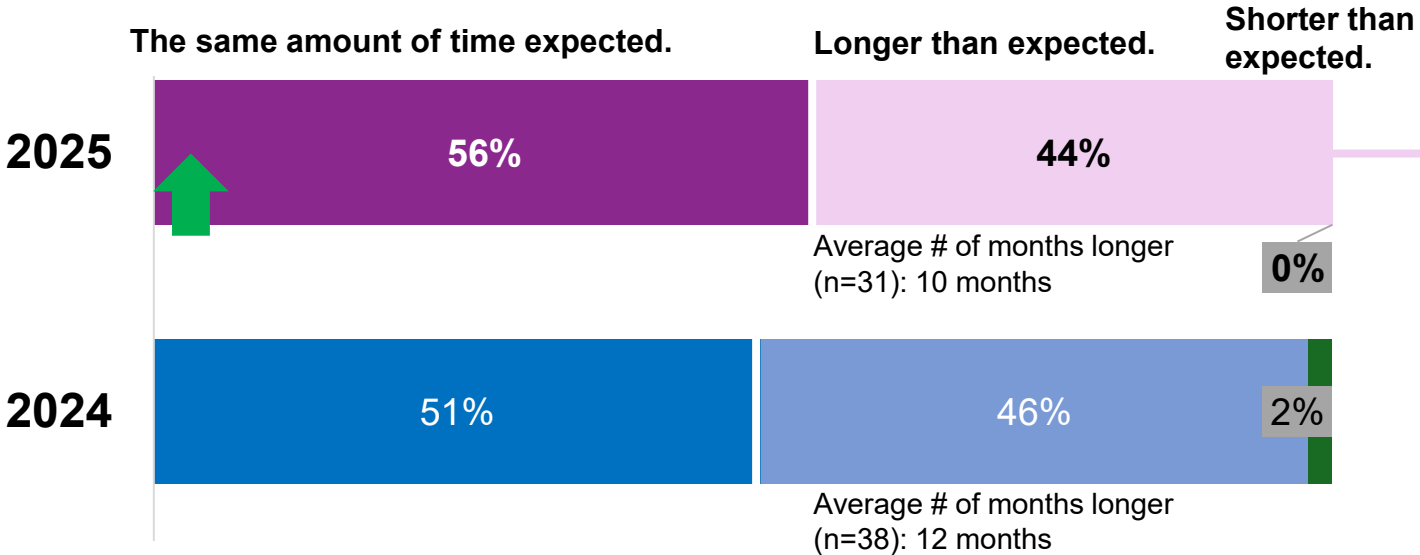
Most S/4HANA users are still early in their journey.



Q. [If 'We are already Live'] How long has your organization been live on SAP S/4HANA? Please provide your best estimate. (n=80)
Note: 'Less than 1 year' netted together data for 'Less than 6 months' (10%) and '6 to 12 months' (16%) ; **Question added in 2025**

Most S/4HANA projects stay on track but prove more complex than expected.

Did your SAP S/4HANA implementation/deployment project take...



Why did your SAP S/4HANA implementation take longer than expected?

Top factors contributing most to extended timeline:

55%
Implementation more complex/time-consuming than expected

45%
Testing

Q. [If 'We are already Live'] Did your SAP S/4HANA implementation/deployment project take...(2025 (n=70, 2024 n=82)

Q. [If longer] Why did your SAP S/4HANA implementation take longer than expected? Please select which factors contributed most to the extended timeline. (Please select all that apply). (n=31)*

*Question format adjusted in 2025 ; data still consistent with 2024

Support needs evolve from planning to optimization as S/4HANA journeys progress.

	Already live on SAP S/4HANA (n=71)	Begun to move to SAP S/4HANA (n=19)**	Go live in the next 7–24 months (n=35)
Business case development	17%	21%	31%
Implementation/deployment planning	14%	32%	51%
Implementation/deployment	18%	26%	29%
Change management/OCM/learning and training	32%	16%	37%
Rollout	15%	5%	17%
Application Management Services (AMS)	11%	11%	6%
Optimizing use	34%	16%	29%
Other	3%	11%	0%
Not lacking support in any stage.	38%	21%	14%

Q. Please select the stages of your SAP S/4HANA implementation where you are or were needing more support. (Please select all that apply.)*

Cross analysis of respondents who will go live in the next 6 months (n=11) not shown due to small base size

*Question updated in 2025, **small base size; use data with caution.

 = Highest column %

S/4HANA migration costs trend closer to expectations in 2025.

Did the actual costs align with your organization's anticipated costs for your entire SAP S/4HANA project?


31%

No, costs went above expectations


 (-18% vs 2024)

34%

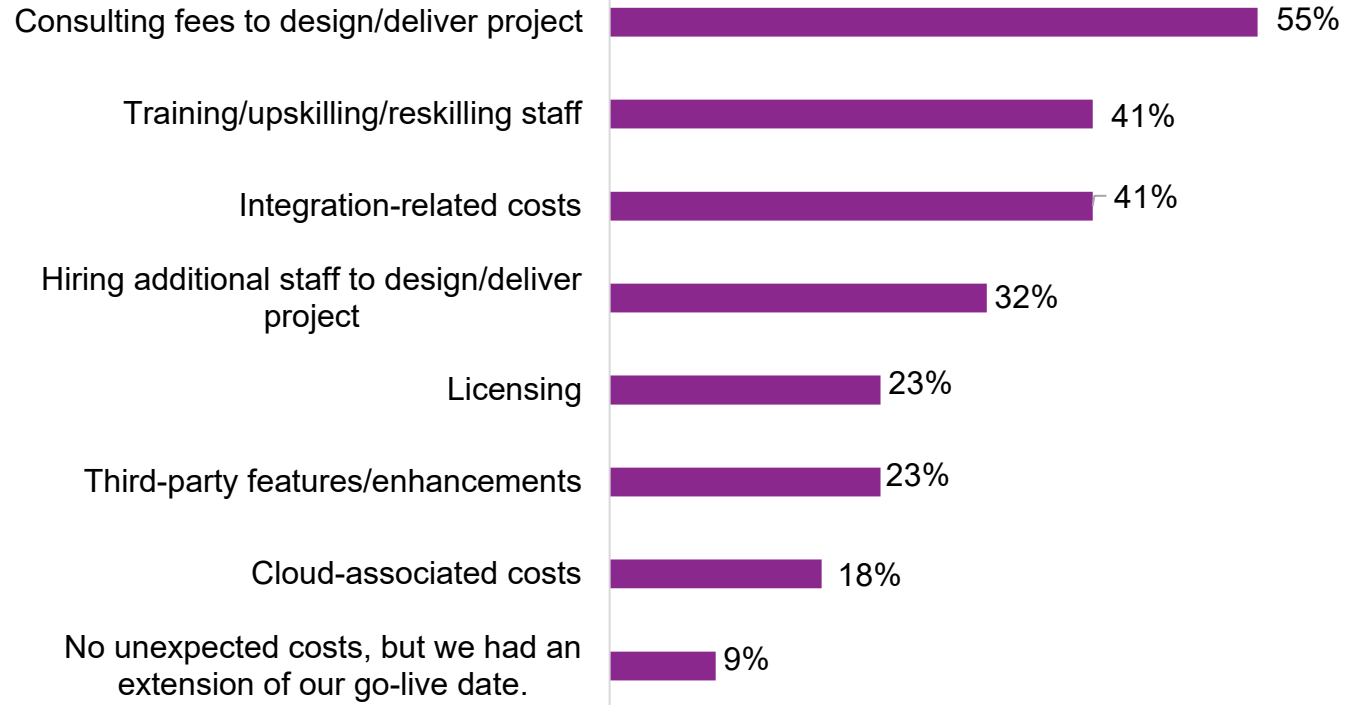
Yes, costs stayed in line with expectations

 (+11% vs 2024)

No, costs went below expectations: 6%
Don't know/not sure: 29% (+5% vs 2024)

 While not statistically significant, directionally, pro users (n=29) were much more likely than newcomers (n=40) to report costs exceeding expectations (38% vs. 28%).

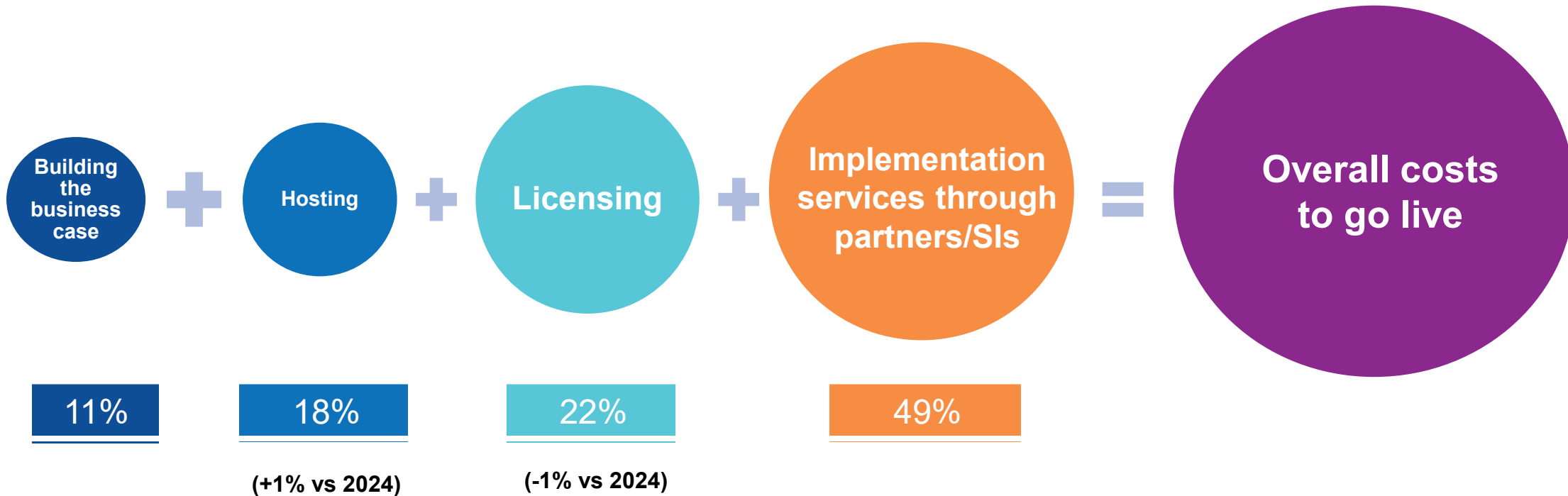
Unexpected costs**



Q. [If 'We are already Live'] Did the actual costs align with your organization's anticipated costs for your entire SAP S/4HANA project? (2025 n=70, 2024 n=82)

Q. [If 'No, costs went above expectations'] Which of the following unexpected costs, if any, did your organization experience? (Please select all that apply.) (2025 n=22)** *Note: Data and sample size rebased to exclude respondents who selected 'Don't know/not sure' **small base size; use data with caution ; Consistent with prior trends, but sample size limits direct comparison to 2024.

Partner/SIs implementation services continue to represent the greatest share of the costs to go live.

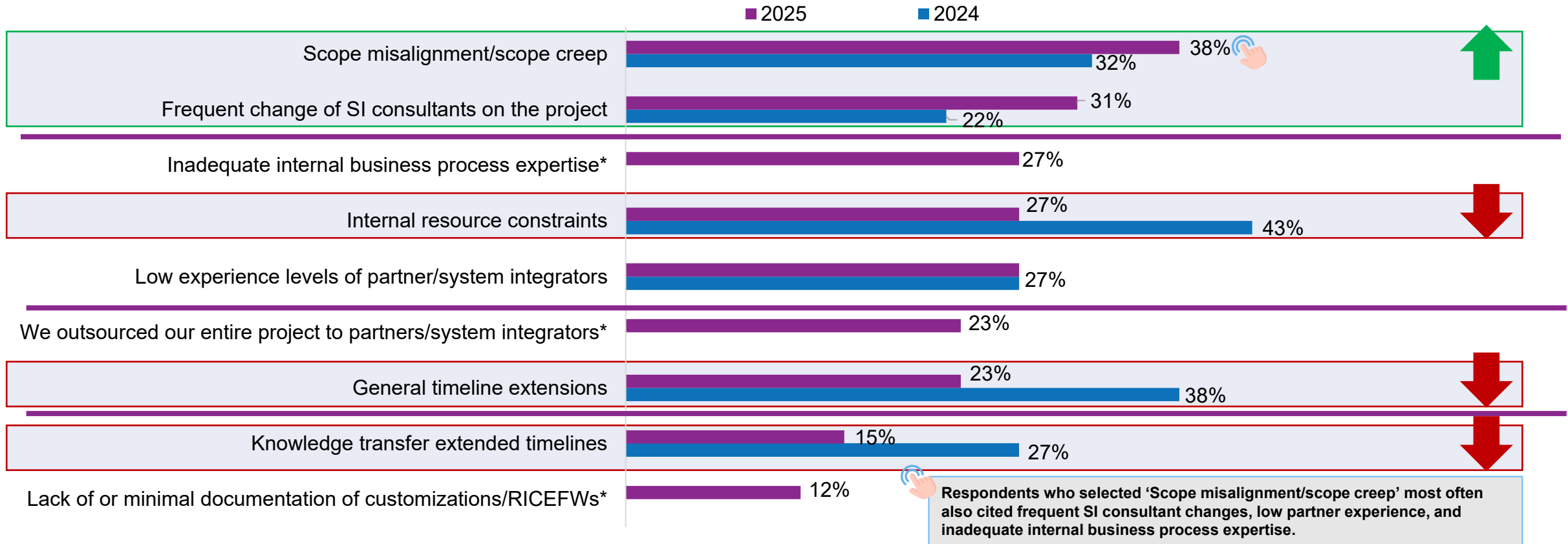


**% Breakout
of costs on
average:**

Q. [If 'We are already Live' and did not select 'Don't know/not sure' for estimating percentage of organization's annual IT budget dedicated to SAP S/4HANA implementation] For each of the following components of your organization's SAP S/4HANA implementation, please estimate the percentage each contributed to the overall cost. (2025 n=26*, 2024 n=37) *small base size; use data with caution.

Scope misalignment/scope creep drive costs for partner/SI implementation services

If implementation services through partners/system integrators contributed most to your overall implementation cost, which factors below best explain why?

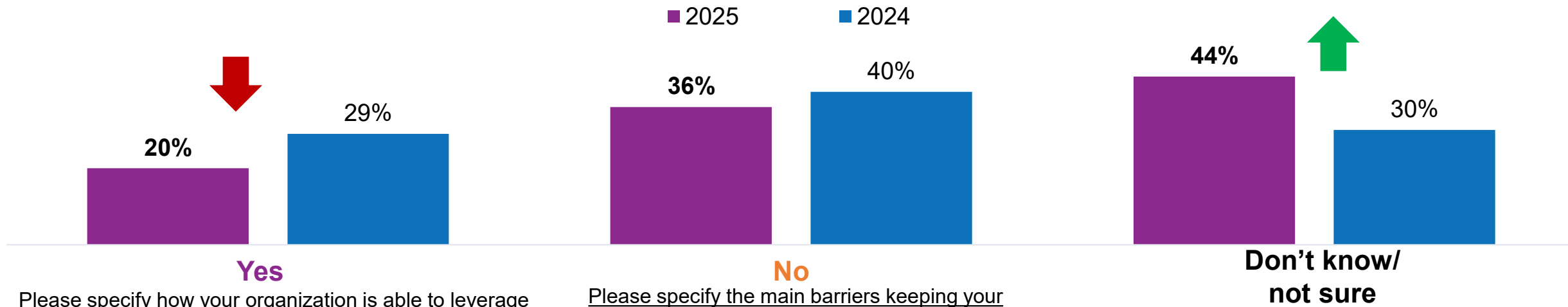


Q. [If 'We are already Live'] If implementation services through partners/system integrators contributed most to your overall implementation cost, which factors below best explain why? (Please select all that apply.) (2025 n=26*, 2024 n=37) *small base size; use data with caution. Note: For 23% of respondents, implementation services did not contribute most to overall implementation cost.

12% selected 'Other' – Data conversion, heavy customization, high cost

Uncertainty around S/4HANA optimization rises overall in 2025, with change management noted as a top barrier

Do you feel your organization is able to fully leverage your SAP S/4HANA solution?



Please specify how your organization is able to leverage solutions.

- Adopt new functionalities (n=3)*
- Consolidate/create more efficient business processes (n=3)*
- Improve data access and capabilities (n=1)*
- Reduce dependence on IT staff (n=1)*

Please specify the main barriers keeping your organization from leveraging.

- Change management barriers and general user resistance to change (n=6)*
- Learning curve for S/4 and new functionalities (n=5)*
- Too many customizations (n=4)*
- Still building functionalities (n=4)*
- “Effort involved in adopting new processes.”
- “Good enough existing feature; vs new feature with unknown ROI and learning curve.”
- “Business resistance to change.”
- “Loss of enhancements due to 'clean core push'.”

Q. Do you feel your organization is able to fully leverage your SAP S/4HANA solution? (2025 n=70, 2024 n=82)

*small base size; use data with caution.

Managing Change: The People Side of Technology

2025

ASUG

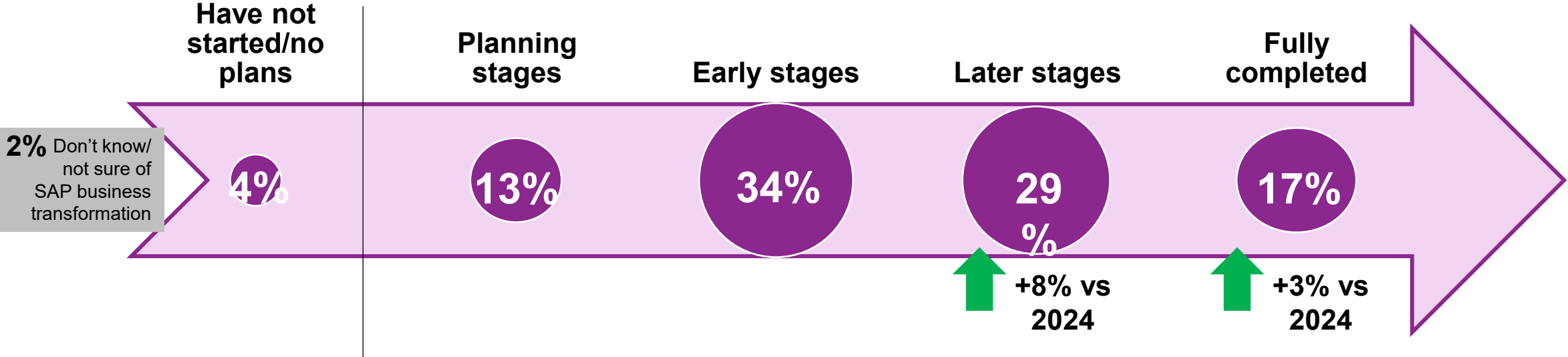
Research

**Successful SAP
Transformation
Hinges on Change
Management**



2026 Sponsorship Still Available!

More respondents advancing in their SAP business transformations.

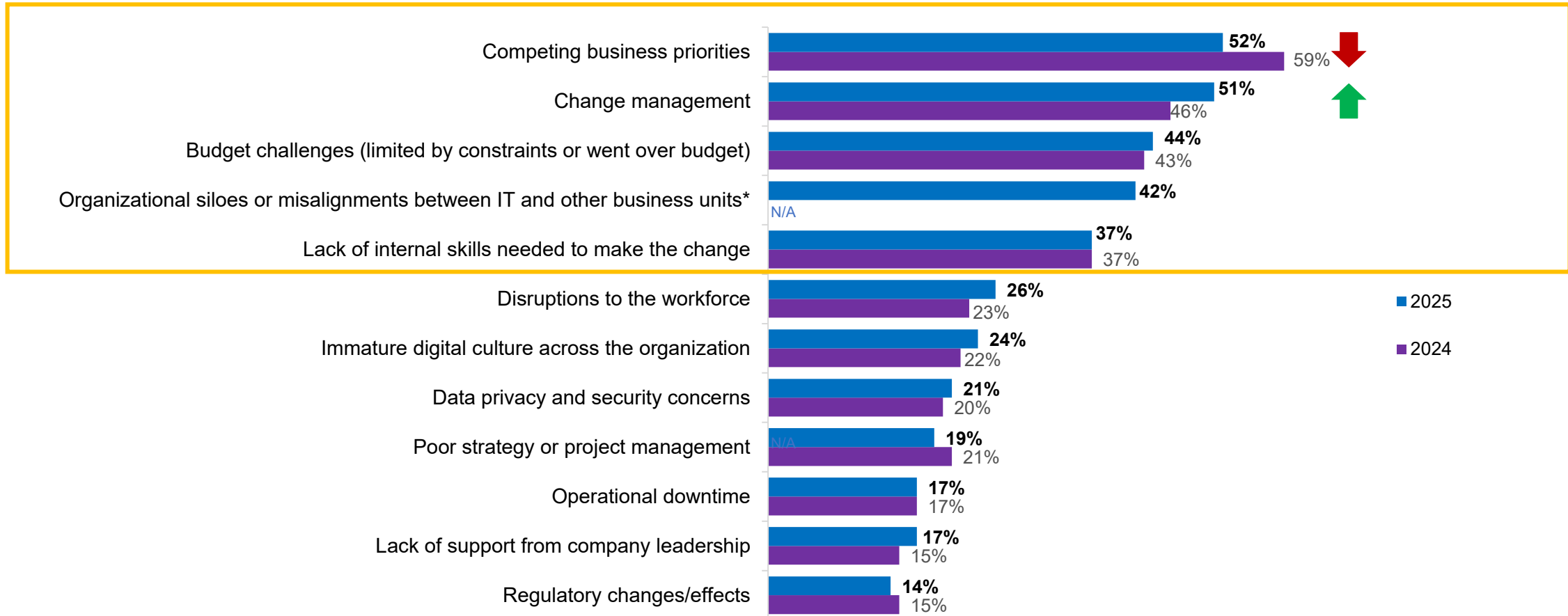


93% of respondents are extremely/somewhat involved in SAP S/4HANA and/or business transformation projects

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)
Q. Please rate your level of involvement with your organization's SAP S/4HANA and/or business transformation projects. (n=176 (2025), n=154 (2024) who are live, in the process of moving, planning, or deciding to move to SAP S/4HANA and aware of their SAP business transformation)
*See Speaking Notes for definition of "business transformations" shown to respondents

Top challenges stay consistent in 2025, but shifts emerge as competing priorities ease while change management slightly increases.

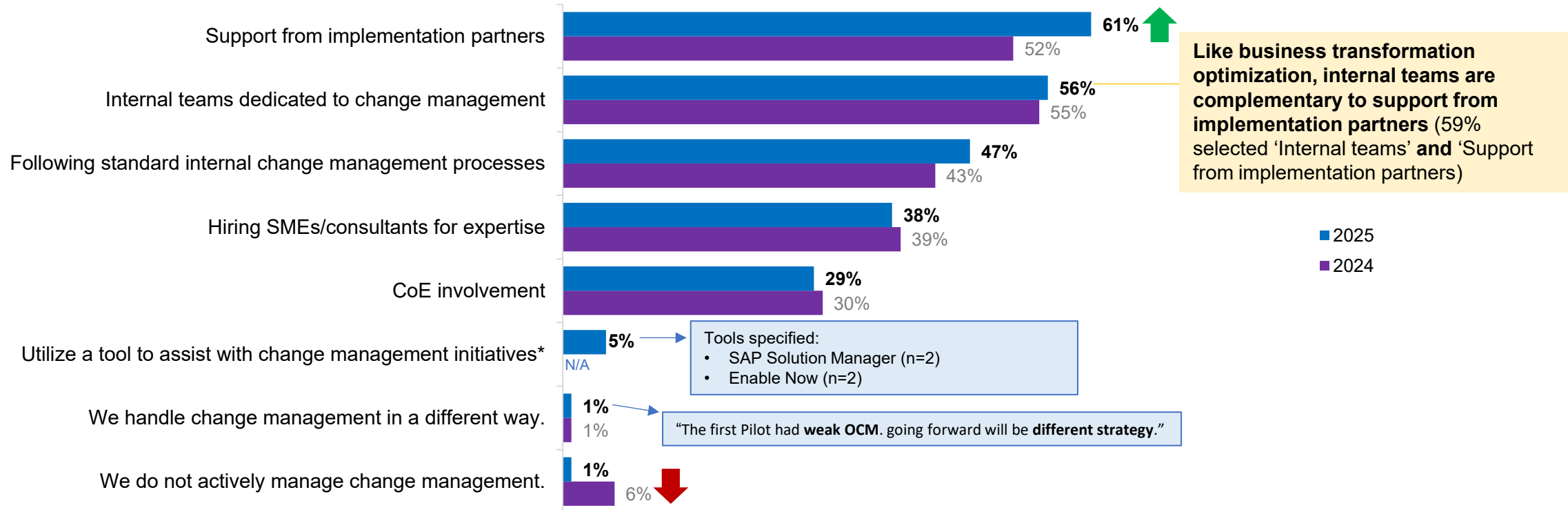
Challenges of business transformation



Q. Which of the following challenges did you experience as part of your organization's business transformation? (Please select all that apply.) (n=156 (2025), n=145 (2024) who are live, in the process of moving, planning, or deciding to move to SAP S/4HANA and have some involvement in S/4HANA and/or business transformation projects.) *Option added in 2025

Conflicting priorities drives organizations to external support for change management support.

How org.'s handle change management when rolling out new technology



Q. How does your organization handle change management when rolling out a new technology? (Please select all that apply.) (n=163 (2025), n=145 (2024) who are live, in the process of moving, planning, or deciding to move to SAP S/4HANA and have some involvement in S/4HANA and/or business transformation projects.) *Option added in 2025

Most organizations follow somewhat structured change management.

Highly structured and proactive — clear change management strategy, strong communication, and engagement across the organization



32%

Somewhat structured — general plans in place, but strategies may vary across teams or phases



39%

Ad hoc or reactive — limited planning, mostly responding to issues as they arise



10%

Still in early planning — change management strategy is not yet defined



12%

Not applicable — no change management efforts tied to our SAP S/4HANA roll-out



1%

We're still too early in our S/4 implementation process for change management/roll-out discussions.



6%

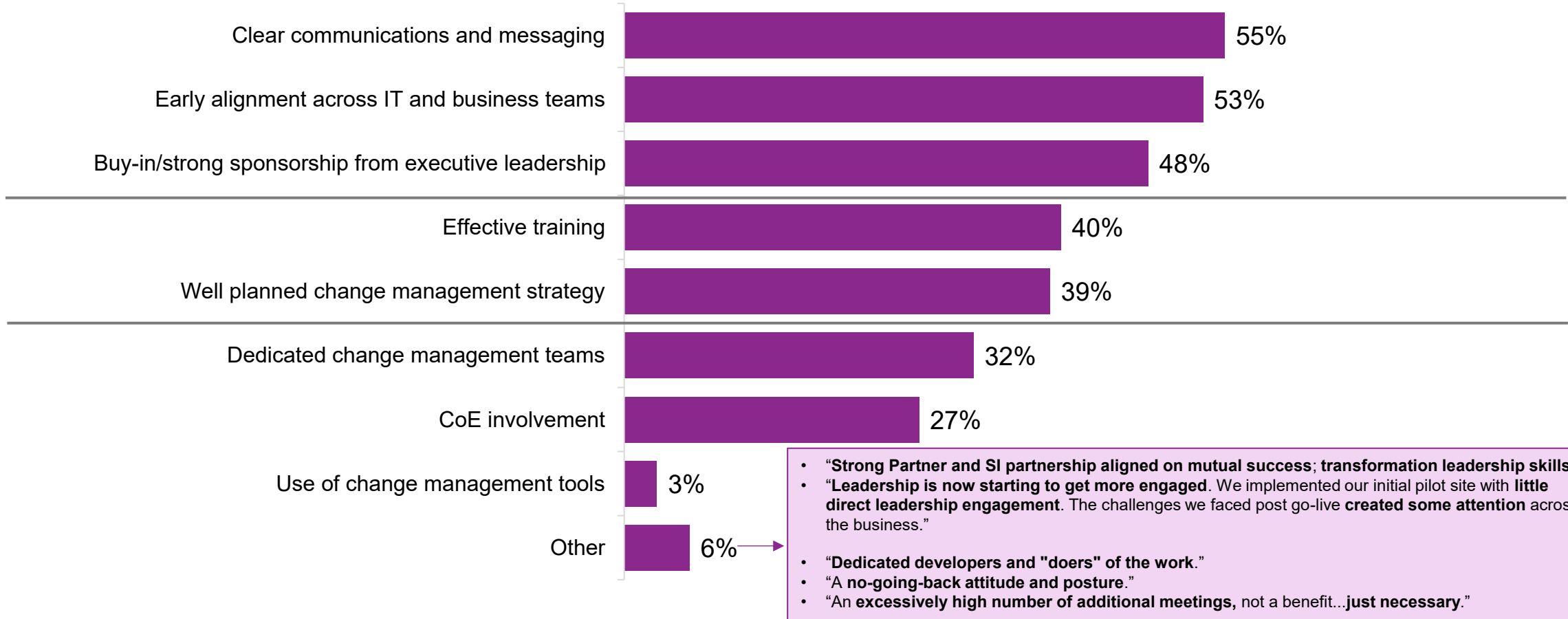
71%
have a somewhat to highly structured strategy



Respondents with highly structured change management strategy also note CoE involvement most (35%, +6% vs Total) for how they handle change management.

Q. How would you describe the change management process and the roll-out (or planned roll-out) of SAP S/4HANA? (n=163) Note: 2% selected 'Don't know/not sure'

Change management success hinges on communication, alignment, and leadership support.



Q. What made the **most meaningful difference** in the success of your organization’s SAP S/4HANA change management and roll-out? (Please select all that apply.) (n=131 who describe the change management and roll-out processes of S/4 at their organization as ‘Highly structured’, ‘Somewhat structured’, ‘Ad hoc or reactive’) Note: 6% selected ‘Don’t know/not sure’ ; See change management tools used (3%) in Speaking Notes

ASUG

Questions?

Your Partner Success Team

ASUG



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