Rethinking SAP Automation: Where the Market Stands Heading into 2026

A paraphrased summary of Precisely and ASUG's 2025 research report, "Transforming SAP® Processes Through Automation: 2026 Trends and Challenges"

Executive Summary

Source: Precisely & ASUG, 2025, p. 3

SAP customers are at a turning point. Migrations to S/4HANA have picked up speed considerably, with close to 60% of organizations either running on the new platform already or actively working toward it, and urgency is climbing as the 2027 cutoff nears. This shift is influencing how companies approach IT strategy, process design, and data governance more broadly.

Automation, however, hasn't kept pace. Adoption has held flat at 57%, essentially matching last year's figure. This isn't necessarily a sign of retreat — it reflects how much attention migration projects are absorbing, how crowded the automation tooling market has become, and how genuinely difficult SAP processes remain to automate. Interest in AI is real, but most organizations are hesitant to pile new complexity onto transformations that are already demanding enough. Encouragingly, fewer companies each year report having done nothing at all with automation, and there's a clear tilt toward mixing best-of-breed tools with no-code/low-code platforms and citizen development to expand automation without straining IT teams.

Use of the SAP Business Technology Platform (BTP) is climbing too — half of respondents are now using it, and another 26% are just getting started. But the same forces slowing automation and migration are also slowing BTP: a shortage of skilled talent, the difficulty of building on the platform, and the sheer scope of what BTP offers make the learning curve steep.

Across all three areas — automation, migration, and BTP — the recurring obstacle is complexity: in business processes, in data, in user interfaces, and in organizational change. Companies have to keep current operations running smoothly while building toward what comes next. The ones that tackle complexity head-on, through automation, stronger data quality practices, and a coordinated platform strategy, will get the most out of their investment in S/4HANA and BTP. Partners such as Ben Accord Business play a role here as well, working directly with organizations to identify where automation will have the greatest impact across their specific data, process, and application environments (see "How Ben Accord Business Can Help" below).

Key Figures at a Glance

Source: Precisely & ASUG, 2025, p. 4

- **BTP adoption:** 50% of organizations are now using BTP, a 10-point jump from 2024, with another 26% just beginning.
- **Interface fragmentation:** 54% of companies are still juggling multiple interfaces (SAP GUI, Fiori, and the browser-based GUI for HTML). Meanwhile, the share fully committed to Fiori has doubled, from 9% in 2024 to 18% in 2025.
- **S/4HANA migration:** 59% of organizations are fully or partially live on S/4HANA, up 13 points year over year.
- **Automation adoption:** Steady at 57%, virtually unchanged from 2024.

Introduction: Balancing What Works Today Against What's Needed Tomorrow

Source: Precisely & ASUG, 2025, p. 5

Precisely's 2025 survey of SAP customers found that by year's end, 64% of respondents will be either fully migrated to S/4HANA or actively in transition. For a lot of these companies, the move isn't just a technical upgrade — it's the catalyst for a much larger wave of IT modernization. But that progress isn't coming easily. Rigid legacy processes and scattered, inconsistent data continue to slow things down.

This creates a genuine tension: organizations need to keep today's operations dependable while simultaneously building the foundation for future innovation. To understand how SAP customers are navigating that tension, Precisely partnered with ASUG for the third consecutive year to survey the community about automation, migration, and platform adoption.

Prior years' findings set the stage: the 2023 survey showed how complexity across multiple dimensions routinely stalled digital transformation efforts, while 2024 showed real momentum — automation spreading, BTP usage climbing, and migration activity accelerating. Building on that trajectory, the 2025 survey dug into three specific questions:

1. How has automation adoption evolved, and what's still holding it back?
2. Is the pace of S/4HANA migration speeding up or slowing down?
3. What's driving — and limiting — broader adoption of SAP BTP?

Drawing on both this survey data and years of firsthand experience helping companies automate their SAP environments, this report aims to surface where the real opportunities and gaps lie in the current SAP ecosystem.

Section 1: Automation Adoption — Real Progress, but a Stall in Momentum

Source: Precisely & ASUG, 2025, pp. 6–10

Where Adoption Stands

Automation adoption in 2025 sits at 57%, holding essentially steady against 58% the year before. After a run of consistent growth, this leveling-off suggests many organizations are choosing to pause new automation initiatives until their ERP migrations are further along.

Conversations with customers point to three main reasons for the plateau:

Migration is eating up bandwidth. ASUG data shows more than 30% of SAP migration projects are running late, over budget, or both. That's pulling SAP teams' attention almost entirely toward S/4HANA work, leaving little room to explore automation initiatives that aren't strictly necessary right now.

The market has gotten crowded. What used to be a smaller field — anchored by platforms like Precisely Automate and traditional RPA vendors — now includes newer players such as Microsoft Power Apps and SAP Build. Faced with more choices, many teams are taking time to reassess which tools actually fit their modernization plans before committing further.

AI is adding uncertainty rather than clarity. The fast rise of AI agents and large language models has generated genuine interest, but also hesitation. Many teams would rather watch how the technology matures before locking in a strategy.

Even so, organizations that are moving forward with automation are doing so more deliberately. A case-by-case approach remains the most common strategy, now used by 54% of respondents (up four points from last year), and it's been the leading approach for two years running. Best-of-breed strategies are also gaining ground — 19% now, up from 15% — as companies lean into no-code/low-code tools that work across both SAP and non-SAP systems.

There's another encouraging signal: fewer organizations are stuck in limbo. Only 13% say they're still trying to figure out the right automation approach, down sharply from 23% in 2024 and 28% in 2023. That's a strong indication that companies are growing more confident in automation's value, helped along by how much more capable no-code/low-code tools have become.

What's Standing in the Way

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The ranking of top obstacles shifted this year. Integration — last year's biggest complaint — has been overtaken by process complexity, now cited by 62% of respondents. Integration is now tied for second place with a related issue: difficulty understanding and mapping process requirements (both at 49%). Together, these three challenges trace directly back to the pressure of ongoing SAP migrations and the inherent intricacy of running an SAP-based business.

Process complexity. SAP ERP processes are complicated by nature. Something as basic as creating a single master data record can involve hundreds of fields, require sign-off from several teams, and follow strict compliance procedures. Automating a process like that takes real time and careful design.

Defining requirements. This challenge is closely linked to complexity — simply documenting the steps in an SAP process is often a major undertaking on its own. Automation frequently has to account for hundreds of individual business rules tied to compliance and regulatory needs, and just gathering those rules can take as long as building the automation itself.

Integration. As businesses push for tighter connections between SAP and other core systems, integration remains a persistent hurdle. Even though APIs connecting SAP to platforms like Salesforce have gotten simpler, the effort involved still compounds the difficulty of dealing with process complexity and requirements gathering at the same time.

These obstacles echo the broader theme running through the report: organizations have to keep the lights on today while building for tomorrow. The real challenge for SAP-run companies is figuring out how to manage complexity without letting it stall progress altogether.

The Growing Role of No-Code/Low-Code and Citizen Development

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One strategy companies are using to work around these barriers is opening automation up to "citizen developers" — business users, not just IT professionals — through no-code/low-code platforms. Done well, this lets business teams automate their own processes and speeds up adoption without piling more work onto IT.

More than half of this year's respondents say citizen development is a meaningful part of their automation strategy, and the share calling it "very important" rose to 14%, up from 11% the year before. This growth is being driven by no-code/low-code platforms maturing to the point where both professional developers and business users can work in the same environment — which speeds up delivery and cuts down on duplicated effort.

Three-quarters of respondents said no-code/low-code capabilities matter to their overall automation strategy. That tracks with what customers describe in conversation: with limited budgets and stretched IT teams, many organizations want one shared environment where business users can handle straightforward automations on their own, freeing up SAP IT staff to focus on the more complex, data-heavy workflows — along with overseeing and maintaining whatever the business teams build.

Still, collaboration between citizen and professional developers isn't yet the norm. Only 18% of organizations currently have SAP teams that blend both groups. A much larger share, 42%, still keeps automation entirely within SAP IT — a more cautious, traditional model that tends to mean longer timelines and higher costs. Given how complicated SAP processes can be, that caution is understandable, but it also represents a missed chance to scale automation more broadly across the organization.

Where This Leaves Automation Adoption

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This year's data points to a temporary lull in automation growth, driven by three overlapping pressures: migration projects absorbing resources, an increasingly crowded field of automation tools prompting reassessment, and the ongoing difficulty of automating inherently complex SAP processes — all compounded by uncertainty around where AI-driven automation is headed.

Even so, the pool of organizations that haven't started automating at all keeps shrinking. Growth in both case-by-case adoption and best-of-breed strategies shows that appetite for SAP automation hasn't gone away — it's just being channeled more carefully. Going forward, no-code/low-code platforms and citizen development look set to be key tools for pushing past today's barriers.

Section 2: S/4HANA Migration — Accelerating, But Far From Simple

Source: Precisely & ASUG, 2025, pp. 11–14

With the 2027 deadline closing in, migrating to S/4HANA has shifted from a "someday" project to an urgent priority. This year's survey shows 59% of organizations are now fully or partially live on S/4HANA — a 13-point jump from 2024. Another 5% expect to go live by year-end, and an additional 29% are actively in the process.

The Big Three Obstacles

Despite the momentum, the path isn't smooth. Respondents pointed to three major hurdles:

Business process change (49%). Moving from SAP ECC to S/4HANA isn't a straightforward technical swap. It forces companies to rethink how their core data creation and management processes actually work.

Customizations (44%). Many organizations have spent years building custom, business-critical processes in ECC that don't translate cleanly using SAP's standard migration tools. That makes it hard to follow SAP's "clean core" approach, often requiring custom development or manual workarounds instead.

Organizational resistance (37%). Change management is consistently underestimated. Customers routinely describe the cultural and operational adjustment required by S/4HANA as being just as demanding as the technical migration itself.

Taken together, these findings confirm what customers say directly: shifting from ECC to S/4HANA takes about as much organizational effort as it does technical work.

Data Quality: A Quiet but Persistent Problem

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Data quality didn't rank at the top of the survey's list of challenges, but it comes up constantly in customer conversations. Two issues stand out:

Accuracy. Manual data processes tend to introduce errors that complicate migration.

Transformation. Moving data from acquired ECC systems and non-SAP sources into S/4HANA and the underlying HANA database requires substantial restructuring — work that many teams underestimate going in.

Building automated data quality checks and transformation steps directly into the migration plan can cut down on errors, speed up timelines, and produce benefits that last well beyond the migration itself.

Juggling Multiple User Interfaces

(pp. 13–14)

Another layer of complexity comes from the shift in how users actually interact with SAP. Moving away from the traditional SAP GUI toward Fiori apps and the browser-based GUI for HTML creates friction for IT and business users alike. GUI for HTML feels familiar, but Fiori represents a genuinely different way of working, designed to simplify the user experience.

More than half of companies (54%) are still operating across multiple interfaces at once — a modest improvement from last year, but still a real source of friction. At the same time, the share of companies that have fully moved to Fiori and GUI for HTML doubled, from 9% in 2024 to 18% in 2025, suggesting the shift away from the classic SAP GUI is picking up speed.

This interface complexity has a direct impact on automation planning. Many IT teams are hesitant to invest in automation until their interface strategy settles, so they don't end up building the same thing twice across different environments. As a result, organizations are looking for automation tools that stay consistent across both ECC and S/4HANA, and across every interface — GUI, Fiori, and GUI for HTML alike.

Adoption data shows finance, sourcing, procurement, and supply chain leading the way in Fiori usage, which lines up with both how complex those processes tend to be and how many SAP-built Fiori apps already exist to support them. Finance usage of Fiori grew 6 points since 2024, and sourcing and procurement usage grew 17 points.

Where Migration Stands

S/4HANA migration is speeding up as the 2027 deadline approaches, but it's anything but simple. Companies are wrestling with deep process changes, years of accumulated customization, and real organizational pushback — on top of data quality and transformation issues, and a user interface landscape in flux. Still, the direction is unmistakable: more organizations are moving forward and leaving ECC behind. Those that build automation, data quality practices, and a consistent user experience into their migration plans will be the ones best positioned not just to hit the deadline, but to actually get full value out of S/4HANA once they're there.

Section 3: SAP BTP — Growing Fast, But Hard to Master

Source: Precisely & ASUG, 2025, pp. 15–17

Alongside the migration wave, adoption of SAP's Business Technology Platform (BTP) is climbing too. Half of this year's respondents are now using BTP services, up 10 points from 2024, and another 26% are just starting their journey. Given this trajectory, it's reasonable to expect that nearly every S/4HANA customer will eventually rely on BTP in some form.

Why Adoption Is Still Difficult

Getting up to speed on BTP isn't easy. Organizations are running into many of the same problems that show up in automation and migration efforts — namely, complexity and a shortage of relevant expertise. The top three challenges respondents named were a skills gap (46%), the complexity of development on the platform (43%), and difficulty grasping everything BTP can actually do (36%).

Skills gap. A shortage of in-house BTP expertise is the single biggest barrier — something that comes up constantly in customer conversations. Without that talent, companies struggle to get real value out of the platform.

Complexity of development. BTP offers a wide range of services and components, but companies often compare the experience to an assembly kit with no instructions: plenty of parts, but no clear sense of how they fit together. The skills shortage makes this problem worse.

Difficulty understanding capabilities. Even organizations that have adopted BTP often struggle to grasp its full scope. Few teams have the bandwidth or expertise to stitch its many services together into complete, end-to-end solutions.

Where BTP Adoption Stands

BTP was built to be a comprehensive toolkit for extending and improving SAP processes. In practice, companies find it powerful but genuinely hard to use well. Without investment in skills and a simpler approach to adoption, BTP risks going underused — even as it becomes a more essential part of the broader SAP modernization picture.

Adoption is clearly accelerating: half of respondents are already using BTP, and another quarter are getting started. That reflects BTP's growing importance as the layer that lets companies extend and enhance their core S/4HANA environment. But the challenges are just as real — skills shortages, development complexity, and limited understanding of what the platform can do are all holding organizations back from realizing its full potential. Companies willing to invest in building internal expertise, simplifying their approach, and aligning BTP with their broader automation and migration efforts will get the most value out of it.

Conclusion: Where SAP Automation Goes From Here

Source: Precisely & ASUG, 2025, pp. 18–19

This year's survey captures a market at an inflection point. SAP customers are racing to complete their move to S/4HANA ahead of the 2027 deadline, with more than half already live or in progress. Automation adoption, meanwhile, has leveled off as resources shift toward migration work, and BTP adoption — while growing — is still weighed down by skills gaps and complexity.

The overall picture is one of genuine progress paired with genuine hesitation. Companies clearly understand that automation, modernization, and platform adoption all matter for efficiency, agility, and innovation. But they also have to balance those ambitions against real constraints: migration deadlines, process complexity, and limited resources. The tension between sustaining today's operations and preparing for tomorrow's capabilities — introduced at the start of this report — remains the defining challenge for SAP customers.

Even so, the trend is encouraging. Fewer organizations each year report having no automation strategy at all. Case-by-case automation remains the most common approach, but best-of-breed strategies and no-code/low-code platforms are gaining share, and citizen development is becoming a more important tool for scaling automation without overloading IT. Migration to S/4HANA continues to accelerate, bringing steady gains in process standardization, data quality, and modern interfaces along with it. And BTP, despite uneven adoption, is emerging as the natural next layer for driving innovation on top of S/4HANA.

The takeaway for CIOs and SAP leaders is straightforward: success means keeping migration on schedule without letting automation and platform strategy fall by the wayside. Automation shouldn't be treated as something to revisit once migration wraps up — it should be built in as a foundation for managing complexity and protecting data integrity throughout. Investing in people and change management matters just as much as the technology decisions themselves.

How Ben Accord Business Can Help

Note: This section is supplementary information, not drawn from the Precisely/ASUG report.

Ben Accord Business, a Partner of Precisely, works closely with organizations to turn the findings above into an actionable plan. Rather than approaching automation as a single, generic initiative, Ben Accord Business partners with each business to pinpoint where automation will have the most impact across three specific areas:

Data. Identifying where data quality, accuracy, and transformation issues are most likely to slow down migration or undermine automation efforts, and building the right data management practices to address them.

Process. Mapping and prioritizing the SAP business processes most in need of automation, taking into account the complexity, compliance requirements, and cross-team dependencies that are unique to each organization.

Applications. Assessing the application and interface landscape — including SAP GUI, Fiori, and GUI for HTML, as well as SAP BTP services — to determine where automation and platform investments will deliver the most value with the least disruption.

By working directly with businesses to assess their specific environment rather than applying a one-size-fits-all approach, Ben Accord Business helps organizations move past the complexity highlighted throughout this report and build automation strategies suited to their own operations.

About This Research

Source: Precisely & ASUG, 2025, p. 20

Precisely worked with ASUG (Americas' SAP Users Group) to design this survey and gather responses from ASUG members, collecting 173 completed surveys across a broad cross-section of the SAP community, including both IT stakeholders and business users. ASUG led the analysis in partnership with Precisely, and Precisely authored the final report to place the findings in context.

Respondents spanned a range of industries, led by consumer products (16%), industrial manufacturing (9%), and aerospace & defense, chemical, government, and utilities (6% each). By department, IT Operations made up the largest share of respondents (35%), followed by Finance (15%) and Enterprise Architecture (12%). Most respondents held director-level roles (47%) or were in non-managerial positions (30%), and the large majority (68%) reported having input into purchasing decisions for their organization. Company size varied widely, with organizations over $10 billion in revenue representing the largest single segment (28%).

References

Precisely & ASUG (Americas' SAP Users Group). (2025). *Transforming SAP® Processes Through Automation: 2026 Trends and Challenges — Understanding adoption, opportunities, and challenges in SAP® modernization* [Research report]. Precisely. Retrieved from precisely.com/sap. (Source file: Rept_precisely-asug-research-report-2025_251103_E_final.pdf)

This is the single source used for every fact, statistic, and finding in this summary. Page-level citations for each section appear above; all data points (percentages, year-over-year comparisons, and survey figures) trace back to Figures 1–12 and the demographic breakdowns on pages 6–20 of that report. No other sources were used.

This summary is an independent paraphrase of the above report and is intended to convey the same findings and conclusions in different language. For the original data, charts, and full report, refer to the source document. SAP, S/4HANA, Fiori, and BTP are trademarks of SAP SE.