

March 2025

DETAILED  
**FINDINGS**

From The Benchmark Report:

# SAP BTP Data, Integration, and Application Development

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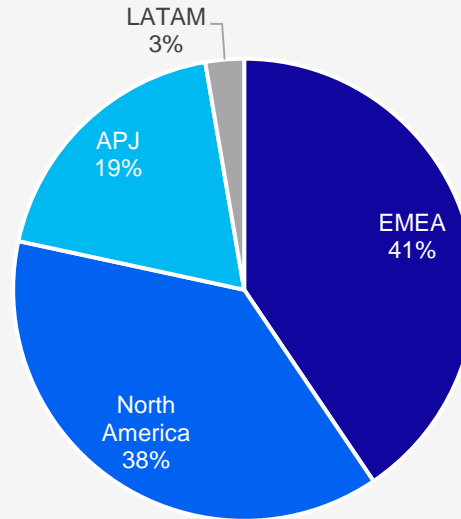
Robert Holland

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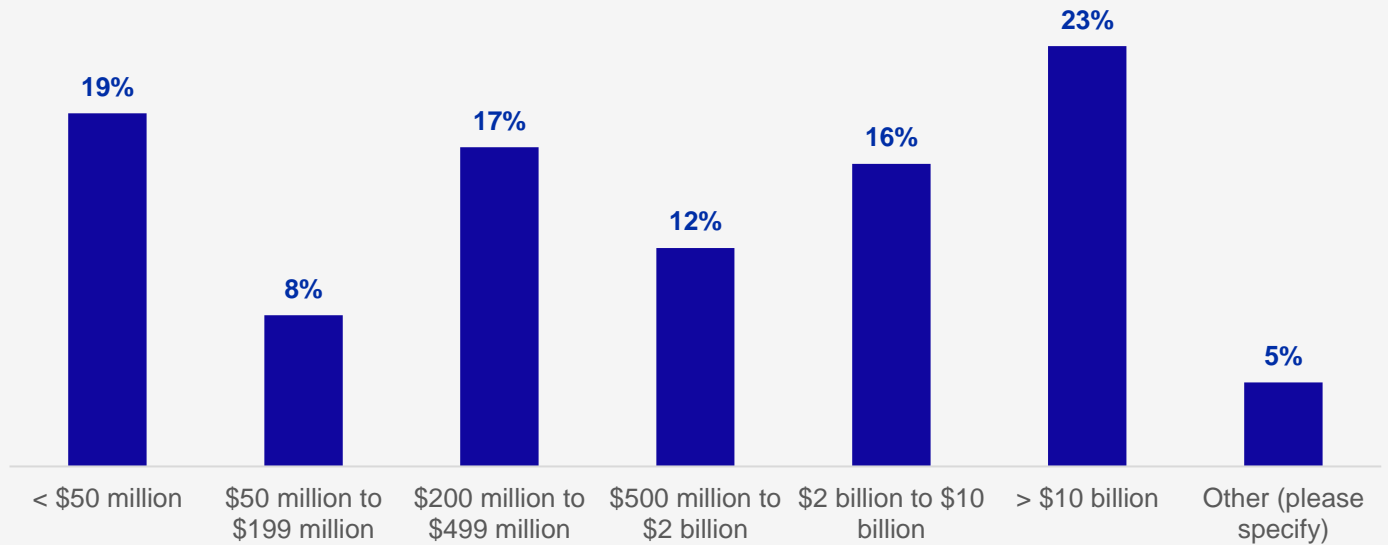


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Between January and March 2025, SAPinsider surveyed 151 community members to gain deeper insights into their use of SAP BTP and the role data, integration, and application development play in their organizations. The survey explored what is behind their decisions around enterprise platforms, the SAP BTP services in use, and the different types of integration and application development tools utilized.

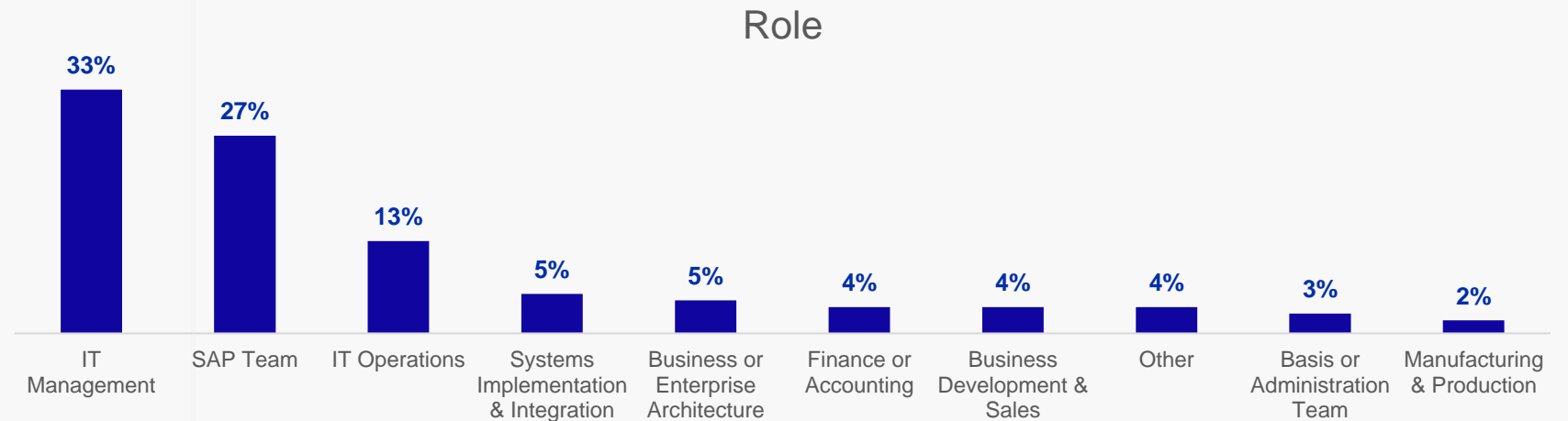
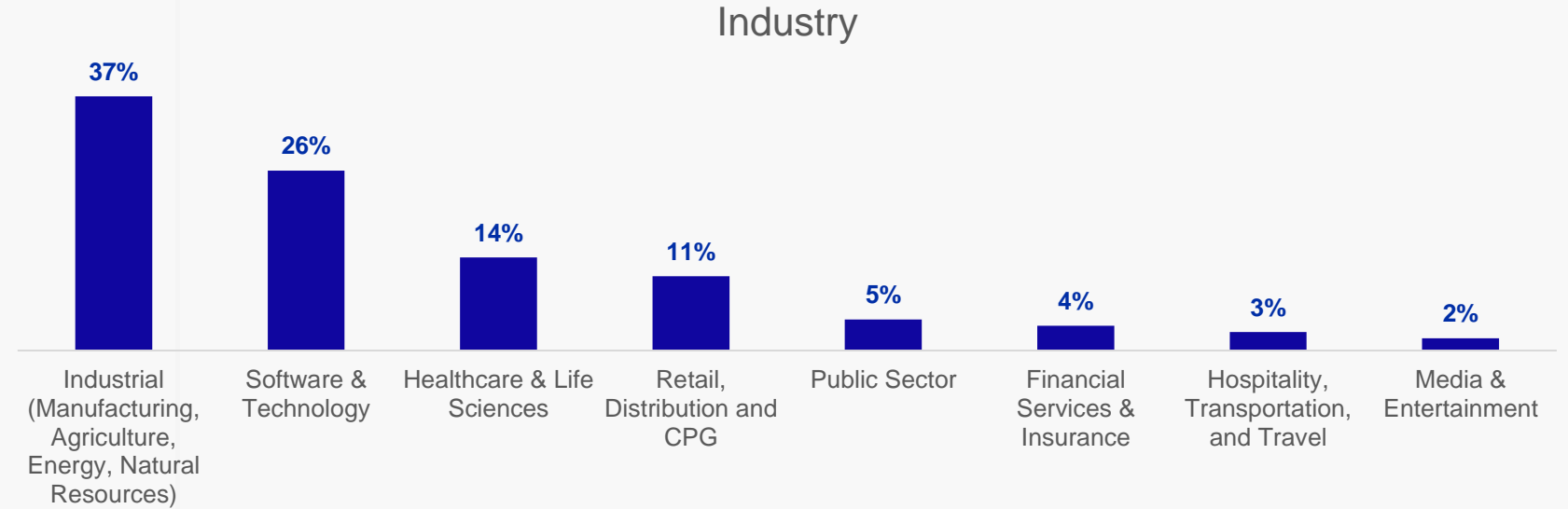


Revenue



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The participants were also asked about their organizational roles and the market sector in which their organizations operated.

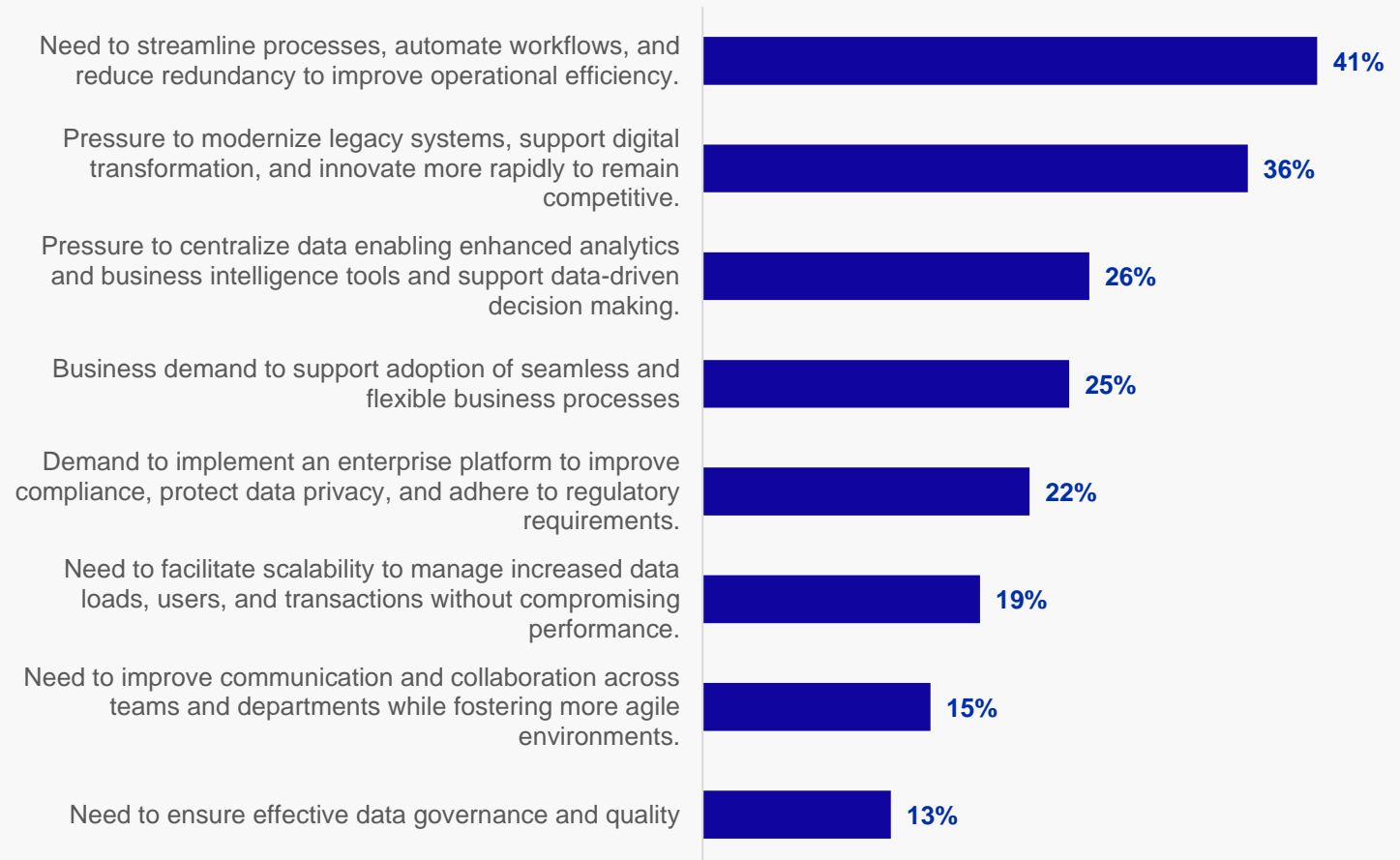


## 3

Although managing and harmonizing data is a priority for many organizations today, especially for those looking to deploy AI in an enterprise capacity, the need to streamline processes, automate workflows, and reduce redundancy to improve operational efficiency (41%) was identified as the most important factor by respondents. Behind this is the pressure to modernize legacy systems, support digital transformation, and innovate more rapidly to remain competitive.

Given these factors, and the complexity of today's enterprise environment, organizations need to understand how to use enterprise platforms to fulfil these needs.

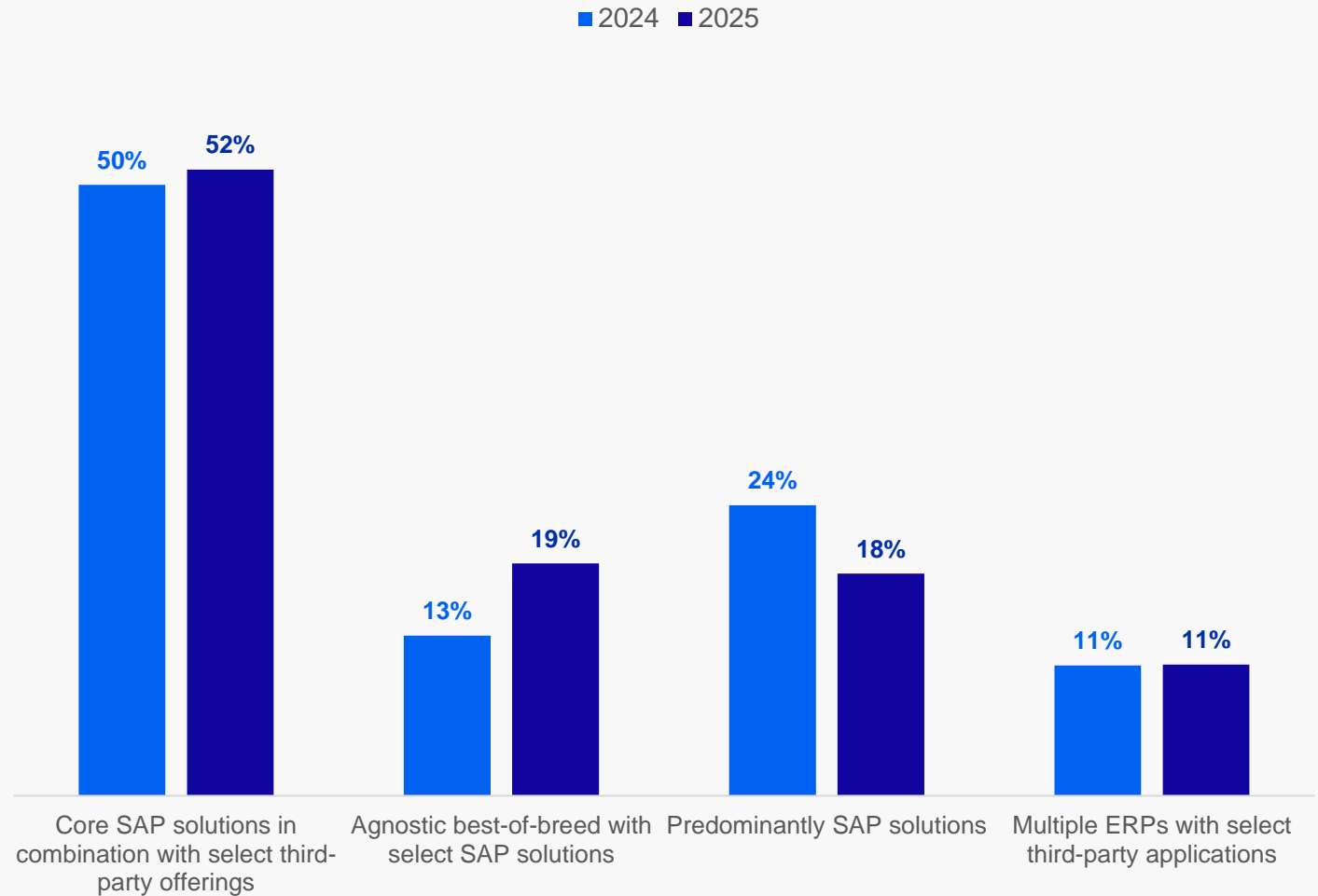
## Factors Responsible for Strategy for Data and Enterprise Platforms



## 4

The enterprise landscape itself has become increasingly complex. Slightly more than half the respondents (52%) report that they are running SAP solutions at the core of their enterprise in combination with select third-party offerings. While this is only a small increase from last year, those reporting a landscape that uses an agnostic choice of best-of-breed applications in combination with select SAP applications increased by nearly half year over year (from 13% to 19%). Additionally, those reporting that their organization uses predominantly SAP solutions decreased from 24% to just 18% this year. This suggests that, while organizations are relying on a central core of SAP solutions like SAP ECC or SAP S/4HANA, there is a growing use of non-SAP solutions even among long-term SAP customers.

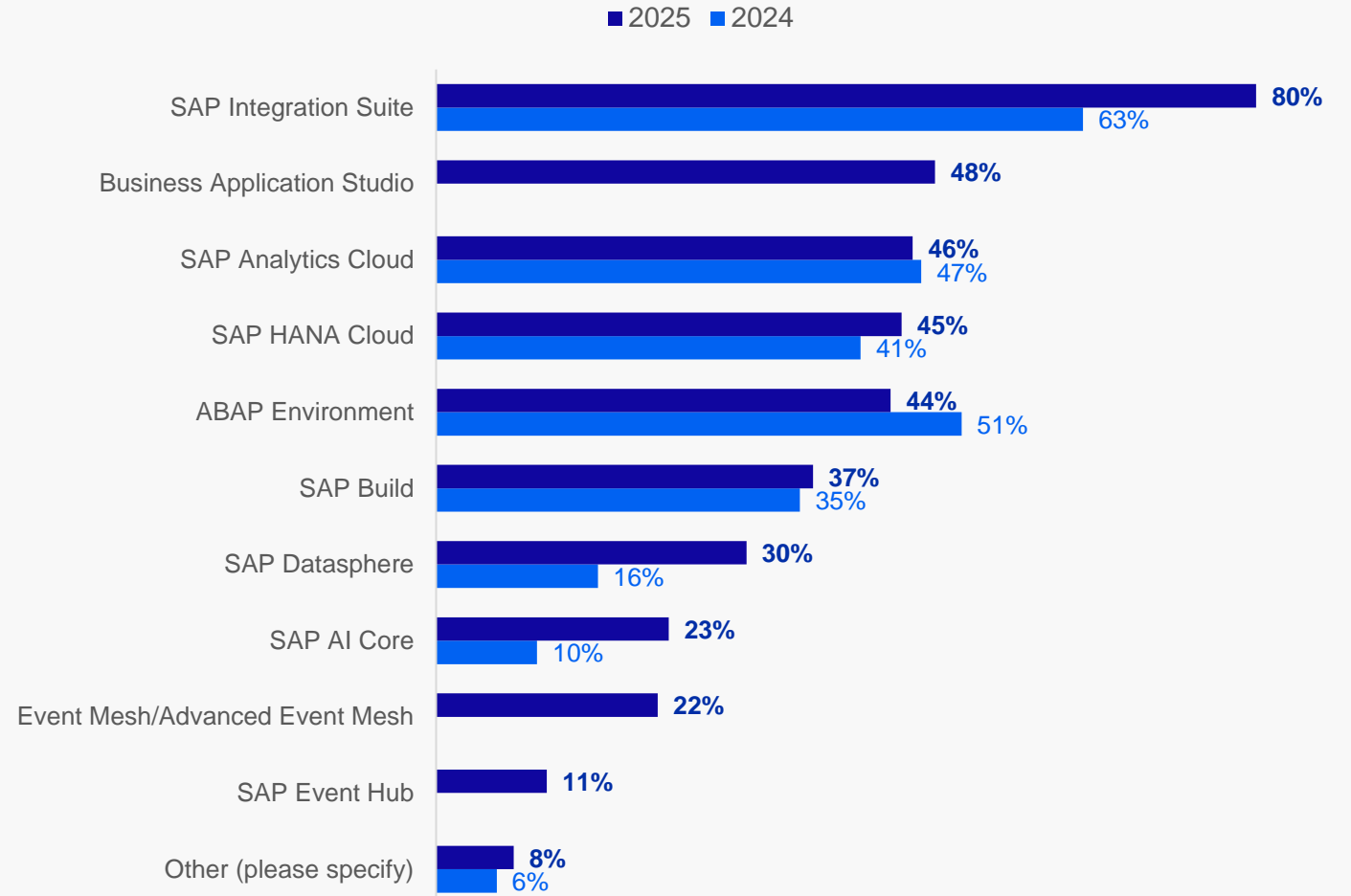
## View of Overall IT Landscape



5

SAP Integration Suite remains the most used service in SAP BTP and has grown significantly in usage over the past year (80% this year vs 63% in 2024). Part of this growth is driven by mainstream maintenance ending for legacy SAP integration solutions, such as Process Intelligence (PI) and Process Orchestration (PO), at the end of 2027. SAP has worked hard to position SAP Integration Suite as a replacement for existing PI/PO deployments and has even provided a deployment option called Edge Integration Cell to support organizations that will continue to require support for on-premise solutions with cloud-based SAP Integration and SAP BTP.

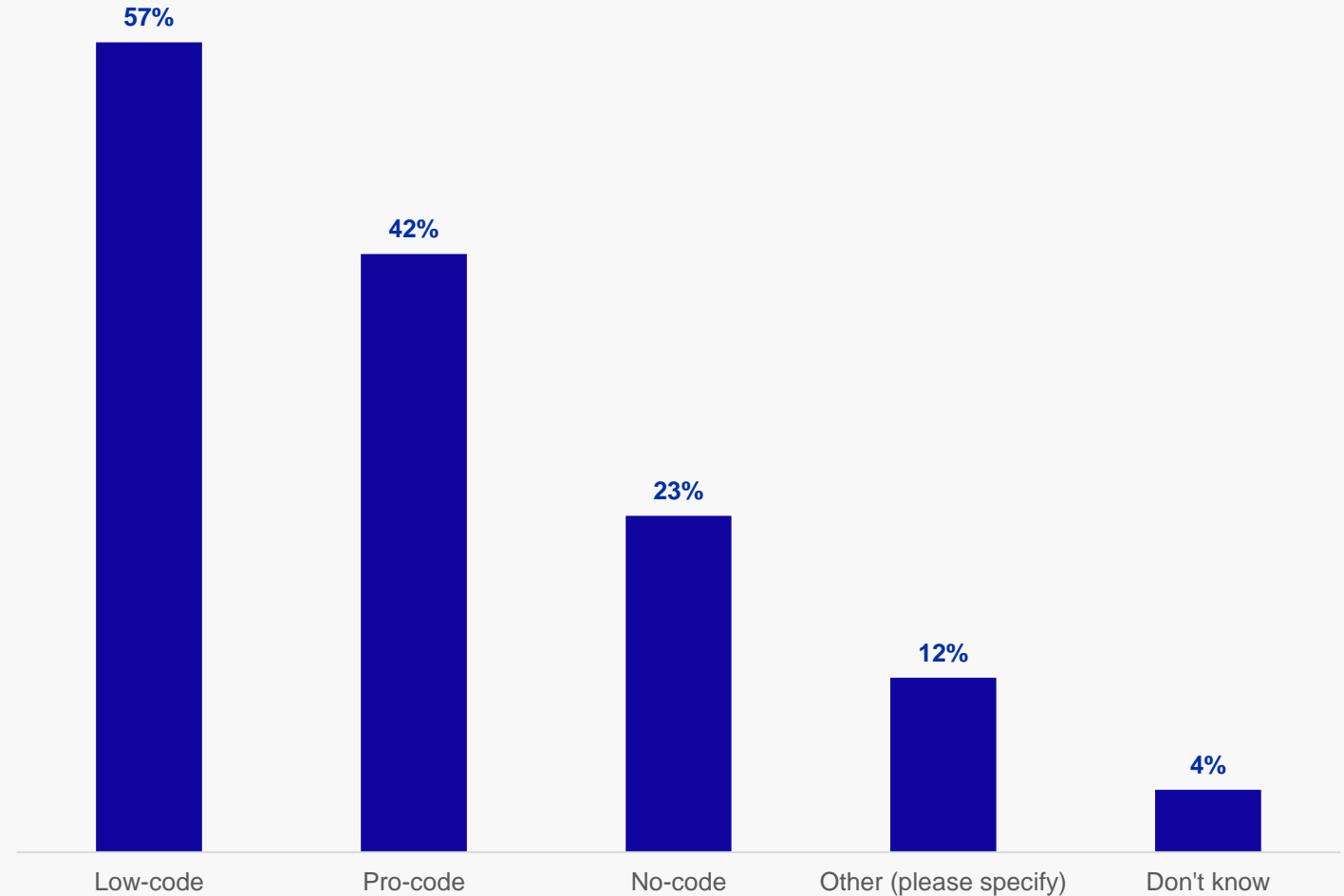
## SAP BTP Services Currently Being Used or Evaluated



## 6

With development being a key capability of enterprise platforms, respondents were asked whether their organization was using low-code, no-code, or pro-code development tools. Given that low-code development tools allow users that are not professional developers to build applications with minimal or no manual coding using visual interfaces, it is no surprise that these are the most used development tools by respondent organizations (57%). While SAP Build has provided a low-code development capability within SAP BTP, SAP customers can leverage other third-party low-code development tools. However, with SAP continuing to add functionality to SAP Build including SAP Build Work Zone, SAP Build Process Automation, and Joule for Developers, organizations will continue to expand their use of low-code development tools.

## Development Tools in Use

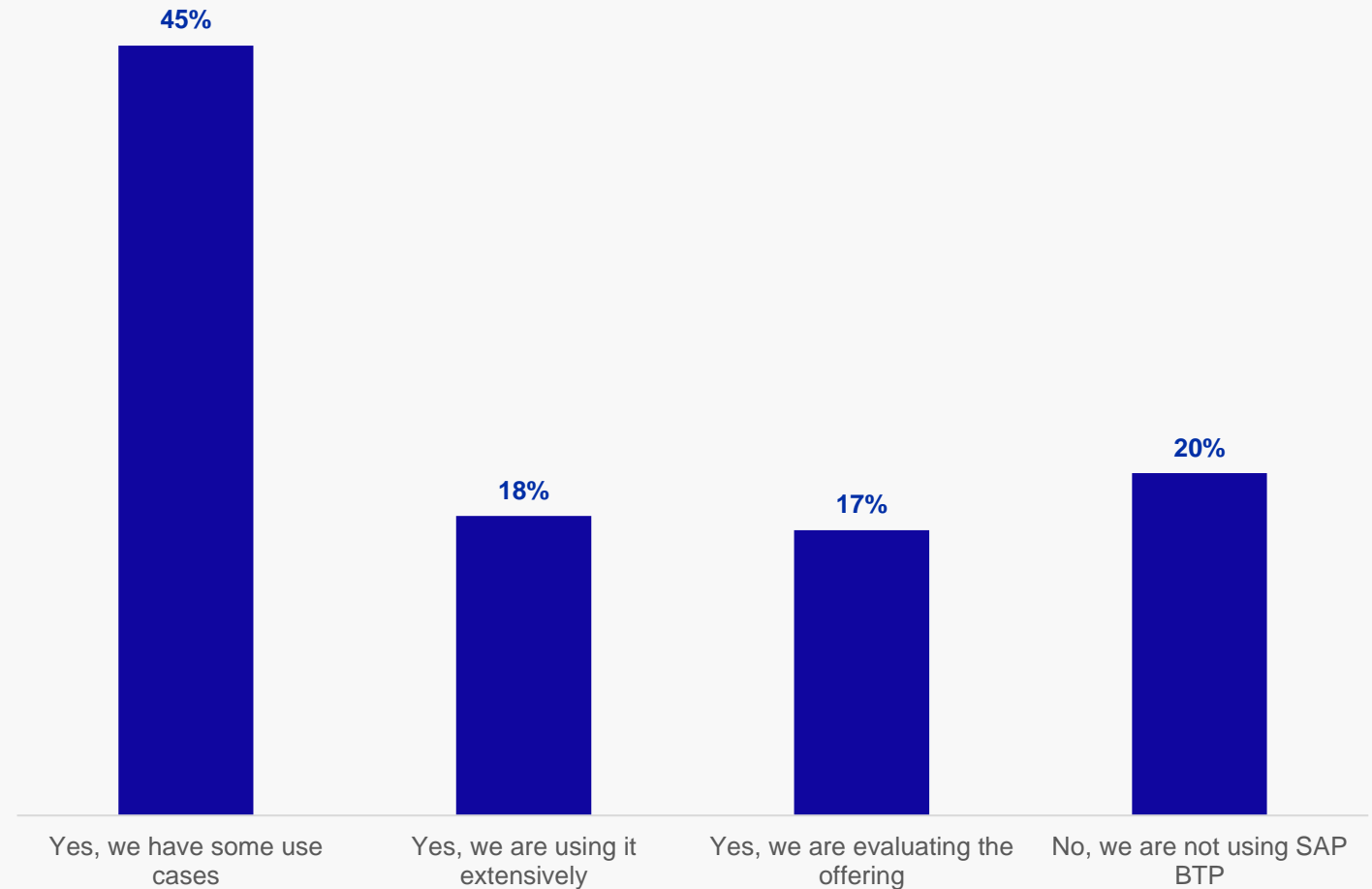


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Although this question was asked in a different manner in 2024, only 44% of respondents reported that their organization was using SAP BTP in any capacity while 42% reported that their organization was not. This year has seen a significant shift in responses, with only half as many (20%) respondents reporting that their organization is not using SAP BTP. Still, only a small proportion of organizations (18%) are using SAP BTP extensively with the largest respondent group (45%) being those that have just some use cases.

However, with usage and adoption of SAP BTP growing, there is significant evidence that SAP's emphasis on the solution as a foundation for SAP Business Suite has an impact on SAPinsiders.

## Use of SAP BTP in any Capacity

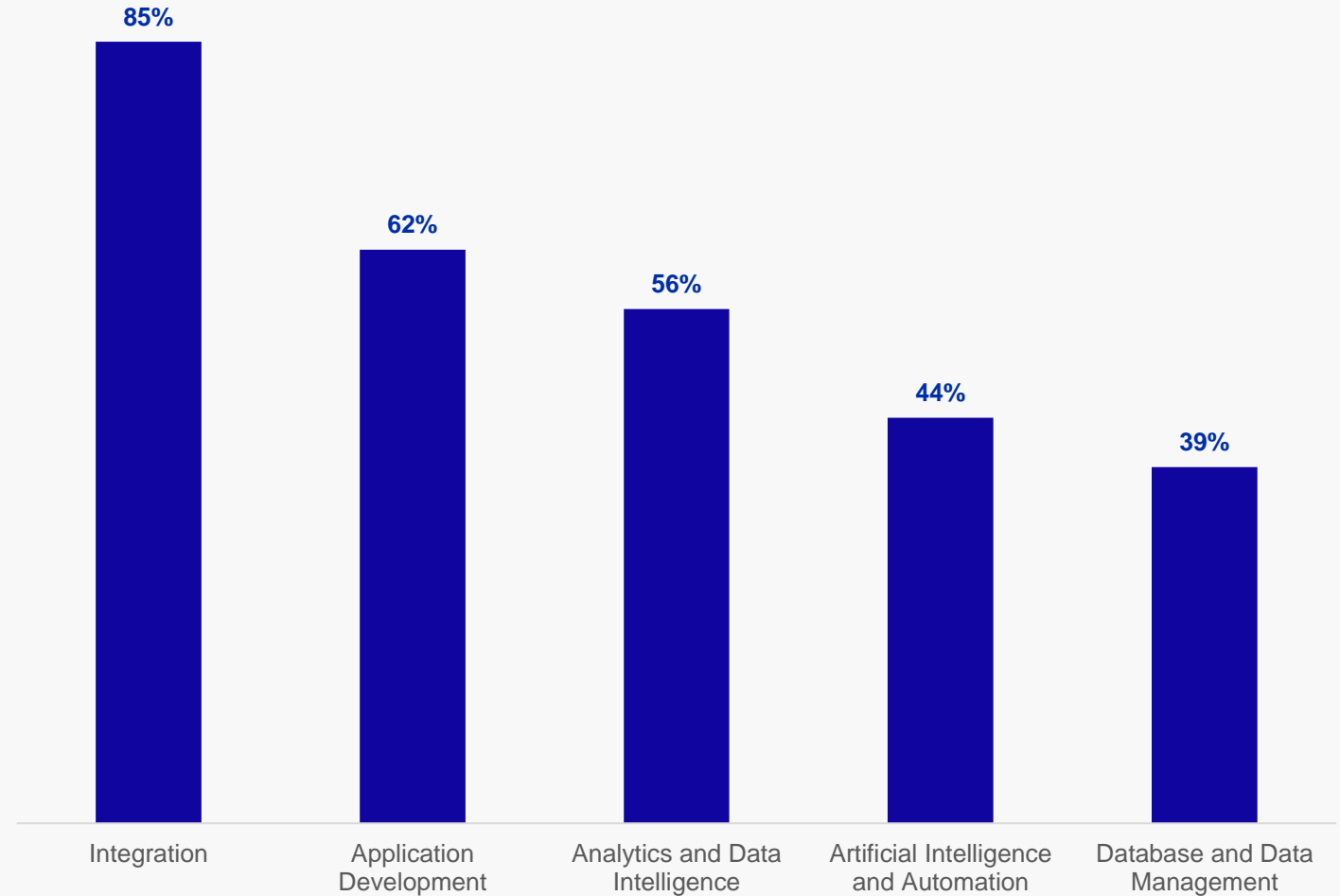


8

Given that SAP Integration Suite is the most used service in SAP BTP it is no surprise that integration is the most important capability in the platform. It is interesting that this is followed by application development, showing that organizations are looking at SAP BTP to create and deploy applications to support their SAP solutions.

Also, even though many organizations are exploring AI use cases and SAP BTP provides access to many AI models through AI Core and AI Foundation, AI is fourth in the list in terms of important capabilities in SAP BTP. This suggests that organizations that are testing AI use cases may be doing so outside SAP solutions.

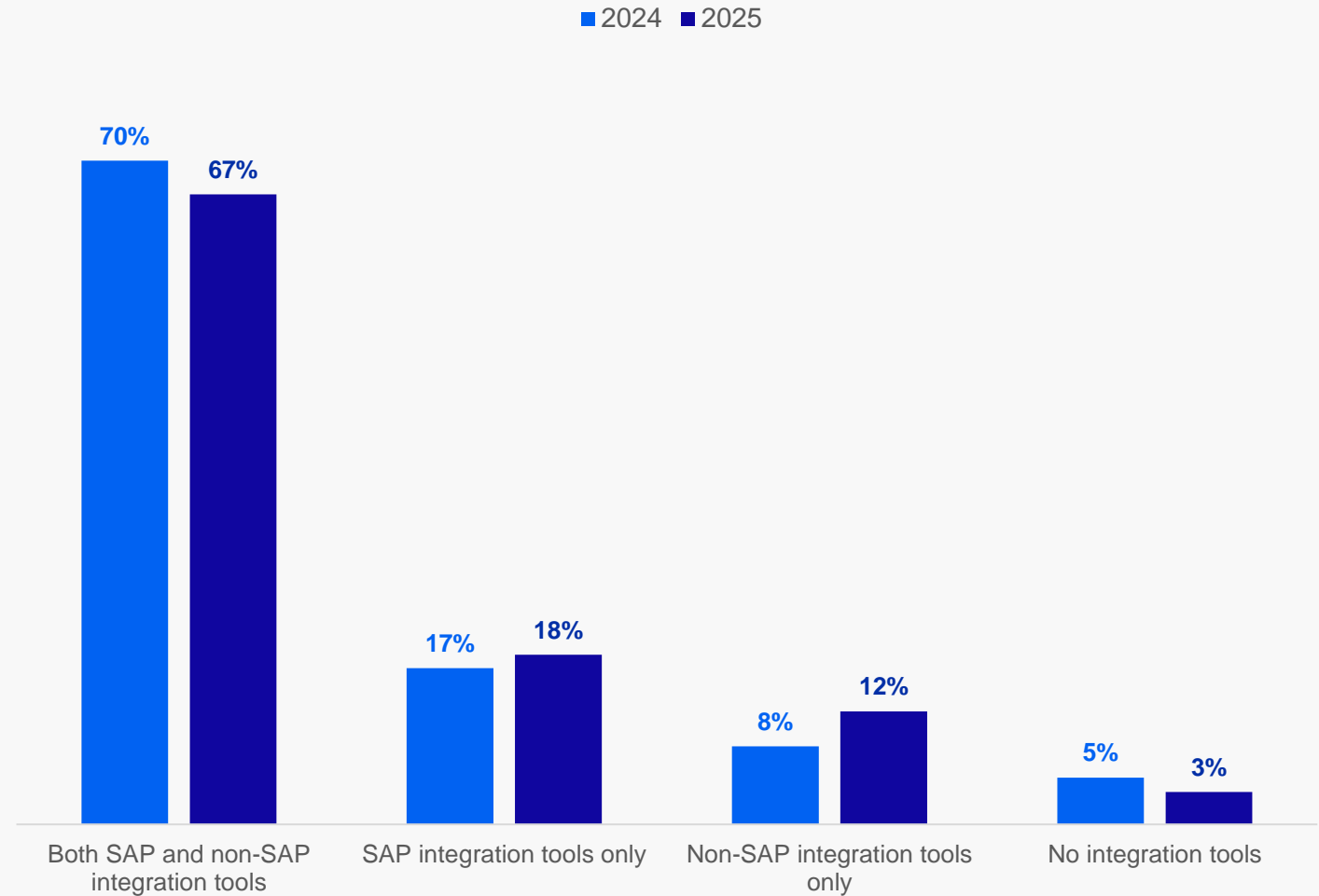
### Most Important SAP BTP Capabilities



## 9

Organizations continue to use a combination of SAP and non-SAP integration tools to meet their enterprise integration needs. The fact that more than two thirds (67%) of respondents continue to use both SAP and non-SAP integration tools suggests that relying purely on SAP integration tools is not meeting customer needs. In fact, this year saw an increase in those using non-SAP integration tools exclusively from 8% to 12%. While this is still a relatively small proportion of respondent organizations, it suggests that the complexity of today's enterprise landscape and utilizing non-SAP with SAP solutions for core business functionality requires integration with non-SAP solutions that may not be as well supported by SAP integration tools as by third-party ones.

## Types of Integration Tools Being Used

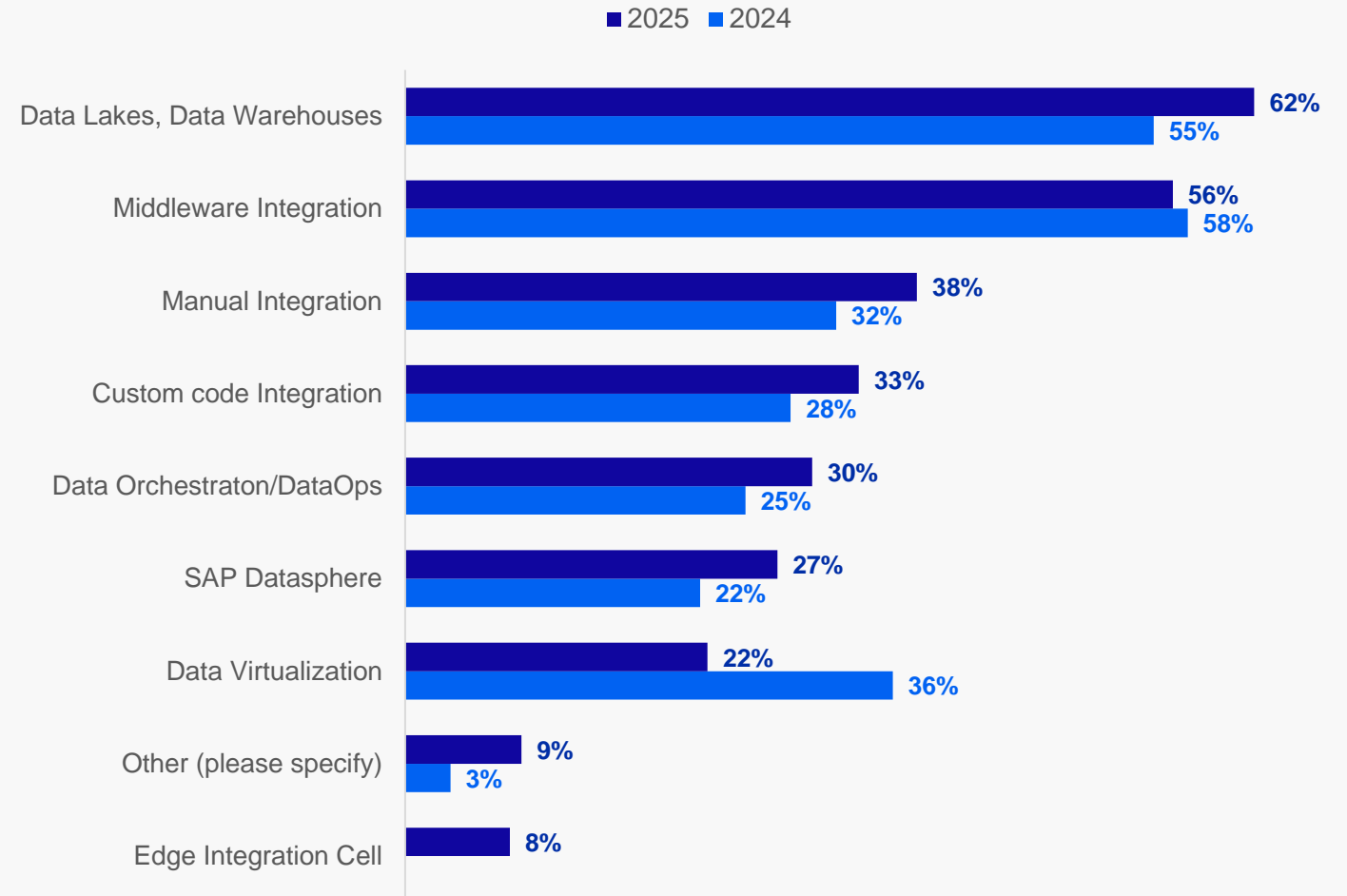


10

The number of organizations looking at data lakes or data warehouses to provide the means to integrate data across the enterprise grew this year. This could be part of a plan for data centralization that helps reduce siloed data across the enterprise. Supporting this development of data lakes and data warehouses are more traditional middleware integration capabilities and even manual integration.

Although there was some growth in those looking at SAP Datasphere to meet their enterprise data integration needs, that may shift this year with the introduction of SAP Business Data Cloud which includes SAP Datasphere.

## Approaches Taken to Integrate Data Across the Enterprise

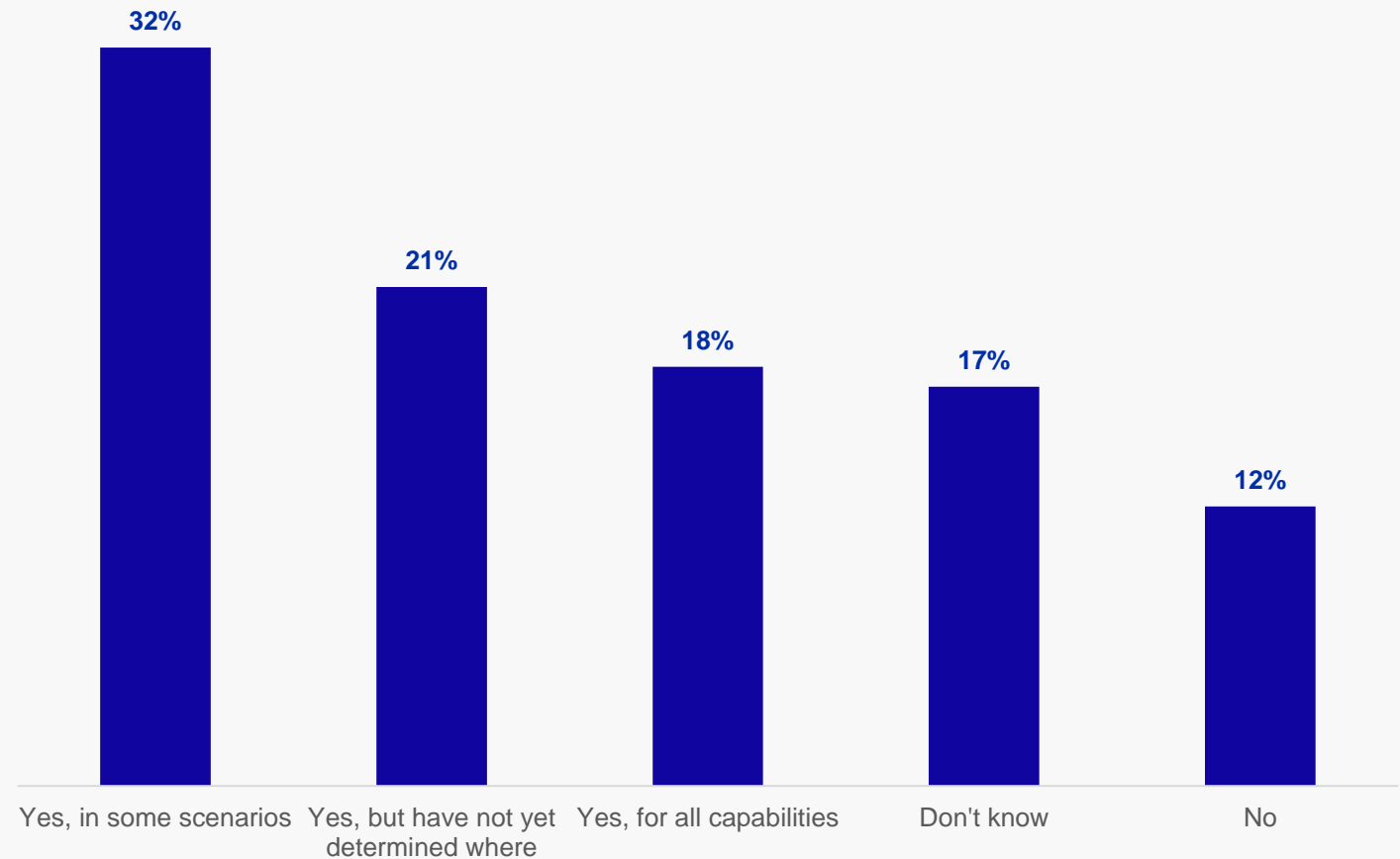


## 11

A relatively small proportion of respondents plan to replace all their existing integration capabilities with SAP Integration Suite, although this is something that SAP has been positioning. It is more likely that organizations will use SAP Integration Suite in some scenarios and continue leveraging other integration tools.

This is borne out by the fact that respondents report they are, on average, integrating 37 different applications with their SAP solutions today (up from 33 last year) with 11 different integration tools. Though some rationalization of integration tools has occurred, the average was 20 in 2024, there is still work to be done for organizations that want to effectively streamline integration capabilities.

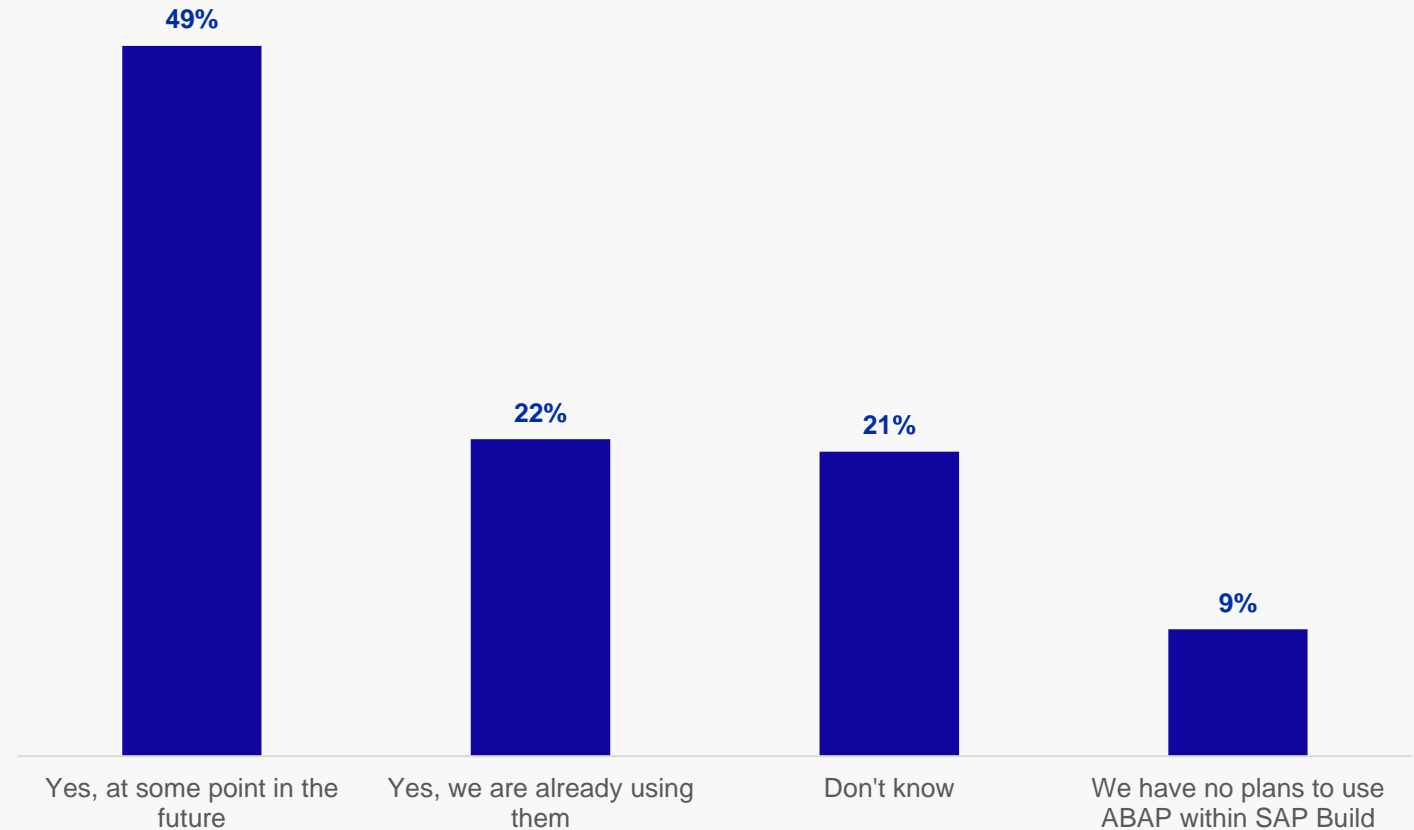
### Plans to Update or Replace Existing Integration Capabilities with SAP Integration Suite



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SAP has recently introduced ABAP capabilities into SAP Build, so it is no surprise that only a relatively small proportion of respondent organizations are already using these capabilities. However, nearly half the respondents to the research planned to use these capabilities at some point in the future, suggesting that there is much interest in both SAP Build and what SAP is doing to provide a transition path to the cloud for ABAP developers.

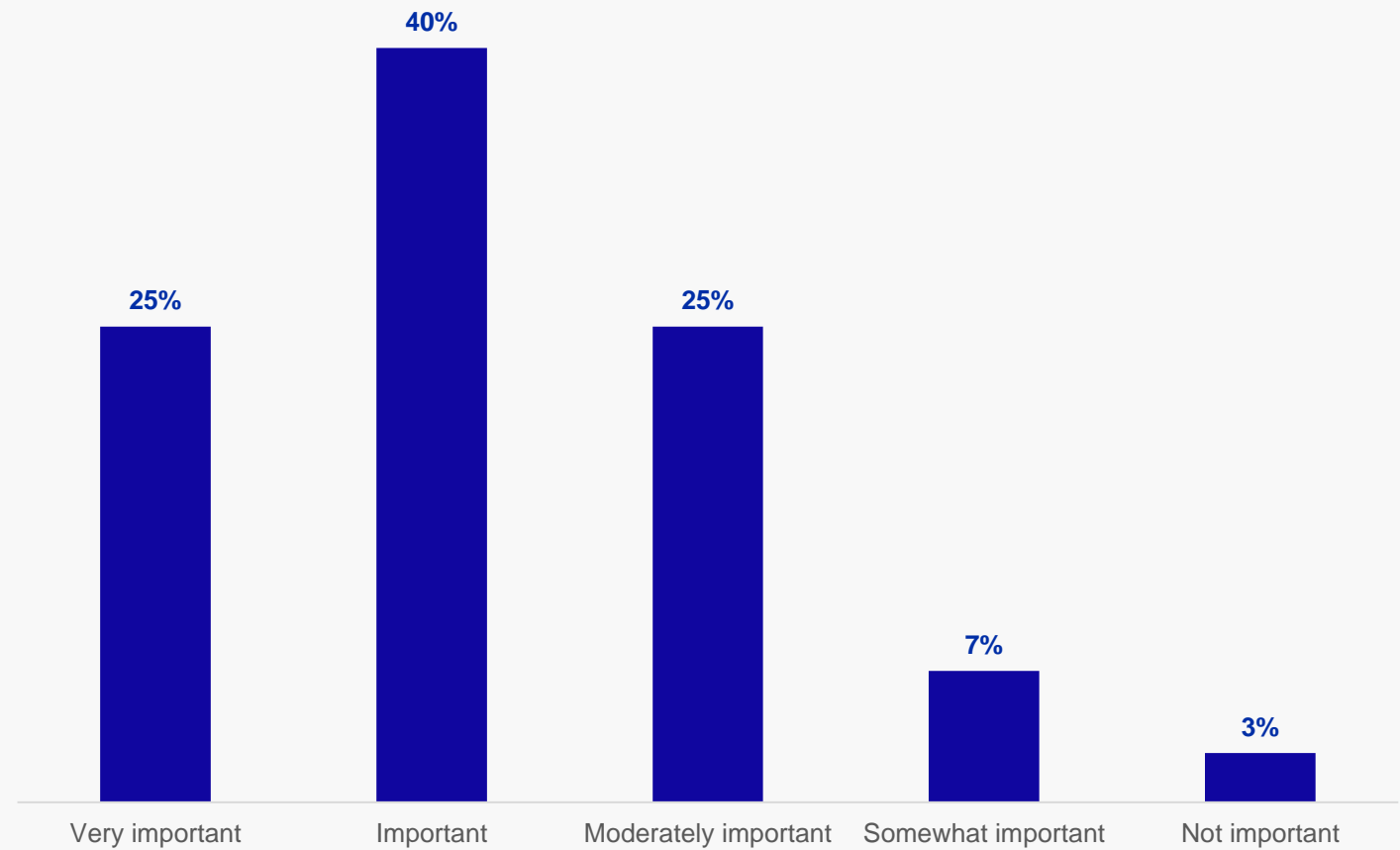
### Intent to Use ABAP Capabilities Within SAP Build



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Although the number of respondents who regarded AI and automation as important features in SAP BTP was relatively low, at least compared to topics like integration, there is much higher interest in having AI capabilities in development tools. Given that much has been said about the ability of AI to assist with coding and the fact that SAP has introduced an ABAP large language model (LLM) to help developers, there is obvious interest in the SAP community to access these tools.

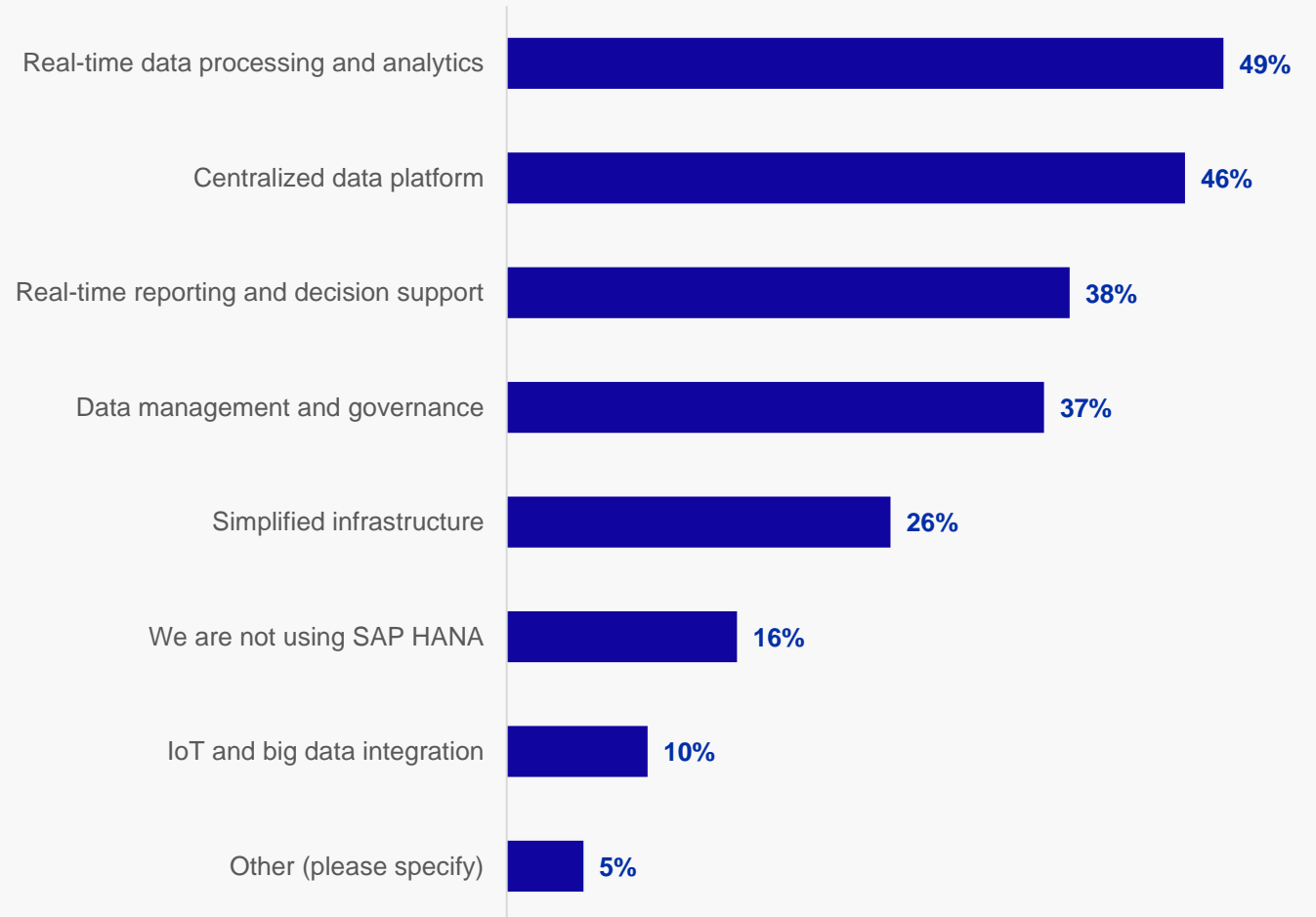
### Importance that Application Development Tools Include AI Capabilities



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Moving to SAP HANA is a significant shift for organizations. Although it is now the foundation for many SAP solutions, switching to the database is both more expensive than traditional relational databases from a license standpoint and requires a completely different infrastructure to support in-memory capabilities. Thus, adoption of the database is something that organizations must plan for carefully. However, with the introduction of SAP HANA Cloud there may be more flexibility and scalability than when deployed. Still, that does not mean that SAP HANA does not play an important role in organizational data strategy as highlighted in this question, especially as a centralized data platform for SAP customers and with real-time data processing for which the performance offered by in-memory capabilities are particularly suited.

## Role SAP HANA Plays in Organizational Data Strategy

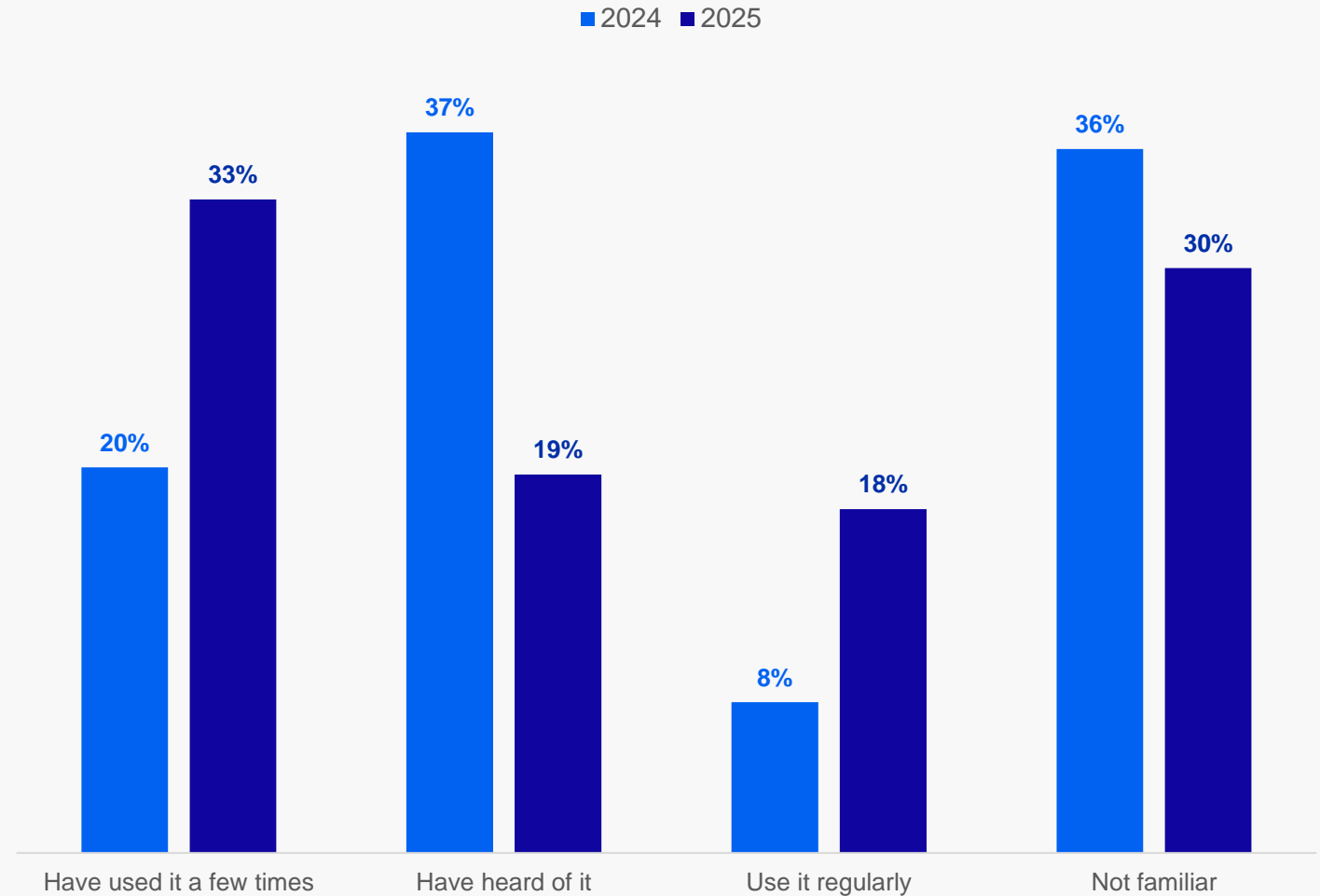


15

This year has shown a significant growth in the number of respondents that are using SAP BTP Discovery Center regularly or occasionally, although most of that growth appears to have come from those that had heard of SAP BTP Discovery Center in the past but perhaps were not using it.

As one of the best tools for education and understanding of the services in SAP BTP, organizations should utilize this free service to ensure that internal teams can ramp up quickly on the platform.

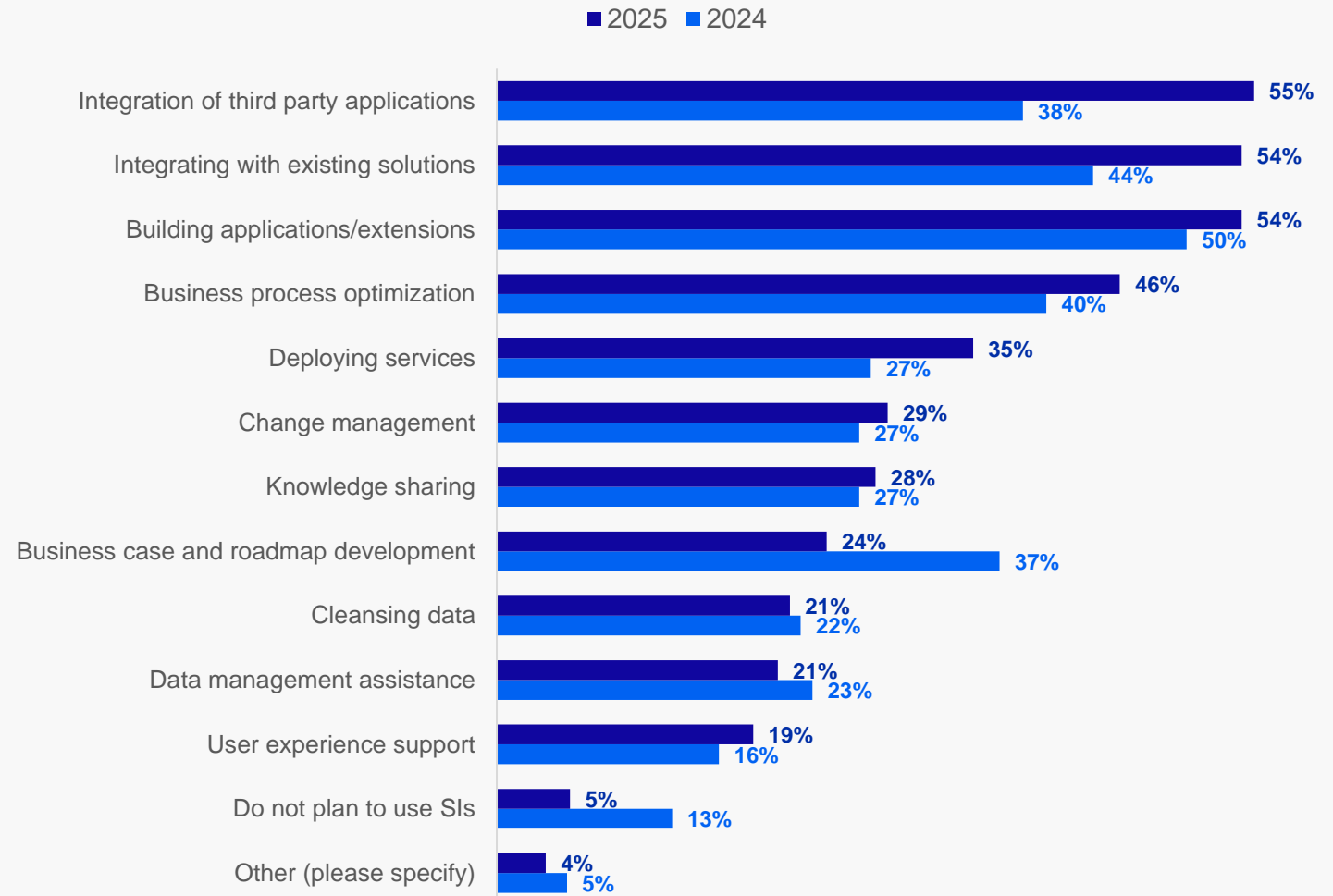
## Familiarity with SAP BTP Discovery Center



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The biggest change in the planned use of consultants or SIs to support enterprise platform plans relates to assistance with integration. The number of respondents who planned to use consultants to assist in integration with existing solutions grew this year, with a larger jump among those that plan to use them to support integration of third-party applications. Integration is complex, even when using tools that have pre-built connectors for systems, and internal teams do not always have the skill sets to effectively support these systems. This is where consultants and integrators are expected to aid in addition to the more traditional roles of building extensions, change management, deployment, and knowledge sharing.

## Planned Use of Consultants or SIs to Support Enterprise Platform Plans





# Data and Enterprise Platforms Strategy



## DRIVERS

- Streamline processes, automate workflows, and reduce redundancy to improve operational efficiency (41%)
- Modernize legacy systems, support digital transformation, and innovate more rapidly to remain competitive (36%)
- Centralize data enabling enhanced analytics and business intelligence tools and support data-driven decision making (26%)
- Demand to support adoption of seamless and flexible business processes (25%)



## ACTIONS

- Implementing integration strategies across cloud and on-premise SAP and non-SAP systems (48%)
- Moving to cloud-based enterprise platforms to achieve better flexibility, scalability, and cost management (47%)
- Centralizing data into unified platforms to facilitate better reporting, analytics, and decision-making (47%)
- Implementing automation tools within enterprise platforms to streamline workflows and reduce manual tasks (42%)



## REQUIREMENTS

- Comprehensive security and compliance policies (89%)
- Information security and security in transit (86%)
- Integration of SAP and non-SAP solutions (83%)
- Strong data governance policies and practices (80%)
- Platforms that better support connected data and integration capabilities (80%)



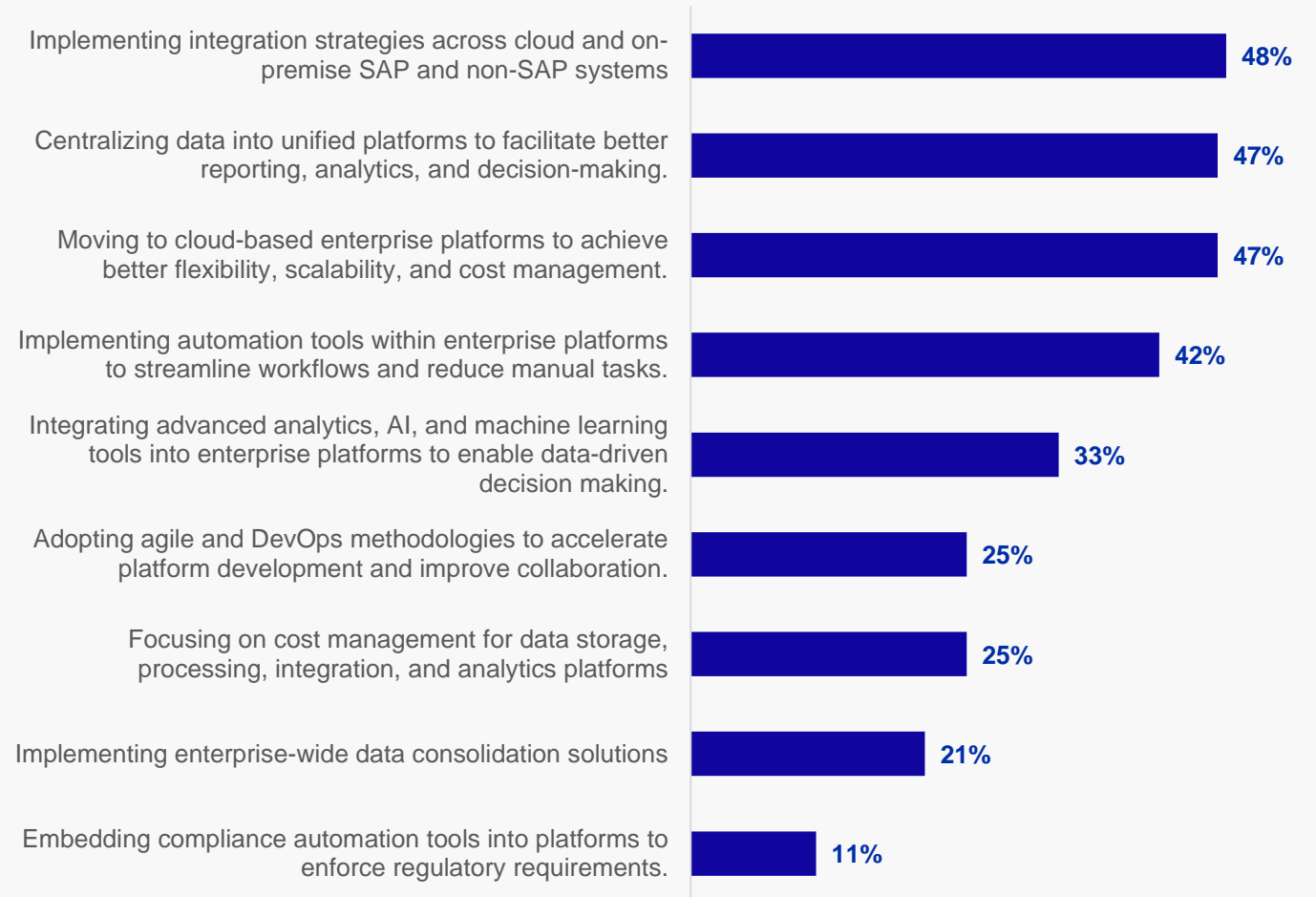
## TECHNOLOGIES

- Data analytics and business intelligence (50%)
- Identity and access management (48%)
- Security and threat detection tools (46%)
- Cloud infrastructure (45%)
- Cloud-based data stores (43%)
- DevOps and CI/CD tools (36%)
- Data governance and compliance (34%)
- API and microservices architectures (33%)
- Unified data and integration platforms (30%)
- Low-code/no-code platforms (24%)
- Infrastructure as Code (22%)
- AI and machine learning (21%)

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With organizations focused on streamlining processes to improve efficiency, modernizing systems to innovate more rapidly, centralizing data to enable enhanced analytics, and the business demanding a seamless adoption of flexible business processes, organizations must put in place strategies that support these needs. This starts with implementing integration strategies across increasingly complex enterprise environments, centralizing into unified platforms, moving to the cloud to support system modernization, and implementing automation tools to support the adoption of streamlined processes and workflows.

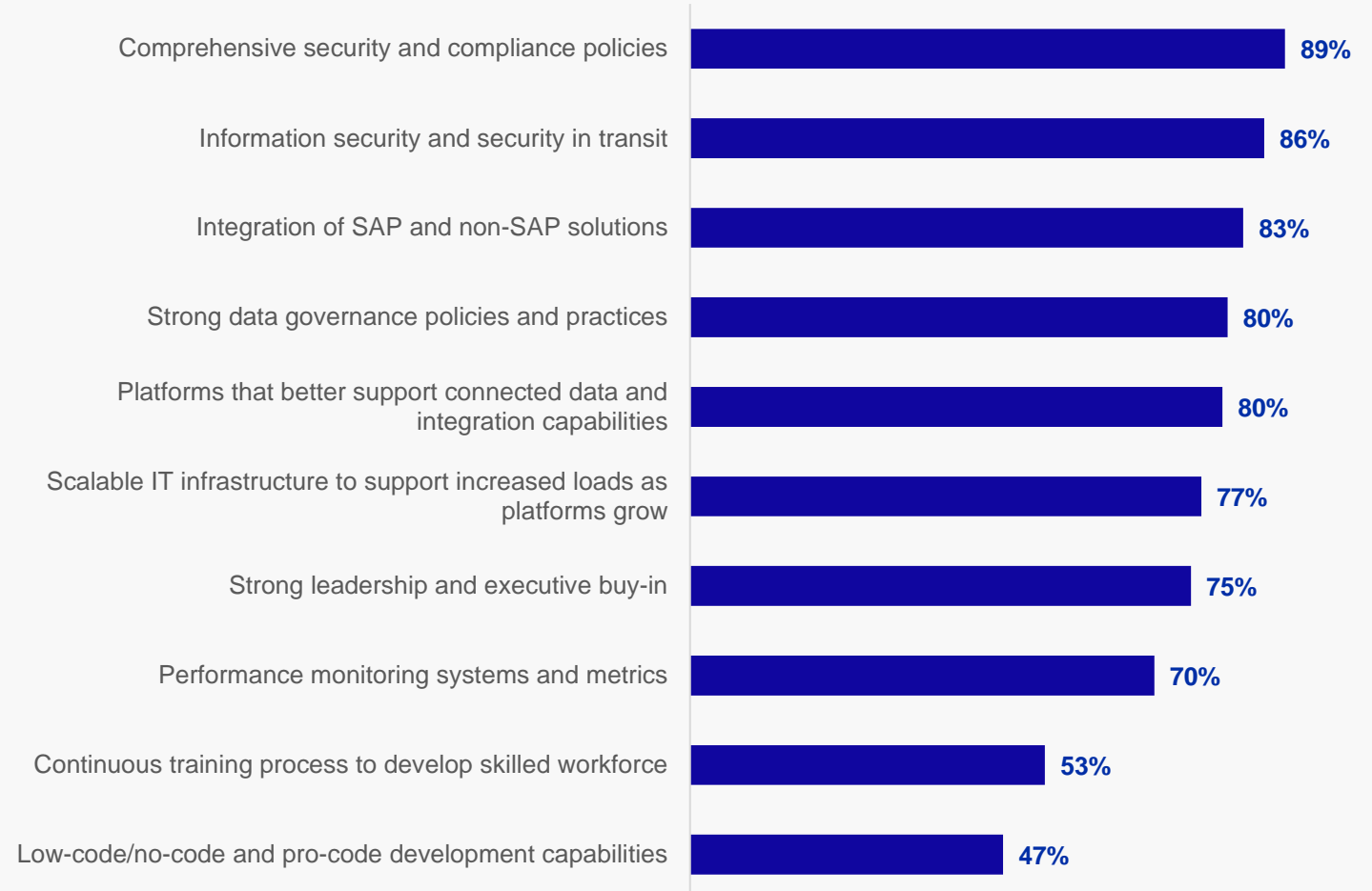
## Strategies Supporting Data and Enterprise Platform Needs



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**Comprehensive security and compliance policies remain at the top of the list for organization's data, integration, and enterprise platform plans as the threat environment becomes increasingly mature. This also includes a need for information security and strong governance policies that relate to accessing data inside the organization and using AI. The only one of the top four requirements that organizations must meet as they implement their data, integration, and enterprise strategy plans is integrating SAP and non-SAP solutions. This makes it vital for organizations to focus on security at the start of their deployments rather than adding it later in the process.**

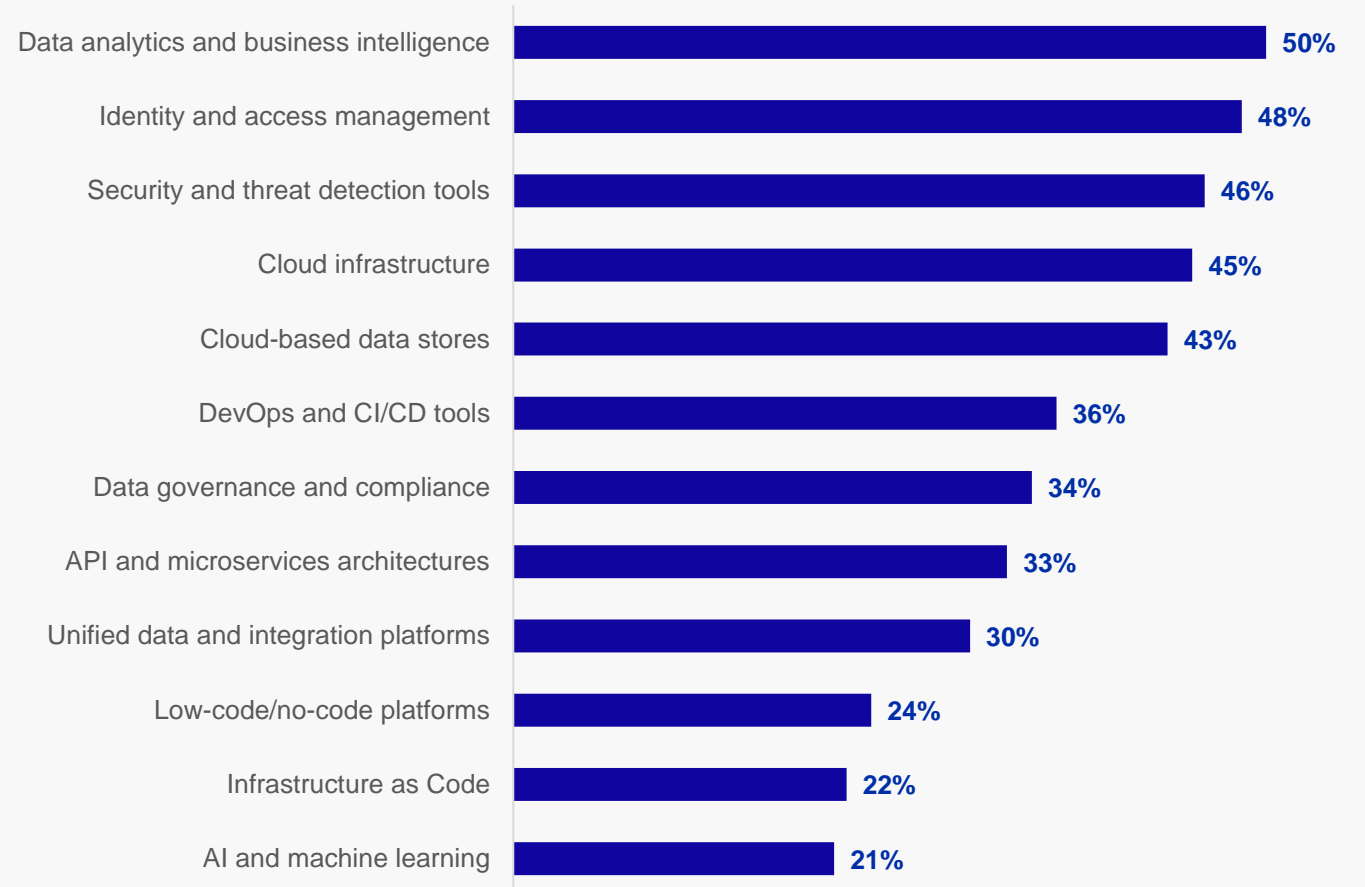
## Requirements for Data and Enterprise Platform Plans



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The technologies in use supporting data, integration, application development, and enterprise platform strategies start with analytics and BI. They are immediately followed by those supporting security – identity management and security and threat detection tools. Cloud infrastructure and cloud-based data stores are at the top of the list of environments in which these innovations are happening. These technologies align with the requirements that organizations must meet if they are to deploy these platforms effectively.

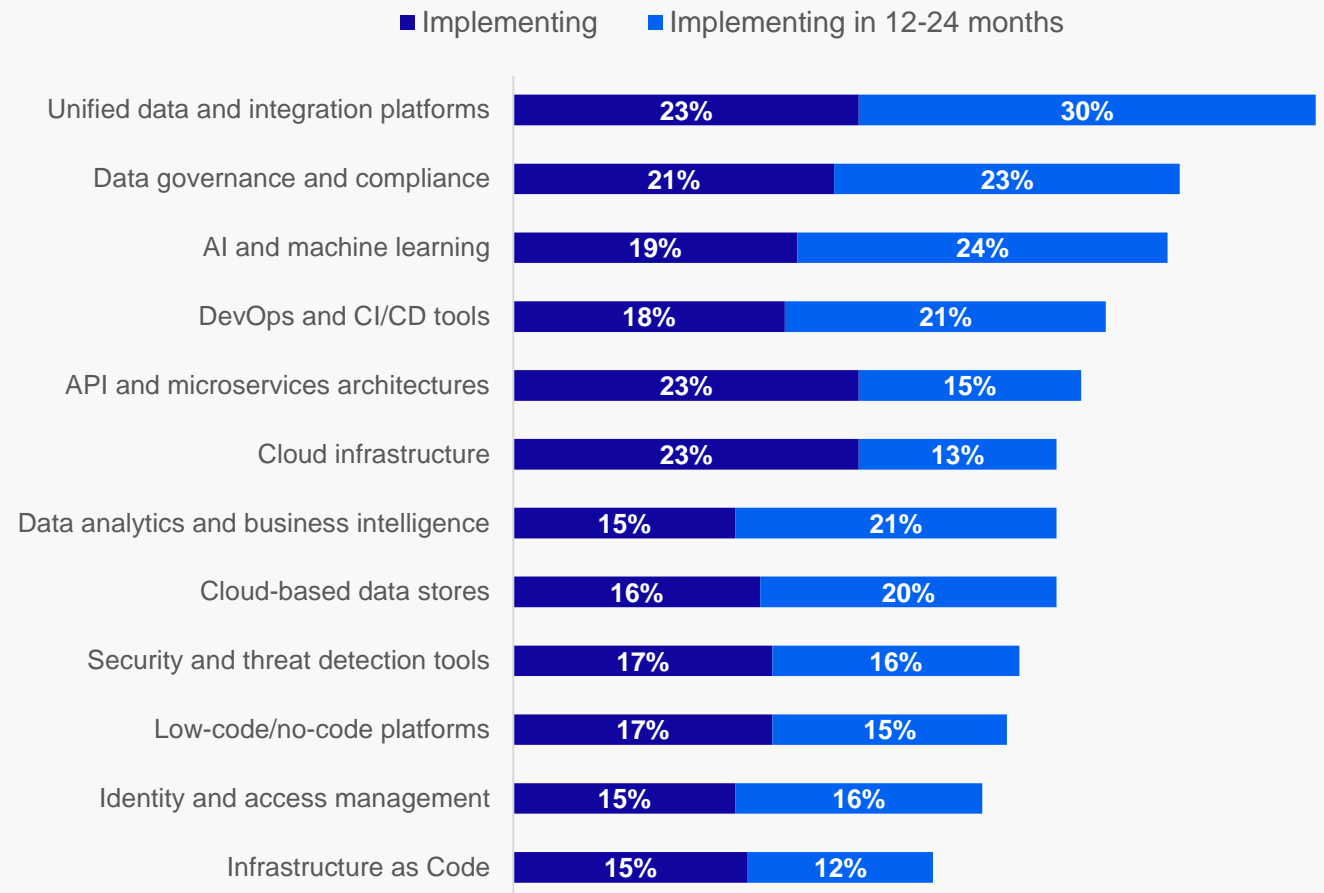
## Technologies Being Used to Support Data and Enterprise Platform Strategies



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Despite limited use today, unified data and integration platforms are being deployed by more than half the respondents to support their data and enterprise platform strategies. These could be solutions like SAP Integration Suite but could equally be a third-party solution offering deeper connectivity to non-SAP solutions. Data governance and compliance solutions along with AI and machine learning are also being deployed. DevOps and Continuous Improvement/Continuous Development tools and API and microservices architectures are next on the list.

## Technologies Being Implemented to Support Data and Enterprise Platform Strategies

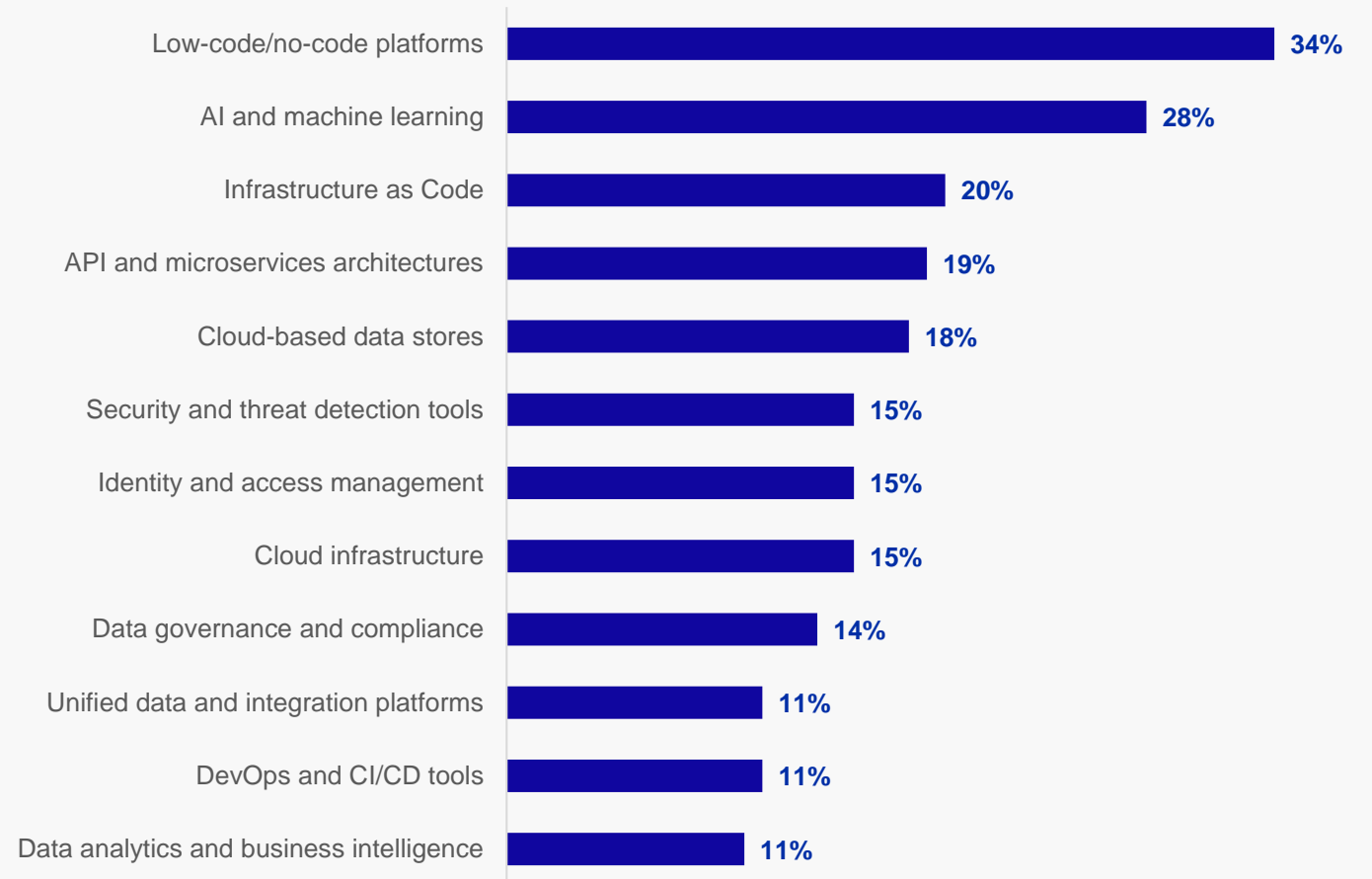


21

In the future, organizations are evaluating a much more significant use of low-code and no-code platforms. While solutions like SAP Build have seen reasonable adoption, as SAP continues to add features like Joule for Developers and access to additional new functionality, significantly more adoption is likely.

Beyond this, more organizations continue to evaluate AI, whether it is generative AI or not, and machine learning capabilities to support faster and more accurate decision making. This adoption will continue to grow over the coming years.

## Technologies Being Evaluated to Support Data and Enterprise Platform Strategies



THANK YOU

## Robert Holland

Vice President and Research Director  
[robert.holland@wellesleyglobal.com](mailto:robert.holland@wellesleyglobal.com)



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