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DETAILED FINDINGS

Benchmark Intelligence Report:

SAP Business Data Cloud (BDC)

Use Cases and Adoption

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Survey conducted by SAPinsider in 2026 on SAP Business Data Cloud (BDC) adoption

Across multiple industries, functions, and company sizes, IT Operations (38%), IT Management (24%), and Data Engineering (8%)

Industries represented: Software & Technology (34%), Industrial/Manufacturing (28%), Retail/Distribution (12%)

Revenue range: from under $50M to over $10B organizations

About This Research

This research highlight show organizations are using and adopting SAP BDC in their SAP ecosystems, how their data architecture and governance readiness aligns with their SAP BDC implementation, the top drivers and barriers to adoption, and which SAP BDC use cases and products are in production.

Key takeaways:

- An understanding of where SAP customers are in adopting SAP BDC.
- Insight into how leading organizations are extracting the most value from their data.
- The ability to benchmark your own data and analytics maturity with your peers

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SAP Business Data Cloud: Platform Overview & Market Context

What is SAP Business Data Cloud?

SAP BDC is SAP's unified data and AI platform, bringing together data integration, governance, semantic modeling, and analytics into a single governed cloud fabric.

Key capabilities:

- Unified data layer connecting SAP + non-SAP sources
- Business semantic models (industry data models)
- Native SAP Analytics Cloud & Datasphere integration
- Built-in AI / ML via SAP AI Core and Joule
- Data Marketplace for sharing governed data products

Predecessor, Successor & Roadmap

- PREDECESSOR: SAP BW / BW4HANA + SAP Data Warehouse Cloud (DWC)
  Separate products, siloed analytics, limited AI / LLM integration
- SAP BDC (current): Converged platform — Datasphere + SAC + AI Core
  Announced 2024, GA rollout 2024-2025 on SAP BTP
- ROADMAP (2025-2027): Deeper Joule AI agent integration, expanded industry cloud data models, zero-ETL SAP-to-SAP connectivity, and an open data Lakehouse on Hyperscaler infrastructure.

Components & SAP BTP Architecture Fit

SAP BDC sits within the SAP BTP (Business Technology Platform) data layer:

SAP Datasphere — Data integration, transformation, semantic layer

SAP Analytics Cloud — Planning, BI, predictive analytics

SAP AI Core / AI Launchpad — AI/ML model training & deployment

SAP Integration Suite — Connect SAP + non-SAP data pipelines

SAP Data Marketplace — Governed data product exchange

Hyperscaler Storage (AWS/Azure/GCP) — Open lakehouse foundation

Where the Market is Going

- AI-First Data Architecture: LLM-ready datasets & semantic models become the default output of SAP BDC implementation.
- Agentic Workflows: Joule-powered AI agents run end-to-end supply chain, finance & HR analytics without human handoffs.
- Industry Cloud Data Models: Pre-built models for manufacturing, retail, and financial services reduce time-to-value.
- Open Ecosystem: SAP BDC interoperates with Databricks, Snowflake, and major hyperscalers — positioning SAP alongside cloud-native tools.

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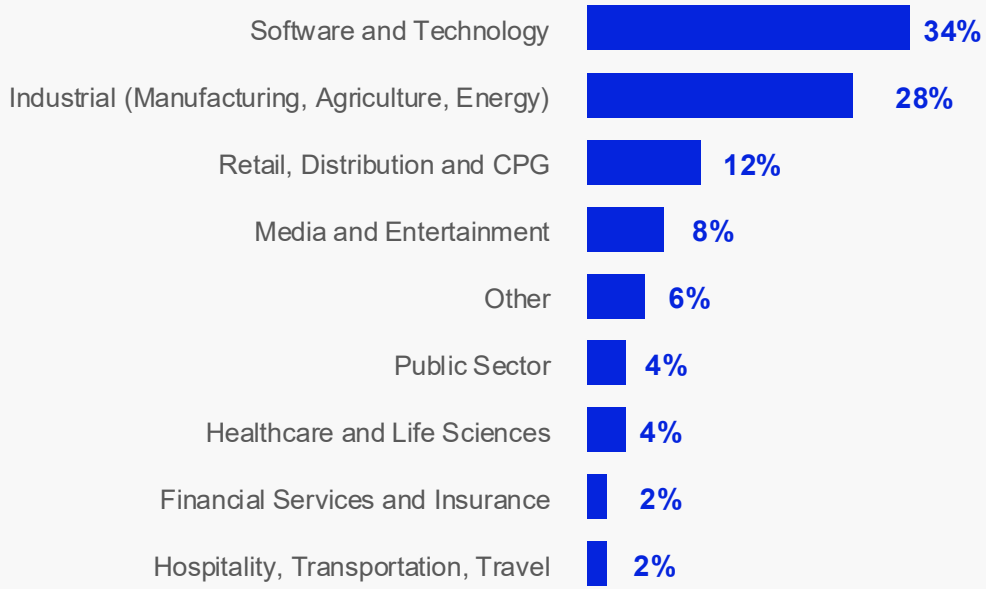
The survey shows Software & Technology (34%) and Industrial/Manufacturing (28%) as the dominant respondent groups, confirming relevance across SAP's core verticals. The insight that this cross-industry spread ensures findings are applicable across SAP's core vertical markets suggests broad applicability of SAP BDC trends. Organizations should benchmark themselves against peers in similar industries to understand competitive positioning and adoption urgency.

Respondent Organization Industry



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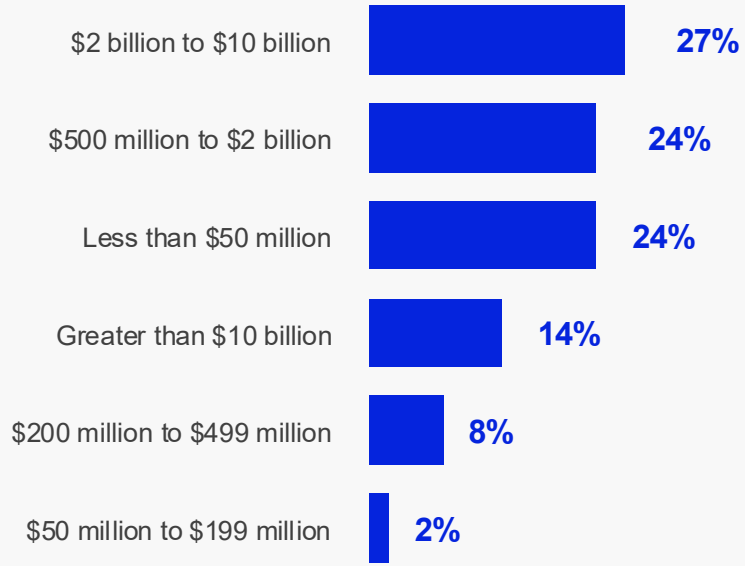
The largest cohort falls in the $2B–$10B range (27%), with 46% representing large enterprises, indicating that SAP BDC adoption is being driven primarily by complex, global organizations. The report notes that this gives these findings strong relevance for enterprise-scale SAP BDC deployments. Companies should assess whether their scale and complexity require early BDC adoption to stay aligned with enterprise best practices.

Respondent Organization Annual Revenue



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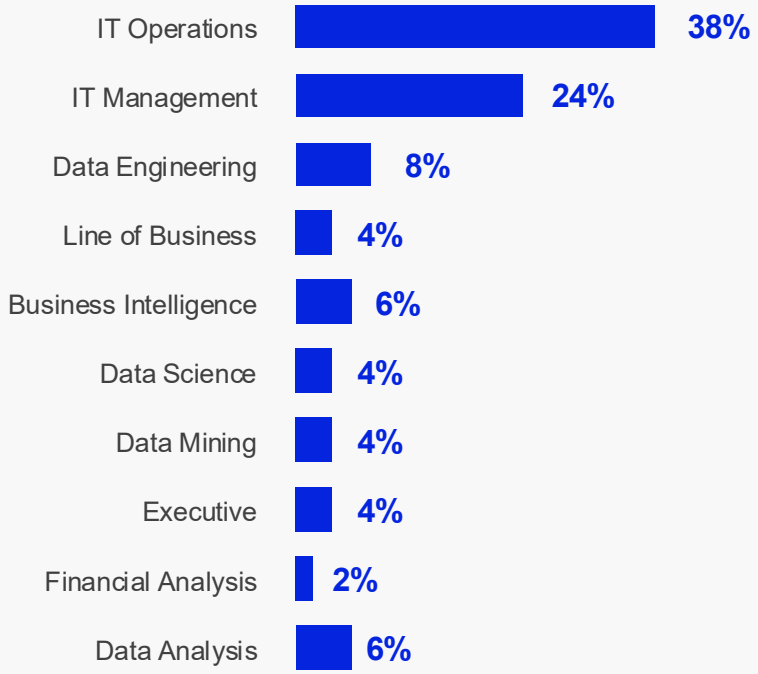
IT Operations (38%) and IT Management (24%) dominate the respondent base, showing that SAP BDC evaluation is still largely IT-led. This reflects the teams directly responsible for SAP BDC technical evaluation and deployment. Organizations should broaden involvement by including business stakeholders early to accelerate use-case definition and value realization

Respondent Department / Functional Area



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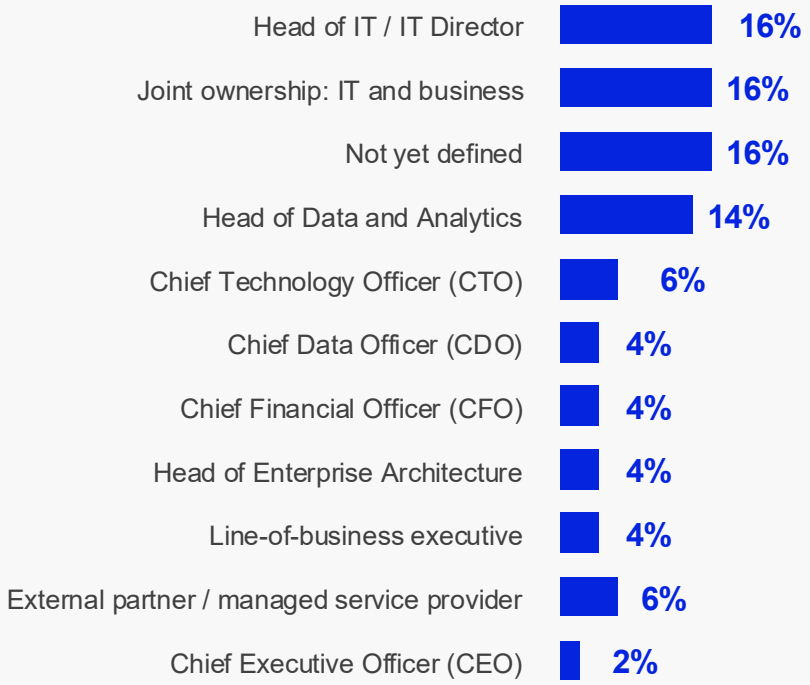
Ownership of SAP BDC strategy is fragmented, with IT Directors (16%) leading but 14% have no defined ownership — a governance gap that slows decision-making. This lack of clarity can delay architecture decisions and use-case prioritization. Organizations should establish a clear owner—ideally a joint IT–business governance model—to accelerate progress.

SAP BDC Strategy Ownership by Role



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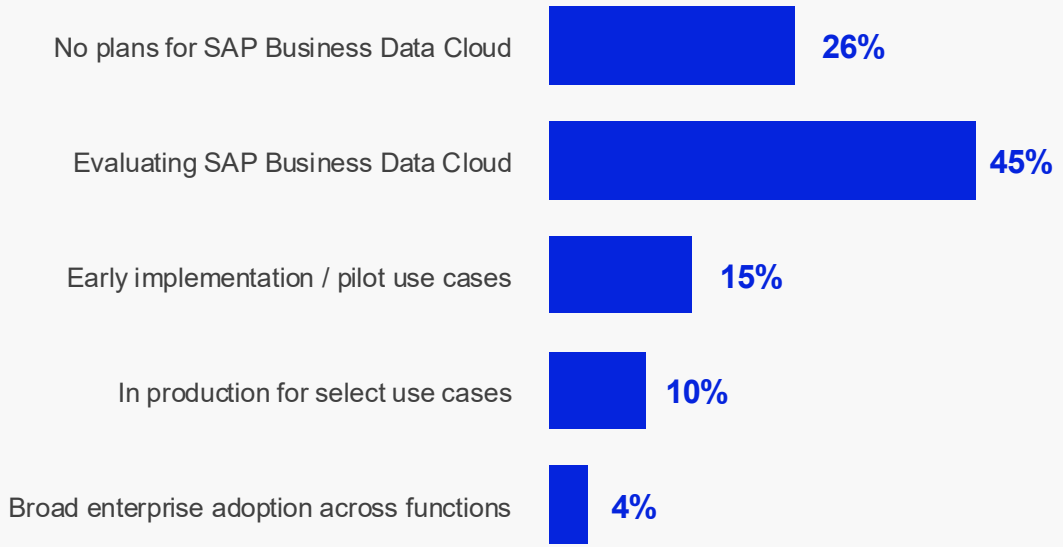
Most organizations are early in their journey, with 45% evaluating and only 4% achieving broad adoption. This makes SAP BDC firmly a 2026-2027 deployment horizon for most companies. Companies should focus on pilots and foundational architecture work now to avoid falling behind as adoption accelerates.

Current SAP Business Data Cloud Adoption Level



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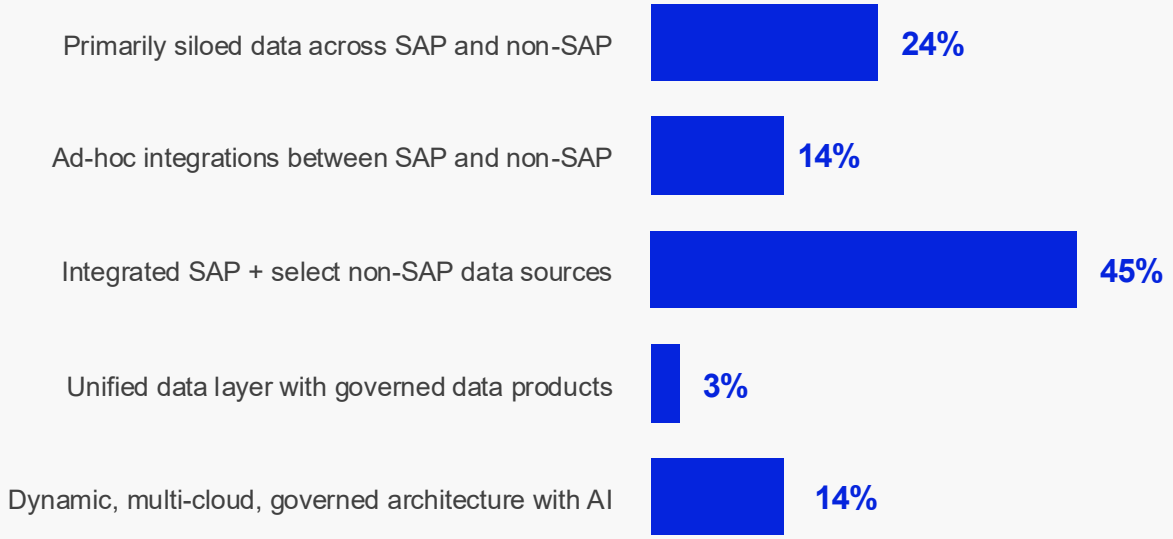
Only 3% report a unified governed data layer, while 45% have partial SAP + non-SAP integration. Thus, architecture readiness remains the critical prerequisite for realizing SAP BDC value, underscores the need for modernization. Organizations should prioritize harmonizing data models, reducing silos, and establishing a governed semantic layer.

Organization Data Architecture Maturity



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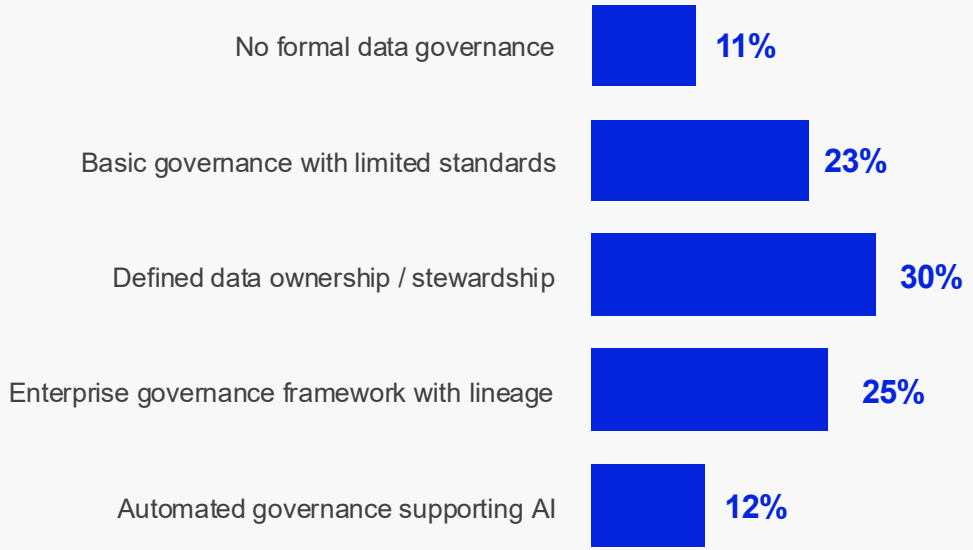
A third of organizations have no or only basic governance, and only 12% have automated governance suitable for AI. This is a critical gap for SAP BDC adoption. Companies should invest in stewardship models, metadata management, and automated lineage to support AI and real-time analytics.

Data Governance Model Maturity



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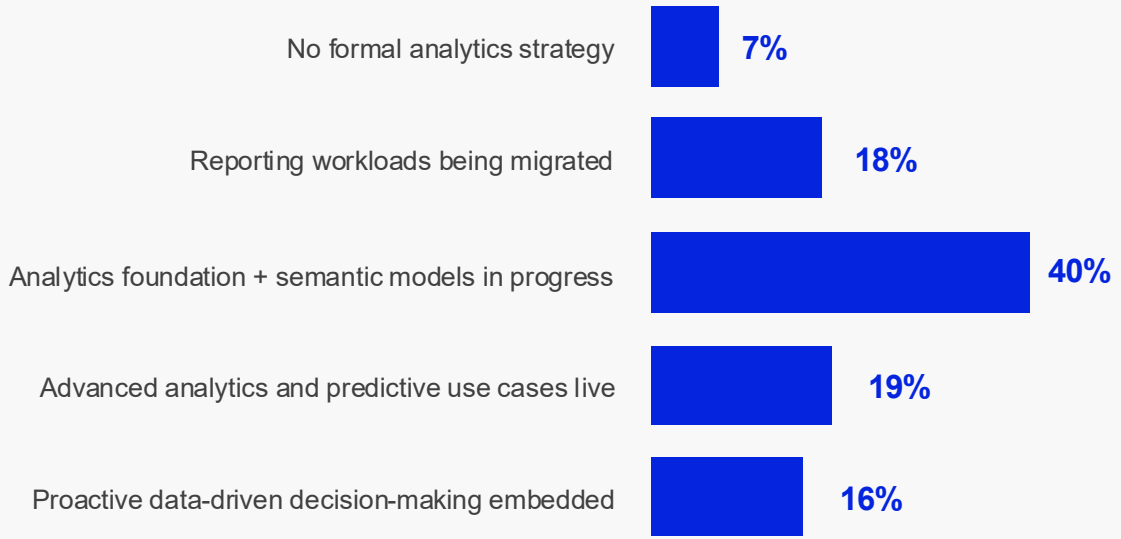
Most organizations (40%) are still building analytics foundations and semantic models, while 19% have advanced predictive analytics live. The insight that these advanced users represent These advanced users are SAP BDC's most productive deployment cohort, suggesting a clear maturity advantage. Organizations should accelerate semantic modeling and predictive capabilities to unlock SAP BDC's AI potential.

Analytics Approach & Maturity



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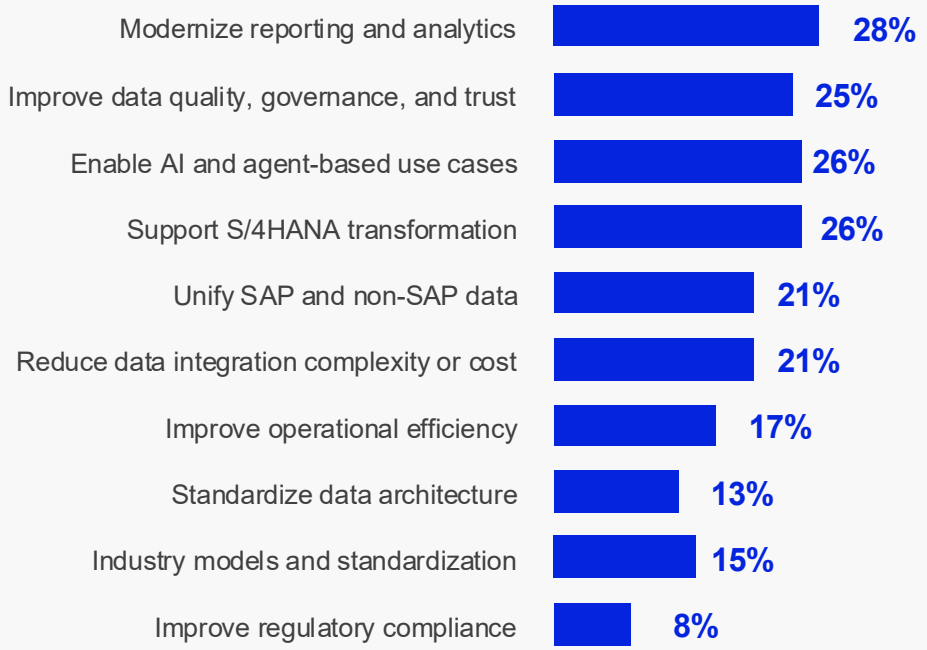
Analytics modernization (28%), AI enablement (26%), and SAP S/4HANA transformation (26%) are the top drivers. The findings clearly show a shift towards intelligence as AI enablement now rivals SAP S/4HANA transformation. Organizations should align SAP BDC investments with AI and agentic use cases rather than treating it as a traditional data warehouse upgrade

Top Investment Drivers for SAP BDC



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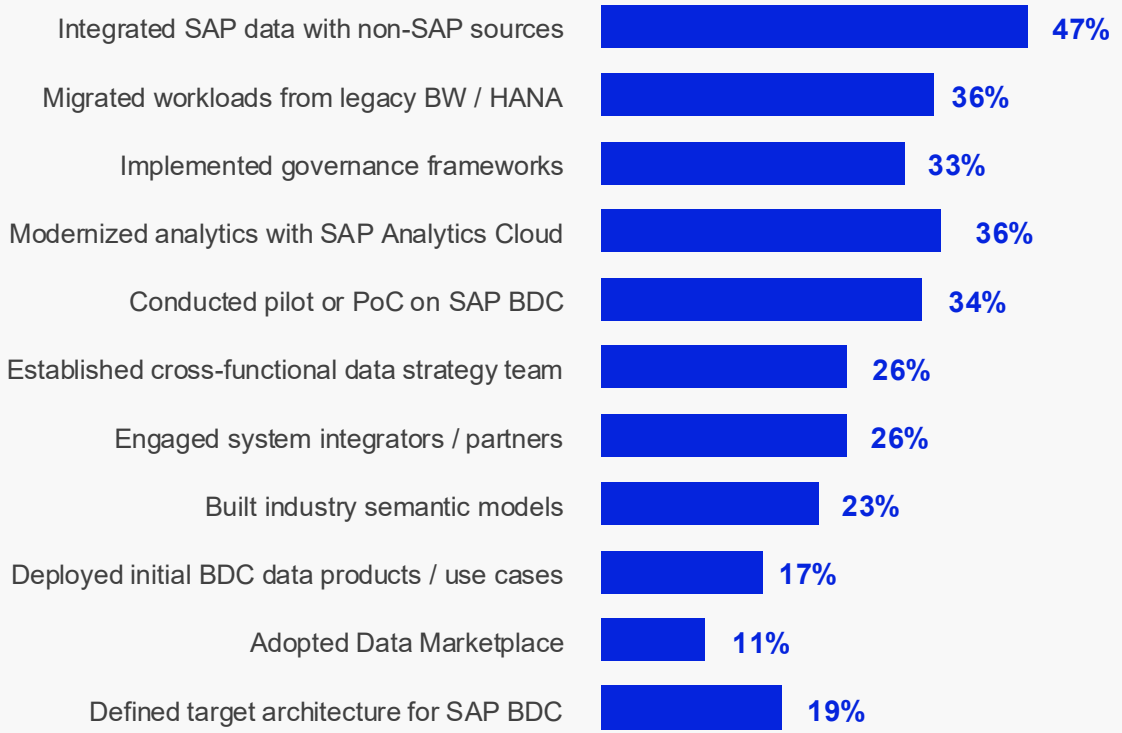
The most common actions include SAP + non-SAP integration (47%), SAP BW/HANA migration (36%), and governance implementation (33%). Findings confirm a platform-led transformation approach. Organizations should continue focusing on integration and governance while accelerating pilot use cases to demonstrate value.

Key Strategic Actions Taken for SAP BDC



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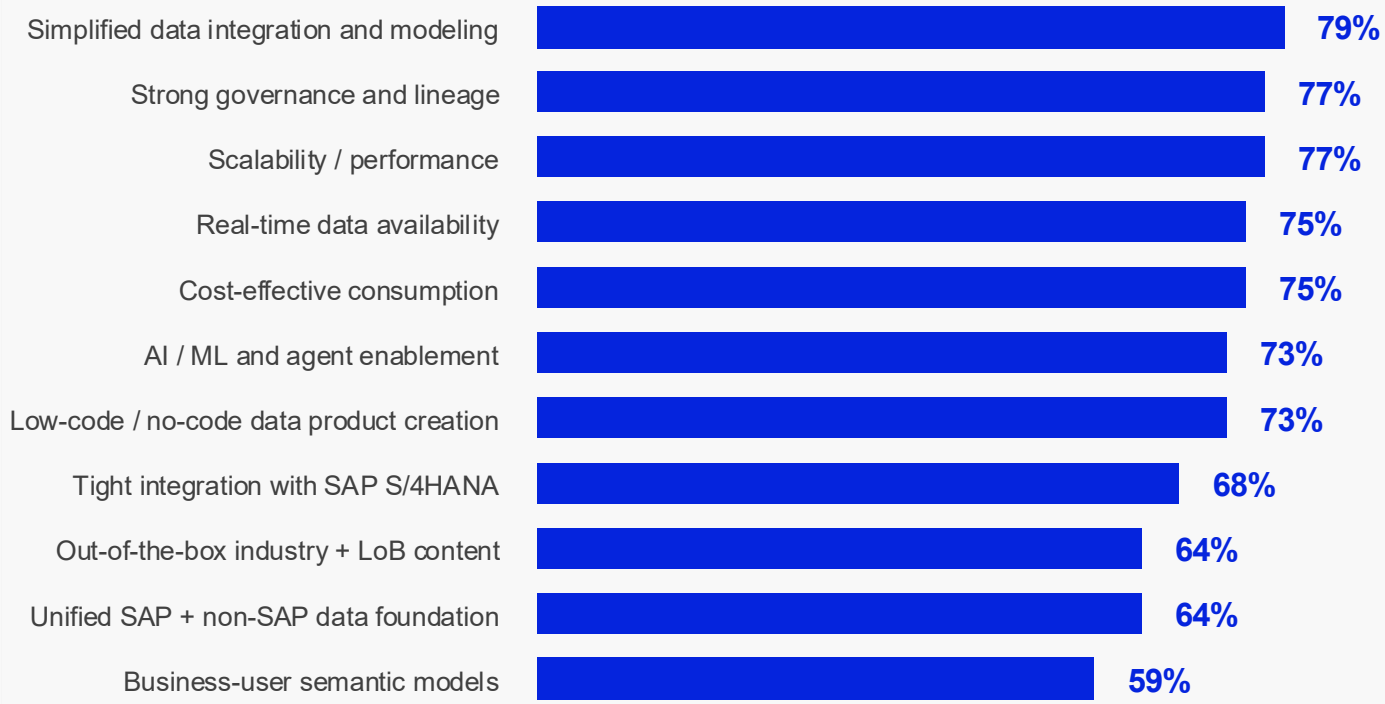
Simplified integration (79%) and governance/lineage (77%) top the list, with AI/ML enablement close behind at 73%. Moreover, SAP BDC is being evaluated as an intelligence platform and not just a data layer. Companies should prioritize capabilities that support AI agents, real-time data, and low-code data product creation.

Importance of SAP BDC Requirements (% Important + Very Important)



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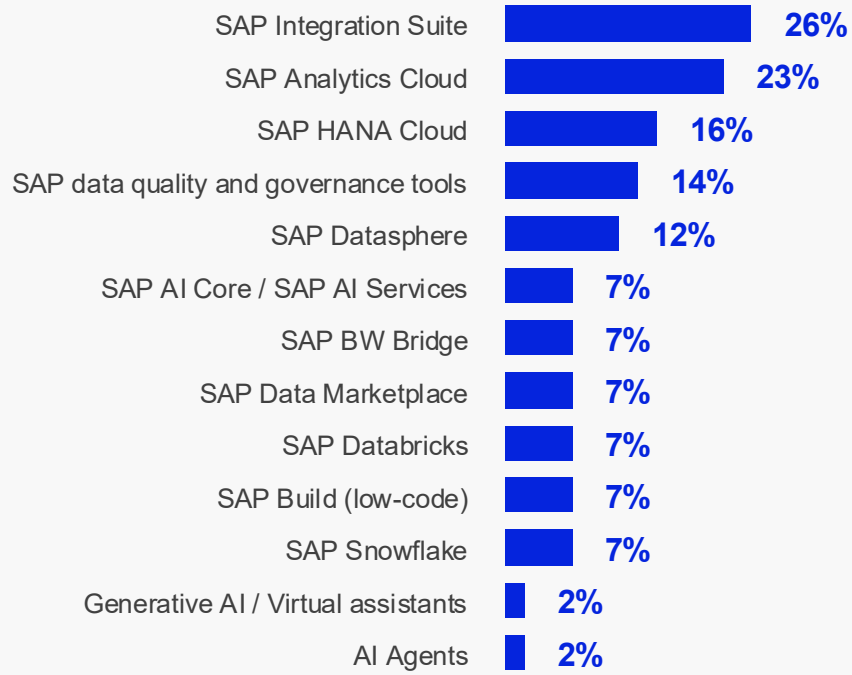
Integration Suite (26%) and Analytics Cloud (23%) lead current usage, while AI agents and GenAI are only at 2% today. However, 35% of the respondent's plan AI agent deployment within 24 months. Thus, organizations should begin experimenting with AI Core, Joule, and agentic workflows to prepare for rapid adoption.

SAP BDC Technologies: Current Use



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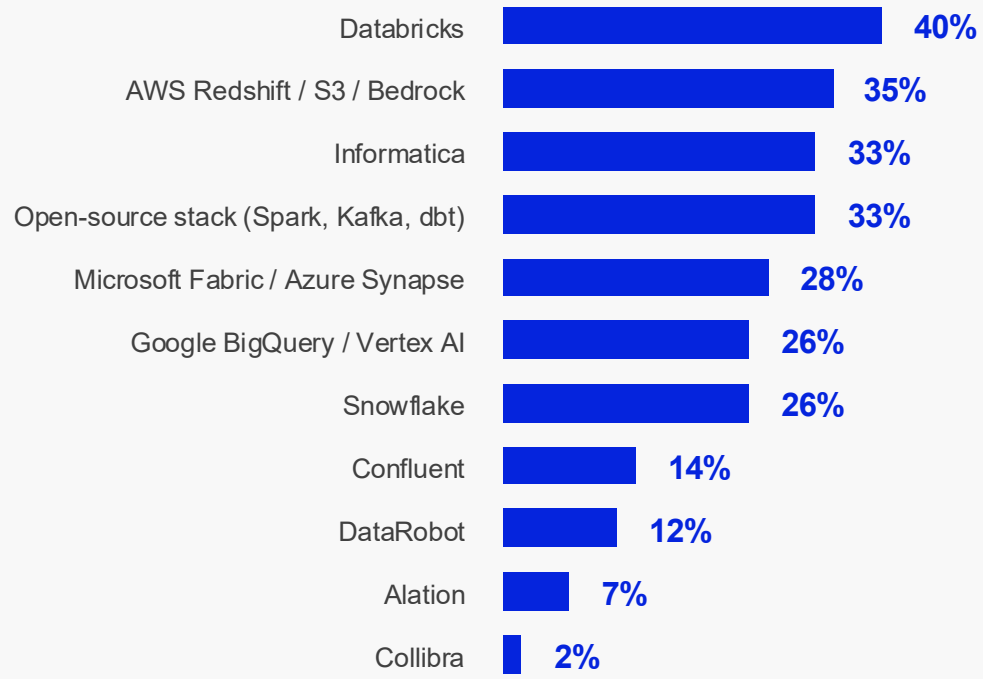
Databricks (40%) and AWS (35%) dominate non-SAP integrations, showing that SAP BDC must coexist with multi-cloud ecosystems. Since the integration breadth is a key differentiator, companies should design SAP BDC architectures that interoperate with existing Lakehouse and AI platforms rather than replacing them.

Non-SAP Technologies Integrated with Data Strategy



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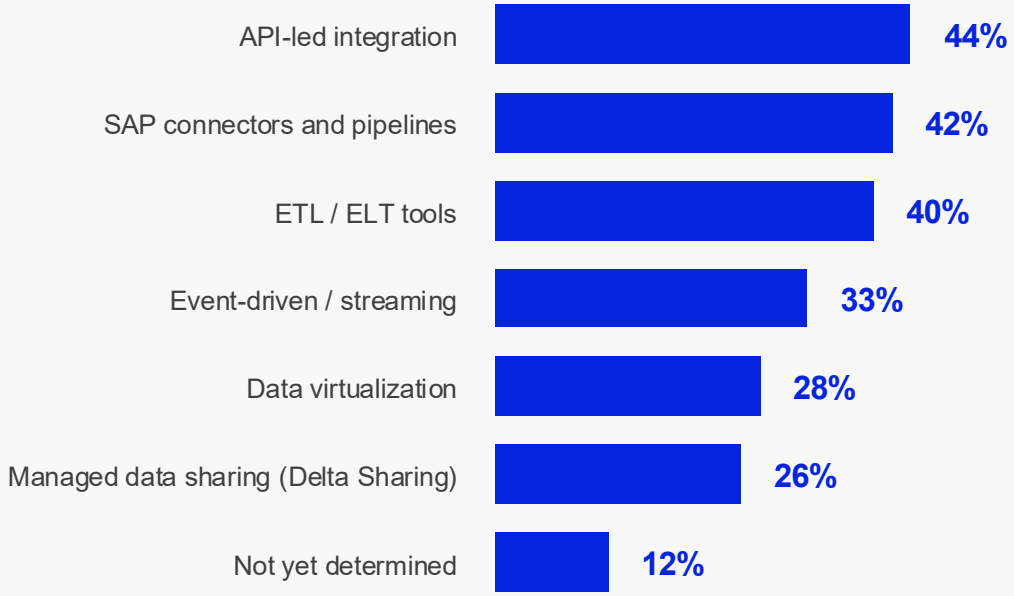
API-led integration (44%) and event-driven streaming (33%) are gaining traction, reflecting a move toward real-time architectures. Additionally, 12% of the respondents have not yet determined their approach. This signifies that organizations should define a clear integration strategy emphasizing APIs, streaming, and managed data sharing.

Methods Used for Integrating SAP and Non-SAP Data



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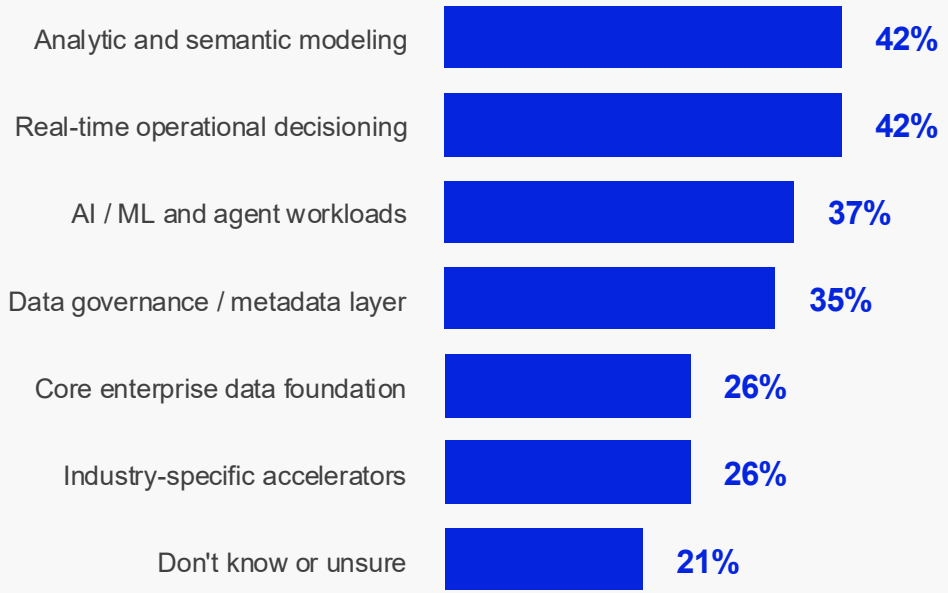
Semantic modeling (42%) and real-time decisioning (42%) are seen as SAP BDC's primary roles.

SAP BDC is becoming the intelligence and semantics layer of the enterprise. Therefore, organizations should invest in semantic models and real-time analytics to maximize its value.

SAP BDC Primary Architectural Role



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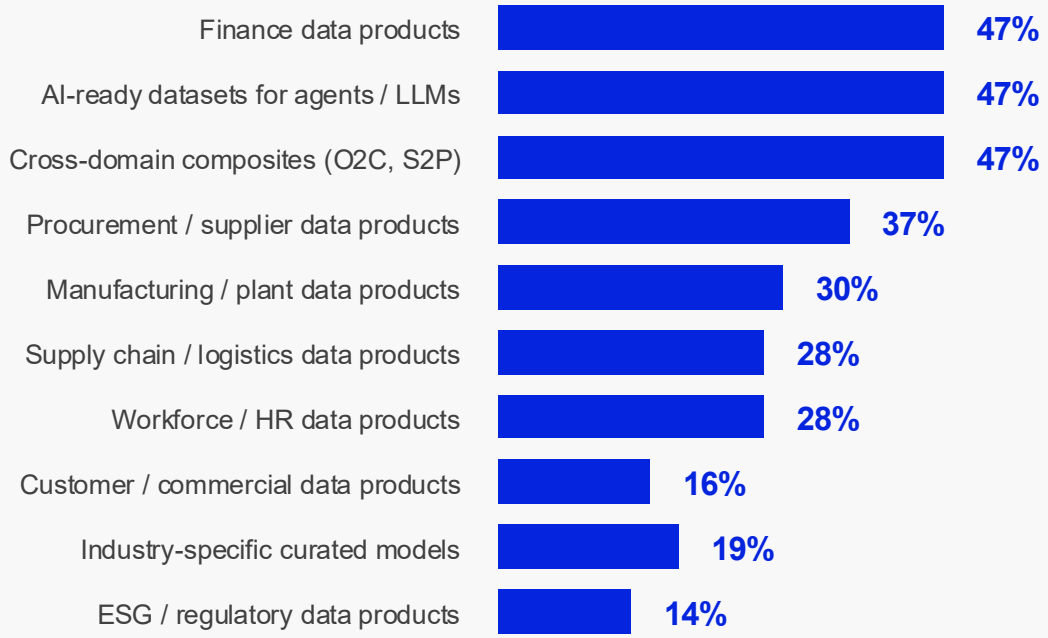
Finance, AI-ready datasets, and cross-domain composites each appear in 47% of plans. The insight that these form the three equal pillars of early SAP BDC data product strategy shows where organizations are focusing. Companies should prioritize finance and AI-ready data products as foundational assets.

Data Products In Use or Planned within SAP BDC



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Financial analytics and predictive AI/ML lead at 29%, with agentic workflows planned by 24. The findings highlight that AI agents are entering early production roadmaps. Organizations should identify high-value agentic workflows—such as supply chain or finance automation—to pilot in SAP BDC.

SAP BDC Use Cases in Production or Planned

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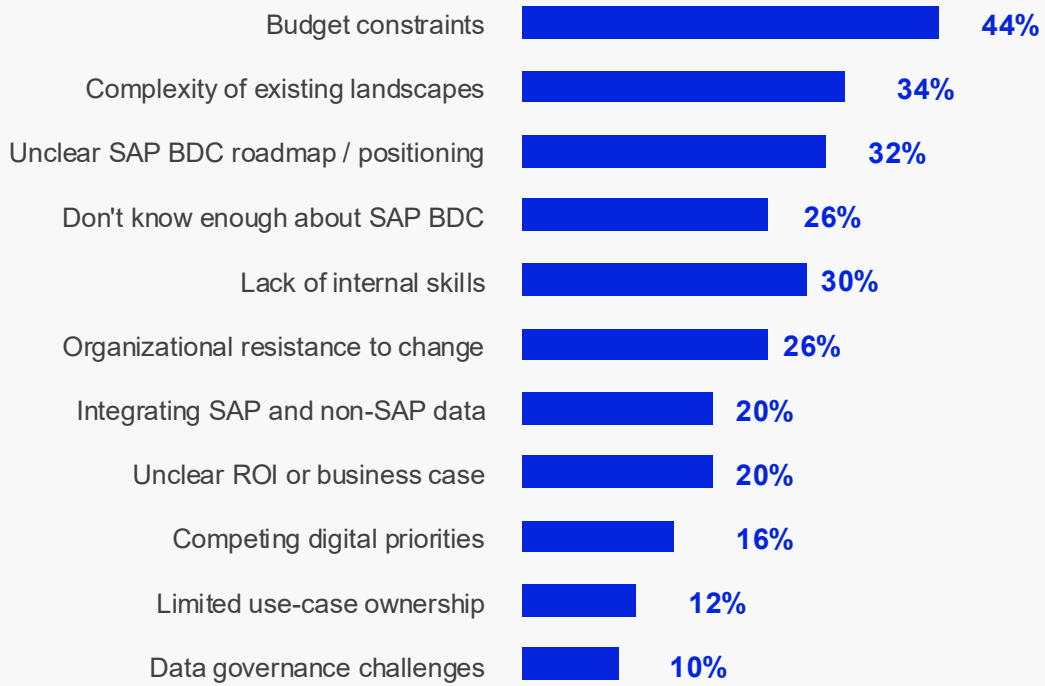
Budget (44%) and landscape complexity (34%) are the top barriers, with 26% saying they don't know enough about SAP BDC. This highlights a major education gap. Organizations should invest in training, partner support, and roadmap clarity to overcome these blockers.

Biggest Barriers to SAP BDC Adoption



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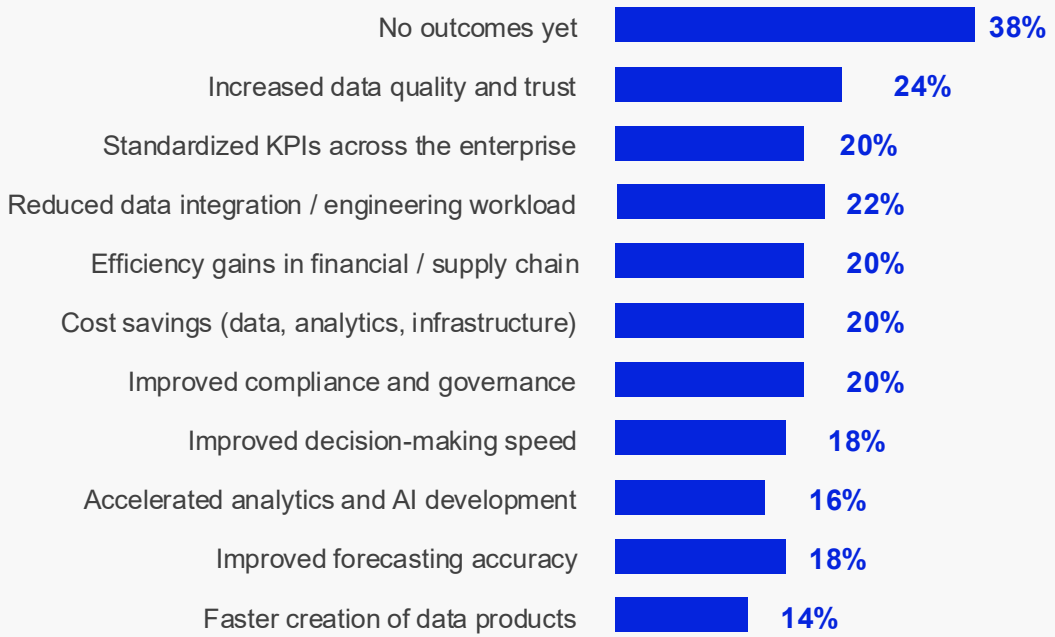
Of the respondents surveyed, 38% report no outcomes yet, while early adopters see gains in data quality (24%), KPI standardization (20%), and efficiency. The findings confirm that value realization is still ahead for most organizations. Companies should focus on quick-win use cases that demonstrate measurable improvements.

Business Outcomes Achieved from SAP BDC



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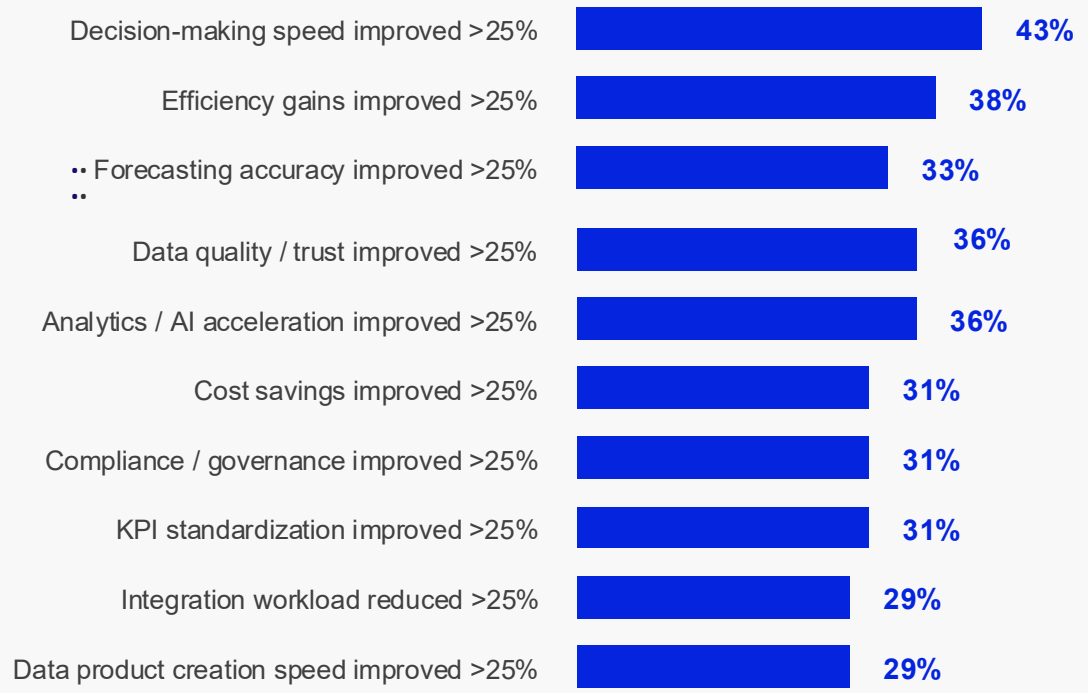
Decision-making speed shows the strongest gains, with 43% reporting >25% improvement. These gains are concentrated among organizations that are already deploying SAP BDC. Organizations should accelerate production use cases to unlock similar performance improvements.

Data & Analytics KPI Improvement (% Reporting >25% Gain)



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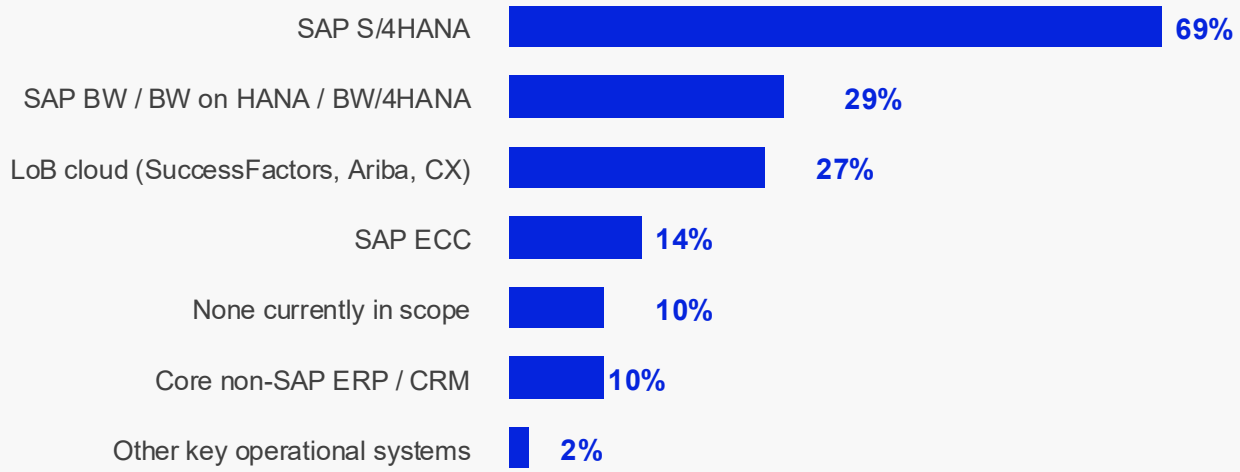
SAP S/4HANA is in scope for 69% of initiatives, making it the anchor for SAP BDC adoption. With SAP BW/HANA migration (29%) and LoB cloud integration (27%) highlighted as key scope areas by respondents, organizations should look at aligning SAP BDC rollout with SAP S/4HANA projects to maximize synergy.

Landscapes In Scope for SAP Business Data Cloud



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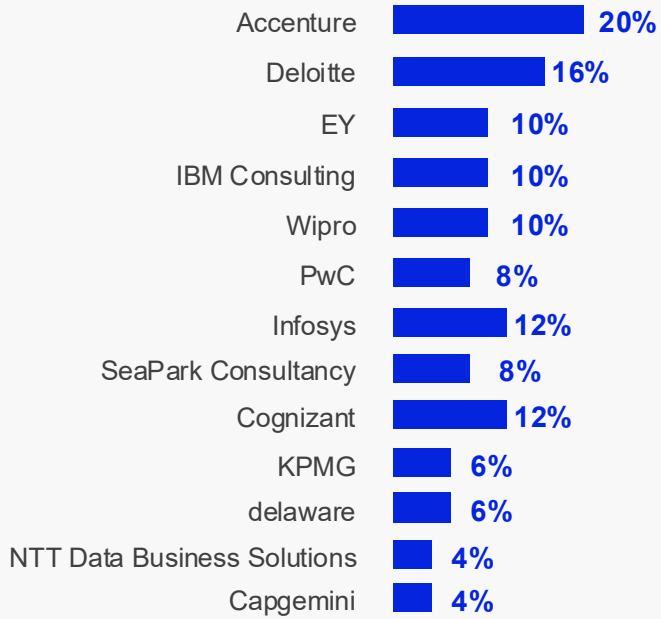
While Accenture (20%) and Deloitte (16%) lead in terms of partners, 17% of the respondents do not use partners—missing acceleration opportunities. However, findings show that strategy support drives time-to-value. This signifies that organizations should engage partners not only for delivery but also for architecture and use-case design.

System Integrators & Partners for SAP BDC



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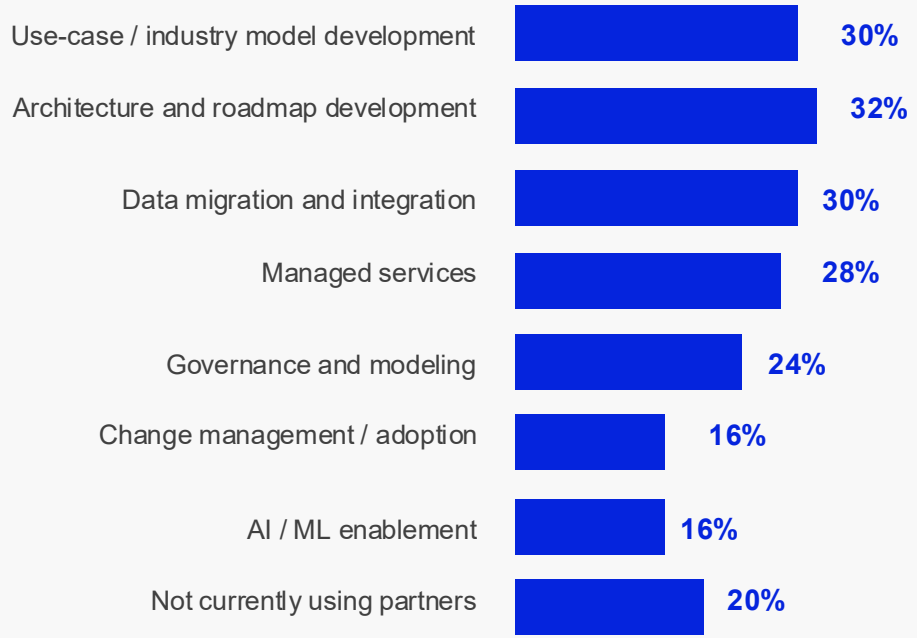
Partners are most often used for use-case development (30%), architecture (32%), and data migration (30%). Additionally, organizations using partners for strategy achieve faster time-to-value with SAP BDC. This critical insight highlights that organizations should involve partners early in their roadmap planning and governance design.

Partner Roles in SAP BDC Strategy



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DART MODEL FRAMEWORK

SAP Business Data Cloud

The DART model summarizes drivers, actions, requirements, and technologies shaping SAP BDC adoption. It reinforces the need to modernize analytics, unify data, and enable AI while leveraging tools like SAP SAC, SAP Datasphere, and SAP Integration Suite. Organizations should use this framework to structure their SAP BDC roadmap and ensure alignment across architecture, governance, and use-case execution.

DRIVERS

- Modernize reporting and analytics to gain competitive edge 28%
- Enable AI and agent-based use cases 26%
- Improve data quality, governance, and trust 25%
- Unify SAP and non-SAP data for a single source of truth 21%
- Reduce data integration complexity and cost 21%

ACTIONS

- Conducted pilot or proof-of-concept on SAP BDC 34%
- Integrated SAP data with non-SAP sources 45%
- Established cross-functional data strategy team 26%
- Modernized analytics with SAP Analytics Cloud 36%
- Migrated workloads from legacy BW/HANA systems 34%

REQUIREMENTS

- Simplified data integration & modeling 81%
- Real-time operational decisioning platform 77%
- Unified SAP + non-SAP data foundation 69%
- AI / ML and agent enablement 71%
- Out-of-the-box industry / Lob content 63%

TECHNOLOGIES

- SAP Analytics Cloud 43%
- SAP HANA Cloud 33%
- SAP Integration Suite 49%
- SAP Datasphere 25%
- SAP Databricks / Snowflake 19%
- SAP AI Core / Services 31%

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