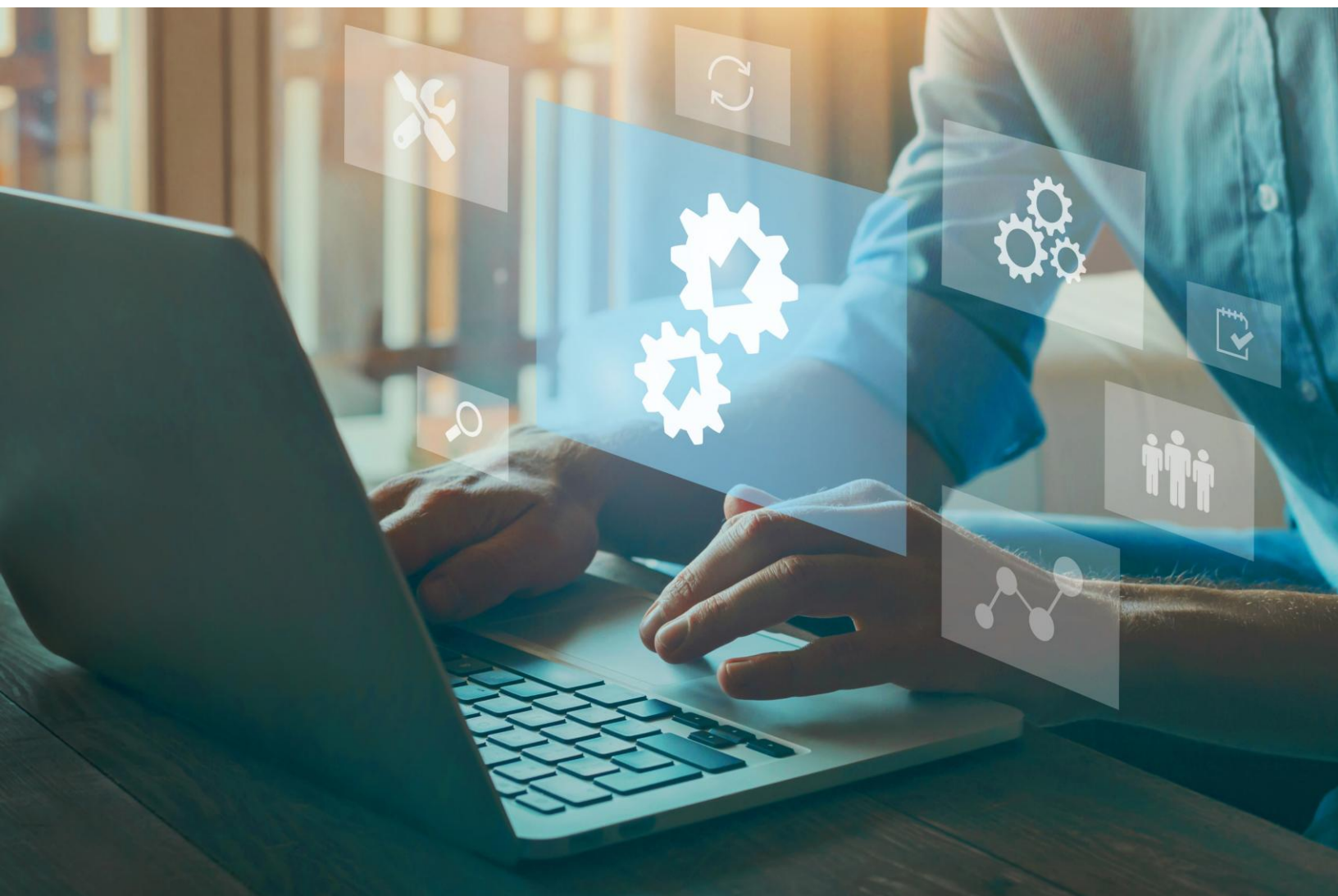




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Benchmarking the Capabilities that Define SAP Leaders



SAP Integration Landscape 2026

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Executive Summary

Enterprise integration is becoming a strategic platform capability for SAP organizations. As application landscapes expand across SAP and non-SAP systems, businesses increasingly depend on integration to support cloud transformation, operational visibility, analytics, partner connectivity, and artificial intelligence. The question is no longer whether organizations need an integration strategy. It is whether they can translate that strategy into a modern, governed, and scalable architecture.

This year's integration research reveals substantial progress at the strategic level. Half of respondents describe their integration strategy as either enterprise-wide or platform-driven and AI-enabled, while only 4% have no formal strategy. Integration is also closely connected to transformation: 46% say it is strategically aligned with, or fully embedded in, broader cloud and digital transformation programs.

Yet the supporting architecture has not advanced as quickly. Forty-three percent of respondents still rely primarily on point-to-point connections or legacy middleware and enterprise service bus technology. Only 35% describe their architecture as API-led and event-driven or intelligent and adaptive. This disconnect indicates that many organizations know what they want integration to deliver but are still operating technology environments designed for an earlier generation of connectivity.

The pressure to close that gap is increasing. Seventy-two percent identify demand for real-time operational visibility as a leading modernization driver. Cloud and SaaS growth and AI-related demand for real-time data pipelines are

each selected by 62%. However, only 29% have achieved broadly or fully real-time integration across their SAP landscape. AI adds further urgency, but adoption remains uneven. Fifty-eight percent are either exploring AI-assisted integration without an active use case or have not incorporated AI into integration at all. At the same time, just 35% say their architecture systematically delivers well-governed, context-rich data for downstream AI and analytics.

Organizations are responding with increased investment. Sixty percent report higher spending on integration platforms and tools, with event-driven connectivity, expansion of SAP Integration Suite, and improved observability leading planned investments. But cost, skills shortages, legacy technical debt, and the difficulty of replacing point-to-point integrations remain significant constraints.

The findings point to a clear conclusion: SAP organizations have made progress defining their integration vision. Their next challenge is building the operating model, skills, governance, and platform capabilities needed to execute it.

Strategy Advances Ahead of Architecture

Integration strategy is becoming more formalized within SAP organizations shown by the fact that only 4% of respondents say integration continues to be handled project by project without a defined approach. By comparison, 34% have an enterprise-wide strategy governed through defined patterns, APIs, and platform standards, while another 16% treat integration as a platform-driven and AI-enabled strategic asset. One-third remain at a foundational stage, with a defined strategy covering only selected SAP systems or use cases.

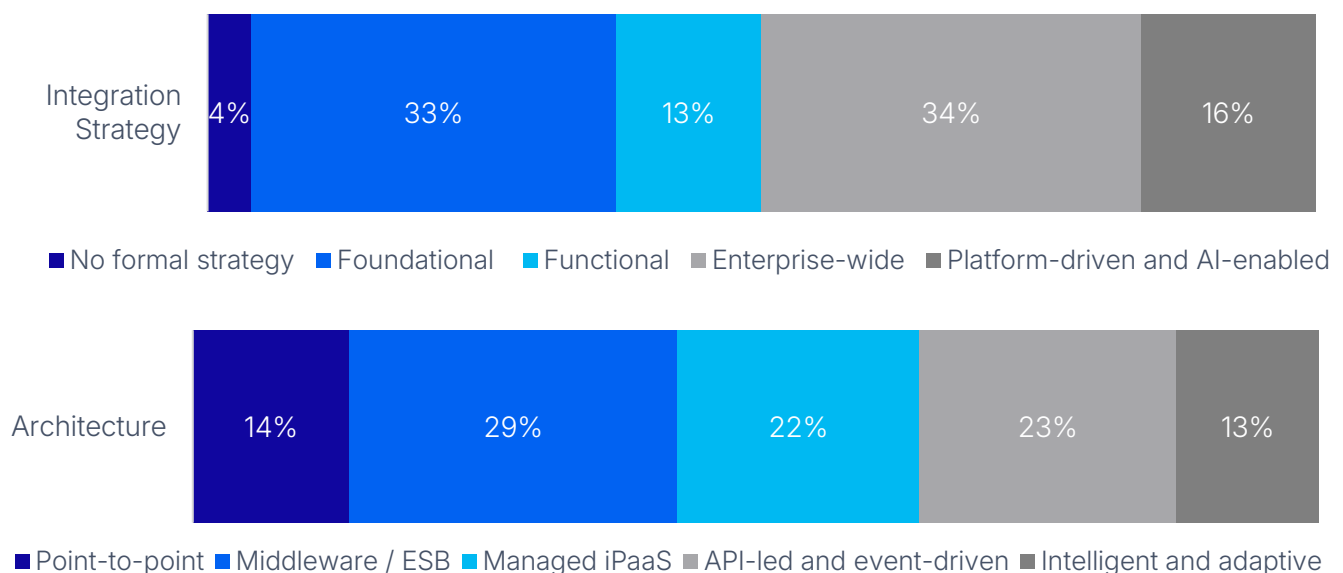
The results suggest that the SAP community has largely moved beyond the question of whether an integration strategy is necessary. The focus is shifting toward the scope, consistency, and operational maturity of that strategy.

Integration also has a meaningful connection to broader transformation programs. Forty percent say it is a defined enabler within enterprise-wide

transformation initiatives, and 6% consider it a foundational platform capability that helps drive transformation outcomes. Only 6% say integration is managed reactively and independently from transformation. However, 49% remain tactically or functionally aligned, indicating that integration often supports individual initiatives without being fully coordinated across the enterprise.

Architecture maturity presents a less advanced picture. Twenty-nine percent primarily use legacy middleware or an enterprise service bus, and 14% remain dependent on custom point-to-point connections. Another twenty-two percent operate a managed integration platform as a service, while 23% have established an API-led and event-driven architecture. Only 13% describe their architecture as intelligent and adaptive, with AI assistance, real-time observability, governance, and automated remediation.

Figure 1: Strategy has advanced, but many still rely on point-to-point connections or legacy middleware.



Strategy Advances Ahead of Architecture

This creates a measurable strategy-to-execution gap. Half of all respondents have reached an enterprise-wide or platform-driven strategy, but only slightly more than one-third have reached the API-led, event-driven, or intelligent stages of architecture maturity. Meanwhile, 43% remain primarily anchored in point-to-point integration or legacy middleware.

Last year's research reached a similar directional conclusion: strategy was advancing faster than technology adoption. It found that many organizations had begun building cohesive integration strategies while continuing to rely on older technologies, custom integrations, and middleware. This year's data suggests that this tension remains, although there is a greater emphasis on real-time integration, AI readiness, and platform operations.

Governance is becoming more established with less than one in ten (9%) respondents reporting their organization has no clear integration owner. Central IT owns integration platforms and standards at 34% of organizations, while 24% have an Integration Center of Excellence. Another 21% use shared ownership between IT and business teams, and 11% have adopted a product-oriented platform team model.

These figures indicate that the ownership question is evolving. The primary issue is no longer simply who owns integration. It is whether the ownership model possesses the funding, authority, skills, and operational capabilities needed to modernize the landscape.

The strongest driver of integration modernization is business demand for real-time operational visibility across SAP and non-SAP systems, selected by 72% of respondents. The growing number of cloud and SaaS applications requiring SAP connectivity and AI adoption creating demand for real-time data pipelines are tied as the next-largest drivers at 62%.

SAP S/4HANA migration and cloud transformation continue to play a significant role, with 52% saying these initiatives expose gaps in legacy integration. Regulatory, data sovereignty, and security requirements influence 48%, while 42% point to the complexity and cost of maintaining fragmented point-to-point landscapes.

Collectively, these factors show that integration modernization is no longer simply an exercise in replacing middleware. It is a response to a broader shift in how organizations operate. Businesses need timely information across applications, processes, and organizational boundaries. Cloud adoption increases the number and diversity of endpoints, while AI requires data that is current, reliable, governed, and connected to business context.

Integration is consequently moving closer to the center of enterprise transformation. Organizations that cannot connect SAP and non-SAP environments consistently may struggle not only with technical complexity but also with delayed decisions, inconsistent experiences, and limited ability to scale analytics and AI.

The Transition to Real-Time and AI-Ready Integration

Although real-time visibility is the leading modernization driver, most organizations have not achieved real-time integration broadly.

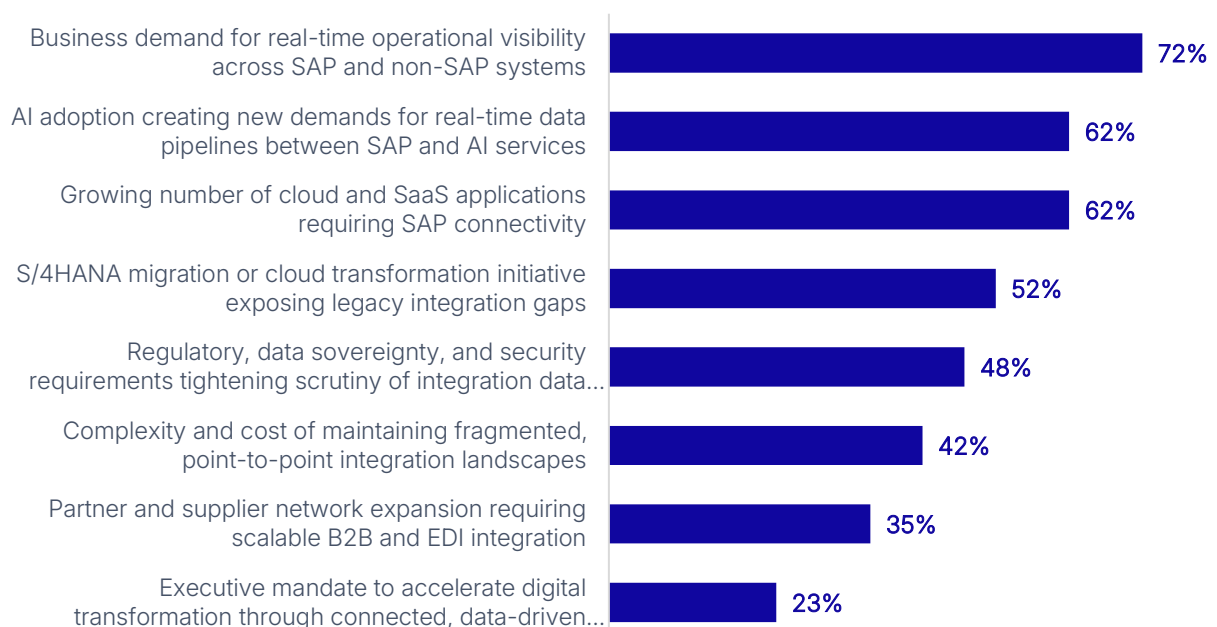
Nineteen percent remain primarily batch-based, exchanging data at scheduled intervals. Twenty-seven percent describe their integrations as near-real-time but subject to latency, and 25% have deployed event-driven or streaming integration selectively for high-priority processes. Only 18% have broadly real-time connectivity across most core SAP processes, while 11% continuously stream SAP data to AI, analytics, and operational systems.

This produces one of the report's most significant findings: 72% of respondents identify real-time visibility as a modernization driver, but only 29% have attained broadly or fully real-time integration.

The adoption of individual integration patterns further illustrates the transition. API-led integration is currently used by 63% of respondents, making it the most prevalent modern pattern. Nevertheless, batch and file-based integration remains in use at 54%, demonstrating that established approaches continue to play a major role. Forty-one percent currently use real-time data streaming, while only 28% use event-driven integration.

Interest in event-driven integration is substantial. Forty percent are evaluating or piloting it, and another 13% plan adoption within 12 to 24 months. Microservices and containerized integration are currently used by only 15%, but 43% are evaluating these capabilities and 19% plan to adopt them.

Figure 2: Real-time visibility leads modernization priorities, while AI and cloud growth create parallel pressure.



The Transition to Real-Time and AI-Ready Integration

The shows that market is not moving through a simple replacement cycle in which real-time integration displaces batch processing. Modern SAP landscapes may require APIs for application access, events for operational responsiveness, streaming for high-volume data, EDI for business networks, and scheduled transfers for processes where immediacy provides limited value.

The objective should not be to make every integration real-time. It should be to establish a fit-for-purpose architecture in which teams can choose the appropriate pattern while applying consistent security, governance, monitoring, and lifecycle standards.

However, achieving that balance is difficult. Nearly half (48%) identify skills gaps in event-driven design and configuration as a leading real-time integration challenge. Forty-four percent struggle to transition from batch-based to event-driven architectures, while 40% report data quality and consistency problems when synchronizing SAP with external systems.

Cost and platform limitations are also challenges when supporting real-time SAP workloads at scale. These findings emphasize that real-time integration is not only a technology decision. It requires architectural expertise, infrastructure, observability, data-quality controls, and a business case that connects reduced latency to measurable value.

48%

Skill gaps in event-driven integration is the biggest challenge organizations face when it comes to real-time integration with SAP.

37%

The cost of real-time integration infrastructure relative to the business value it provides was highlighted by respondents as a major challenge to implementing real-time integration.

AI Creates Two Integration Challenges

AI is influencing SAP integration in two distinct ways. First, organizations must integrate SAP with AI services by delivering timely, governed, and context-rich data. Second, they can apply AI within the integration lifecycle to assist with mapping, transformation, monitoring, anomaly detection, optimization, and error resolution.

The first requirement is advancing faster than the second. Two thirds (62%) of respondents identify AI-driven demand for real-time data pipelines as a leading modernization driver. Yet 42% remain at the awareness stage of AI-assisted integration and have no active use cases, while 16% have not incorporated AI into their integration approach. Only 10% use AI for selected tasks, 24% have embedded it into workflows, and 7% regard AI as central to integration management and governance.

Consequently, 58% remain at the no-role or awareness stage, compared with 31% that report expanding use or a core AI capability.

The ability to provide context-rich data is similarly mixed. Thirteen percent say their integration flows primarily deliver raw data without sufficient context for AI or analytics. Another 31% provide contextual metadata inconsistently, and 21% can support most downstream use cases adequately.

Only 26% systematically enrich data with contextual metadata, while 10% deliver governed, context-rich data products in real time.

Without business context, AI systems may receive technically complete data that lacks the meaning needed for dependable outcomes. Integration architectures need to retain metadata such as semantics, lineage, authorization, quality indicators, and relationships to relevant business processes.

Respondents' platform priorities reflect a practical approach to AI. Seventy-three percent rate end-to-end security as important or critical, and 66% say the same about real-time monitoring and observability. By comparison, 48% assign that level of importance to AI-assisted mapping, transformation, and error resolution.

This does not indicate that organizations consider AI unimportant. Rather, they recognize that foundational capabilities must come first. Reliable AI depends on secure data movement, observable integration flows, governed access, and trustworthy context. For many organizations, strengthening those foundations will be the most important AI-related integration action over the next several years.

Building the Capacity to Execute

The leading barriers to modernization are practical rather than strategic. Fifty-five percent cite cost and budget constraints, while 52% identify skills shortages in API design, event-driven architecture, and modern integration platforms. Legacy on-premise SAP complexity and technical debt constrain 45%, and 42% struggle to retire point-to-point integrations without disrupting the business.

These barriers are closely connected. Technical debt increases the cost and risk of modernization. Skills shortages reduce the organization's ability to redesign older integrations. Concerns about disruption encourage teams to retain custom connections, which further expands technical debt and maintenance requirements.

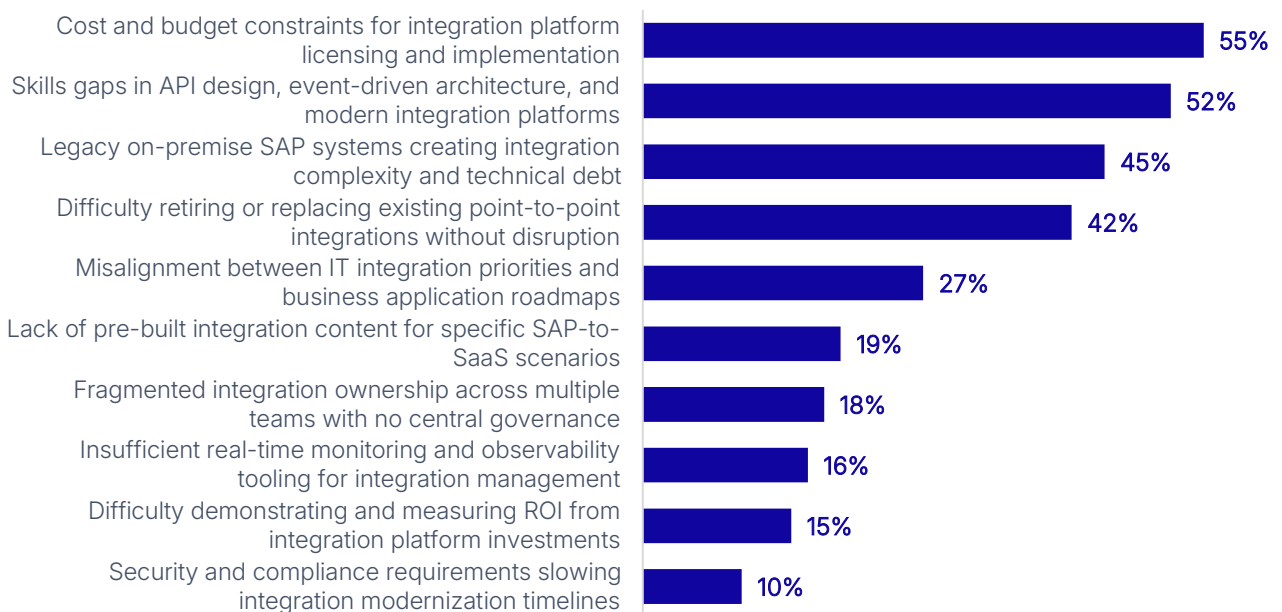
Security and compliance present a more nuanced picture. Only 10% identify them as one

of the top three barriers to modernization. However, 38% say regulatory requirements are a significant influence on integration architecture, and 5% describe compliance complexity as a major blocker. Together, 43% face a significant regulatory constraint or blocker.

Respondents also place high importance on security capabilities. End-to-end security, encryption, and access control receive the highest platform-capability rating. However, implementation is incomplete: 49% use a centralized API gateway to enforce access controls, 40% have role-based access controls for managing flows, and only 24% have automated compliance monitoring and alerts.

This suggests that security may not always stop modernization programs, but it continues to shape platform selection, data routing, and architecture.

Figure 3: Barriers to SAP integration modernization.



Investment Targets the Capability Gap

Organizations are increasing investment in response to these pressures. Forty percent report an increase of up to 25% in integration platform and tooling spending, and another 19% report an increase above 25%. In total, 60% increased investment year over year, compared with 24% reporting no change and 16% reporting a decrease.

Planned investment aligns closely with current capability gaps. Fifty-three percent intend to adopt event-driven integration during the next 12 to 24 months. Forty-four percent plan to expand SAP Integration Suite, while 42% will improve integration observability, monitoring, and service-level management. Thirty-one percent plan to migrate from legacy middleware or an enterprise service bus to a modern integration platform as a service.

AI-specific investment is more selective. Eighteen percent plan to deploy AI-assisted integration tools, and the same proportion plan to build contextual data pipelines for AI and analytics. The lower priority relative to event-driven integration and observability reinforces the conclusion that many organizations are still developing the foundations needed for scaled AI adoption.

60%

The number of respondents who experienced an increase in investment in SAP integration platforms year-over-year.

53%

Plan to adopt event-driven integration for real-time SAP connectivity during the next one to two years.

Investment Targets the Capability Gap

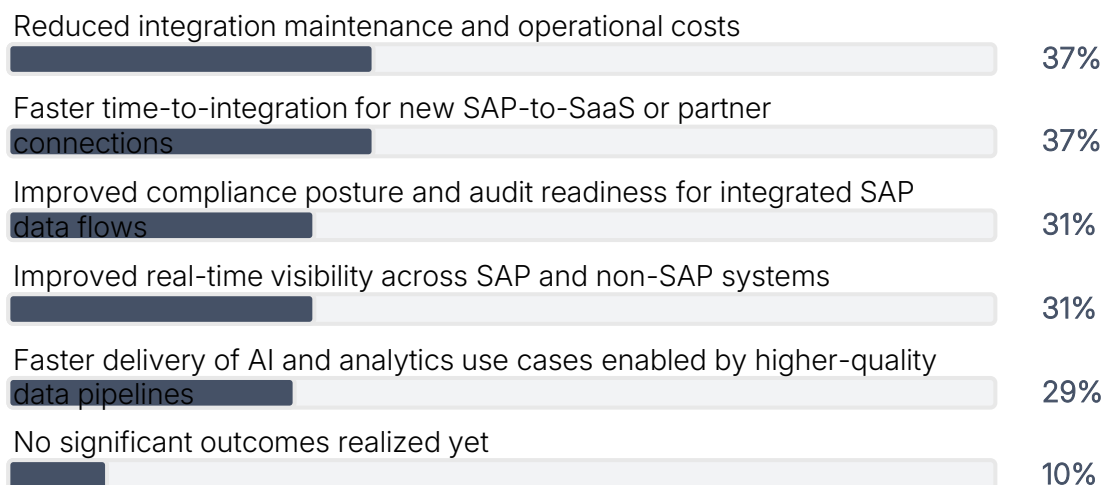
Modernization is already generating value. Thirty-seven percent report faster deployment of new SAP-to-SaaS or partner connections, and 37% report lower integration maintenance and operating costs. Thirty-one percent have improved operational visibility, and the same percentage report stronger compliance and audit readiness. Twenty-nine percent have accelerated AI and analytics use cases, while only 10% say they have realized no significant outcomes.

KPI results provide additional evidence, although they also identify measurement gaps. Approximately half report year-over-year

improvement in deployment time, incidents, integration costs, real-time data availability, and integration reuse. However, substantial shares report no change, and between 8% and 16% do not measure several of the KPIs examined.

Organizations therefore need to strengthen not only their integration technology but also their approach to measuring outcomes. A mature operating model should connect technical metrics, such as latency, reuse, incidents, and deployment time, with business measures, including onboarding speed, process resilience, decision latency, and user satisfaction.

Figure 4: Modernization is delivering measurable benefits, but scaling those benefits requires investment in people and operating capabilities, not just new technology.





Required Actions

Treat integration as a managed enterprise platform. Organizations should move beyond project-specific connectivity and manage integration as an enterprise capability. This requires defined patterns, reusable assets, lifecycle standards, architectural guardrails, and sustained funding. An Integration Center of Excellence or platform team can provide these capabilities, but organizational structure alone is insufficient. The team must have the authority to establish standards, reduce duplication, manage shared services, and help delivery teams select the appropriate integration pattern.

Prioritize real-time integration according to business value. Real-time integration should be applied where latency materially affects business outcomes. Organizations should identify processes in which faster information improves customer experience, operational response, supply-chain decisions, compliance, financial control, or AI performance. Batch and EDI integration will remain appropriate for many scenarios. The goal should be a governed portfolio of patterns rather than simply converting every flow to event-driven or streaming technology.

Build AI readiness through context, governance, and observability. AI readiness begins with trustworthy data pipelines. Organizations should ensure that integration flows preserve business meaning, lineage, security classifications, quality information, and access controls. They should also distinguish between integrating with AI and applying AI within integration operations. The immediate priority for many organizations will be delivering secure and contextual SAP data to AI services. AI-assisted mapping, monitoring, and remediation can expand as governance and operational maturity increase.

Fund the operating model, not just the platform. Technology acquisition will not resolve skills gaps or technical debt by itself. Platform investments need to be accompanied by training, migration resources, observability, asset reuse, and clear accountability. Organizations should establish measurable modernization roadmaps that identify which legacy integrations will be retained, refactored, replaced, or retired. They should also track deployment speed, incidents, maintenance cost, reuse, real-time availability, and business satisfaction to demonstrate value and guide future funding.



Conclusion

SAP integration has become strategic, but it is not yet uniformly modern. Organizations are defining enterprise strategies and increasing investment as real-time visibility, cloud growth, SAP transformation, and AI create new connectivity demands. At the same time, legacy middleware, point-to-point integrations, skills shortages, and technical debt continue to limit execution.

The next phase of maturity will not be defined solely by implementing a new platform. It will be determined by whether organizations can operate integration as a secure, observable, reusable, and continuously evolving enterprise capability.

Those that close the gap between strategic ambition and architectural execution will be better positioned to connect expanding application landscapes, respond to events in real time, and provide AI and analytics platforms with governed business context. Those that do not may find that integration becomes the constraint on transformation rather than the foundation for it.

Research Methodology and Profile

SAPinsider surveyed members of its global community between June and September 2026 to understand the strategies, technologies, challenges, investments, and outcomes shaping SAP integration.

Respondents represented multiple industries, organization sizes, and functional roles. Nearly half the respondents to the research report that they are in IT or enterprise architecture roles, with another 21% coming from integration, middleware, or platform engineering teams.

The largest industry groups represented were retail, distribution, and consumer packaged goods (29%), organizations in the industrial sector including manufacturing, energy, natural resources, and agriculture (19%), and software and technology companies (19%). More than 40% of respondents represented organizations with annual revenues above \$2 billion.

Comparisons made with the [Enterprise Integration for SAP](#) report from September 2025 should be regarded as directional rather than year over year measurements due to changes in question wording and response categories.

45%

of respondents report that they are in Information Technology or Enterprise Architecture roles.

40%

of respondents represented organizations with annual revenues above \$2 billion.

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