



PRESSEMITTEILUNG

DSAG Investment Report 2025

Willingness to invest in future-oriented technologies is growing

Walldorf, March 20, 2025 – This year, the German-speaking SAP User Group e. V. (DSAG) once again asked about the investment plans of companies in Germany, Austria and Switzerland. The key findings: The general willingness to invest in IT solutions and also in SAP solutions continues to increase. With regard to the SAP Enterprise Resource Planning (ERP) solutions SAP Business Suite, SAP S/4HANA On-Premises and S/4HANA Cloud, it is clear that S/4HANA continues to gain in importance. The same applies to RISE and GROW with SAP. In addition, the survey participants confirm that the importance of SAP for their company will continue to grow. Significant differences compared to the previous year are particularly evident in the assessment of the S/4HANA Cloud strategy, the investment plans for S/4HANA Cloud and the assessments of RISE and GROW with SAP as well as the use of the Business Suite.

This year, DSAG took a new approach to collecting the figures. For the first time, SAP sent out the questionnaire for participants, which meant that significantly more larger companies were surveyed compared to the [Investment Report 2024](#). For the first time, SAP user companies that are not DSAG members were also included in the panel.

“There were also changes in the top 5 industries among the participants, which is why comparability of the results with those of the previous year is only possible to a limited extent. In addition, some of the survey results must be evaluated in this context,” explains Jens Hungershausen, DSAG Chairman of the Board (see survey basis).

IT and investment budgets are growing

In terms of IT and SAP investment budgets, many companies continue to show a high willingness to invest. The overall IT budget is increasing at 40% of the companies surveyed in the DACH region, compared to 43% a year ago. It will remain the same at 30% (2024: 36%) and decrease at 24% (2024: 18%). With regard to investments in SAP, 47% (2024: 46%) reported an increasing budget. The SAP budget remains unchanged for 23% (2024: 32%) and decreases for 25% (2024: 19%).



PRESSEMITTEILUNG

“The decrease in companies with a constant SAP budget and the increase in those with a decreasing budget suggests that some companies are reviewing their SAP spending. Possible reasons could be delays in planned migrations, savings through consolidation of SAP systems or a general reduction in costs,” says Hungershausen. However, as more larger companies took part in the survey this year, budget developments may also have shifted as a result.

S/4HANA on the heels of the Business Suite

When asked about the SAP Enterprise Resource Planning (ERP) solutions used, SAP ERP or SAP Business Suite is once again ahead of S/4HANA On-Premises with 51% (2024: 68%) and 42% (2024: 44%). The use of S/4HANA Private Cloud and S/4HANA Public Cloud is experiencing significant growth. For example, 33 percent (2024: 11 percent) rely on S/4HANA Private Cloud and 13 percent (2024: 6 percent) on S/4HANA Public Cloud. S/4HANA Cloud is also gaining ground in terms of planned investments. For example, 68 percent of respondents stated that they intend to invest in S/4HANA Cloud (private and public). In 2024, this was 50 percentage points less. 42 percent (2024: 51 percent) plan to invest in S/4HANA On-Premises and 23 percent (2024: 22 percent) in the Business Suite.

“The results show a clear shift towards cloud solutions. Here, too, this trend reversal must be read against the background of the changed survey structure. It is often large companies whose strategy for digital transformation is a reason to migrate to the cloud,” summarizes Hungershausen and specifies: “Many larger companies have a group-wide cloud strategy or requirements to modernize IT processes. At the same time, they usually have greater investment power.”

Growing popularity for S/4HANA cloud strategy

For the second time, companies were asked how they rate SAP's S/4HANA cloud strategy. The first survey in 2024 was conducted before the launch of the new SAP program [RISE with SAP Migration & Modernization](#), which includes incentive measures when moving to the cloud. At the time of the survey for this investment report (January 20, 2025 to February 14, 2025), the program can be considered established. This time, 40 percent attest to the program's high/medium relevance. “While only 13 percent of re-



PRESSEMITTEILUNG

spondents gave a positive assessment of the S/4HANA cloud strategy in the last investment report, this year the figure is 38 percent. The SAP program seems to be bearing fruit," says Hungershausen. Incentivization is also set to continue in 2025, with an official announcement expected in the coming weeks. From DSAG's point of view, however, this must be a permanent offer that continues to provide added value for existing customers.

Increased importance for RISE with SAP

When asked about the role of RISE with SAP for companies, 48% (2024: 16%) of respondents stated that they already use or plan to use the service. Four percent (2024: eight percent) state that they are not aware of the offering. While 61% responded in 2024 that they were not planning to use the service, this year the figure is 23%. 16% do not consider the service to be relevant to them.

GROW with SAP is experiencing slightly weaker growth in importance. While 55% of respondents stated that they would not use the offering in 2024, this year the figure is 26%. The offering is not relevant for 38%. In contrast, this time 17% say that they use or plan to use GROW with SAP. "Companies are increasingly realizing that there is no way around the cloud in the long term - not least because of SAP's roadmap and maintenance strategy or the approaching end of maintenance for numerous on-premises solutions," Hungershausen concludes.

Switching to the cloud must make strategic sense

From DSAG's perspective, the developments surrounding RISE with SAP and the RISE with SAP Migration and Modernization program are clear signs that DSAG's demand not to leave on-premises customers out in the cold is necessary and correct. "On the one hand, the program takes into account investments that have already been made. In addition, SAP provides best-practice guidelines, tools and services to facilitate the transition to the cloud. These measures help companies to protect their existing investments while benefiting from the advantages of the cloud," says Hungershausen.

Nevertheless, the DSAG Chairman of the Board warns: "Some customers feel under pressure from SAP to move to the cloud. The pace that the software manufacturer is setting here is not feasible for every company. SAP must not pressure its customers to



PRESSEMITTEILUNG

make quick decisions for the sake of its own share price. Instead, SAP must ensure that companies have a realistic, economically viable and strategically sensible migration perspective. Freedom of choice, long-term planning security and fair conditions for on-premises customers are still needed.”

Business Technology Platform takes the lead

In terms of SAP cloud solutions and their relevance for investments in 2025, SAP Business Technology Platform (BTP) is in first place with high and medium investments of 40% (2024: 33%), ahead of SAP SuccessFactors. 25% (2024: 21%) are planning high and medium investments for SuccessFactors. SAP Signavio follows in third place with 18%, replacing SAP Customer Experience.

In terms of BTP, 46% (2024: 34%) of respondents plan to make high and medium investments in analytics solutions, followed by integration solutions at 40% (2024: 27%). For application development and automation, 36% (2024: 17%) of respondents are planning high and medium investments in BTP.

Hungershausen: “Companies seem to be increasingly recognizing the advantages of BTP and want to use it to optimize their business processes and remain competitive. The willingness to invest in application development and automation on the BTP speaks for the need for individually tailored solutions. In order to remain competitive, companies do not want to rely solely on standard SAP software, but want to develop their own applications.” However, it should also be borne in mind that this time it was predominantly large companies that took part in the investment survey, which generally have more resources available for developing their own applications than smaller or medium-sized companies.

Role of BTP against the backdrop of the announcements on Business Data Cloud

From DSAG's perspective, it will be exciting to see how the figures for BTP develop against the backdrop of SAP's [latest announcements on SAP Business Data Cloud \(BDC\)](#). SAP is positioning BDC as an offering for the cross-system harmonization of SAP data management. This new solution in turn accesses various sub-solutions, such as SAP Analytics Cloud (SAP SAC), SAP Data Warehouse, SAP Business Warehouse



PRESSEMITTEILUNG

and SAP BW/4HANA in the S/4HANA Private Cloud Edition. The data available in the BDC can then be used with artificial intelligence (AI) from SAP or 3rd party providers.

Hungershausen: “The growing willingness to invest in BTP analysis and integration solutions indicates that companies are already placing value on seamless data processing. Whether and how SAP can create additional added value with BDC will be decisive. Particularly in view of the increasing importance of AI and data-driven business models, the question arises as to how well SAP can ensure the integration of data from different systems - even beyond the SAP world.” DSAG will also devote appropriate space to this topic at the [DSAG Technology Days 2025](#).

Companies plan budgets for AI

The question about the relevance of AI for companies also fits into this context. 68% (2024: 28%) attest to its high and medium relevance. It therefore comes as no surprise that 45% of respondents are considering AI very strongly/strongly in their IT investments for 2025. In addition, 48% of respondents stated that they see a very high/high potential benefit in AI solutions. This year, 29 percent rated SAP's AI strategy as very good/good, while in 2024 no one gave the strategy a very good rating and 10 percent rated it as good. This time, 30 percent did not provide any information (2024: 47 percent).

“The results show that AI is becoming a key topic for the future for companies in the DACH region. The fact that SAP's AI strategy is rated better than in the previous year is a positive signal,” says Hungershausen. However, it remains unclear for many companies how they can profitably integrate AI into their existing SAP landscape at this point in time. “What is needed here are transparent roadmaps and practical support from SAP. As DSAG, we also see it as our responsibility to support our member companies as practically as possible,” says Hungershausen.

Cybersecurity will continue to dominate IT topics in 2025

In addition to pure SAP topics, the survey also focused on the relevance of overarching topics for investment planning. With 92% (2024: 88%) of high and medium relevance, cybersecurity is clearly in first place, followed by process automation with 85% (2024: 75%) and IT governance 68% (2024: 56%). “The increasing relevance of cybersecurity and the focus on process automation and IT governance are direct reactions to the

PRESSEMITTEILUNG

growing threats and regulatory requirements such as the [NIS2 directive](#). Companies must prepare to further strengthen their security measures - also in order to meet the legal requirements,” Hungershausen concludes.

Positive view of the status quo of the digital transformation

Another question revolves around the digital transformation and the progress made by companies. This year's respondents, most of whom come from large companies, paint a more positive picture of this question than those who took part in previous investment reports. This year, 64% say they are very far/far along. In 2024, 44% of respondents felt this way. 29% described themselves as not very far. Last year, the figure was 48%.

“The more positive assessment of large companies with regard to their digital transformation is hardly surprising. Due to their resources and budgets, large companies are often able to implement comprehensive digitalization projects more quickly and integrate their IT infrastructure efficiently. In addition, digital transformation and innovation are often strategic priorities that are actively driven forward,” explains Hungershausen. From DSAG's perspective, this can contribute to larger companies assessing the progress of their transformation more positively than smaller companies, which may have to work with more limited means and resources.

Conclusion of the DSAG Investment Report 2025

The results of this year's DSAG Investment Report show that companies are increasingly willing to invest in future-oriented technologies and SAP solutions. The significant trend towards the cloud is particularly noteworthy. The increasing importance of AI and cybersecurity also underlines the current challenges and opportunities that companies are facing. The shift towards increased cloud usage, the positive development of the S/4HANA cloud strategy and the growing importance of AI reflect the urgency to develop technologically in order to remain competitive. At the same time, there is an increasingly differentiated picture between large and small companies in terms of resources for digital transformation.



PRESSEMITTEILUNG

Assessment of the key findings from Switzerland and Austria

Markus Bierl, DSAG Board Member Switzerland:

“The results of the investment report suggest that the RISE and GROW with SAP offerings are becoming more interesting for users in the DACH region. Nevertheless, the figures also show that a substantial proportion of SAP customers are still using on-premises solutions. It must therefore be ensured that SAP continues to provide innovations not only in the cloud, but also for on-premises users. This user group cannot be left behind and forced to make the switch. Instead, the path to the cloud should be paved with incentives - such as the [RISE with SAP Migration & Modernization](#) program.

The fact that 40 percent of respondents rate the program as highly/medium relevant is a clear signal to the software group. The aim must therefore be not only to resume the program, but also to offer it indefinitely. Incentives represent important support for companies and a strong argument for migration in the current difficult economic situation. What is more, the report still records rising IT investments. But this picture is likely to change quickly, as the economic outlook is also bleak.”

Walter Schinnerer, DSAG Board Member for Austria:

“When asked about the SAP Enterprise Resource Planning (ERP) solutions they use, SAP ERP and SAP Business Suite are still in the lead among DACH users in 2025 with 51%. Almost a quarter of respondents also stated that they would continue to invest in the Business Suite. This shows that the solution is not just being kept alive as an 'after-thought', but is being actively used and further developed. Two years before the regular end of maintenance, this is remarkable and underlines the fact that while SAP is pushing its customers into the cloud at a rapid pace, many users still have to make strategic preliminary considerations. They first have to decide how to replace their existing ERP system and build up the necessary expertise. At the same time, resources on the consulting market are limited and such a transformation project cannot necessarily always be mastered with existing in-house capacities. Accordingly, it is important for SAP not to misjudge reality, to take its foot off the gas and to focus on actual user interests.



PRESSEMITTEILUNG

The fact that - despite the considerable user growth in cloud solutions - the proportion of S/4HANA on-premises users is roughly the same as last year at 42% also makes it clear that the cloud offerings are still far from suitable for all users. This is reflected in the GROW with SAP program, among others, which is rejected by 26% of users. Even if there is no way around the cloud in the long term, the message to SAP is: proceed with a sense of proportion.”

***Survey basis**

In the period from January 20, 2025 to February 14, 2025, 243 people took part in the survey. The investment report survey was sent out by SAP for the first time. Only one person per company was surveyed. A total of 79 percent of the company representatives who took part in the survey are DSAG members. These were CIOs, CC managers or contact persons exclusively from user companies.

In terms of industries, the top five were dominated by the machinery, equipment and component manufacturing industry with 13 percent, followed by the automotive industry with 9 percent and the consumer goods and healthcare industries with 7 percent each. The chemical industry accounted for 6 percent of participants. Compared to the previous year, there were significantly more participants from the manufacturing industry this year, and the public sector, for example, is no longer one of the top 5 sectors.

42 percent of companies employ 5,000 or more employees. In 2024, 29 percent of participants belonged to this category. SAP therefore surveyed significantly more larger companies than DSAG in previous years.



PRESSEMITTEILUNG

All current DSAG positions can be found in the [DSAG press center](#).

On the [digital platform impulsant](#), interested parties can find all relevant content from the SAP and DSAG cosmos in a comprehensive and multimedia format.

About DSAG

The German-speaking SAP User Group (DSAG) is one of the most influential user associations in the world. Over 4,000 member companies and more than 70,000 members form a strong network that extends from medium-sized companies to DAX corporations and across all economic sectors in Germany, Austria and Switzerland (DACH). Based on this reach, the industry association gains well-founded insights into the digital challenges in the DACH market. DSAG uses this knowledge advantage to represent the interests of SAP users and pave the way for digitalization for its members. For more information, visit: www.dsag.de, www.dsag.at, www.dsag-ev.ch

Press contact:

DSAG

Thomas Kircher, Julia Theis, Dana Walter
Deutschsprachige SAP® Anwendergruppe (DSAG) e. V.
Altrottstraße 34a
69190 Walldorf
Telephone: +49 1512 5630665
E-Mail: presse@dsag.de
Internet: www.dsag.de