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DSAG-ASUG-UKISUG-JSUG survey on the use of cloud services

Cloud solutions on the rise, but hybrid scenarios dominate the picture

- **System landscapes predominantly hybrid**
- **Familiarity with the new Business Suite could be improved**
- **Need for information on the Business Data Cloud**

Walldorf, December 9, 2025 – According to a joint survey of SAP user groups in North America, Germany, Austria, Switzerland, the United Kingdom, and Japan, more than two-thirds of all respondents use cloud solutions for business applications, workloads, or data storage. The system landscapes used are predominantly hybrid, i.e., they consist of on-premises and cloud solutions. To date, 33 percent of respondents are very familiar or familiar with the new Business Suite.

76 percent of DSAG members surveyed currently use cloud solutions for business applications, workloads, or data storage (ASUG: 84 percent, UKISUG: 70 percent, JSUG: 72 percent). "In an international comparison, we see that cloud usage is also steadily increasing among our members – albeit with a different dynamic than in the US, for example. The DACH region is characterized by mature on-premises landscapes, high data protection requirements, and a strong awareness of investment security. This explains the more cautious but sustainable approach many companies are taking to cloud transformation," says Jens Hungershausen, DSAG Chairman of the board.

Impact of the changed SAP licensing models on cloud plans



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10 percent of DSAG members (ASUG: 21 percent, UKISUG: 15 percent, JSUG: 24 percent) believe that the RISE and GROW journeys will fundamentally accelerate their move to the cloud. Thanks to the RISE and GROW offerings, 15 percent (ASUG: 22 percent, UKISUG: 10 percent, JSUG: 28 percent) plan to move to the cloud more quickly. The newly structured cloud offerings are designed to help customers gradually modernize their landscapes. Even though these announcements are already creating initial incentives for moving to the cloud, more initiatives are needed to accelerate the transition. Many companies still operate highly customized systems with S/4HANA on-premises. "To encourage more customers to actively move toward the cloud, SAP must show these customers attractive ways to achieve a modular clean-core landscape" said Hungershausen.

Hybrid system landscapes in first place

When asked about the system landscapes currently in use, 78 percent of DSAG members are using hybrid on-premises and cloud solutions (ASUG: 49 percent, UKISUG: 56 percent, JSUG: 55 percent). Seven percent rely solely on private cloud (ASUG: 23 percent, UKISUG: 14 percent, JSUG: 10 percent). The public cloud is the favorite among one percent of DSAG members (ASUG/JSUG: 4 percent, UKISUG: 8 percent), while 7 percent prefer a mix of private and public cloud (ASUG: 24 percent, UKISUG: 17 percent, JSUG: 27 percent).

"Companies' reluctance to adopt the public cloud is due, among other things, to the complexity of existing customer landscapes, fears of losing system adaptations and well-established functions, and, last but not least, the economic conditions, which cause some to doubt the return on investment. Finally, potential dependence on a single provider also plays an important role in the considerations", Hungershausen summarizes. Almost



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half (49 percent) of DSAG members (ASUG: 21 percent, UKISUG: 33 percent, JSUG: 29 percent) are concerned about potentially being dependent on a single provider. In addition, 27 percent of DSAG members (ASUG: 18 percent, UKISUG: 22 percent, JSUG: 27 percent) have concerns about a lack of internal expertise or cloud readiness.

Cultural and structural reasons

S/4HANA On-Premises is used by 55 percent of DSAG members (ASUG: 28 percent, UKISUG: 23 percent, JSUG: 18 percent). When it comes to planning S/4HANA deployment, on-premises is also ahead at 31 percent (ASUG: 15 percent, UKISUG: 10 percent, JSUG: 6 percent). S/4HANA is used as a private cloud edition by 18 percent of respondents (ASUG: 33 percent, UKISUG: 18 percent, JSUG: 44 percent). Public cloud deployment is comparatively low, with only 4 percent of DSAG members surveyed here using this option so far (ASUG: 10 percent, UKISUG: 10 percent, JSUG: 13 percent). Private cloud deployment is planned by 35 percent (ASUG: 50 percent, UKISUG: 35 percent, JSUG: 28 percent). Seven percent of DSAG members plan to use the public cloud (ASUG: 11 percent, UKISUG: 10 percent, JSUG: 16 percent).

The reluctance of DACH companies when it comes to the cloud continues to be more cultural and structural than technical in nature. The pronounced need for data protection in DACH and the associated concerns about possible access to data stored by US hyperscalers, for example, certainly play a role in these considerations. According to the survey, this translates into the following figures: 45 percent of DSAG members (ASUG: 52 percent, UKISUG: 47 percent, and JSUG 31 percent) have security and data protection concerns when operating central SAP workloads and applications in



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the public cloud. 63 percent in DACH (ASUG: 36 percent, UKISUG: 58 percent, JSUG 49 percent) fear a loss of system customizations and functions.

More flexible deployment models

SAP's deployment models are a decisive factor in favor of the cloud for survey participants. 43 percent of DSAG members (ASUG: 32 percent, UKISUG: 36 percent, JSUG 37 percent) expect greater flexibility in this area. This result reflects DSAG's demand for an open, standardized, and flexible operating model for the public and private cloud. "Customers need real freedom of choice and must be able to decide for themselves whether they want to run their systems on-premises, in the private cloud, or in the public cloud. SAP must create the conditions for this with transparent and scalable licensing and cost models as well as clear migration paths," says Hungershausen, emphasizing a key DSAG demand from the DSAG Annual Congress 2025.

Information on roadmap and support requested

33 percent (ASUG: 22 percent, UKISUG: 27 percent, JSUG: 18 percent) of survey participants are very familiar or familiar with the newly designed Business Suite. Thirty-one percent of DSAG members (ASUG: 28 percent, UKISUG: 37 percent, JSUG: 29 percent) consider themselves reasonably familiar with it. Thirty-five percent of DSAG respondents (ASUG: 51 percent, UKISUG: 36 percent, JSUG: 53 percent) are not very familiar or not familiar at all with it. Specifically, 49 percent (ASUG: 40 percent, UKISUG: 54 percent, JSUG: 35 percent) lack information about the long-term roadmap and support timelines.

"The fact that a good two-thirds of those surveyed are at least somewhat familiar with the new Business Suite solution is a good sign that our appeal has not gone unheard. There is a need for more information about the



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roadmaps and support timelines, but things are moving in the right direction. To ensure that this remains the case, we as a user association are in constant communication with SAP managers. However, we also see it as our responsibility as DSAG to ensure that the necessary information reaches our member companies quickly and reliably," summarizes Hungershausen.

Better communication of licensing and pricing models

Further communication efforts are also needed with regard to the licensing and pricing models for Business Suite. 70 percent of DSAG members (ASUG: 39 percent, UKISUG: 61 percent, and JSUG: 68 percent) complain about gaps in their knowledge in this area. "Even though the 'new Business Suite' has only been on the market for a relatively short time, this is a high figure for the DACH region. As DSAG, we need to work with SAP to do a much better job of educating people," explains Hungershausen.

Knowledge gaps regarding the Business Data Cloud

When asked about their knowledge of the Business Data Cloud, 15 percent said they were very familiar or familiar with it (ASUG: 17 percent, UKISUG: 19 percent, JSUG: 11 percent). 52 percent said they were somewhat familiar or slightly familiar with it (ASUG: 61 percent, UKISUG: 53 percent, JSUG: 66 percent). 31 percent are not familiar at all (ASUG: 22 percent, UKISUG: 30 percent, JSUG: 22 percent). When it comes to knowledge gaps about the Business Data Cloud, the top three areas are integration capabilities, licensing and pricing models, and differences from previous SAP data solutions. "Many companies still lack guidance when it comes to the Business Data Cloud. That is why we expect greater transparency from SAP", says Hungershausen.



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No dependence on commercial constructs

Specifically, this means that the Business Data Cloud must be designed to be understandable, accessible, and open so that all customers, both in the cloud and on-premises, can benefit. “There must be no dependence on individual commercial constructs, and SAP needs to provide clearer communication and more information about the prerequisites and specific benefits of the solution. Only then can the Business Data Cloud become a real added value for the entire SAP customer base,” summarizes Hungershausen.

Conclusion

SAP cloud solutions continue to gain ground. The survey also confirmed the coexistence of on-premises and cloud solutions that has been predicted for some time: Many companies are relying on hybrid scenarios or planning to do so – and this will remain the case for the foreseeable future. Nevertheless, it should be noted that twice as many projects are currently planned for the S/4HANA Private Cloud Edition as have already been implemented. The path is therefore clear. The extent to which this also applies to the new Business Suite and the Business Data Cloud remains to be seen. More expertise and reliable information on roadmaps and support are needed here.

Survey basis:

The online survey was conducted in July and August 2025 among SAP user groups from Germany, Austria, Switzerland, the US, the UK, Japan, and Australia. A total of 274 participants from the DACH region registered for the survey, 80 percent of whom are headquartered in Germany. The top five industries represented were machinery, equipment, and component



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manufacturing, followed by utilities and the public sector. Professional services ranked fourth, ahead of financial services.



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About DSAG

The German-speaking SAP User Group (DSAG) is one of the most influential user associations in the world. More than 4,000 member companies 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.dsaq.de, www.dsaq.at, www.dsaq-ev.ch

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