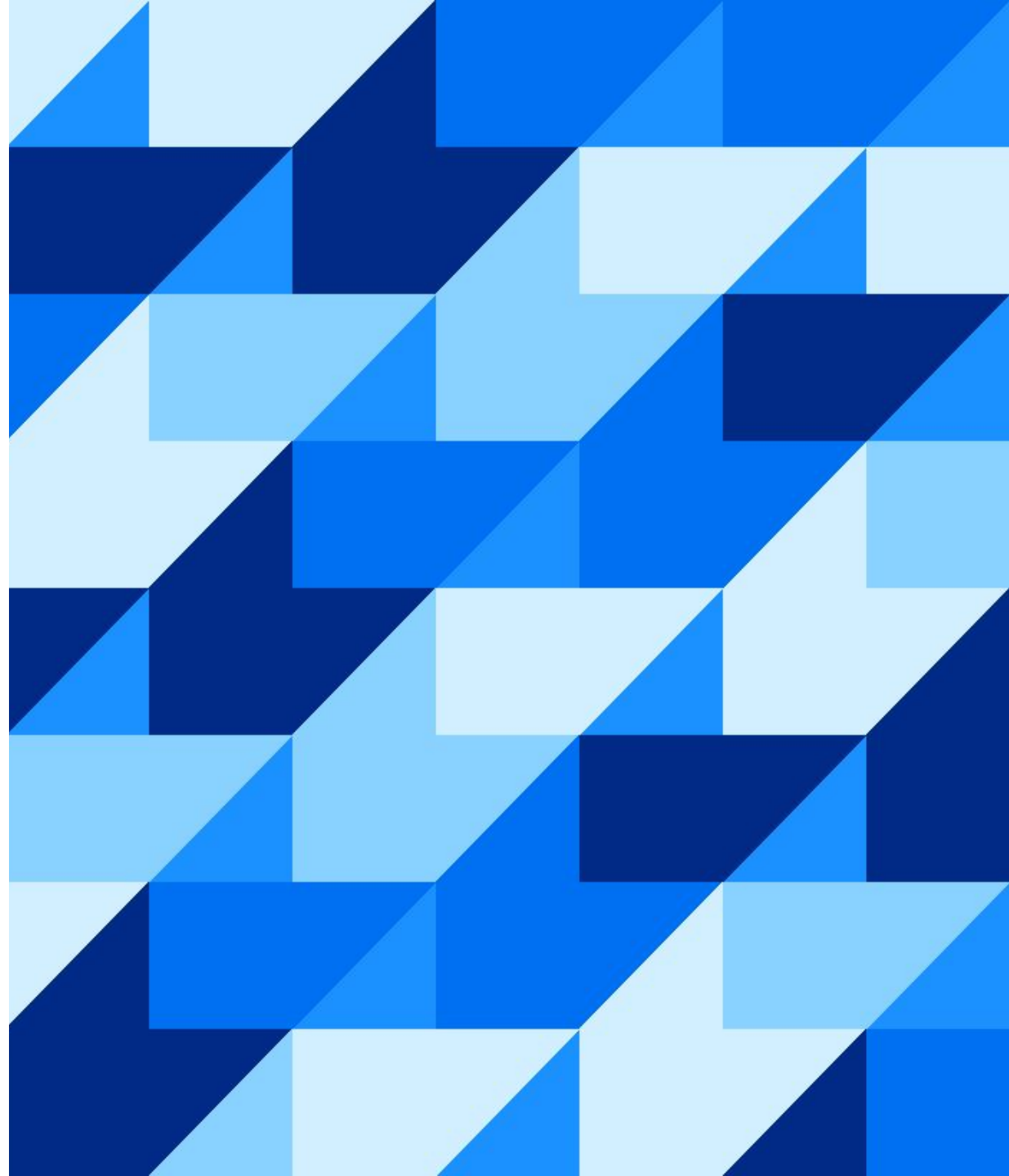




Monetizing SAP Agent-as-a-Service

Technical & Partner Playbook



Presentation Overview & Learning Goals

This technical and business playbook provides comprehensive coverage across the SAP agent ecosystem.

01 Market Landscapes

We will explore the market landscapes driven by the Autonomous Enterprise vision.

02 Partner Revenue Models

We will detail the five core partner revenue models.

03 ERP Agent Use Cases

The presentation will identify the top high-demand ERP agent use cases.

04 Technical Stack & Protocols

We will break down the required technical stack and protocols.

05 Go-to-Market & Risk Mitigation

Finally, we will outline a concrete Go-to-Market phases roadmap and analyze SAP's competitive moats and risk mitigation strategies to ensure successful partner deployments.

SAP's Agent Strategy & Market Context

Seizing the €3-7B Clean Core Agent Addressable Market

A Massive New Frontier for Technical Partners

SAP officially launched its "Autonomous Enterprise" vision on May 12, 2026, creating a massive new frontier for technical partners. This strategic pivot is backed by a dedicated €100M partner investment fund designed to accelerate ecosystem development.

Industry analysis indicates that the Clean Core strategy has unlocked a highly lucrative agent-addressable market valued between €3-7B. This represents the largest platform-native agent opportunity currently available in enterprise software.

Partners who align with SAP's vision now are positioned to capture significant market share as enterprise customers transition toward fully autonomous, AI-driven workflows across their core business processes.

€3-7B

Clean Core Addressable Market

The largest platform-native agent opportunity currently available in enterprise software.

40%

Embedded Intelligent Agents

Gartner projects that by 2028, 40% of all enterprise applications will embed intelligent agents, operating within a \$234B market.

€100M

Partner Investment Fund

Dedicated SAP funding launched alongside the 'Autonomous Enterprise' vision to accelerate ecosystem growth.

Ecosystem Momentum Driven by Partner Agent Submissions

The SAP ecosystem is experiencing rapid momentum following the launch of the Autonomous Enterprise vision. The underlying metrics demonstrate strong partner engagement and platform maturity.

680+

Partner Agent Submissions
recorded at the Agent Hub launch.

200+

Pre-built Joule Agents
specialized agents already developed.

50+

Joule Assistants
highlighted during the SAP Sapphire keynote.

27,000+

BTP Customer Base
enterprise customers ready for deployment.

80:20

Partner Revenue Share
favorable split established in Hub terms.

€100M

Partner Investment
SAP Partner AI Fund directly supporting
builders.

"These hard numbers validate the immediate commercial viability of the platform, providing partners with a massive installed base of 27,000+ BTP customers and a highly profitable 80% revenue share model."

Monetization & Five Partner Revenue Models

Strategic Pathways to Monetize SAP Agent Integrations

Partners have five distinct commercial models to monetize their agent development on the SAP platform, ranging from transactional micro-billing to multi-million euro consulting engagements.

1

Subscription Agent

The most common model, charging a monthly or annual fee per agent instance, ideal for repetitive automation tasks.

2

Usage-Based

Charging per transaction or API call, perfectly suited for high-volume, variable workloads like document processing.

3

Outcome-Based

Tying revenue directly to a measurable business outcome or value share, best for high-value optimization scenarios.

4

Platform/Connector Revenue

Licensing reusable connectors, SDKs, or agent frameworks to enterprise clients, targeting technical ISVs.

5

Consulting + Managed Service Hybrid

An end-to-end advisory, build, and operate model tailored for system integrators and Big 4 consultancies managing complex transformations.

Scaling Revenue via Subscription and Usage-Based Agents

Model 1: Subscription Agent

Most Common Deployment Model

Core Concept: Relies on a predictable monthly or annual fee per agent instance.

Best Fit: Highly effective for repetitive automation tasks such as invoice processing or HR onboarding.

Pricing Range: €500 to €200,000 per year (depending on the agent's complexity and scope).

Real-World Example

A procurement approval agent deployed at €2,000 per month per customer.

Model 2: Usage-Based

Per Transaction Model

Core Concept: Charges customers based on consumption, paying per agent action or API call.

Best Fit: Best fit for high-volume, variable workloads where demand fluctuates.

Pricing Range: Typically between €0.10 and €5 per transaction.

Real-World Example

Large-scale document extraction, billed at €0.50 per document processed, allowing customers to scale costs directly with their operational throughput.

Capturing Enterprise Value with Outcome, Platform, and Hybrid Models

MODEL 3

Outcome-Based

Value Share Model

3% – 20%

of the value delivered

Revenue is directly tied to measurable business outcomes, typically capturing 3-20% of the value delivered. This is ideal for high-value scenarios like cash flow optimization or supply chain savings.

Example Scenario:

A partner might take 10% of the procurement savings identified by their agent.

MODEL 4

Platform/Connector

Reusable IP Licensing

€10K – €100K+

per enterprise license

Technical partners and ISVs can build and license reusable connectors, SDKs, or agent frameworks. This enables productized asset sales with predictable pricing structures.

Example Scenario:

Licensing an MCP/A2A connector suite designed for legacy SAP integration.

MODEL 5

Consulting + Managed

System Integrator Hybrid

€150K – €2M+

engagement value range

System integrators can deploy an advisory, build, and operate model. This enables comprehensive end-to-end management of high-ticket enterprise transformation initiatives.

Example Scenario:

Advisory on strategy, custom implementation, and ongoing 24/7 operations.

Where the money is — High-demand use cases

High-Demand Agents in Procurement, Finance, and HR

The highest demand for SAP agents is concentrated in core operational modules where automation drives immediate ROI.



S/4HANA & Ariba
Highest Demand

Autonomous Procurement

€50K – €200K

Est. Revenue / Year / Customer

Targeting **S/4HANA and Ariba**, this use case exhibits the **highest demand level**. Partners can expect estimated revenues of **€50K to €200K** per year per customer by automating complex purchasing workflows.



S/4HANA Finance
Top-Tier Demand

Intelligent Invoice Processing

€20K – €80K

Est. Revenue / Year / Customer

Focused on **S/4HANA Finance**, this is another **top-tier demand** category. By automating financial document handling, partners can generate between **€20K and €80K** in annual revenue per customer.



SuccessFactors
High Demand

HR Self-Service Agent

€30K – €100K

Est. Revenue / Year / Customer

Integrating with **SuccessFactors**, this **high-demand agent** streamlines employee interactions and requests. It commands an estimated revenue range of **€30K to €100K** per year per customer, significantly reducing HR administrative overhead.

Driving Resilience and Sustainability via Specialized ERP Agents

Beyond core finance and HR, specialized agents addressing supply chain, sales, and sustainability offer highly lucrative opportunities for partners.

01 Supply Chain

Supply Chain Resilience

Integrating IBP and S/4HANA, these agents help navigate business disruptions. They command strong market demand.

Estimated Revenue

€80K – €300K

per year / customer

Demand: Strong

02 Asset Mgmt

Predictive Maintenance

Targeting Asset Management modules, these specialized agents forecast equipment failures to optimize operations.

Estimated Revenue

€60K – €200K

per year / customer

Demand: High

03 ESG Reporting

ESG Reporting Agent

Spurred by regulatory pressure, Sustainability agents generate high value by automating complex environmental reports.

Estimated Revenue

€40K – €150K

per year / customer

Demand: Solid

04 Sales Order

Sales Order Agent

Bridging CX and S/4HANA, these agents streamline the order-to-cash workflow, ensuring steady revenue streams.

Estimated Revenue

€25K – €60K

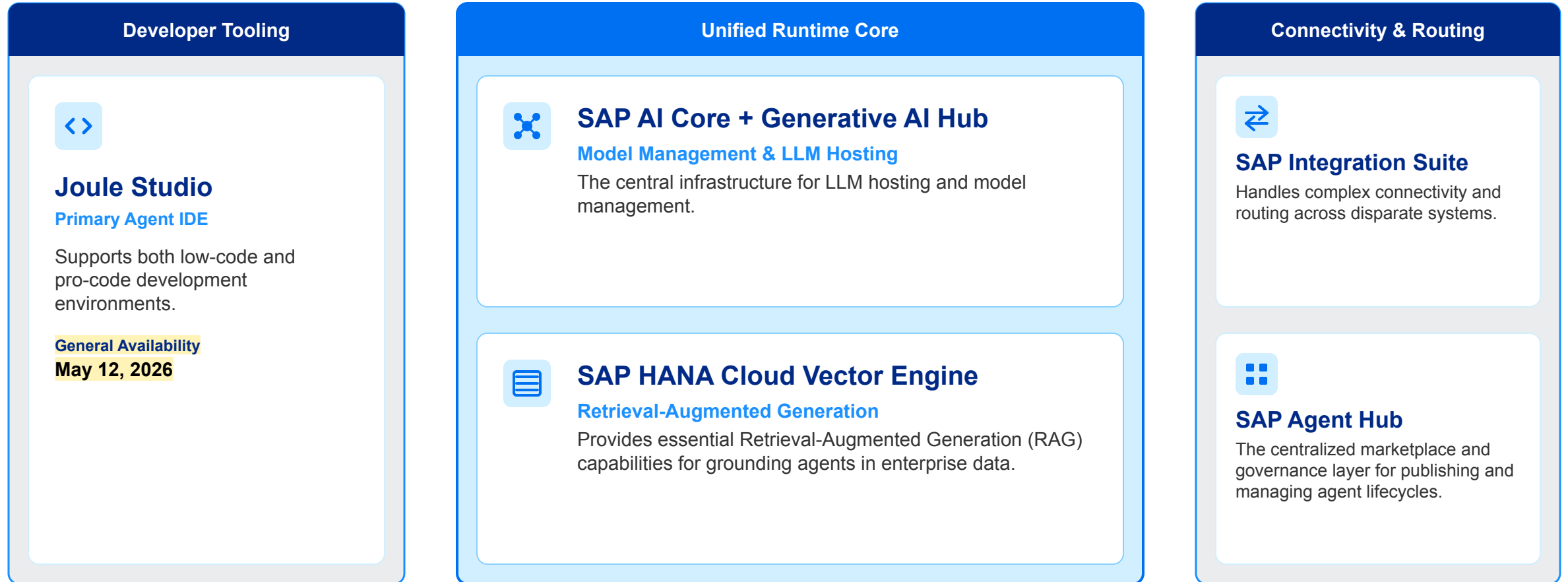
per year / customer

Demand: Steady

Unified Technical Stack & Architecture

Architecting on the SAP Business AI Platform Unified Runtime

The foundation for all agent development is the SAP Business AI Platform, which serves as the unified runtime replacing previous BTP AI architectures. This core platform is mandatory for building and deploying enterprise-grade agents.



Tailoring Agent Development from No-Code to Pro-Code

SAP provides flexible development pathways tailored to different skill levels and architectural requirements, ensuring teams can build everything from simple workflows to complex, side-by-side extensions.

01 / NO-CODE

No-Code Approach

Designed for business users utilizing the Joule Studio Agent Builder. This is best suited for creating simple, straightforward workflow agents without engineering resources.

02 / LOW-CODE

Low-Code Approach

Targeted at citizen developers using Joule Studio alongside pre-built templates. This pathway is ideal for orchestrating multi-step automations.

03 / PRO-CODE

Pro-Code (Python)

Built for professional developers leveraging the SAP Cloud SDK for AI (v6.10). This is required for complex orchestration and custom logic.

04 / PRO-CODE

Pro-Code (ABAP)

Utilizes the ABAP MCP Server (GA in Q2 2026) for deep, native ERP integration by specialized SAP developers.

05 / ENTERPRISE

CAP-Based

Enables full-stack developers to build robust, side-by-side extensions using the Cloud Application Programming Model (CAP) and BTP.

Pathway Complexity & Customization Power 

Leveraging Advanced Interoperability & Custom LLM Code Gen

To ensure agents can communicate seamlessly and access deep enterprise data, the platform incorporates several key technical protocols and capabilities.

A2A Protocol



Enables sophisticated Agent-to-agent communication, developed through a strategic partnership between Google and SAP to support multi-vendor interoperability.

MCP Protocol



The Model Context Protocol provides standardized tool and data access, crucial for deep integration.

BYOM



Offers the flexibility to integrate external models including GPT, Claude, Gemini, or open-source alternatives directly into the platform.

SAP-ABAP-1



SAP's proprietary, custom-trained model specifically optimized for ABAP code generation, accelerating native ERP development.

Multi-agent Orchestration

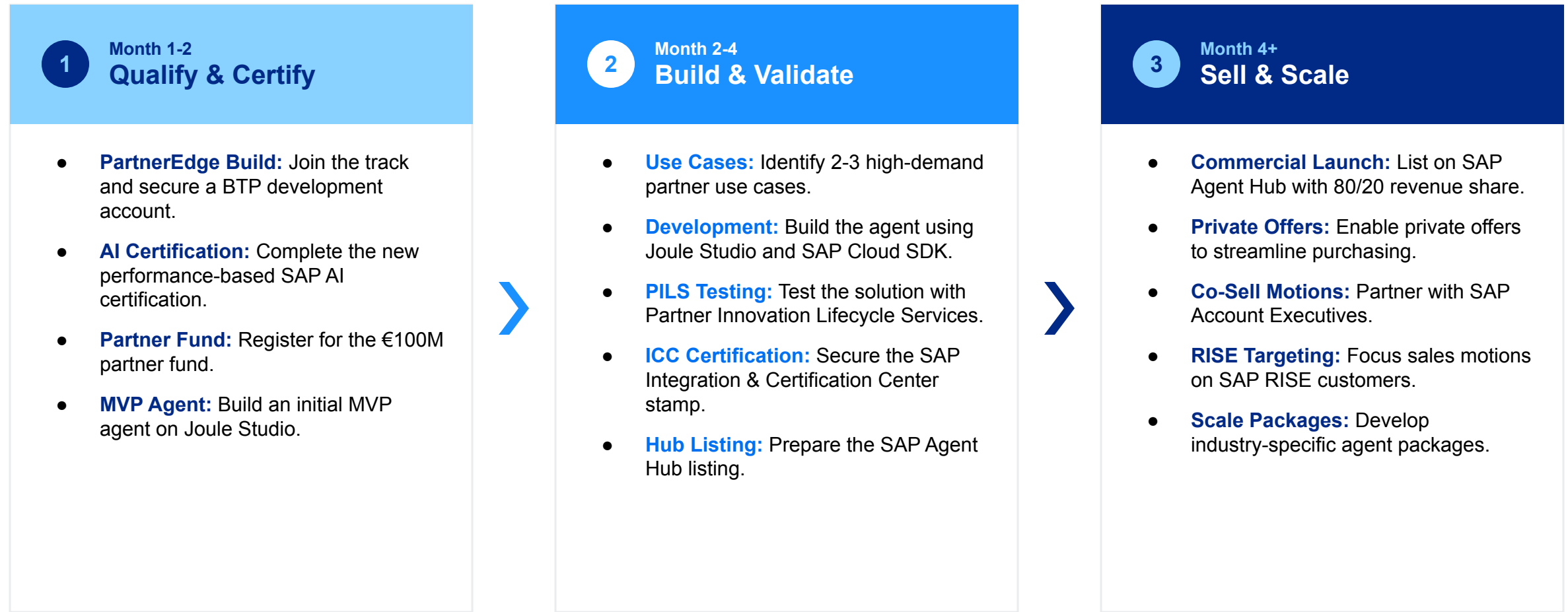


Native support within Joule Studio to manage complex interactions between multiple specialized agents.

Go-to-Market Playbook for Partners

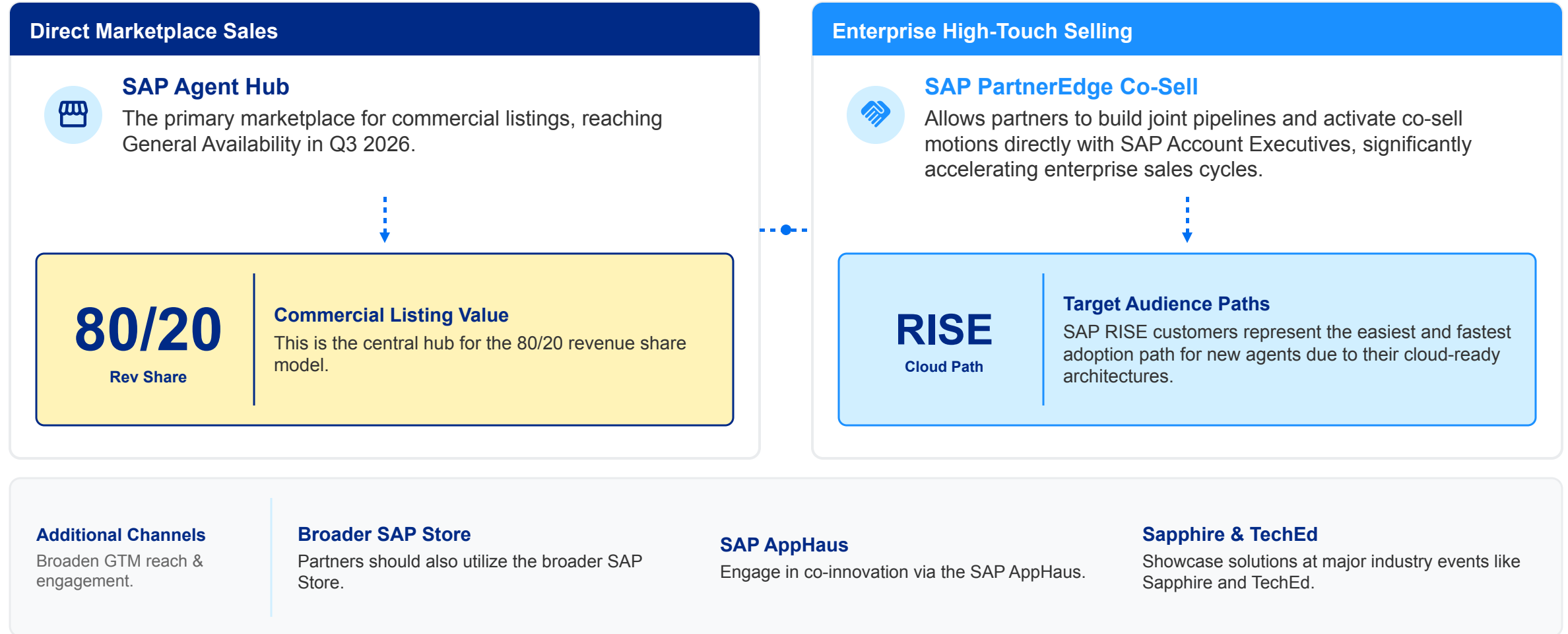
Executing the 3-Phase Go-to-Market Partner Strategy

Partners must follow a structured 3-phase roadmap to successfully launch and monetize their agents.



Accelerating Sales via SAP Agent Hub and Co-Sell Motions

To maximize market penetration, partners must leverage SAP's primary go-to-market channels designed specifically for the agent ecosystem.



Strategic Context, Competitive Moats, & Risk Mitigation

Defending Market Position with Core ERP Process Depth

The Core ERP Moat

27,000+

Enterprise BTP Customers

“SAP agents operate directly within the financial and operational heart of the enterprise, leveraging exclusive, direct access to the core ERP data of our massive global ecosystem.”

UNPARALLELED BUSINESS DEPTH

While competitors like ServiceNow, Salesforce, and Microsoft focus heavily on IT workflows, CRM, or desktop productivity, SAP agents run within the operational core of the enterprise, delivering unmatched transactional value and workflow depth.

UNIFIED GOVERNANCE & SUPPORT

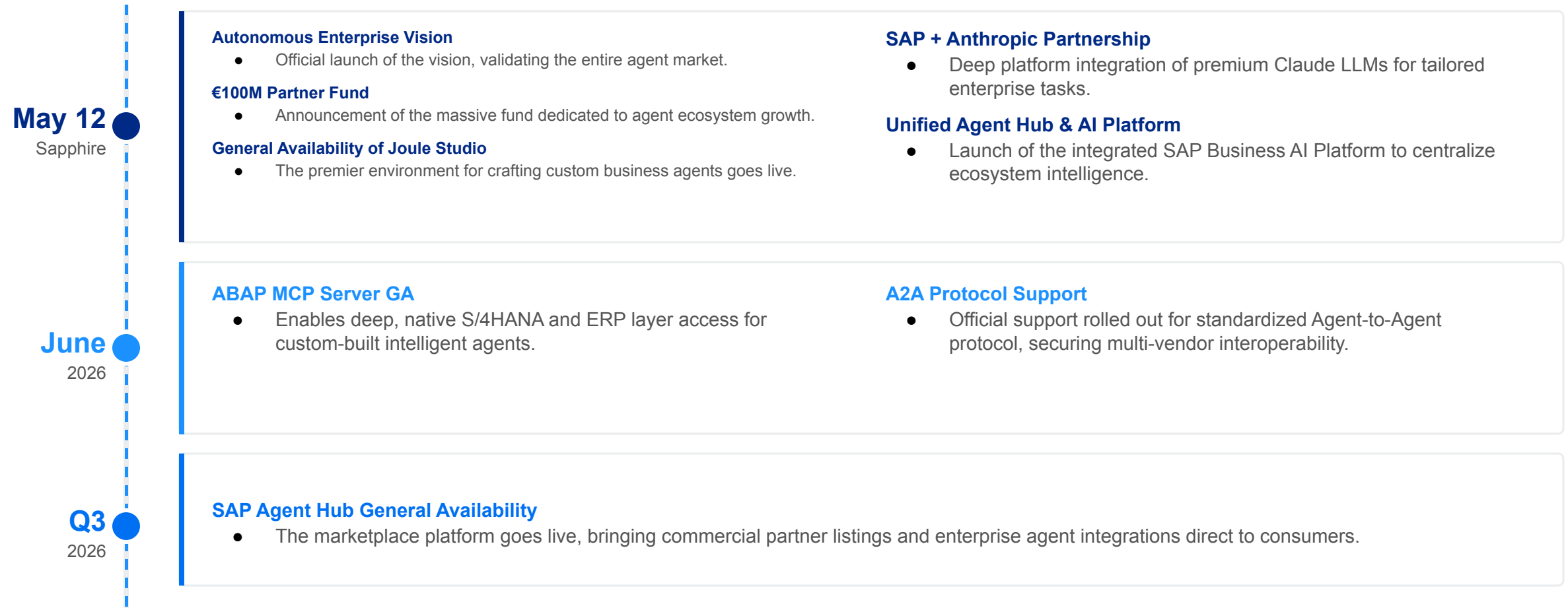
This critical data advantage is reinforced by secure, unified governance through the SAP Agent Hub and accelerated by substantial financial investment, including a dedicated €100M partner fund.

CENTRAL ORCHESTRATION LAYER

SAP's unwavering commitment to multi-vendor interoperability using standard A2A and MCP protocols ensures that SAP remains the primary orchestration layer for enterprise-wide autonomous processes.

Tracking Strategic Joule and MCP Platform Announcements

The rapid evolution of the SAP agent ecosystem is defined by a dense timeline of strategic announcements between May and July 2026.



Mitigating Risks to Optimize Platform Margins and Trust

Partners must proactively manage several key risk factors to ensure profitable and secure agent deployments.

CORE TECHNICAL & PRICING RISKS

EXPLICIT PARTNER MITIGATIONS

LLM Costs Eating Margins

Unpredictable API costs can erode profitability.

Mitigation requires using **SAP-hosted models** and heavily optimizing workflows with **caching**.

Customer Trust in Autonomous Agents

Enterprises are hesitant to deploy fully autonomous systems immediately.

Partners should start deployments in **"copilot" mode**, requiring **human-in-the-loop approvals**, before graduating to full autonomy.

SAP Platform Lock-In

To maintain architectural flexibility, partners must build portably.

Partners must build using standardized **MCP and A2A protocols**, ensuring complete portability.

Data Privacy and Compliance

Enterprise data security is paramount for all production scenarios.

Partners must strictly leverage SAP's built-in **governance** and **security frameworks**.

Agent Hub Timing

With GA targeted for Q3 2026, the building window is active.

Partners must **start building immediately** to ensure day-1 listing readiness.

Initiating Your Partner Build with 11 Immediate Action Steps

To capitalize on the **€3-7B Clean Core TAM**, technical partners should execute this quick-start checklist immediately:

PHASE 1: BUILD PREPARATION

- 01** Join the **SAP PartnerEdge program** (Build track).
- 02** Provision an **SAP BTP account** (moving from trial to production).
- 03** Install and configure **Joule Studio**.
- 04** Complete the new **AI Foundations certification**.
- 05** Apply directly for the **€100M partner fund**.
- 06** Select the **top 2 agent use cases** based on market demand.

PHASE 2: COMMERCIALIZATION & GTM

- 07** Develop the **MVP agent** within a 4-6 week timeframe.
- 08** Complete **technical certification** through PILS.
- 09** Prepare and list the solution on the **SAP Agent Hub** for Q3 2026 GA.
- 10** Establish **commercial pricing** (choosing subscription or usage-based models).
- 11** Activate **co-sell motions** with SAP Account Executives.

Key Target Timeline

Complete steps 1–11 immediately to align with the **Q3 2026 General Availability (GA)** and pipeline build.