Magic Quadrant pour les plateformes de gestion SaaS

4 septembre 2024 ⓘ - ID G00811445 - 48 min de lecture

MISE À JOUR   Cette recherche a été mise à jour pour inclure les changements récents en matière de capacités.

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Les plateformes de gestion SaaS permettent aux entreprises de relever les défis croissants liés à l'utilisation des applications SaaS dans l'ensemble de l'entreprise, qui entraînent des dépenses excessives, des risques accrus, un manque de visibilité et une prolifération des contrats. Ce premier Magic Quadrant aide les dirigeants d'I&O à identifier les fournisseurs appropriés.

Hypothèses de planification stratégique

D'ici 2027, les organisations qui ne parviennent pas à gérer de manière centralisée les cycles de vie SaaS resteront cinq fois plus exposées à un incident informatique ou à une perte de données en raison d'une visibilité incomplète sur l'utilisation et la configuration du SaaS.

D'ici 2027, les organisations qui ne parviendront pas à obtenir une visibilité centralisée et à coordonner les cycles de vie SaaS dépenseront au moins 25 % de plus en SaaS en raison de droits inutilisés et d'outils inutiles et superposés.

D'ici 2027, plus de 50 % des organisations centraliseront la gestion des applications SaaS à l'aide d'un SMP, soit une augmentation par rapport à moins de 10 % en 2024.

Définition/Description du marché

Il s'agit de la première version du Magic Quadrant des plateformes de gestion SaaS. Il remplace le Guide du marché des plateformes de gestion SaaS .

Gartner définit les plateformes de gestion SaaS (SMP) comme des outils logiciels qui visent à aider les entreprises à découvrir, gérer, optimiser et automatiser le cycle de vie des applications SaaS à partir d'une console centralisée. Les principales fonctionnalités SMP comprennent la découverte, l'optimisation des coûts, le libre-service des employés via un magasin d'applications, des informations pour augmenter l'adoption et l'automatisation des activités d'intégration/de départ.

À mesure que l'adoption du SaaS s'accélère, les responsables informatiques ont du mal à découvrir et à prendre en charge les applications hébergées en SaaS conformément aux politiques et réglementations de l'entreprise, du marché ou de la zone géographique. L'augmentation des coûts du SaaS, combinée à une visibilité limitée sur l'ensemble du portefeuille SaaS (y compris les SaaS non approuvés) et à des niveaux élevés de licences sur-déployées et sous-consommées , entraîne des risques financiers, opérationnels et de cybersécurité importants. Les SMP contribuent à atténuer ces risques et offrent les avantages suivants :

- Découverte et surveillance des utilisations SaaS approuvées et non approuvées .

- Augmentation du retour sur investissement SaaS grâce à la fourniture de données pour favoriser l'adoption .

- Amélioration de la gestion, des prévisions et de la prise de décision concernant les contrats et renouvellements SaaS , ainsi que des coûts et des droits de licence optimisés .

- Expérience employé améliorée via un catalogue ou un magasin d'applications en libre-service organisé pour rechercher et demander l'accès aux applications SaaS approuvées.

- Intégration rationalisée des nouveaux employés aux applications SaaS existantes et des nouvelles applications SaaS à l'organisation.

- Départ automatisé des employés au sein des applications SaaS.

- Réduction des frais informatiques grâce à l'automatisation de la configuration et de la gestion des politiques.

- Collaboration accrue entre les équipes qui participent au cycle de vie des applications SaaS, y compris toutes les parties prenantes internes et externes à l'informatique.

- Risque réduit grâce à une meilleure connaissance des applications SaaS non approuvées qui ne sont pas intégrées aux fournisseurs d'identité d'entreprise.

- Amélioration de la capacité à se conformer à un nombre croissant de nouvelles réglementations qui exigent une connaissance complète de l'emplacement des données de l'entreprise et des clients, et une divulgation accélérée des violations ou vulnérabilités potentielles.

Les cas d'utilisation courants incluent :

- Découvrir : Découvrez les utilisations et les coûts SaaS autorisés et non autorisés, tout en équilibrant la confidentialité des employés.

- Optimiser : Analyse, informations, alertes et automatisation pour optimiser les coûts et les droits SaaS.

- Activation : mise à disposition d'un magasin ou d'un catalogue d'applications destiné aux employés pour simplifier les demandes SaaS. Analyse, informations et alertes pour favoriser l'adoption du SaaS et maximiser le retour sur investissement.

- Automatisez : simplifiez l'administration SaaS (exécution des demandes, intégration, départ, récupération de licence, etc.) avec des flux de travail personnalisables et basés sur des modèles .

- Gérer : Gestion de la configuration, de la politique, des utilisateurs et des licences via l'intégration API en lecture/écriture.

- Conformité : identification des applications SaaS et des détails de certification courants pour déterminer la conformité avec les réglementations du secteur et la politique organisationnelle.

Capacités indispensables

Les capacités indispensables pour ce marché incluent :

- La capacité de découvrir l'utilisation SaaS autorisée et non autorisée via l'extension de navigateur, l'agent de périphérique, l'intégration de systèmes financiers/de dépenses, l'intégration d'outils de sécurité (y compris, mais sans s'y limiter, SASE, SSE, CASB, SIEM, SWG, pare-feu et EDR), l'intégration de la plate-forme SSO et IDP, l'intégration d'outils de gestion des points de terminaison, l'intégration du système de messagerie ou l'intégration API directe avec les applications SaaS.

- Une capacité de flux de travail automatisé, y compris la possibilité d'automatiser l'intégration et le départ des employés pour les applications SaaS.

- La capacité d'optimiser les dépenses liées au SaaS, y compris la capacité d'identifier les applications redondantes, d'identifier et de réaffecter les licences inutilisées, d'optimiser l'utilisation, de prévoir les dépenses SaaS et d'attribuer la propriété des applications aux propriétaires d'entreprise en dehors de l'informatique avec des contrôles d'accès basés sur les rôles.

- La possibilité de gérer directement les applications SaaS courantes à partir du SMP via l'intégration d'API en lecture/écriture.

Capacités standard

Les capacités standard pour ce marché incluent :

- Une plateforme conforme aux exigences réglementaires applicables, telles que le RGPD et le CCPA/CPRA .

- Intégration ITSM, y compris la billetterie, le catalogue de services, le libre-service et la CMDB.

- Extensibilité via API, intégrations, ainsi que possibilité d'importation et d'exportation de données.

- Un catalogue d'applications SaaS en libre-service pour les employés , comprenant un grand nombre d'intégrations d'applications SaaS directes.

Capacités optionnelles

Les fonctionnalités optionnelles pour ce marché incluent :

- Fournir des notes de risque et de conformité pour les applications découvertes, y compris les certifications applicables.

- Rapports d'analyse comparative des prix et de l'adoption.

- Capacités de gestion des fournisseurs et des contrats.

- Intégration GenAI pour les administrateurs.

- Formulaire de demande de candidature et processus permettant aux employés de demander des applications SaaS.

Quadrant magique

Figure 1 : Magic Quadrant pour les plateformes de gestion SaaS

CHALLENGERS — LEADERS

Zylo

Torii

Zluri

Flexera (Snow Software)

ServiceNow

Productiv — Trelica

Lumos — BetterCloud

Calero

USU

Oomnitza — Josys — CloudEagle

FinQuery

ABILITY TO EXECUTE

NICHE PLAYERS — VISIONARIES

COMPLETENESS OF VISION

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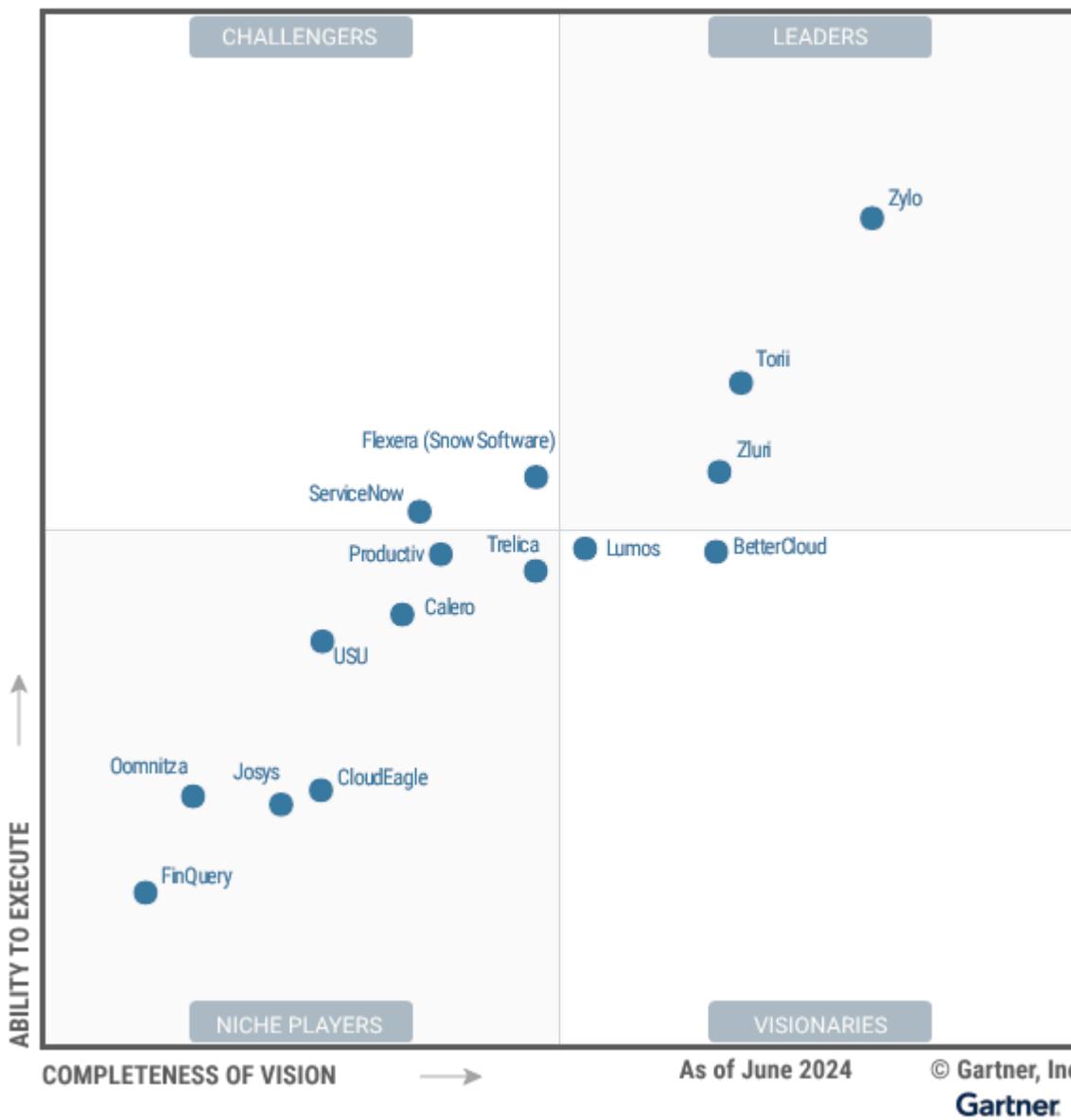
Points forts et précautions du fournisseur

MeilleurCloud

BetterCloud, un visionnaire de ce Magic Quadrant, a été fondé en 2011 et son siège social se trouve à New York, dans l'État de New York. Ses opérations sont basées en Amérique du Nord, en Amérique latine et dans la région Asie-Pacifique, et ses clients sont principalement des petites et moyennes entreprises nord-américaines. La plateforme BetterCloud a été lancée en 2016. Elle est conforme au RGPD et a obtenu les certifications ISO-27000 et SOC 2. Le fournisseur ne permet pas aux clients de déterminer où leurs données sont stockées.

Historiquement axée sur les opérations SaaS, BetterCloud a acquis G2 Track en 2024 pour combler une lacune antérieure dans les capacités d'optimisation des licences SaaS et de gestion des dépenses.

Points forts

- Réactivité/historique du marché : En tant que fournisseur SMP original, BetterCloud possède une connaissance approfondie du marché et des besoins des clients. Sa récente acquisition de G2 Track pour la gestion des dépenses SaaS est un exemple de la reconnaissance par le

fournisseur que les exigences du marché vont au-delà de l'amélioration et de l'automatisation des opérations SaaS.

- Orchestration des flux de travail : la capacité d'orchestration des flux de travail low-code/no-code de BetterCloud fournit une plate-forme simple mais puissante pour automatiser les tâches de gestion SaaS courantes. En plus des intégrations intégrées, des webhooks personnalisés peuvent être utilisés pour étendre l'automatisation à une grande variété d'applications SaaS et d'autres outils de gestion informatique.

- Opérations SaaS : En raison de l'orientation historique de BetterCloud vers les opérations SaaS, il excelle dans l'amélioration et l'automatisation des activités opérationnelles courantes, telles que l'intégration/le retrait, la gestion des licences et la gestion de la configuration et des politiques.

Précautions

- Opérations géographiques : la stratégie géographique de BetterCloud est fortement axée sur l'Amérique du Nord et l'Amérique latine. Le fournisseur n'offre pas à ses clients la possibilité de choisir où leurs données sont stockées , et le support client n'est proposé que du lundi au vendredi, de 9 h à 20 h, heure de l'Est des États-Unis. Cela peut poser problème aux organisations situées en dehors de l'Amérique du Nord.

- Découverte SaaS : BetterCloud prend actuellement en charge l'authentification unique (SSO), l'intégration directe des API d'applications SaaS, l'intégration des systèmes financiers et OAuth pour la découverte. Le fait qu'il ne propose pas d'extension de navigateur peut limiter sa capacité à découvrir des SaaS non autorisés (shadow) sans frais.

- Stratégie produit : BetterCloud n'accorde pas une grande importance à la gestion des dépenses SaaS, ce qui a conduit certains clients à envisager d'autres options pour répondre à leurs besoins. Cependant, la récente acquisition de G2 Track par BetterCloud, une fois entièrement intégrée à la plateforme, devrait rapidement combler cette lacune.

Calero

Calero, un acteur de niche dans ce Magic Quadrant, a été fondé en 1995 et son siège social est situé à Rochester, New York. Ses opérations sont basées en Amérique du Nord, en Europe et dans la région Asie-Pacifique, et ses clients sont principalement de grandes entreprises. Calero SaaS Management a été lancé dans le cadre de sa plateforme de gestion des dépenses technologiques en 2021. La plateforme est conforme au RGPD et aux normes CCPA/CPRA et a obtenu les certifications ISO 27000 et SOC 2. Le fournisseur permet aux clients de déterminer si leurs données sont stockées en Amérique du Nord ou en Europe.

Historiquement axé sur la gestion des dépenses en télécommunications, communications unifiées et mobilité, Calero a ajouté des capacités de gestion SaaS pour identifier les opportunités de gaspillage, de chevauchement et d'optimisation SaaS.

Points forts

- Opérations internes : Les 30 ans d'histoire de Calero, ainsi que ses investissements géographiques importants et ses opérations internes efficaces, lui ont permis de fournir une gestion SaaS efficace parallèlement à sa solution de gestion des dépenses de mobilité, de téléphonie, d'UCaaS et de données de marché.

- Stratégie de vente : Bien que Calero ne soit pas cotée en bourse, sa tarification est simple et inférieure à celle des autres fournisseurs participant à cette étude. Les clients peuvent acheter directement ou par l'intermédiaire de revendeurs.

- Gestion des dépenses : Calero s'appuie sur son expérience historique en matière de gestion des dépenses technologiques pour proposer une solution SMP qui permet aux entreprises d'optimiser en permanence leurs dépenses SaaS. Sa plateforme offre un traitement robuste des factures, des informations approfondies et exploitables sur l'état des licences, des données d'utilisation des applications riches, des données de tarification détaillées et des capacités de répartition des coûts.

Précautions

- Intégrations d'applications SaaS directes limitées : bien que Calero utilise l'automatisation des processus robotisés (RPA) et les intégrations API directes pour interagir avec les applications SaaS, seul un nombre limité d'intégrations est pris en charge. Cela peut limiter la capacité du produit à effectuer des activités de gestion plus complexes au sein des applications SaaS où l'intégration n'est pas fournie, telles que la récupération de licences et la fourniture de données d'utilisation détaillées qui sont essentielles pour l'optimisation des droits de licence et les efforts d'adoption.

- Opérations SaaS : Calero s'est toujours concentré sur la gestion des dépenses technologiques. L'entreprise a défini une feuille de route solide pour apporter des améliorations, mais des améliorations supplémentaires sont nécessaires dans ses capacités de gestion de configuration et d'automatisation SaaS pour répondre pleinement aux besoins des acheteurs d'opérations informatiques.

- Stratégie marketing et mise en œuvre : le marketing de Calero s'est généralement concentré sur les cas d'utilisation liés aux dépenses technologiques globales, ce qui a donné lieu à un message SMP dilué. L'entreprise publie également rarement du contenu SMP pertinent sur les réseaux sociaux et autres canaux de médias. Un succès limité dans le marketing produit peut limiter la capacité des prospects à trouver le fournisseur, ce qui peut avoir un impact sur la croissance.

NuageEagle

CloudEagle, un acteur de niche dans ce Magic Quadrant, a été fondé en 2021 et son siège social se trouve à Palo Alto, en Californie. Ses opérations sont basées en Amérique du Nord, en Europe et dans la région Asie-Pacifique, et ses clients sont principalement des entreprises de taille moyenne à petite. Son CloudEagle.ai a été lancé en 2021. La plateforme est conforme au RGPD et a obtenu les certifications ISO 27000 et SOC 2. La plateforme permet aux clients de déterminer si leurs données sont stockées en Amérique du Nord ou en Europe.

Principalement axé sur l'optimisation SaaS, CloudEagle a massivement investi dans l'IA pour permettre des décisions basées sur les données pour la gestion des applications et le renouvellement des contrats SaaS.

Points forts

- Innovation : CloudEagle utilise largement l'IA et le Machine learning pour se différencier. Sa SaaSMap, un graphe de connaissances basé sur LLM, fournit une interface conversationnelle permettant de prendre des décisions basées sur les données pour la gestion et le renouvellement du SaaS.

- Stratégie produit : la feuille de route de CloudEagle est directement alignée sur les besoins des clients et vise à combler l'écart avec ses principaux concurrents. Comme en témoignent ses 405 intégrations directes (deuxième rang parmi les fournisseurs de ce rapport), CloudEagle a prouvé sa capacité à se développer rapidement. Cela se reflète dans sa feuille de route et dans le lancement agressif de nouvelles fonctionnalités.

- Optimisation des droits de licence : CloudEagle offre des fonctionnalités robustes qui permettent aux organisations d'optimiser facilement leurs dépenses en récupérant les licences inutilisées et en rétrogradant les niveaux de licence. L'intégration directe avec Slack et Microsoft Teams permet des interactions efficaces avec les employés et les propriétaires d'applications SaaS au cours de ce processus.

Précautions

- Exécution des ventes/tarification : le modèle de tarification de CloudEagle repose principalement sur des devis personnalisés dont le prix est fixé en fonction d'un coût annuel basé sur un nombre convenu d'employés. Cela peut améliorer la capacité d'un client à négocier un accord favorable, mais cela limite la transparence des prix et complique la budgétisation et les prévisions.

- Stratégie sectorielle verticale : la force de CloudEagle et ses principaux clients cibles sont les entreprises de taille moyenne et les petites entreprises, en particulier celles du secteur technologique. Les clients de plus grande taille ou ceux des secteurs verticaux réglementés doivent évaluer la capacité de CloudEagle à répondre à des exigences uniques.

- Gestion de la configuration SaaS : CloudEagle ne fournit pas de fonctionnalité permettant de gérer la configuration des plateformes d'applications SaaS. Cela réduit l'utilité de la plateforme pour les acheteurs d'opérations informatiques et ne répond pas à leur besoin de rationaliser la gestion de la configuration SaaS et de réduire les risques.

FinQuery

FinQuery (anciennement LeaseQuery), un acteur de niche dans ce Magic Quadrant, a été fondé en 2011 et son siège social est situé à Atlanta, en Géorgie. Ses opérations sont basées en Amérique du Nord et ses clients vont des petites entreprises aux entreprises de taille moyenne. Son logiciel de gestion FinQuery a été lancé à l'origine en 2020 sous le nom de StackShine avant d'être acquis par LeaseQuery et rebaptisé en 2023. Le fournisseur ne permet pas aux clients de

déterminer où leurs données sont stockées (toutes les données sont stockées en Amérique du Nord).

Initialement axée sur la comptabilité des contrats de location, FinQuery a étendu ses activités à des solutions de gestion des contrats et de gestion des actifs logiciels. FinQuery se distingue en répondant aux besoins de gestion SaaS des services financiers et informatiques. FinQuery a récemment reçu un investissement de 25 millions de dollars pour accélérer le développement de ses produits et étendre sa portée commerciale grâce à des acquisitions stratégiques.

Points forts

- Offre de produits : FinQuery propose la gestion SaaS en tant que produit autonome au sein de son portefeuille de gestion des dépenses. Associée à ses produits de comptabilité et de gestion des baux et de gestion des contrats, elle aide les organisations à gérer leurs plus grands postes de dépenses sur une seule et même plateforme.

- Expérience client : FinQuery fait largement appel à des responsables de la réussite client pour simplifier le déploiement, réduire le délai de réalisation de la valeur et simplifier les interactions et l'engagement des clients avec le fournisseur. Ils ne facturent pas les clients pour ce service.

- Gestion des dépenses : FinQuery permet aux organisations de gérer efficacement les dépenses SaaS et de rationaliser le portefeuille global d'applications grâce aux informations et recommandations générées.

Précautions

- Stratégie géographique : la plateforme de FinQuery n'est actuellement pas conforme au RGPD et l'entreprise n'a obtenu aucune certification majeure en matière de conformité ou de cybersécurité. La plateforme ne permet pas aux clients de stocker leurs données en dehors de l'Amérique du Nord. Les clients des secteurs verticaux réglementés ou soumis à des réglementations sur la résidence géographique des données doivent évaluer la capacité de FinQuery à répondre à des exigences uniques.

- Viabilité globale : Bien que FinQuery soit rentable et ait reçu un investissement de 25 millions de dollars, la gestion SaaS ne représente actuellement qu'une petite partie de son chiffre d'affaires global. Malgré des investissements constants et relativement importants en R&D, cela soulève des questions sur l'engagement à long terme et la viabilité du fournisseur sur le marché des plateformes de gestion SaaS.

- Orientation en fonction de la taille de l'entreprise : FinQuery cible les petites et moyennes entreprises. Par conséquent, les fonctionnalités de son produit peuvent ne pas répondre aux exigences des grandes entreprises.

Flexera (logiciel Snow)

Snow Software , acquis par Flexera en février 2024, est un Challenger dans ce Magic Quadrant. L'entreprise a été fondée en 1997 et son siège social est désormais situé à Itasca, dans l'Illinois, à la suite de cette acquisition. Ses opérations sont diversifiées à l'échelle mondiale et sa clientèle

s'étend des entreprises de taille moyenne aux grandes entreprises. Sa solution Snow SaaS Management a été lancée en 2023. La plateforme est conforme au RGPD et a obtenu les certifications ISO 27000 et SOC 2. L'offre Snow SaaS Management permet aux clients de déterminer s'ils souhaitent que leurs données soient stockées en Amérique du Nord, en Europe ou en Australie.

Historiquement axée sur la gestion des actifs logiciels, Flexera (Snow Software) a ajouté des capacités de gestion d'applications SaaS et investit dans l'IA pour accélérer la gestion des opérations et des dépenses.

Points forts

- Opérations : Flexera (Snow Software) dispose d'un vaste réseau mondial de partenaires pour les services de mise en œuvre et d'assistance. Le fournisseur dispose d'employés en Amérique du Nord et du Sud, en Europe, en Inde et en Australie. Grâce à son acquisition par Flexera le 15 février 2024, la société issue du regroupement dispose d'une plus grande capacité à répondre aux besoins de ses clients à l'échelle mondiale.

- Expérience client : Flexera (Snow Software) dispose d'un programme de gestion de la réussite client qui met l'accent sur l'engagement accru des clients, ainsi que sur l'adoption et l'utilisation efficace de leur plateforme. Ainsi, les clients peuvent accélérer leurs programmes de gestion SaaS et leur délai de rentabilisation.

- Exécution marketing : Flexera (Snow Software) a publié une large gamme de contenus innovants via divers canaux. Son acquisition ne devrait qu'amplifier cette force, car Flexera est également bien implantée dans le marketing produit et a fait preuve d'un leadership d'opinion historique.

Précautions

- Découverte SaaS et intégrations directes limitées : Flexera (Snow Software) ne fournit pas d'intégration avec les plateformes de gestion des dépenses courantes, ce qui peut limiter sa capacité à découvrir toutes les dépenses SaaS. Il fournit également un nombre limité d'intégrations API SaaS directes , ce qui peut limiter l'utilisation du SaaS et les capacités d'optimisation et d'automatisation liées aux dépenses.

- Analyse de conformité : Flexera (Snow Software) ne fournit pas d'évaluation des risques de sécurité des applications SaaS ni d'informations sur la conformité des certifications. Cela complique la sécurité informatique, la conformité et la capacité des services d'approvisionnement informatique à examiner efficacement les applications existantes et à évaluer les nouvelles applications.

- Impact de l'acquisition : L'impact complet de l'acquisition de Snow Software par Flexera n'est pas connu. À mesure que les plans de fusion seront développés et partagés, les clients devront se préparer à d'éventuelles transformations de la stratégie produit et des opérations de l'entreprise.

Josys

Josys, un acteur de niche dans ce Magic Quadrant, a été fondé en 2021 et son siège social est situé à Tokyo, au Japon. Ses opérations sont basées dans la région APAC et ses clients vont des petites aux moyennes entreprises. La plateforme de gestion SaaS de Josys a été lancée en 2021. La plateforme est conforme au RGPD et a obtenu la certification SOC 2. Le fournisseur ne permet pas aux clients de déterminer où leurs données sont stockées.

Historiquement axée sur la gestion des actifs technologiques, Josys a ajouté des fonctionnalités de gestion SaaS et d'automatisation des flux de travail pour modifier l'accès au sein de la plateforme. Le fournisseur continue également d'étendre sa capacité de découverte SaaS pour améliorer l'identification de l'informatique non gérée (shadow).

Points forts
- Expérience client : Josys fait appel à des Customer Success Managers pour accélérer et simplifier les déploiements. Josys propose également plus de 240 intégrations prédéfinies pour simplifier les connexions aux nouvelles applications SaaS et autres sources de découverte.

- Stratégie marketing : Josys fait preuve de leadership et d'engagement sur le marché japonais des SMP en ayant recours à de nombreux webinaires et événements destinés aux clients, aux partenaires et aux roadshows. Des messages cohérents et des articles de blog mettent en valeur sa proposition de valeur, qui est bien adaptée aux besoins des acheteurs SMP.

- Orientation régionale : Josys se concentre fortement sur le Japon, avec de nombreuses études de cas de clients régionaux pour illustrer son succès sur ce marché. Les clients du marché Asie/Pacifique bénéficieront de la connaissance et de l'expertise régionales approfondies du fournisseur. L'entreprise se développe activement sur d'autres marchés après son dernier tour de financement en 2023.

Précautions
- Stratégie de stockage des données régionales : Josys ne permet pas aux clients de déterminer la région géographique où leurs données sont stockées. De plus, son exposition limitée au-delà du marché japonais peut poser des problèmes aux organisations situées hors du Japon.

- Offre de produits : l'orchestration des workflows de Josys se limite aux activités d'intégration et de départ. En outre, le fournisseur ne propose pas de boutique d'applications en libre-service destinée aux employés ni la possibilité de gérer les configurations SaaS. Il ne fournit pas non plus d'intégrations prédéfinies avec les plateformes ITSM, SAM ou SIEM.

- SaaS discovery: Josys enables discovery via SSO, browser extension and direct SaaS API integrations. However, the lack of integration with expense management platforms for SaaS discovery limits its ability to manage SaaS expenses.

Lumos

Lumos, a Visionary in this Magic Quadrant, was founded in 2020 and is headquartered in San Francisco, California. Its operations are based primarily in North America, and its customers range from midmarket businesses to large enterprises. Lumos' SaaS management platform was launched in 2022. The platform is GDPR-compliant and has earned certifications within the ISO 27000 family, as well as SOC 2. The vendor does not enable customers to determine where their data is stored.

Historically focused on SaaS discovery and simplifying employees' access to SaaS via an app store, Lumos continues to invest in expanding to holistic SaaS and AI-powered access management for automating contract ingestion, access request workflows, unsanctioned (shadow) IT discovery and license management.

Strengths

- Innovation: Lumos uses AI extensively to improve SaaS management tasks. Lumos also has implemented a unique capability to enable limited time-based access to SaaS (i.e., for 30 to 90 days, if license agreements allow) to optimize expenses. They also offer extensive integration with Slack to interact with IT administrators and employees.

- Product offering: Lumos provides a robust and easy-to-use workflow orchestration capability to streamline on/offboarding and license tier modification. Its entitlement review capability enables automated deprovisioning of unapproved or unused accounts and licenses, and the platform is extensible using a published API.

- Employee-facing application store: Lumos provides a comprehensive and easy-to-use application store that enables employees to find approved and request access to new SaaS applications. The catalog is customizable, and specific apps can be filtered for some employees based on customer-defined and organizational attributes. Status reporting is available on fulfillment processes as well.

Cautions

- Geographic strategy: Lumos does not enable customers to store their data outside North America. As a result, Lumos may not be suitable for organizations with geographic data residency requirements.

- Vertical/industry strategy: Lumos does not differentiate its product, marketing or sales strategy based on industry verticals. The company's lack of a differentiated strategy may limit its ability to be successful within markets that have specialized regulatory or security requirements.

- Compliance analysis: Lumos does not provide SaaS risk ratings or compliance information. This could limit the effectiveness of the platform for IT security and compliance buyers, as well as IT procurement's ability to easily assess new SaaS vendors.

Oomnitza

Since the initial publication of this Magic Quadrant (22 July 2024), Oomnitza was a party in the following significant corporate transaction(s). For Key Background and Considerations for

Technology and Service Selection, see:

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- *"Announced Corporate Transaction Notification: Oomnitza, SaaS Management Platforms" (04 September 2024)*

Analysis within this Magic Quadrant remains as originally published.

Oomnitza, a Niche Player in this Magic Quadrant, was founded in 2012 and is headquartered in San Francisco, California. Its operations are based primarily in North America. Its SMP offering was launched in 2022. The platform is GDPR- and CCPA/CPRA-compliant, and has earned SOC 2 certification. The vendor enables customers to determine the geographic region where their data is stored.

Historically focused on IT hardware asset management (ITAM), Oomnitza has invested in features to improve SaaS operations, automate processes, reduce security and compliance risks, and eliminate redundant spend. It offers a low-code/no-code platform and technology database that simplifies SaaS management.

Strengths

- Innovation: The Oomnitza AI Assistant uses generative AI (GenAI) to create workflows, reports and employee communications, as well as the creation and syntax validation of code. The AI assistant reduces the IT administrator learning curve and reduces the time to value realization.

- Workflow orchestration: Oomnitza's low-code/no-code workflow orchestration capability provides a deep and extensible automation of common SaaS management tasks. It provides prebuilt connectors for over 150 IT management tools and SaaS applications.

- Customer experience: Oomnitza makes extensive use of customer success managers to simplify deployment and reduce time to value realization.

Cautions

- Vertical/industry strategy: Oomnitza does not differentiate its marketing or sales strategy based on industry verticals. The company's lack of a differentiated marketing or sales strategy may limit its ability to be successful within markets that have specialized regulatory or security requirements.

- SaaS life cycle management: Oomnitza provides limited capabilities for SaaS procurement and renewal optimization. Its platform does not currently offer price benchmarking, or application risk and compliance certification details (though it provides data fields for compliance information to be manually added). As a result, Oomnitza may not meet the needs of buyers focused on IT procurement.

- Product offering: Many of Oomnitza's SaaS management capabilities have evolved from its ITAM roots. As a result, it is less mature in expense management, configuration management, compliance analysis and life cycle management.

Productiv

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Productiv, a Niche Player in this Magic Quadrant, was founded in 2018 and is headquartered in Palo Alto, California. Its operations are based primarily in North America, and its customers are primarily midmarket and small enterprise organizations. Its SMP, Productiv Platform, was launched in 2019. The platform is GDPR- and CCPA/CPRA-compliant, and has earned SOC 2 certification. The vendor enables customers to determine if they want their data stored in North America, Europe or APAC.

Historically focused on SaaS intelligence (optimization and expense management), Productiv has expanded its SaaS management capabilities to address more procurement and IT operations focused needs, and has added GenAI to the platform to further simplify SaaS management activities.

Strengths

- Innovation: Productiv released Sidekick to reduce the learning curve for its platform and improve time to value realization. This GenAI-powered assistant promises to simplify spend optimization, improve vendor management and streamline contract management. Productiv also holds several patents for SaaS management techniques and capabilities.

- Marketing execution: Productiv is well-established in the SMP market and frequently publishes thought-leading content through a variety of channels. Its annual "State of SaaS" report provides a comprehensive review of SaaS trends across its customer base. The vendor also appears frequently in industry and trade press.

- Application portfolio optimization: Productiv provides an extensive application catalog, along with automated categorization to quickly identify overlapping or redundant applications. It also provides comprehensive departmental and organizational SaaS usage information to enable portfolio optimization and drive ROI. Finally, its employee-facing application store reduces unsanctioned (shadow) SaaS risk by making it easy to find and request access to new and existing SaaS applications.

Cautions

- SaaS configuration management: Productiv does not provide a capability to manage the configuration of SaaS application platforms. This reduces the platform's utility for IT operations buyers and does not address their need to streamline SaaS configuration and reduce risk.

- Business model: Productiv primarily targets midmarket and enterprise firms located in North America. They are organizationally smaller than many competitors partly as a result of a 2023 downsizing. Combined with recent senior leadership changes, Productiv may struggle to scale its offering and operations to support globally distributed enterprises or expand into other geographic regions if they experience rapid growth.

- Onboarding and offboarding: Productiv's automated on/offboarding is limited to Microsoft Entra ID or Okta SSO group management. For applications that do not integrate with either or for

customers that use other identity providers, workflow is limited to creating a Jira ticket for an application owner or IT administrator to manually provision access.

ServiceNow

ServiceNow, a Challenger in this Magic Quadrant, was founded in 2004 and is headquartered in Santa Clara, California. Its operations are geographically diversified, and it segments its customers as marquee (largest 250), enterprise, commercial and nonprofits. Its SaaS License Management application is a feature with ServiceNow IT Asset Management, which was launched in 2019. The platform is GDPR- and CCPA/CPRA-compliant, FedRAMP-authorized, and has earned ISO-27000-family and SOC 2 certifications. The vendor enables customers to determine if they want their data stored in a specific geographic region.

Historically focused on holistic IT and software asset management, ServiceNow has added basic SaaS management capabilities to address the needs of IT asset management and IT procurement buyers.

Strengths
- Geographic and vertical strategy: ServiceNow has a proven ability to service global organizations of all sizes. Its extensive global operations and large 2,000-plus partner network assists with its entire portfolio. It is established in all industry verticals. ServiceNow is also the only SMP with FedRAMP authorization.

- Customer experience: ServiceNow provides comprehensive customer success programs paired with highly effective support to accelerate value realization and improve product usage. It also has a robust process to assess and respond to customer feedback through product advisory councils and an online community.

- Extensibility and integration: The ServiceNow platform provides extensive integration capabilities to other IT management tools, identity/SSO providers, financial management systems, other SaaS applications and native ServiceNow applications. Its no-code Flow Designer simplifies workflow creation and task automation.

Cautions
- Market understanding: ServiceNow's SMP offering is part of their SAM product, which focuses primarily on procurement and asset management use cases. Its SMP strategy also focuses on expense and asset management, which may not fit the needs of buyers that prioritize IT operations and security use cases.

- Product offering: ServiceNow's browser extension for SaaS discovery is only available within its Digital End-user Experience (DEX) product. Not having a browser extension as an included component of their SMP offering could limit the discovery of unsanctioned (shadow) SaaS. ServiceNow SaaS License Management also does not natively provide SaaS risk ratings or

compliance information (available separately within their Security Operations product), which complicates the ability to effectively review existing and assess new applications for risk.

- SaaS configuration management: ServiceNow SaaS License Management does not natively provide a capability to manage the configuration of SaaS application platforms (available separately within their Security Operations product). This reduces the platform's utility for IT operations buyers desiring to streamline SaaS configuration management and reduce risk.

Torii

Torii, a Leader in this Magic Quadrant, was founded in 2017 and is headquartered in New York, New York. Its operations are based in North America and Israel, and its customers consist predominantly of midmarket to large enterprises. Its SMP was launched in 2017. The platform is GDPR- and CCPA/CPRA-compliant and has earned ISO-27000-family and SOC 2 certifications. The vendor does not enable customers to determine where their data is stored.

Historically focused on automated SaaS management, Torii has recently made significant investments in AI discovery and mapping, contract ingestion and parsing, RBAC to enable distributed SaaS management, and a low-code/no-code workflow builder.

Strengths
- Offering/product strategy: Torii's roadmap is focused on customer needs curated via a robust multichannel customer feedback program. As a result, Torii's value proposition is strongly aligned with the core needs of SMP buyers, and its high Critical Capabilities performance reflects the progress it has made. Torii has recently accelerated its release cadence and publishes updates on its website.

- Innovation: Torii provides an AI assistant to simplify SaaS management activities. It also extensively uses AI for streamlining the identification and merging of user profiles from various sources, contract ingestion, application categorization, and data aggregation and deduplication, and for the retrieval of application compliance information. It also released a developer portal and APIs that enables customers, partners and SaaS application vendors to build integrations with its platform.

- Workflow orchestration: Torii provides flexible low-code/no-code workflow orchestration with unlimited branching. This provides an easy-to-use and highly customizable automation framework to eliminate common SaaS management tasks. The vendor also provides Slack integration and a large number of prebuilt connectors to other IT management systems and SaaS application platforms.

Cautions
- Operations: In 2023, Torii transitioned from growth to operationally sustainable mode, which included restructuring and elimination of some back-office roles. The intent was to clear its path to profitability and invest in additional development talent. Some back-office functions may not

be able to keep pace if they experience rapid growth, which may result in challenges in account servicing.

- Geographic strategy: Torii only offers data storage in North America, which may not be suitable for global organizations or those with geographic data residency requirements.

- Scalability: Torii is a young company and is also smaller than most vendors participating in this report. This may concern larger enterprises about its overall viability and ability to scale to accommodate their needs if Torii experiences rapid growth.

Trelica

Trelica, a Niche Player in this Magic Quadrant, was founded in 2018 and is headquartered in Cambridge, United Kingdom. Its operations are based in Europe and North America, and its customers consist predominantly of midmarket to medium enterprises. Its SMP was launched in 2021. The platform is GDPR-compliant and has earned SOC 2 certification. The vendor enables customers to determine if they want their data stored in North America or Germany.

Historically focused on overall SaaS management, Trelica has recently invested in AI to improve data processing throughout the platform, extracting data from contract documents and improving its application library. It also continues to invest in its SaaS application direct integration capability (300-plus integrations).

Strengths

- Product offering: Trelica has a flexible workflow orchestration with an extensive number of templates and robust reporting. It offers customizable expense reporting dashboards, rightsizing recommendations and automated license tier downgrade workflows. The vendor provides a large number of integrations to other IT management tools, identity/SSO providers, and HR information systems (HRIS) platforms. Trelica has developed over 300 direct SaaS API integrations.

- Business model: Trelica is founder-owned and funded. It is singularly focused on the needs of SMP buyers, given that their SMP is the company's sole product offering. This reduces the risk of external parties trying to influence their mission and vision, and prepares them to overcome macroeconomic disruptions or accommodate new customer requirements.

- Market responsiveness: Trelica has a robust customer success management program and feedback mechanisms to identify new product requirements and requested features. It has also adopted a continuous release cadence to accelerate new capabilities and fixes.

Cautions

- Marketing strategy and execution: Trelica is less-established than many SMP competitors. Although the product performed very well in the companion Critical Capabilities research, limited investment and success in product marketing limits prospects' ability to find the vendor, which will impact growth.

- Scalability: Trelica is a young company and is also smaller than most vendors participating in this report. This may concern larger enterprises about its overall viability and ability to scale to accommodate their needs.

- Vertical/industry strategy: Trelica does not differentiate its product, marketing or sales strategy based on industry verticals. The lack of a differentiated strategy may limit its ability to be successful within markets that have specialized regulatory or security requirements.

USU

USU, a Niche Player in this Magic Quadrant, was founded in 1977 and is headquartered in Möglingen, Germany. Its operations are based in Europe and North America, and its customers consist mainly of medium to extra-large enterprises. Its Optimization for SaaS (soon to be known as SAM for SaaS) product was launched in 2018. The platform is GDPR-compliant and has earned ISO-27000-family and SOC 2 certifications. The vendor enables customers to determine if they want their data stored in a specific geographic region.

Historically focused on IT asset management, USU has recently invested in AI to improve its SaaS management capabilities with intelligent automation, data-driven insights and decision-making support for more accurate recommendations.

Strengths
- License entitlement optimization: USU provides comprehensive SaaS license optimization capabilities, including the ability to reclaim unused licenses, adjust license tiers, interact with employees via email and automatically deactivate accounts via direct SaaS API connections.

- Sales execution/pricing: USU has a flexible pricing and discounting model based on organization size, strategic account status and vertical industry. As a result, customers may have a greater ability to create an agreement that better fits their organization.

- Customer experience: USU deploys customer success managers to simplify deployment and reduce time to value realization. It also has a comprehensive customer feedback program to ensure satisfaction and fuel the product roadmap. USU also offers a fully managed service offering. It has won several customer-related awards in the past few years.

Cautions
- Product offering: USU's platform performed inadequately within the IT operations and IT security and compliance analysis use cases within the companion Critical Capabilities research. Organizations should examine their own critical needs to determine whether USU can fully meet their requirements.

- Compliance analysis: USU does not provide any SaaS compliance details such as application risk ratings, security certification details, regional regulatory compliance status or data storage location details. This complicates IT security and regulatory compliance analysis, as well as IT procurement's ability to effectively review and assess existing and new applications.

- SaaS configuration management: USU does not provide any ability to manage its SaaS configuration settings. This reduces the platform's utility for IT operations buyers and does not address their need to streamline SaaS configuration management and reduce risk.

Zluri

Zluri, a Leader in this Magic Quadrant, was founded in 2020 and is headquartered in Milpitas, California. Its operations are based in North America, Europe and India, and its customers consist of midmarket to small enterprises. Its SMP was launched in 2020. The platform is GDPR-compliant and has earned ISO 27000 family and SOC 2 certifications. The vendor enables customers to determine if they want their data stored in North America, Europe, Middle East or APAC.

Historically focused on complete SaaS management, Zluri has recently invested in adding identity governance and administration (IGA) capabilities and an AI engine to capture and ingest all details from any contract or document, as well as a GenAI chatbot assistant that provides SaaS usage insights.

Strengths
- Market understanding: Zluri's platform is well aligned with the needs of SMP buyers. The vendor anticipates and adapts to market trends well, resulting in several enhancements to its product. It also implemented internal organization changes to be better-prepared for macroeconomic uncertainty.

- Innovation: Zluri has integrated AI and ML into its product for automated contract ingestion and SaaS application analysis. Its GenAI-powered assistant, Zluri Co-Pilot, reduces the learning curve and enables IT administrators to quickly obtain actionable insights about their SaaS estate. Its platform is powered by its patent-pending AuthKnox engine, which informs policy configuration and provides SaaS insights.

- Product offering: Zluri's platform has broad capabilities and performed very well in the Critical Capabilities dimensions. They provide the highest number of direct SaaS application integrations (753) of all vendors in this report. Its application library also has over 250,000 apps with profiles containing relevant SaaS information, as well as certifications, hosting details, cybersecurity incident history and application risk rating.

Cautions
- Sales execution/pricing: Zluri's pricing is based on a tiered model, with add-ons available for access management and access reviews. Although not publicly disclosed, Zluri's all-inclusive pricing is more expensive than many of its competitors.

- Operational scalability: Zluri's customer base is predominantly midmarket or smaller. Also, Zluri is a younger company with a smaller installed base than most of the competition. This may concern larger enterprises about its overall viability.

- Product marketing: Zluri's marketing content, while very frequent and detailed, tends to be too broad and not focused on its core capabilities of SMP and IGA. This can lead to confusion among prospective buyers about what the vendor actually provides, potentially resulting in unrealistic expectations or lost opportunities.

Zylo

Zylo, a Leader in this Magic Quadrant, was founded in 2016 and is headquartered in Indianapolis, Indiana. Its operations are based in North America, and its global customers consist of enterprises of all sizes. Its Zylo SaaS Management platform was launched in 2016. The platform is GDPR- and CCPA/CPRA-compliant, and has earned SOC 2 certification. The vendor does not enable customers to determine where their data is stored.

Historically focused on complete SaaS management, Zylo continues to invest in its AI-powered SaaS application discovery, as well as data aggregation, normalization and analysis. It has also added workflow orchestration to manage and optimize licensing, and has partnered with Netskope to include SaaS security and compliance insights.

Strengths
- Thought leadership and marketing execution: Zylo consistently and effectively publishes a high volume of thought-leading content through all available channels. Its annual, virtual SaaSMe event, and its SaaSMe Unfiltered and SaaSMe Anything podcasts, promote success stories, strategies and practical guidance on how anyone can improve SaaS management. It has published the annual SaaS Management Index (SMI) for six years, which compiles insights gleaned from an installed base of over 30 million licensed employees and $34 billion in spend.

- Product offering: Zylo's application library, the Zybrary, includes over 22,000 applications, with financial, risk and functionality details on each to enable informed purchasing and renewal decisions. It also provides extensive low-code/no-code workflow orchestration, onboarding/offboarding automation, and an employee-facing application store to simplify employees' ability to find and request access to or a new application.

- Customer experience: Zylo makes extensive use of customer success managers to enrich customer experience. The Zylo Value Framework is a proprietary methodology that includes key metrics and methods to maximize value and accelerate operations, and drives customers to fully leverage the platform. As a result, Zylo has won several awards for its customer experience.

Cautions
- Geographic strategy: Zylo does not enable customers to store their data outside of North America. As a result, Zylo may not be suitable for organizations with geographic data residency requirements.

- SaaS discovery: Zylo enables discovery via SSO and OAuth, as well as integrations with SaaS security tools, financial systems and SaaS APIs. Not offering a browser extension may limit its

ability to discover unsanctioned (shadow) SaaS.

- Sales execution/pricing: Zylo's pricing model is tiered based on organization size, and also offers several product and service add-ons. This perceived complexity can make it difficult for customers to understand, estimate and forecast SMP costs.

Inclusion and Exclusion Criteria

To qualify for inclusion, providers need:

- A single-license SKU, generally available by 31 March 2024, that includes all must-have capabilities defined in the market definition and also provides all of the following capabilities:

  - The ability to discover authorized and unauthorized SaaS usage via three or more of the following methods:

    - Browser extension

    - Device agent

    - Financial/expense system integration; security tool integration (including but not limited to SASE, SSE, CASB, SIEM, SWG, firewall and EDR)

    - Single sign-on (SSO) and identity provider (IdP) platform integration

    - Endpoint management tool integration

    - Email system integration

    - Direct API integration with SaaS applications

    - OAuth integration

- To help organizations optimize SaaS spend, the SMP must be able to

  - Categorize and identify redundant applications with overlapping capabilities across product categories

  - Mnually or automatically identify, revoke and/or reallocate unused license entitlements.

- Workflow orchestration capability to automate common SaaS application management tasks such as employee onboarding/offboarding, license allocation/deallocation, access modification and configuration management.

- The ability for an administrator to take action on five or more distinct SaaS applications directly from the SaaS management platform, including but not limited to the following:

  - Modification of SaaS application access privileges

  - Modification of entitlement/licenses

- All capabilities listed in the sections of the first two bullets above must be the vendor's own intellectual property; none of the capabilities may be enabled via third-party products or partnerships.

- The SaaS management platform must be purchasable as a stand-alone product and must not solely be sold or licensed as an add-on to another product.

- Rank among the top 20 organizations in the customer interest index (CII) defined by Gartner for this Magic Quadrant. Data inputs used to calculate the SaaS Management Platform CII include a balanced set of measures, including but not limited to:

  - Gartner customer search, inquiry volume and trend data

  - Frequency of mentions as a competitor to other SaaS management platform vendors within reviews on Gartner's Peer Insights forum between April 2023 and March 2024

  - Customer interest and engagement as represented by various social media engagement measurements.

Honorable Mentions

The criteria for inclusion of platform providers in this Magic Quadrant are based on a combination of quantitative and qualitative measures, as noted in the Inclusion Criteria section. Below are several noteworthy providers that did not meet all inclusion criteria but could be appropriate for clients, contingent on requirements. The following is a nonexhaustive list, presented in alphabetical order:

Beamy: Beamy's SaaS governance platform provides large enterprises the ability to monitor and govern their SaaS landscape. Through its web browser extension, Beamy provides SaaS usage observability and real-time guidance for end users while using SaaS. The solution integrates with enterprise IT tools such as ITSM, cloud security, SAM and IAM platforms. Beamy did not meet the inclusion criteria for direct API-based SaaS application integration.

CloudNuro: CloudNuro's SaaS management platform combines FinOps with SaaSOps to deliver visibility across all cloud-hosted services and to increase operational efficiency, reduce shadow IT risks, governance and enhance compliance. CloudNuro did not meet the inclusion criteria for workflow orchestration, the capability to revoke unused license entitlements and the ability to directly manage common SaaS applications from the SMP via read/write API integration.

Flexera: Flexera One SaaS Management enables SaaS discovery and spend optimization for SaaS applications. Flexera recently acquired Snow Software to increase its SaaS management capabilities. Flexera did not meet the inclusion criteria for role-based access controls.

Nudge Security: Nudge Security enables SaaS discovery via an organization's email system by analyzing messages for known SaaS usage patterns. The platform encourages app owners and other SaaS stakeholders to take action via workflow-based multichannel (email, Slack, etc.)

nudges. Nudge did not meet the inclusion criteria for SaaS expense optimization and the ability to take direct action to modify SaaS application entitlements from the platform.

Evaluation Criteria

Ability to Execute

Gartner analysts evaluate vendors on the quality and efficacy of the processes, systems, methods or procedures that enable provider performance to be competitive, efficient and effective, and to positively impact revenue, retention and reputation. Ultimately, vendors are judged on their ability and success in capitalizing on their vision.

Product: This criterion looks at the core technology product that competes in and or serves the defined market. This includes current product capabilities, quality, feature sets and the like. Additional consideration is given to the breadth and depth of the base platform, ability to optimize SaaS spend and overall application portfolio, and the vendor's track record of delivering on their roadmap.

Overall viability: This criterion includes an assessment of the organization's overall financial health, as well as the financial and practical success of the business unit. It considers the likelihood of the organization to continue to offer and invest in the product, as well as the product position in the current portfolio. Additional consideration is given to sustainable investment/ownership structure, revenue and growth, leadership stability, and organizational and partner scalability.

Sales execution/pricing: This criterion looks at the vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support and the overall effectiveness of the sales channel. Additional consideration is given to sustained growth, volume and impact of conquest sales (competition take-out) and bundling, pricing, and discounting evolution.

Market responsiveness: This criterion looks at a vendor's ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the provider's history of responsiveness to changing market demands. Additional consideration is given to tenure in the market, product vision and value proposition and product roadmap (including items identified by customers).

Marketing execution: This criterion looks at the clarity, quality, creativity and efficacy of programs designed to deliver the vendor's message in order to influence the market, promote the brand, increase awareness of products and establish a positive identification in the minds of customers. This "mind share" can be driven by a combination of publicity, promotional activity, thought leadership, social media, referrals and sales activities. Additional consideration is given to brand awareness, thought-leading content and events, webinars, podcasts, and other forms of engagement.

Customer experience: This criterion covers the products and services and/or programs that enable customers to achieve anticipated results with the products evaluated. Specifically, this includes quality supplier/buyer interactions, technical support or account support. This may also include ancillary services, customer support programs, availability of user groups, service-level agreements and the like. Additional consideration is given to general customer feedback and sentiment, the availability of customer success services, and customer case studies.

Operations: This criterion looks at the ability of the vendor to meet goals and commitments. Factors include quality of the organizational structure, skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently. Additional consideration is given to size and scalability of the organization, size and scalability of partners, and scalability of the platform.

Criteria for product service and customer experience are weighted high. These are often key drivers for vendor selection with potential buyers. Buyers express interest in product functionality, the vendor's ability to deliver against objectives, overall satisfaction with the vendor, and the vendor's ability to provide implementation, support and consistent delivery.

Criteria for overall viability, sales execution/pricing, market responsiveness, marketing execution and operations are weighted medium. This is to ensure vendors have sufficient investment and growth in their product, support a diverse set of customer requirements and have a track record of maintaining long-term customer relationships. It also ensures that included vendors have the ability to build brand-name recognition while using multiple brand channels to build market share in this emerging market.

Table 1: Ability to Execute Evaluation Criteria

Evaluation Criteria ↓	Weighting ↓
Product or Service	High
Overall Viability	Medium
Sales Execution/Pricing	Medium
Market Responsiveness/Record	Medium
Marketing Execution	Medium

Evaluation Criteria ↓	Weighting ↓
Customer Experience	High
Operations	Medium

Source: Gartner (July 2024)

Completeness of Vision

Table 2: Completeness of Vision Evaluation Criteria

Evaluation Criteria ↓	Weighting ↓
Market Understanding	High
Marketing Strategy	High
Sales Strategy	High
Offering (Product) Strategy	High
Business Model	High
Vertical/Industry Strategy	Low
Innovation	Medium
Geographic Strategy	Low

Quadrant Descriptions

Leaders

Leaders exhibit strong execution and vision scores and exemplify the functionality required for IT organizations to continuously discover, manage and optimize SaaS. Leaders have the broadest set of capabilities, strongest roadmaps, a larger installed base, and cover the most geographic regions and industries.

Challengers

Challengers exhibit a strong set of technologies, marketing and sales execution, and intellectual property, as also exhibited by Leaders, but do not have the requisite strategic support, vision, innovation or roadmap to compete in the Leaders quadrant. Many tailor solutions to specific market segments or use cases.

Visionaries

Visionaries exhibit strong strategic support, vision, innovation and a robust roadmap, but have not yet amassed the requisite size, installed base, platform breadth or integration points to compete in the Leaders quadrant.

Niche Players

Niche Players exhibit consistent ability to address specific use cases, geographic regions, market segments or verticals. Their offerings, however, fail to provide a breadth of features and cannot scale to be relevant to all buyers.

Context

The goal of any Magic Quadrant is to provide a level view of comparable products (size, capability and corporate structure) to address the demands of a wide variety of buyers. Not every company's requirements are identical. We encourage clients to review the accompanying Critical Capabilities research to review use case and functionality requirements, and this research to align industry expertise, vision, technology and cost requirements to the right vendor, regardless of the vendor's quadrant.

Market Overview

The SMP market focuses primarily on addressing the operational and financial challenges associated with SaaS-hosted application portfolios.

Organizational SaaS spend continues to grow as organizations shift from traditional on-premises application hosting strategies to operationally efficient "as-a-service" delivery models. Per-employee SaaS spend currently averages $1,370, a 55% increase since 2021 (12% CAGR). [1] Further compounding the challenge, Gartner estimates that as many as 25% of provisioned licenses are not regularly used by employees. In addition to increased spend, decentralized ownership and sourcing results in increased risk, as organizations are generally only aware of

40% of applications in use. Social media analysis has also revealed that some SaaS application vendors may be adopting less-transparent pricing practices, resulting in further challenges for buyers. [2]

Emerging governmental regulations (see Note 1) focused on asset discovery, risk assessment and disclosure require that many organizations maintain an accurate inventory of their application portfolio. Given the lack of visibility into SaaS application usage, most organizations will be unable to fully comply without a centralized SMP, alongside other asset management and security tools. Though the majority of regulations are currently focused on specific industries (mainly financial services and technology providers), Gartner expects these regulations to expand to all industries in the near future, further driving SMP market growth.

SMP providers often target four discrete buyer personas: IT asset management, IT security and compliance, IT procurement and IT operations. However, SMP features often are oriented toward the needs of IT procurement and IT operations, and most providers have the best success marketing and selling to them.

Many Gartner clients are not yet fully aware of the complexity and challenges presented by unmanaged SaaS portfolios and frequently rely on traditional, yet ineffective, tools and methods to identify and manage discrete SaaS application entitlements and usage. SaaS security tools such as SaaS security posture management (SSPM), cloud access security brokers (CASBs), and security service edge (SSE) can generally identify and block visits to SaaS provider websites. However, they often lack the context to distinguish between a site visit and actual usage. These tools also lack functionality to manage, automate, optimize or enable SaaS entitlements.

While hype has progressed past the Peak of Inflated Expectations (see Hype Cycle for Digital Workplace Infrastructure and IT Operations, 2024), demand from Gartner clients for SMP and related strategy topics remains low. Most conversations with Gartner clients are currently focused on solving a specific problem: trying to understand the market landscape; choosing between SMP, SaaS security and software asset management (SAM) tools; and overcoming resistance to adding another tool. Despite low client demand, Gartner recommends that organizations implement the capabilities of an SMP to reduce the financial, operational and visibility risks associated with unmanaged applications and the largely underestimated size and related spend within the SaaS portfolio.

Most of the vendors in this market are fairly nascent. Due to the relatively low market maturity and vendors' need to generate revenue, buyers have significant leverage when negotiating SMP contracts. Despite this leverage, Gartner recommends negotiating relatively short-term contracts (one or two years), as it is difficult to determine the overall viability for many of the vendors in this report. Outcomes such as mergers, acquisitions and financial instability may impact the serviceability of vendors in this market.

Over the next 12 to 18 months, Gartner anticipates the following demand-side market changes:

- Stronger partnerships and collaboration across procurement, finance, IT security and applications, and lines of business to control SaaS sprawl.

- Organizations will centralize SaaS portfolio responsibility and will formalize roles in response to increased regulation and cost scrutiny.

- Demand and budget for SaaS management will increase as organizations realize the magnitude of unmanaged SaaS cost, sprawl and risk, while adoption growth remains uncontrolled.

- Increased use of SMP to monitor SaaS adoption and measure return on strategic SaaS investments.

- Growing interest in automating employee onboarding and offboarding processes.

- Rising demand for simplified contract negotiation and renewal, and detailed usage data to support rightsizing of contracts.

Over the next 12 to 18 months, Gartner anticipates the following supply-side market changes:

- SMP vendors will increase their focus on high-value use cases within IT operations and IT procurement.

- Traditional SAM market vendors will expand their capabilities to include SMP use cases.

- Continued investor interest in and further funding of SMPs.

- Increased normalization in base feature sets due to coalescing buyer needs and vendors' needs for increased operational scalability.

- Increased partnerships, as well as mergers and acquisitions, among SMP and adjacent tool vendors.

- Introduction of managed services offerings from SMP, consulting and outsourcing vendors to address skills gaps. Few SMPs offer managed services today.

- Increased focus on automation of common IT operations tasks, such as onboarding and offboarding, and automatic inactive license harvesting.

- Increased number of direct SaaS application integrations from the average of 114 per vendor today.

- Enhanced risk rating for SaaS applications, including compliance with common certifications and detection of data breaches.

Evidence

[1] Gartner's IT Key Metrics Data 2024: Industry Measures — Cross-Industry Analysis shows that median IT spending per employee is $11,424. The current percentage of IT spending on SaaS is 12%, meaning that per-employee IT spend on SaaS is $1,370 per employee per year. A year-

over-year increase of $230 (+20%), two-year increase of $330 (+32%) and a three-year increase (since 2021) of $488 (+55%)

Note 1: Examples of Regulations Increasing the Importance of SaaS Management

Examples of regulations requiring focus on asset discovery, risk assessment and disclosure:

- The EU's Digital Operational Resilience Act (DORA)

- The EU's NIS2

- The U.S.'s Securities and Exchange Commission regulations

- The New York State Department of Financial Services in the U.S.

- The U.K. National Cyber Security Centre's using SaaS securely and shadow IT guidelines

Evaluation Criteria Definitions

Ability to Execute

Product/Service: Core goods and services offered by the vendor for the defined market. This includes current product/service capabilities, quality, feature sets, skills and so on, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

Overall Viability: Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

Sales Execution/Pricing: The vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel.

Market Responsiveness/Record: Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.

Marketing Execution: The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional initiatives, thought leadership, word of mouth and sales activities.

Customer Experience: Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements and so on.

Operations: The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure, including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

Completeness of Vision

Market Understanding: Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen to and understand buyers' wants and needs, and can shape or enhance those with their added vision.

Marketing Strategy: A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.

Sales Strategy: The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service, and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

Offering (Product) Strategy: The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements.

Business Model: The soundness and logic of the vendor's underlying business proposition.

Vertical/Industry Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets.

Innovation: Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

Stratégie géographique : stratégie du fournisseur visant à orienter les ressources, les compétences et les offres pour répondre aux besoins spécifiques des zones géographiques situées en dehors de la zone géographique « d'origine » ou native, soit directement, soit par l'intermédiaire de partenaires, de canaux et de filiales, selon ce qui convient à cette zone géographique et à ce marché.

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