

# Magic Quadrant pour les services gérés de gestion des actifs logiciels

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À mesure que la consommation de logiciels et de cloud augmente en volume et en complexité, les clients continuent de faire appel à l'expertise externe des fournisseurs de services gérés SAM. Les responsables du sourcing, des achats et de la gestion des fournisseurs peuvent utiliser cette évaluation de 12 fournisseurs pour sélectionner le fournisseur adapté à leurs besoins.

## Hypothèses de planification stratégique

- D'ici 2026, la croissance des dépenses et de la complexité incitera 40 % des organisations à utiliser des services gérés de gestion continue des actifs logiciels (SAM) fournis par des tiers experts, contre 20 % en 2023.
- D'ici 2026, les organisations qui déploient une discipline d'opérations financières cloud ( FinOps ) généreront 30 % d'économies supplémentaires sur les coûts de leurs infrastructures et services de plateforme cloud (CIPS) par rapport à celles qui ne l'ont pas fait.

## Définition/description du marché

Les services gérés (MS) de gestion des actifs logiciels (SAM) sont fournis directement aux clients utilisateurs finaux sur une base continue ou planifiée pour répondre aux objectifs de gouvernance des logiciels et des services cloud et d'optimisation des coûts . Les services gérés SAM exploitent l'expertise , les méthodologies et la propriété intellectuelle (IP) exclusives des fournisseurs pour transformer et gérer la discipline SAM au nom du client. Les services gérés SAM combinent les lacunes de ces initiatives, permettent l'évolutivité et améliorent la maturité tout en assurant les activités SAM quotidiennes.

Les services gérés SAM combinent une série d'activités de gestion des changements et d'optimisation du cycle de vie. Ils transforment les pratiques existantes pour offrir transparence et optimisation des dépenses en logiciels, support, maintenance, SaaS et cloud. FinOps joue un rôle central au sein de ces services pour gérer les dépenses cloud et la portabilité des licences.

Les services gérés SAM établissent une base de données fiables , intégrant la gestion des droits d'utilisation et une transparence d'utilisation optimisée tout en exploitant plusieurs techniques

pour augmenter les fonctions des outils SAM . La mise en œuvre cohérente et soutenue d'une gestion rigoureuse permet :



- Réalisation d'une plus grande valeur grâce aux investissements logiciels
- Avantages de l'élasticité du cloud, de l'optimisation des coûts et de l'environnement
- Gouvernance améliorée
- Réduction des déchets grâce à la rationalisation des applications
- Minimisation des risques de non-conformité et de sécurité

La gestion des impacts environnementaux occupe également une place centrale pour les clients, non seulement pour le matériel , mais également pour suivre et optimiser la durabilité de la consommation de logiciels et de cloud.

Les services répondent à des cas d'utilisation complexes et omniprésents, à des mesures et à des droits d'utilisation ambigus dans les organisations. Bon nombre de ces demandes découlent des caractéristiques de l'adoption du cloud et de l'utilisation des logiciels dans un large éventail d'environnements : multicloud , cloud hybride et prolifération des appareils Internet des objets (IoT). La demande provient également de la consommation de logiciels par les services d'automatisation des processus robotiques (RPA), les intégrations d'applications et l'accès indirect . Ensemble, ces impacts nécessitent des ressources et une discipline SAM hautement qualifiées (et souvent rares).

Au sein d'un service géré SAM, les fournisseurs sont censés fournir un ensemble complet et continu de services à un large éventail d'éditeurs de logiciels.

« Complet » signifie la fourniture de chacun des composants essentiels suivants au sein d'un service géré SAM :

- **Services de processus et de transformation.** Les services du fournisseur doivent inclure l'évaluation, la conception, la gestion et la réalisation de la transformation ; amélioration continue; et le fonctionnement des disciplines SAM et FinOps en tant que mécanisme de base pour l'efficacité et les meilleures pratiques durables.
- **Services de données gérés et fiables.** Les services du fournisseur développent et maintiennent en permanence une vue de l'environnement complet, y compris les actifs informatiques, les logiciels et les données associées. Grâce à la vérification et à l'analyse, les fournisseurs fournissent une représentation précise de tous les inventaires et de leur utilisation, prenant en compte les charges de travail ou les équipements retirés et nouvellement provisionnés sur plusieurs plates-formes. Les fournisseurs se chargent de la gestion des données d'inventaire fiables , en éliminant les doublons, les faux positifs, les anomalies et les écarts. Les fournisseurs doivent fournir une analyse supplémentaire, en augmentant les données de l'outil

SAM si nécessaire pour représenter une vue précise, continue et complète de tous les logiciels installés, utilisés et consultés.



- **Droits gérés et droits d'utilisation.** Les fournisseurs prennent la garde, gèrent et analysent en permanence la documentation relative aux achats, aux contrats et aux droits d'utilisation dans le but de fournir une source unique et fiable de droits de licence et de droits d'utilisation pour un large éventail d'éditeurs.
- **FinOps et gestion des licences cloud .** Les fournisseurs évaluent toutes les instances de logiciels en tant que service (SaaS) et de services d'infrastructure et de plateforme cloud (CIPS), leur utilisation et l'ensemble complet des actifs logiciels dans le cloud par rapport aux engagements et droits contractuels. Le fournisseur de services offre de la valeur grâce à l'optimisation et à la gouvernance continues de tous ces logiciels et instances.
- **Actions de gouvernance et d'optimisation.** Les fournisseurs fournissent une expertise pour créer et évaluer en permanence l'utilisation, gérer les positions de licence et fournir des rapports de gouvernance dans tous les environnements. Le fournisseur de services crée de la valeur en réconciliant continuellement les positions, en identifiant les risques, en établissant des stratégies d'atténuation et des opportunités d'optimisation.
- **Gestion intégrée du cycle de vie.** Les fournisseurs fournissent des services qui s'approprient, exploitent et gèrent les exigences quotidiennes, intégrant les demandes de logiciels, l'approbation, l'approvisionnement, la gestion, la récolte, la mise hors service, les conseils en matière de licences et les activités d'optimisation intégrées aux opérations et aux ressources des clients.
- **Plateforme de livraison continue.** Les fournisseurs facilitent une visibilité continue de la prestation de services gérés SAM et FinOps , y compris l'IP et l'automatisation pour permettre une sensibilisation et des actions à tout moment. Ceci est fourni via une interface consolidée unique où les éléments suivants sont visibles : les livrables, les jalons, la gestion des données d'exception et de non-instance, les réalisations et la gestion de la prestation de services IP, les processus et les ressources .
- **Réalisation de la valeur.** L'engagement des fournisseurs en faveur de la valeur consiste en une amélioration continue, y compris des engagements de service qui éliminent les frais généraux et les défis spécifiques au domaine, des avantages prouvés grâce à des études de cas et des mécanismes commerciaux alignés sur les coûts, les économies et les impacts des risques pour le client.
- **Services de durabilité environnementale.** Les fournisseurs fournissent des services qui mesurent, gèrent et optimisent les impacts environnementaux de la consommation de logiciels et de cloud. L'identification des opportunités d'optimisation permettra aux clients de poursuivre des actions pour réduire leur impact environnemental et minimiser les déchets.

« Continu » est défini comme la prestation de services avec une cadence **minimale** et comprend :

- **Services de processus et de transformation** : Exploitation quotidienne et mesure du respect des processus SAM.
- **Services de données gérés et fiables** : collecte, mise à jour et ratification hebdomadaires ou plus fréquentes de tous les actifs et logiciels informatiques installés et utilisés, ainsi que des données consultées.
- **Droits et droits d'utilisation gérés** : collecte et mise à jour hebdomadaires ou plus fréquentes des droits de licence et des droits d'utilisation.
- **FinOps et gestion des licences cloud** : mesure et optimisation hebdomadaires ou plus fréquentes de l'utilisation des logiciels et des services cloud.
- **Actions de gouvernance et d'optimisation** : maintenance et optimisation mensuelles ou plus fréquentes des positions de licences, reporting d'utilisation et de gouvernance.
- **Gestion intégrée du cycle de vie** : gestion quotidienne des activités de demande de logiciel, d'approbation, d'approvisionnement, de renouvellement, de récolte, d'élimination et d'optimisation.
- **Plateforme de livraison continue** . Maintenance quotidienne de la solution permettant la gestion des livraisons, le suivi des livrables et la gestion des données d'exception et hors instance.
- **Réalisation de la valeur**. Validation et rapprochement mensuels ou plus fréquents des valeurs réalisées en accord avec le client.
- **Services de durabilité environnementale**. Collecte et mise à jour mensuelles ou plus fréquentes des impacts environnementaux de la consommation de logiciels et du cloud, ainsi que des opportunités d'optimisation.

**Services programmés** : les services SAM ne répondant pas à la définition de services continus mais fournis à chaque client de manière reproductible sont traités dans ce Magic Quadrant comme des « services programmés ». »

Un « large éventail d'éditeurs de logiciels » est défini comme des services gérés SAM fournis par un minimum de 20 éditeurs nommés (dont Microsoft, IBM, SAP et Oracle sont obligatoires), avec des capacités permettant une fourniture étendue à au moins 200 éditeurs au sein d'un seul service géré. là où cela est nécessaire.

Les outils SAM et les revenus des outils SAM ne sont pas évalués dans ce Magic Quadrant (voir la note 1 pour une liste complète des exclusions). Pour examiner le marché des outils SAM, consultez le [Guide du marché des outils de gestion des actifs logiciels](#) .

## Quadrant magique

**Figure 1 : Magic Quadrant pour les services gérés de gestion des**





## Points forts et mises en garde du fournisseur

### Point d'angle

Anglepoint est un leader dans ce Magic Quadrant. Il s'agit d'un fournisseur américain spécialisé dans les services gérés SAM, géré de manière indépendante mais détenu majoritairement par Crayon. Près de la moitié des consultants d'Anglepoint sont basés en Amérique du Nord (NA), dont 40 % en Europe, au Moyen-Orient et en Afrique (EMEA), grâce à l'acquisition en novembre 2022 de la société britannique FisherITS. Viennent ensuite 8 % en Amérique latine (LATAM) et 4 % en Asie/Pacifique (APAC), y compris le Japon. Les revenus d'Anglepoint sont principalement réalisés en Amérique du Nord et ont augmenté de 16 % en 2022 au total. Anglepoint convient parfaitement aux organisations disposant de parcs importants et complexes qui souhaitent externaliser entièrement et de manière continue le SAM ; NA bénéficiera de plus de réactivité que les autres régions.

### Forces

- **Breadth and depth of services:** Anglepoint has SAM expertise in over 500 publishers, the three main CIPS (Amazon Web Services [AWS], Microsoft Azure and Google Cloud Platform [GCP]), and a broad range of inventory sources including 30 SAM tools and SaaS management platforms. It invests in proprietary services through its delivery platform, Elevate, to structure its engagements. Its portfolio widened with the FisherITS acquisition along with its partnerships with SAM and SaaS management vendors.
- **Transformation of clients' SAM discipline:** Anglepoint has the highest proportions of clients receiving the entire portfolio of services and of large-scale organizations with continuous services (over 50%). Clients report that their service is not limited to their immediate requirements; Anglepoint also helps them to anticipate future challenges and to transform their SAM and FinOps discipline. Anglepoint self-reports that all of its clients save twice the cost of their services.
- **Leadership in SAM:** Anglepoint's management is heavily involved in the SAM ISO Standards Working Group 21, FinOps Foundations, and other bodies of SAM and ITAM. It has an open approach to its influence to the industry, producing ITAM executive podcasts, webinars, savings estimates and RFP templates for SAM managed services.


### **Cautions**

- **No project-oriented SAM engagement:** Some Gartner clients report that Anglepoint will not engage with them without a SAM maturity assessment first. Anglepoint is a continuous SAM managed services provider, and will not engage in ad hoc SAM projects such as effective license position (ELP) generation or SAM tool management. In addition, Anglepoint targets mainly midsize to large organizations with more than 10,000 managed devices.
- **Resourcing and market presence:** Although Anglepoint reports to deploy resources only in countries where it conducts delivery, clients should review its resources and delivery model alignment to their account when delivery is remote. Clients are concentrated in NA (77%); it has a low presence in APAC (2%) and only one client in LATAM. EMEA's business is moderate (20%) but growing.
- **Limited availability of staff:** Some Gartner clients reported a lack of timely responsiveness of Anglepoint SAM managed services resources and consultants, especially when clients are operating in different time zones than in the U.S., since this is where the majority of Anglepoint's resources and clients are.

### **Bytes**

Bytes is a Niche Player in this Magic Quadrant. It is a publicly listed software and cloud services reseller headquartered in the U.K. Bytes' SAM workforce is primarily based in EMEA (65%) and APAC (33%), with the rest in NA (2%). Bytes' revenue is primarily realized in EMEA, and grew overall by 48% in 2022. Bytes is a good fit for small and midsize clients looking for a provider that is contractually flexible and engages on a continuous and scheduled basis. Prospective clients should review their requirements for SAM to ensure Bytes will be able to meet their needs.

## Strengths

- **Investments in cloud consumption management:** Bytes has invested in its umbrella FinOps  and SaaS management offering, Quantum, focusing on Microsoft environments (Azure and M365). Bytes SAM managed services resources grew by 30% year over year (YoY), meaning more workpower for actions outside of tools.
- **Measuring and tracking value:** Bytes applies a technical approach to service management to manage performance and drive satisfaction. It has methods defined for measuring and tracking value, and demonstrates constant engagement with clients. Bytes is leveraging industry-known methodologies for service improvement, and it has shifted from a project focus to be service-led. Bytes is aligned to ITIL and ISO standards, its services are customizable, and it addresses the full life cycle of SAM.
- **Flexible SAM contracts:** On top of the traditional fixed fees, Bytes offers flexible models such as Gain Share and Flex Tokens (i.e., credit units to allow rightsizing of their services) for certain deliverables. Those models do provide clients some flexibility and more billing options over the standard consumption models. Bytes provides flexible currency billing for global clients.

## Cautions

- **Few large and complex clients:** Bytes has a low share of large and complex clients. Compared to other providers in this research, its investments are below average in innovation, which is crucial to address clients' challenges. Bytes remains focused on clients with fewer than 10,000 devices under management, and has only a small number of clients in NA with more than 50,000 devices under management.
- **Fragmented approach:** Bytes has a limited depth of services with a modular approach in lieu of driving best practice management across the life cycle and portfolio. It has a very small scope of deliverables and average contract value compared to others in this research. While its services appear to be tactically oriented and positioned as low-cost, Bytes provided no examples of how it is addressing the complete portfolio of cloud services.
- **Service delivery:** Over 35% of Bytes resources are offshored in India, and less than 10% of its clients are located outside of EMEA. It has few resources in NA and none in LATAM. It was unclear whether Bytes SAM managed services in the U.S. are delivered through partners or by Bytes directly, and in what proportion. Bytes had the second-lowest resource-to-customer ratio of all providers in this research.

## Crayon

Crayon is a Leader in this Magic Quadrant. It is headquartered in Norway, with a global presence, and is a publicly listed software and cloud services reseller. Crayon's SAM consultants are primarily based in EMEA (67%), APAC (24%) and NA (9%). Crayon's 2022 revenue grew by an estimated 61% and is primarily generated in EMEA. Crayon is a good fit for small and midsize clients looking for international coverage and with complex cloud and SaaS spend. Clients should

review their SAM and FinOps requirements to confirm Crayon's ability to support their vendors and complex use cases.



### **Strengths**

- **Cloud and SaaS challenges:** This past year, Crayon expanded its expertise on cloud cost management and bring your own license (BYOL) management. Crayon has joiner/mover/leaver process capabilities with the automation of license assignment and reharvesting services, such as for Microsoft 365 subscriptions. Crayon seems to be the only vendor in this research advising clients on the newly released Microsoft Azure savings plans.
- **Breadth of services:** Crayon engages clients with a variety of tools and has developed new services, such as Java license optimization, IBM compliance and Microsoft 365 optimization. Crayon covers all components of SAM managed services offerings from technical to commercial: remediations, life cycle management, FinOps and SaaS. An above-average proportion of clients receive its full portfolio of capabilities.
- **International presence:** Crayon has a robust international footprint and reach with a cross-regional spread of resources in 17 locations (of 31 assessed in this research), a unified delivery platform, competency centers for disciplines (such as FinOps in Denmark), and multiple centers of excellence worldwide. Crayon is investing in hiring, retention, certification and training, and has a 95% customer retention rate.


### **Cautions**

- **Anticipation of SAM challenges:** Crayon did not fully demonstrate the transformative nature of its services in this evaluation; its continuous services appear reactive via service desk and support in lieu of running a SAM discipline. It has below-average market share of large, complex clients, and its response to Java licensing changes was slightly slower compared to others in this research. Crayon did not provide details on AI/ML innovation, nor on other challenges such as bots, containers and noninstance data.
- **Not for complex organizations:** Crayon primarily focuses on small to midsize organizations with 1,000 to 10,000 devices under management. It reported among the lowest average SAM managed services contract values of peers in this research (80% below \$100,000 per year). It has below-average continuous services revenue compared to other players, which may indicate more project-oriented engagements.
- **Inconsistent vendor expertise:** Some Gartner clients report that Crayon's SAM managed services have inconsistent quality across all software and cloud vendors. This is confirmed by Crayon's below-average assessment by clients with more than 20 vendors managed. Crayon also has a below-average client-to-resource ratio compared to others in this research.

### **Deloitte**

Deloitte is a Challenger in this Magic Quadrant. Deloitte is privately held and provides audit and professional services globally. Deloitte's consultants are based in EMEA (57%), NA (40%) and APAC (3%). Most of its SAM managed services revenue is driven by NA and EMEA, and grew



overall by 25% in 2022. Deloitte is a good fit for large clients looking primarily for scheduled SAM managed services (72%) with the capability to provide on-site staffing. Clients must assess their present and future SAM and FinOps requirements to validate Deloitte's fit for their needs. 

### **Strengths**

- **Investments in SAM:** Deloitte is investing in IP to address SAM challenges such as software and cloud cost inflation, SaaS usage, hybrid environments, and FinOps. It is developing multiple IP internally, and it can enhance other SAM tools. Deloitte provides security, SaaS, open source, FinOps, ESG and ServiceNow modules. Clients can use its open-source software code for licensing optimization and to allay concerns about compliance and security.
- **For large and complex organizations:** Deloitte targets clients with over 10,000 devices, \$100 million in software spend and hundreds of vendors managed. CIPS like AWS, GCP, Azure, IBM and Oracle Cloud Infrastructure (OCI) are managed in its FinOps offering. Deloitte has the highest average contract value of all providers in this research, and reports above-average total continuous services revenue.
- **Breadth of resources:** Deloitte has the largest workforce of SAM managed services consultants in this research and an above-average rate of dedicated SAM managed services resources. It uses onshore and offshore resources to cover clients 24 hours a day, five days a week. It has multiple delivery centers and the second-largest customer success manager-to-total SAM MS clients ratio in this research.

### **Cautions**

- **Reactive, not proactive:** Some Gartner clients report a lack of proactivity in Deloitte's SAM managed services, on different aspects of SAM life cycle. Deloitte provided a high-level overview of the steps needed to drive change, but did not present detailed operational steps to achieve change. Deloitte reported the lowest proportion of continuous services of all providers in this research. It also did not go into detail as to how it measures financial results and success, and its contract maturity is low.
- **Lacking transformation:** Some Gartner clients report that, even if Deloitte enables them to tackle their current challenges, its ability to transform SAM discipline is limited, despite the 80% of clients receiving process transformation services. Deloitte reports discovery of IoT and containers, but does not demonstrate how these are analyzed for consumption of software.
- **Engaging clients outside of tools:** Although Deloitte invests in its own IP to tackle multiple SAM challenges, it's unclear how those offerings help automate SAM tasks, operationally change processes, or generate savings and cost avoidance. It's also unclear how Deloitte's extensive expertise is coordinated and made easily available to clients.

### **DXC Technology**

DXC Technology is a Niche Player in this Magic Quadrant. It is a hardware, software and cloud services reseller with a global presence, headquartered in the U.S. DXC's SAM resources are based across all geographies: APAC at 51%; NA, 27%; EMEA, 12% and LATAM, 9%. DXC's SAM

managed services revenue is primarily driven by NA and EMEA, and declined overall by an estimated 9% in 2022. DXC is a good fit for clients with up to 100,000 devices to manage and primarily requiring scheduled engagements, on-site engagements and international reach. However, clients must fully review DXC's ability to meet their requirements on SaaS and cloud spend, complex use cases and multitool environments.



### **Strengths**

- **Integrated within IT services:** DXC demonstrated interesting aspects of its SAM managed services offering beyond conventional activities. Examples are application rationalization, creation and management of software catalogs, “what if” analysis (e.g., architecture changes), integration to IT service management (ITSM), automation of software requests, and software removal.
- **SAM workflow optimization:** DXC enables cost and process optimization for clients to manage their software and cloud assets for the full life cycle, enabling cost and process optimization. Its Optimized Software Request (OSR) IP designs and runs software life cycle management steps for license allocation, reclamation and reassignment. Key events such as discovery, deployment, compliance and optimization are covered in this model.
- **Worldwide presence:** DXC supports international organizations, with resource representation in NA, LATAM, EMEA and APAC. Its working models accommodate clients 24 hours a day, five days a week, and it has sales teams in more than 70 countries. DXC can leverage vendor specialists from other parts of its business, and reports the second-largest resource-to-customer ratio of all providers assessed in this research.

### **Cautions**

- **Maturity on SaaS and CIPS cost management:** DXC reported that its SaaS management service was released in 2022 as standard part of its offering and FinOps (currently a separate practice) will be fully integrated in the next 12 months. Gartner only had limited data on those service layers, as they were not yet fully integrated. It's unclear how those services will be developed, though DXC has an innovation budget higher than the average among peers in this research.
- **Ability to engage with multiple toolsets:** DXC reports that it addresses complex environments on a single platform. It did not provide further details on investments or IP to resolve gaps that could exist in existing inventory sources, and provided no further evidence on operational management of CIPS providers or SaaS platforms. In addition, the DXC offering primarily relies on Flexera, while reporting to support other toolsets.
- **Value delivered:** DXC did not provide specifics on how it generates and tracks savings and cost avoidance. High-level description was provided on tracking relative operational efficiency, procurement, licensing and advisory tasks, which are critical elements for clients evaluating the opportunity to engage with SAM managed services providers. It has the lowest proportion of customer success resources among its peers in this Magic Quadrant.

Insight is a Challenger in this Magic Quadrant. It is headquartered in the U.S. and is a publicly listed hardware, software and cloud services reseller with a global presence. Insight's SAM consultants are primarily based in EMEA at 68%, APAC at 21% and NA at 11%. Insight's SAM managed services revenue is primarily driven by EMEA, and declined overall by an estimated 17% in 2022. Insight is a good fit for midsize and large organizations looking to engage either on a continuous or scheduled basis or needing an international reach. However, clients need to review Insight's ability to meet their requirements for more challenging forms of software and cloud consumption.

### **Strengths**

- **Investments on SAM challenges:** Insight has above-average reinvestment of revenue in development of innovation and IP (e.g., Service Performance tracking tool, Cloud Inform). Insight provides software engineering (e.g., Autodesk) licensing analysis, profiling and optimizations. Insight operates a tool-agnostic service model and reported capacity to work with a broad range of inventory sources including SaaS management platforms and SAM tools.
- **Flexible commercial model:** Along with the traditional base fixed fees, Insight offers more flexible models such as success fees, per transactions and service credits to enable scalability. Insight provides SAM managed services contract models where clients will not be charged if certain objectives are not met (clients should work with Insight to clearly define those objectives). Service flexibility is enabled with vendor and platform swaps (e.g., SaaS or cloud vendors).
- **International reach:** Insight has made steady investments and growth in resources across geographies, which will be a good fit for clients needing global coverage. Its SAM managed services resources are based in a range of locations throughout Europe, APAC and the U.S., and it is expanding into India. Insight has multiple centers of excellence, including for cloud, FinOps, SAM and its operational licensing desk.

### **Cautions**

- **Tomorrow's challenges:** Although it understands today's SAM challenges, Insight did not specifically address the anticipation of emerging SAM challenges such as compliance on SaaS, containers or bots. Cloud license management and FinOps services appeared to be limited; it covers Azure and AWS, but not GCP and more advanced consumption scenarios.
- **Limited experience with high complexity:** Insight has relatively few high-value contracts compared to its peers in this research. It also has a below-average proportion of clients with broad vendor scope (most have less than five vendors in scope). Most of its services are delivered to organizations with 1,000 to 10,000 devices under management and it has a below-average proportion of large clients.
- **Limited focus on transformation of SAM discipline:** Insight appears to favor focusing on customer-by-customer requirements instead of pushing them to higher standards of SAM

discipline and maturity through a global and unified approach. Insight has a very low proportion of clients receiving process and transformation services, decreasing from last year, which could make clients lag in their maturity journey.

## **ITAM solutions**


ITAM solutions is a Niche Player in this Magic Quadrant. It is headquartered in the Netherlands and is a privately owned specialist provider of SAM managed services. Its SAM consultants are predominantly located in EMEA (90%) and APAC (10%). ITAM solutions' revenue is primarily driven by EMEA and increased overall by 12% in 2022. ITAM solutions is a good fit for EMEA-based midsize organizations looking for a SAM specialist. However, clients should build robust requirements and evaluate potential limitations ITAM solutions might have around certain CIPS or SaaS vendors, or SAM life cycle elements.

### **Strengths**

- **Improving breadth of services:** ITAM solutions aims at reducing the gap between SAM and other disciplines linked to it, such as ITSM, and is doing so through acquisition (e.g., InfraVision in April 2022). Further developments for joiner/mover/leavers processes were made, as well as SAM life cycle management through its proprietary ITAM 360° offering. Its ability to connect and inventory IT sources improved on cloud access security broker (CASB), dockers, SaaS and CIPS since Gartner's last evaluation.
- **Contracting and procurement expertise:** ITAM solutions has robust capabilities for entitlement and contract discovery, analysis and management. ITAM solutions has an above-average proportion of clients with extensive vendor scope (fewer than 20 vendors under management) compared to its peers in this research. ITAM solutions is managing at least 20 publishers for one-third of its clients.
- **Customer management staffing:** ITAM solutions has a healthy proportion of customer success managers compared to its client base. ITAM solutions has among the highest proportion of dedicated SAM managed services resources of those evaluated in this Magic Quadrant. ITAM solutions demonstrated agile methods to respond to clients' requirements and feedback, such as on automation of certain SAM operations.

### **Cautions**

- **Depth and breadth of services:** ITAM solutions did not demonstrate detailed and specialized coverage across different publishers, SaaS or CIPS platforms. ITAM solutions' branded IP is limited, and relies heavily on third-party SAM tools, which could be limiting for clients with more complex environments and a large vendor portfolio. ITAM solutions also has few large contracts (approximately 80% are less than \$100,000 per year).
- **Limited uptake of unified portfolio of services:** ITAM solutions did not provide examples of transformation to match the new challenges facing SAM. ITAM solutions does not offer a continuous delivery platform for its SAM MS clients. It has a small number of clients receiving

FinOps and cloud management services, and only 4% of ITAM solutions' clients receive the full portfolio of SAM managed services. 

- **Limited geographic and client segment reach:** ITAM solutions has no resources in NA or LATAM, and 90% of its resources are in EMEA, with unclear plans for development. Its primary focus is on EMEA and APAC, but its range of clients in these areas is smaller than others assessed in this Magic Quadrant. It has very low penetration (less than 5% of clients) of large to extra-large clients with over 50,000 managed devices.

## **KPMG**

KPMG is a Challenger in this Magic Quadrant. It is headquartered in the U.K. and is a privately held audit and professional services firm. KPMG SAM resources are broadly spread over EMEA (39%), APAC (35%), NA (23%) and LATAM (3%). KPMG's revenue is primarily driven by NA and grew overall by an estimated 10% in 2022. KPMG is a good fit for clients of all sizes looking to engage on either a continuous or scheduled basis, with a clear view of what their SAM and FinOps needs are. Clients should review their requirements with KPMG regarding their vendors or complex use cases.

### ***Strengths***

- **Automation of SAM tasks:** KPMG has made IP investments that enable automated discovery, inventory and license assignments for vendor-specific scenarios. KPMG also provides SAM process blueprints, contract and entitlement ingestion, and processing. Its SAM Navigator delivery platform enables data management, reporting and tracking benefits through KPIs and SLAs, as well as formal, postengagement and real-time feedback.
- **Addressing different client segments and regions:** KPMG addresses all segments of client sizes, among the most comprehensive on this Magic Quadrant. KPMG reports a sound distribution of contract values from less than \$100,000 per year to greater than \$1 million, with the highest proportion of contracts more than \$1 million annual value. It provides international coverage for its SAM managed services.
- **Customer care:** KPMG has the highest proportion in this research of customer success manager resources compared to its client base. Its SAM managed services resources have grown over the past two years, and the company demonstrates a healthy resource-to-customer ratio – the third highest among its peers. It has at least one resource in 26 of 31 markets tracked in this research, and it has five centers of excellence with designated IP and innovation responsibilities.

### ***Cautions***

- **Ability to manage cloud consumption:** KPMG has a below-average proportion of clients receiving FinOps services compared to its peers in this Magic Quadrant. It presented limited investment in resources or service developments for cloud services, only tools. It is unclear how KPMG enables clients to optimize and rationalize their SaaS and CIPS costs, beyond the fundamental pillars of visibility.

- **Orientation toward future challenges:** Although KPMG provided a good overview of current and future SAM challenges, it only provided high-level examples on how it addresses those on more operational levels. Although software and cloud spend grows both in volume and complexity for clients, KPMG did not specifically show how the inherent opportunities and risks were harnessed.
- **Cadence and depth of engagement:** KPMG reports one of the lowest proportions of continuous SAM managed services clients compared to its peers in this research. Its revenue per resource is currently below the average of others assessed in this research. Half of KPMG's clients use them to manage five vendors or fewer. The highest proportion of KPMG's SAM resources are located in India, available to clients through offshoring. Customers seeking offshore SAM MS services resourcing should review KPMG's resources and delivery model alignment to their account.


### **Livingstone Group**

Livingstone Group is a Leader in this Magic Quadrant. It is a U.K.-headquartered specialist provider of SAM managed services now owned by One Equity Partners (which also owns the U.K.-based reseller Trustmarque). Livingstone SAM consultants are located in EMEA (79%) and NA (21%). Livingstone's SAM MS revenue is primarily driven by EMEA (61%) and grew by an estimated 2% in 2022 (7% in constant currency). Livingstone is a good fit for large and complex organizations located in EMEA or NA with large and complex estates looking to fully outsource their SAM and FinOps functions. Clients should carefully review their CIPS management needs for vendors outside of Microsoft.

### **Strengths**

- **Making sure SAM delivers value:** Livingstone is one of the few providers that ties contract commitments to ROI achievement through its Livingstone Assurance. It reported above-average contract maturity and proportion of dedicated SAM managed services resources compared to its peers. It drives service improvements and differentiation by focusing on core revenue and removing lower-value, indirect revenue.
- **Large and complex estates:** Livingstone has an above-average proportion of contracts receiving with the entire portfolio of SAM services and of contracts with extensive vendor scope (10% of its contracts include more than 100 managed vendors). It has the third-highest contract value among vendors assessed in this research, and it has an extensive set of managed vendors (300), along SaaS and CIPS vendor coverage.
- **Investments in IP and skills:** Livingstone has invested in its data collection framework and Hub toolsets, which enable consolidation and normalization of datasets from technical inventory, mobile device management (MDM), HR IT systems, ITSM, cloud (including noninstance data) and SaaS environments. Skills investments include developing a technical account manager role, and creating the Livingstone Academy to facilitate competency developments.

### **Cautions**

- **Breadth on CIPS management:** Although Livingstone added AWS and GCP as part of its FinOps services, and keeps investing in its Hub platform (connectors to CIPS and SaaS), it appears  primarily focused on Microsoft environments. It has a slightly below-average proportion of its clients receiving FinOps services compared to its peers, which indicates a limited penetration on this capability.
- **Growth:** Over the past two years, Livingstone has had below-average revenue growth compared to its peers in this Magic Quadrant, and a shrinkage of resources, while maintaining a healthy profitability. The number of its continuous service customers is below the average (but the highest proportion of continuous clients out of all SAM MS clients compared with its peers). Its focus is the U.S.; clients there and in LATAM remained stable while declining in EMEA and APAC.
- **International coverage:** Livingstone has 80% of its customers in EMEA, but it has seen a drop in resourcing in that region. It has resources in only six locations of the 31 assessed in this research, and none in LATAM or APAC. However, Livingstone has plans to develop in the U.S. in the next 24 months, and has made the choice not to offshore.


## **Noventiq**

Noventiq Holdings (Noventiq) is a Challenger in this Magic Quadrant. In October 2022, Softline Holding began trading under Noventiq, and it is now headquartered in London. The group's majority business is software and cloud reselling. SAM resources are almost entirely located in EMEA at 99%, and less than 1% in APAC. Noventiq's SAM MS revenue is primarily driven by EMEA, and declined by an estimated 5% in 2022. Noventiq will be a good fit for small and midsize EMEA organizations looking to engage on a scheduled basis. Clients should meticulously review any limitations regarding immediate and future requirements, including any unique toolset.

## **Strengths**

- **Sound SAM offer:** Noventiq provides coverage for on-premises and cloud-based solutions, as well as coverage for Tier 1 vendors and Tier 2 and 3 publishers (more than 200 in total), and over 35 SaaS vendors. Noventiq is tool-agnostic and supports a range of inventory sources. Its House of ITAM is a clear model for clients to build the foundations and attributes of a SAM discipline.
- **Holistic approach to data:** Noventiq values providing visibility to clients through sources that will complement SAM, such as through HR IT systems, configuration management database, MDM, security or single sign-on. Its offering has also an approach to more complex environments such as cloud, edge or IoT. Noventiq leverages its own proprietary scripts to recover consumption or usage.
- **Tracking SAM value:** Noventiq co-develops KPIs with its customers and its customer success managers. It engages and reports to clients' C-level representatives at least on a quarterly basis to ensure optimal involvement and continued investment with SAM. Noventiq is focused on empowering its customers via transparency, control and education/training, which may indicate why it reports a high number of renewals.

## Cautions

- **Limited reach:** Noventiq reports having removed its remaining ties with Russia, and reported  resource locations are down from 18 to six, with almost all (99%) located in EMEA. While it has plans to grow into Eastern and Western Europe, India and Brazil, its growth outside of EMEA is slow. Noventiq has good coverage of the 1,000-to-100,000-client segment, but only a small portion of its clients are in the extra-large category.
- **Dependence over tool ecosystem:** Although enabling Noventiq to address a broader set of inventory and discovery, Noventiq seems to rely heavily on third-party tools such as Flexera and LeanIX. Its relatively low innovation investments, below its peers in this Magic Quadrant, could mean a lower propensity to invest in its own IP and integrated approach. It could also mean less flexibility for clients with different technical contexts.
- **Limited client transformation:** While it would be a benefit for some clients, Noventiq is overly focused on SAM tools in its approach. Noventiq did not demonstrate how they help clients to transform their SAM discipline through a global approach on processes, skills and governance. Its SAM managed resources declining by 23% YoY could also mean less ability to help clients remodel their SAM practices.

## SHI

SHI is a Niche Player in this Magic Quadrant. Headquartered in the U.S., it is a privately owned hardware, software and cloud services reseller. SHI SAM resources are predominantly in the U.S. (78%) followed by EMEA (22%). SHI's SAM MS revenue is almost entirely driven by NA and grew by an estimated 69% in 2022 (the largest growth in this Magic Quadrant). SHI is a good fit for small and midsize organizations in NA looking to engage on a continuous or scheduled basis, but prospective clients must assess the provider's ability to fulfill their requirements, especially for future challenges.

## Strengths

- **Growing and expanding services:** SHI has invested in its product teams to build data services and to expand ISO 19770 consultant certifications. SHI is focused on development of partnerships across SAM tools, inventory tools and SaaS management platforms to expand its coverage and client base. SHI leverages its engagement as a reseller to drive its service offering with clients. It has increased resources YoY, but now has a below-average resource-to-client ratio.
- **Cloud spend optimizations:** SHI has coverage across AWS, Azure and GCP, and it delivers FinOps services both independently and within its SAM managed services to a large proportion of its clients (the largest proportion in this Magic Quadrant). SHI has connectivity to Oracle Cloud, VMware and Alibaba, but only from a visibility perspective, not an optimization one, at the time of research.
- **Tracking and delivering services:** SHI uses voice of the customer and customer advisory boards to gather feedback. It measures service delivery through monthly management review of business KPIs, trends and business measures for the organization, such as revenue and



profitability. SHI is focused on training to improve upskilling resources who are predominantly in NA and EMEA (and where NA generates almost all revenue).



### **Cautions**

- **Minimal discipline transformation focus:** SHI has below-average investment in its delivery platform. Its product management function appears mainly oriented to the first layers of SAM and FinOps services, in lieu of continuously running and transforming the disciplines. Its FinOps practice is built on third-party tooling, and while building its own IP, SHI relies on other tools to enable complex measurement of software and cloud consumption.
- **Size and complexity:** SHI has a below-average vendor scope in services with 99% of contracts having five vendors or fewer in scope. It reports a below-average proportion of customers receiving the entire services portfolio. Over two-thirds of its clients are small and midsize organizations with fewer than 10,000 devices under management. In addition, more than 80% of its typical annual contract size is under \$100,000, representing a light-touch engagement.
- **Limited international outreach:** SHI has no resources in APAC or LATAM, and its resources in NA and EMEA are spread across only five locations. Less than 2% of its clients and SAM managed services revenue are outside of NA. Its lack of business in the APAC and LATAM region is explained by first targeting its reseller and licensing customers, making its SAM/FinOps practice a secondary offering.

### **SoftwareOne**

SoftwareOne is a Leader in this Magic Quadrant. It is headquartered in Switzerland and is a publicly listed software and cloud services reseller with a global presence. Its SAM workforce is evenly distributed across EMEA (53%), APAC (28%), NA (11%) and LATAM (9%). SoftwareOne's SAM MS revenue is primarily driven by EMEA, and grew by an estimated 6% YoY. SoftwareOne is a good fit for small and midsize clients, in any region, with an internal SAM function and looking to source scheduled SAM services, but clients must carefully assess the provider on more advanced SAM tasks.

### **Strengths**

- **Investments on proprietary IP:** SoftwareOne continues to leverage its Zyncc (license management) and PyraCloud (FinOps) IP. It is using Zyncc to standardize customer engagement and data sharing with its clients. Platform investments are focused on gathering and processing entitlement data. SoftwareOne is expanding its SAP scope and Salesforce advisory, and it has invested in areas where tools are lacking, such as end-user license agreement analysis automation.
- **Ability to engage globally:** SoftwareOne has an above-average proportion of customers with a broad set of capabilities delivered globally. It has a strong international presence with sales resources (in 26 of 31 locations assessed), 16 delivery centers across four regions and delivery resources in each region. SoftwareOne has the largest quantity of clients with continuous services reported and the largest continuous services revenue reported in this research.

- **Flexible contracts:** SoftwareOne provides flexible options between fixed fees and consumption-based contracts. Clients have flexible delivery options (onshore, offshore or local). It also allows swapping and easy termination within all contracts. Gainshare options exist, along with bonus with ROI guarantee. However, Gartner clients report that flexibility has to be requested and negotiated.



### **Cautions**

- **Lack of focus on tomorrow's challenges:** SoftwareOne did not provide details on how it addresses SAM's modern issues, such as RPA, IoT or the broad spectrum of SaaS. It has a below-average proportion of investment in innovation compared to its peers. SoftwareOne also has a below-average proportion of clients with FinOps services and is yet to deliver environmental sustainability services.
- **Limited depth of engagement:** Most client contracts are in the \$100,000 to \$250,000 range, which could mean a limited dive into the client's challenges. The proportions of contracts with large vendor scope and of large organizations with continuous services are both below average compared to others in this research, and SoftwareOne reports the lowest dedicated resource-to-customer ratio.
- **Consumption governance:** Gartner clients report facing inventory data quality issues and struggles to get visibility over noninstance data (e.g., containers). ELP generation frequency was also reported as challenges for license governance reasons. Although SoftwareOne is a tool-agnostic vendor and supports different SAM tools, it does not have a unified service delivery platform that enables clients easy consumption and tracking of their services.

### **Vendors Added and Dropped**

We review and adjust our inclusion criteria for Magic Quadrants as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant may change over time. A vendor's appearance in a Magic Quadrant one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

#### **Added**

DXC Technology was added to the Magic Quadrant this year.

#### **Dropped**

No vendors were dropped from the Magic Quadrant this year.

### **Inclusion and Exclusion Criteria**

#### **Inclusion Criteria**

To be included in this Magic Quadrant for SAM managed services, each service provider must meet a combination of essential and required criteria. Providers must meet at least:

- **Eight of the nine (8/9) Essential Criteria** representing required attributes of domain expertise

- **Six of the seven (6/7) subsequent Required Criteria** demonstrating delivery of those attributes in the context of a SAM managed service



## Essential Criteria

SAM managed service providers must deliver **eight of the nine** defined SAM managed services core components by executing both transformation services and run-and-operate services for each.

### Continuous and scheduled SAM managed services:

1. Policy and process assessment, design, transformation, continuous improvement and operation.
2. Continuous and complete trustworthy data services and estate representation, including custodianship of trustworthy IT assets, software installed, used and accessed data.
3. Continuous entitlement custodianship, management and use rights analysis.
4. Continuous FinOps, Cloud license management and optimization services.
5. Development, continuous maintenance and optimization of effective license position, usage, spend recommendation services and governance reporting.
6. Continuous integrated SAM life cycle management delivery – including software request approval, procurement, management, harvest, and retirement services.
7. Continuous delivery platform. Daily maintenance of the solution enabling delivery management, deliverable tracking, and exception and noninstance data management.
8. Value realization. Monthly validation and reconciliation of value realized in agreement with the client.
9. Environmental sustainability services, including continuous measurement and reporting of software and cloud consumption impacts.

## Required Criteria

SAM managed service providers must meet **six of the seven (6/7)** criteria.

### Continuous SAM managed services only:

1. Deliver SAM managed services across a scope of 20 or more software publishers, of which Microsoft, IBM, SAP, and Oracle are mandatory.
2. Deliver SAM managed services that both:
  - Manage usage and compliance of software run on Amazon Web Services, Microsoft Azure, and Google Cloud Platform

- Measure and optimize usage of Amazon Web Services, Microsoft Azure and Google Cloud Platform workloads and instances
3. Deliver SAM managed services to five or more referenceable clients, representing at least two geographical regions (see Note 2).
  4. Provide SAM managed services not only at client's current SAM maturity levels, but also that transform and run SAM discipline to higher standards.



#### **Continuous and scheduled SAM managed services:**

For the purpose of the following criteria, revenue, client quantities and resource quantities from scheduled services are included. Scheduled services are classified as delivering the essential criteria of a SAM managed service as defined as "Complete," but less frequently than continuous services:

5. Delivered at least \$5 million in annual SAM managed services revenue for fiscal year 2022 billed to a minimum of 50 active unique clients (excluding partners or indirect clients). The minimum SAM managed services revenue must exclude the following:
  - Any license or SAM tool revenue embedded within the service contracts
  - Revenue derived from software-publisher-sponsored SAM services activities
  - Revenue from project, packaged or tactical SAM services delivered in isolation
  - Ad hoc retained services such as a help desk
6. Invoiced no more than 90% of SAM managed services revenue to unique clients in any one of the aforementioned and defined regions in 2022:
  - North America (NA)
  - Europe, Middle East and Africa (EMEA)
  - Asia/Pacific and Japan (APAC)
  - Latin America (LATAM)
  - Multiple contracts or service deliverables for the same international organization shall be considered as one unique client aligned to a single location, which will be deemed as the client's headquarters. Example: A provider located in North America would have to prove delivery and billing to at least 10% of its SAM managed services revenue outside of North America.
7. Demonstrate current permanent employment of 50 or more SAM managed services delivery management resources dedicated to delivery of SAM managed services only.

#### **Exclusion Criteria**

Gartner sets requirements that enable organizations to approach providers directly delivering SAM managed services, excluding providers from the MQ and CC that:



- Deliver more than 50% of SAM services revenue through partners or subcontractors.
- Deliver more than 50% of SAM services revenue as a partner or subcontractor to a contracting party (such as an outsourcer) as opposed to directly to end-user clients.
- Deliver more than 50% of SAM services revenue through project, packaged or tactical, noncontinuous SAM services.
- Deliver more than 50% of SAM services revenue through asset tracking and reporting services that are devoid of data augmentation activities or application of use rights intelligence.

## Evaluation Criteria

Gartner evaluates service vendors on their Ability to Execute and their Completeness of Vision per the definitions below. When the two sets of criteria are evaluated together, the resulting analysis provides a view of how well the vendor performs a spectrum of services compared with its peers and how well it is positioned for the future.


For more information on Gartner’s Magic Quadrant research methodology, refer to our [Research Methodologies](#).

### Ability to Execute

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

**Table 1: Ability to Execute Evaluation Criteria**

<b>Evaluation Criteria</b> ↓	<b>Weighting</b> ↓
Product or Service	High
Overall Viability	Low
Sales Execution/Pricing	Medium
Market Responsiveness/Record	High

<b>Evaluation Criteria</b> ↓	<b>Weighting</b> ↓	
Marketing Execution	Low	
Customer Experience	High	
Operations	Medium	

Source: Gartner (September 2023)

## Completeness of Vision

Gartner analysts evaluate providers on their ability to convincingly articulate logical statements about current and future market direction, innovation, client needs, and competitive forces and how well they map to the Gartner position. Ultimately, providers are evaluated on their understanding of how market forces can be exploited to create opportunity for the provider.

**Table 2: Completeness of Vision Evaluation Criteria**

<b>Evaluation Criteria</b> ↓	<b>Weighting</b> ↓
Market Understanding	High
Marketing Strategy	Low
Sales Strategy	Low
Offering (Product) Strategy	High
Business Model	High
Vertical/Industry Strategy	NotRated

<b>Evaluation Criteria</b> ↓	<b>Weighting</b> ↓
Innovation	Medium
Geographic Strategy	Medium



Source: Gartner (September 2023)

## Quadrant Descriptions

### Leaders

Leaders have built a considerable SAM managed services track record, demonstrating their experience to successfully deliver continuous SAM discipline to large, complex enterprises, and are well-positioned to continue delivering services in the future. Leaders have a well-developed vision of market direction, incorporate FinOps and sustainability in their SAM managed services, and are actively building and improving their competencies to sustain their leadership position in the market. The Leaders quadrant indicates the direction of the SAM managed services market, and Leaders have proved their Ability to Execute and their Completeness of Vision.

### Challengers

Challengers execute well and have a track record of successfully delivering SAM managed services, but have a less-well-developed view of the market's direction and demands than Leaders do. Consequently, they may be tomorrow's Leaders, or they may not be proactive enough in preparing for either the future or beyond their current service focus.

Challengers have demonstrated they have solid bases of clients that are satisfied with the services they provide. Challengers' proximity to the Leaders quadrant indicates that their vision of the SAM managed services market is still maturing. They have the potential to move into the Leaders quadrant if they can advance their strategic visions and solidify and expand their service offerings.

### Visionaries

Visionaries recognize and articulate important SAM managed services market trends and directions; aligned to Gartner's view of how the market is evolving, they recognize market requirements and are focused and prepared for them. However, they may not be in a position to fully deliver and consistently execute on that vision and could improve service delivery capabilities. The providers in the Visionaries quadrant have not invested in or delivered on that vision enough in the global market to large, complex enterprises to be categorized as Leaders at this time.

## Niche Players



Niche Players have yet to achieve broad success in the SAM managed services market. Some Niche Players have a recognizable brand or loyal client base. Niche Players focus on a segment of the client base, as defined by characteristics such as client size, geography or capability, or deliver services primarily on a scheduled basis (as opposed to continuous). Their Ability to Execute is limited to those areas of strength and affects a Niche Player's ability to deliver a full scope of requirements. Niche Players need to increase their capabilities across all use cases, geography coverage, number of clients, innovation and resource strength.

## Context

This Magic Quadrant offers support for informed contracting of SAM managed services that deliver software asset management. The Magic Quadrant assesses the Ability to Execute and Completeness of Vision of 12 SAM managed services providers that meet our criteria for inclusion. The positioning of providers in this Magic Quadrant is based on factors determined by Gartner as being relevant to this market worldwide. This Magic Quadrant is a point-in-time analysis, with all provider profiles reflecting the status as of March 2023. Quantitative data collected was for a 12-month period ending March 2023.

SAM managed services providers offer an array of capabilities — identified in detail in the complementary [Critical Capabilities for Software Asset Management Managed Services](#). Delivering these capabilities in an optimal fashion requires expertise — more expertise than most organizations possess or are realistically able to recruit directly. Even when an organization can secure expertise, demand for those internal experts often exceeds what can be fulfilled by the organization's employees. Consequently, SAM managed services are a vital contributor to SAM success for a growing number of organizations.

## Evaluate Gartner's Provider Positioning to Find Candidates That Meet Your Specific Requirements

The greatest benefits are derived from SAM managed services when they are used comprehensively, delivering the complete set of components of a continuous service. (See the Market Definition, Inclusion and Exclusion Criteria section, and [Critical Capabilities for Software Asset Management Managed Services](#).) Gartner's positioning of providers in this Magic Quadrant does not imply that clients considering SAM managed services providers should simply select service providers in the Leaders quadrant when requesting a proposal. A provider may appear in a particular quadrant based on Gartner's extensive analysis across the full-service life cycle in many geographies and other criteria. Consequently, vendors in the Challengers, Visionaries or Niche Players quadrants may prove to be more appropriate for the engagement.

The online features of this Magic Quadrant and its companion Critical Capabilities research enable users to tailor evaluation weights for further analysis based on the aspects that are most important to their organization. This allows sourcing, procurement and vendor management leaders to align the weighting of each criterion — for either the vision or execution axis — to the objectives of their specific sourcing initiative.



Use the Magic Quadrant as a tool to help inform your shortlist and evaluation of providers for your SAM managed services. However, the inclusion criteria in the Magic Quadrant result in the analysis of the largest and most established providers in the SAM managed services market. Clients should not disqualify any potential competitor simply because it does not appear in this Magic Quadrant.



Buyers should consider multiple enterprise-specific factors, such as:

- Each provider will have a different “sweet spot” that reflects the type of service in which it excels.
- Providers differ in scale, and matching the scale of the provider to the scale of the buying organization can be important.
- Providers’ operational cultures differ, and cultural fit to the buying organization is vital.
- Providers vary in their coverage by geography.

## Market Overview

Software asset management (SAM) and FinOps is not a project, but rather an ongoing discipline that can deliver multiple benefits when addressed holistically. Recruiting, retaining or developing skills that address the complexity of software and cloud contracts and consumption remains difficult within a discrete in-house operation. Technology will be required to gain visibility and automate tasks. Processes will have to be enabled, upgraded and maintained. SAM managed services can address these challenges.

Return on investment (ROI) of SAM managed services (including cloud cost management/FinOps) is the difference between:

- The savings and cost avoidance generated by the service (e.g., reduction in spend, risk avoidance),
- The total costs of the service (e.g., costs of people, process, tools, managed services).

This SAM ROI regularly underpins the mandate for SAM managed services.

Providers assessed in this Magic Quadrant report that they delivered in 2022 an ROI of more than 200% (Savings exceed the costs of the managed service by a factor of two, at least) for almost half of their clients under management. It’s important to highlight that on average, SAM MS providers do not track ROI for 22% of their clients, and that they will break even (ROI is at least 101%) for 62% of their clients. This research, and accompanying Critical Capabilities, incorporate extra emphasis on providers driving value realization for their clients, thus realizing benefits in lieu of services limited to identifying optimization potential.

Capable providers leverage core skills and methodologies to deliver benefits by:

- Establishing a vendor scope of service fit with the client's needs, neither too extensive nor too narrow
- Informing acquisition, renewals and disposal decisions
- Maintaining quality across commercial and technical inventory, leading to better management of software and cloud agreements and vendor relationships
- Identifying and eliminating obsolete or underutilized software, subscriptions and cloud services
- Rightsizing environments, instances and contracts, or migrating to optimal models
- Effectively governing software usage and waste, identifying risks and enabling mitigating actions
- Managing the life cycle against each current license position, and validating suitability of requests (challenging requests as appropriate), changes, rationalization, retirement and harvest
- Maintaining a continuous delivery platform which enables visibility over SAM and FinOps managed services delivery (*new for 2023*)
- Maintaining commitment to value delivery and continuous SAM managed services improvement, including realizing value and demonstrating agreed benefits in published case studies (*new for 2023*)
- Providing environmental sustainability services, including software and cloud consumption impacts (*new for 2023*)

The SAM managed services transition from a compliance-led activity to cost optimization has recently been accompanied by increasing delivery of FinOps services. SAM and FinOps must unite in order to properly enable governance of software and cloud investments (see [Target Software and Cloud Costs by Uniting Software Asset Management and FinOps](#)). Over 39% of SAM managed services delivered by the assessed providers are reported to incorporate FinOps services. Example service provider deliverables include:

- Tagging custom attributes and consumption reporting
- Technical optimizations through rightsizing or elimination of unused (e.g., virtual machines)
- Commercial optimizations through committed instances/reservations or BYOL
- Forecasting and commitment contract management

By contrast, internal SAM functions, often stretched to deliver on expectations, appear less likely to take on the management duties of FinOps.

SAM and FinOps also contribute to environmental sustainability initiatives, supporting the analysis of specifications, energy efficiency and greenhouse gas emissions of providers as key inputs to delivering on the enterprise's environmental sustainability objectives. SAM managed service providers have begun packaging services capabilities aligned to this objective, addressing sustainable consumption of software and cloud services, with further enhancement anticipated through 2023 and beyond.

Expanding software portfolios, advanced adoption of SaaS, continued growth in device quantities fueled by IoT, growth of RPA fueled by digital initiatives, complex use cases and ambiguous use rights all increase demands on SAM. Effective capture and management of detailed data across the broadening range of technology environments requires a "mesh" of techniques that the SAM managed services provider will run, operate and integrate.

SAM managed services, when well-delivered, demonstrate a strong fit with the client's culture and time zone, enabling dialogue to address complex scenarios and support progress. Services incorporate the provider's technical capabilities, intellectual property and automation, augmenting the data provided by SAM tools and facilitating efficient delivery. Providers may also offer proprietary automated capabilities that address:

- Data quality management requirements
- Identification and management of noninstance data
- Workflow management
- Presentation of findings
- Trend identification
- Progress tracking
- Action validation

For the 12 vendors analyzed in this research, Gartner has assessed the following SAM managed services market key numbers:

- **Revenue:** Average CAGR for the past two years of 12%. Total size (scheduled and continuous SAM managed services) of more than \$420 million in 2022.
- **Skills:** Average increase of specialist resources of 7% over two years.
- **Clients:** Two-year cumulative average client growth was 2%.

The following are key aspects of the market:

- **SAM managed services are most used by EMEA organizations**, both in terms of revenue and number of clients, followed by North America, APAC and LATAM, which are far behind EMEA.

- **Market offerings are differentiated by provider category.** In this Magic Quadrant, specialist providers, resellers, audit and professional services firms are assessed. No outsourcers, global systems integrators or tool providers met the qualifying criteria:
  - Specialist providers deliver the highest proportion of continuous SAM managed services.
  - Audit and professional services firms have had contracts in place for shorter periods than their counterparts in other categories and report the highest average contract values.
  - Risk-reward cost models increased in use to over 12% of contracts from 5% in the prior year, and are most prevalent in the reseller category, potentially offsetting concerns regarding conflict of interest.
  - Resellers also deliver the highest volumes of SAM managed services.
- **Continuous services resemble outsourcing.** Services remain most effective when delivering continuous guidance, integrating with internal functions to enable optimization throughout the life cycle. As software licensees, the contracting party cannot outsource responsibility for license compliance. However, a penalty clause may be included in SAM managed services contracts to recover some cost of noncompliance should the provider supply inaccurate advice.

## Evidence

Evaluation in this Magic Quadrant is informed by:

### Primary research:

- Gartner inquiries with user organization clients.
- A 90-minute provider briefing from each of the 12 participating service providers addressing capability proof points of each evaluation criterion in the Magic Quadrant.
- A detailed provider survey covering revenue, staffing, geographic capabilities, scale and other relevant information, totaling more than 9,000 data points.
- Client satisfaction and verbatim comments on the performance of individual providers taken from client reviews.

### Secondary research:

- Briefings delivered by providers to Gartner in advance of the Magic Quadrant and Critical Capabilities process on aspects of a provider's SAM managed services capabilities.
- Press releases and publicly available information, including company websites and financial reports.

**Gartner analysts:** Views and comments provided as part of the peer review process.

## Note 1: SAM Managed Services Exclusions



SAM managed services as measured exclude the following:

- Packaged, project or tactical SAM services delivered in isolation, or as ad hoc retained services
- Any license or SAM tool revenue embedded within the service contracts such as SAM tool sales, SAM tool subscriptions, SAM tool support and maintenance contracts and SAM tool hosting
- Asset tracking or reporting devoid of intelligent data augmentation or application of use rights intelligence
- Vendor-specific/sponsored SAM programs (e.g., Microsoft SAM engagement and IBM Authorized SAM Provider [IASP])
- Revenue derived from software-publisher-sponsored SAM services activities
- Vendor-initiated audits, compliance reviews or assessments
- Sale of software licensing or cloud service subscriptions
- Income derived when organizations apply accounting rules when calculating service revenue figures, including license revenue embedded within service contracts, thus reporting excluded SAM tool revenue as service revenue

## Note 2: Regions

This Magic Quadrant addresses presence in regions as follows:

- **North America (NA):** U.S., Canada
- **Europe, the Middle East and Africa (EMEA):** Benelux, France, Germany, Italy, Middle East, Nordics, Poland, Romania, South Africa, Spain, the U.K., other Western Europe, other Eastern Europe, Rest of Africa
- **Asia/Pacific and Japan (APAC):** Australia, China, India, Japan, Philippines, Singapore, Vietnam, other APAC
- **Latin America (LATAM):** Argentina, Brazil, Chile, Colombia, Costa Rica, Mexico, other LATAM

## 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.

**Stratégie de vente :** stratégie de vente de produits qui utilise le réseau approprié de filiales de vente directe et indirecte, de marketing, de service et de communication qui étendent la portée et la profondeur de la portée du marché, des compétences, de l'expertise, des technologies, des services et de la clientèle.

**Stratégie d'offre (produit) :** approche du fournisseur en matière de développement et de livraison de produits qui met l'accent sur la différenciation, les fonctionnalités, la méthodologie et les

ensembles de fonctionnalités en fonction des exigences actuelles et futures.



**Modèle commercial** : la solidité et la logique de la proposition commerciale sous-jacente du fournisseur.

**Stratégie verticale/industrielle** : stratégie du fournisseur visant à orienter les ressources, les compétences et les offres pour répondre aux besoins spécifiques de segments de marché individuels, y compris les marchés verticaux.

**Innovation** : Agencements directs, connexes, complémentaires et synergiques de ressources, d'expertise ou de capital à des fins d'investissement, de consolidation, défensives ou préventives.

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

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