Magic Quadrant pour les plateformes d'orchestration et d'automatisation des services

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Par **et 2 autres** Hassan Ennaciri , Chris Saunderson ,

Les plateformes d'orchestration et d'automatisation des services sont devenues essentielles pour le déploiement de charges de travail complexes qui fournissent des services métier. Ces plateformes combinent l'orchestration des flux de travail, l'automatisation des charges de travail et la fourniture de ressources, et étendent les capacités aux pipelines de données et aux architectures cloud natives.

Hypothèses de planification stratégique

D'ici 2027, 90 % des organisations qui automatisent actuellement les charges de travail utiliseront des plateformes d'orchestration et d'automatisation des services (SOAP) pour orchestrer les charges de travail et les pipelines de données dans des environnements hybrides dans les domaines informatiques et commerciaux.

D'ici 2027, 75 % des flux de travail SOAP exploiteront l'IA générative (GenAI) pour augmenter l'efficacité du dépannage de 50 %, contre moins de 5 % aujourd'hui. |

Définition/Description du marché

Ce document a été révisé le 18 octobre 2024. Le document que vous consultez est la version corrigée. Pour plus d'informations, consultez la page Corrections sur gartner.com.

Gartner définit le marché des plateformes d'orchestration et d'automatisation des services (SOAP) comme englobant des suites de solutions qui offrent des fonctionnalités permettant aux organisations de gérer les charges de travail, les flux de travail, l'approvisionnement en ressources et les pipelines de données dans l'ensemble de leurs environnements technologiques.

Les SOAP permettent aux responsables des infrastructures et des opérations (I&O) de concevoir et de mettre en œuvre des services métier. Ces plates-formes combinent l'orchestration des flux de travail, l'automatisation des charges de travail et la fourniture de ressources sur l'ensemble de l'infrastructure numérique hybride d'une organisation. Elles jouent un rôle de plus en plus essentiel dans la capacité d'une organisation à déployer des charges de travail et à optimiser les déploiements dans le cadre d'initiatives de réduction des coûts et de la disponibilité.

Les SOAP élargissent le rôle de l'automatisation traditionnelle des charges de travail en s'adaptant aux cas d'utilisation qui fournissent et s'étendent aux pipelines de données, aux infrastructures cloud natives et aux architectures d'application. Ces outils complètent et s'intègrent aux chaînes d'outils DevOps pour offrir une agilité axée sur le client, des économies de coûts, une efficacité opérationnelle et une standardisation des processus.

Caractéristiques obligatoires

Les caractéristiques obligatoires pour ce marché incluent :

- **Gestion des charges de travail dans des topologies de technologie et de déploiement complexes.** Cela comprend la prise en charge de l'automatisation des charges de travail critiques des processus métier dans une variété de combinaisons et de configurations d'applications développées en interne, la prise en charge des produits commerciaux prêts à l'emploi (COTS) et des déploiements d'infrastructures, y compris sur site, dans le cloud, en colocation, en mode SaaS (Software-as-a-Service) et en périphérie.

- **Gestion des flux de travail couvrant l'ensemble de l'environnement d'exploitation.** Cela comprend la gestion des demandes, l'intégration entre les plateformes logicielles informatiques et l'activation des utilisateurs finaux.

- **Broad integration capabilities.** This includes the ability to integrate with and incorporate broad software and infrastructure technology landscapes.

Common Features

The common features for this market include:

- Mobile or web portal interaction capabilities for end users

- Jobs-as-code development capabilities to facilitate DevOps interactions with platform

- Event-driven automation — the capability to respond to events as they occur with workflow execution

- Generative AI (GenAI) support — for productivity and advanced AI utilization in the solution

- Data pipeline support — deliver advanced data tasks, directly in support of infrastructure build and more-complex workflows that cross technology domains

- Defining, executing, managing and notifying on workloads and workflows that are executed.

- Providing job scheduling, job definition and execution, dependency management among steps, and enabling plan/predict/optimize actions that ensure service-level agreement (SLA) management.

Magic Quadrant

Figure 1: Magic Quadrant for Service Orchestration and Automation Platforms
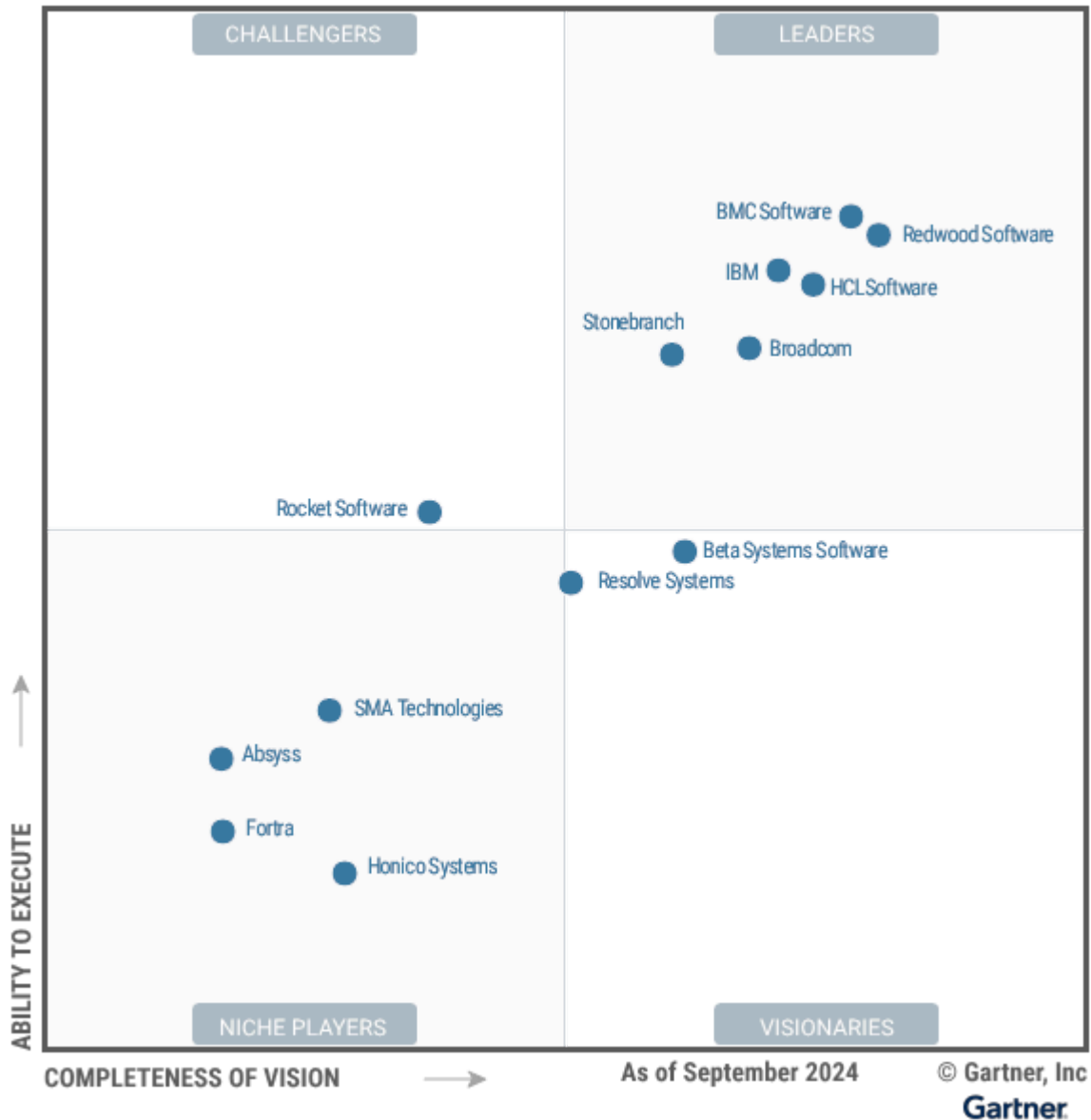
Vendor Strengths and Cautions

Absyss

Absyss is a Niche Player in this Magic Quadrant. Its SOAP offering is Visual TOM, which enables job scheduling and orchestration, supporting workloads delivered in on-premises data centers and hybrid environments. Visual TOM is sold as an on-premises solution or as a managed option available through partners.

Absyss' operations are mainly focused in France and most of its clients are in Europe. In 2024, Absyss created a conversion factory to help customers migrate from competing platforms to Visual TOM.

Strengths

- **User experience**: Visual TOM includes a high-level, self-service capability for business users through a low-code interface. It supports mobile interactions and an integration into Microsoft

Teams for better user experience. The workflow development environment offers a lot of capabilities for workflow control, allowing users to create and schedule workloads.

- **Licensing flexibility:** Absyss offers flexible licensing options for Visual TOM and makes it available through subscription or perpetual licenses. It also supports volume-, agents- or job-based metrics.

- **Conversion support:** Absyss has has a capability to automatically convert jobs from competing platforms to Visual TOM. Absyss self-reported 80% to 90% accuracy on automated conversions of BMC Control-M artifacts.

Cautions

- **Marketing strategy:** Absyss' marketing predominantly targets users in Western and Northern Europe, and has a limited presence outside of these regions. The company's presence outside the French market is limited.

- **Deployment models:** Visual TOM is not provided as a SaaS solution, supporting only self-hosted and cloud-hosted deployments. Customers can secure a managed option only through Absyss partners.

- **Innovation:** Absyss' initial AI capabilities are limited in scope and capability, focused initially on productivity improvements. Its investment in innovation is more focused than competitors, given the size of the company.

Beta Systems Software

Beta Systems Software is a Visionary in this Magic Quadrant. Its SOAP, ANOW!, is a fully featured, highly scalable solution offering workload automation and workflow orchestration capabilities across distributed hybrid and cloud environments. ANOW! offers flexible deployment options, such as self-hosted, or as a SaaS.

The vendor's operations are strong in Central Europe and Scandinavian markets, and provide support for clients of all sizes and sectors. In October 2023, Beta Systems acquired InfiniteDATA to expand and compete in the global SOAP market.

Strengths

- **Product strategy:** ANOW! provides a single platform to orchestrate a wide range of systems, from the newest cloud-based technologies like Snowflake and Databricks to mainframe, OpenVMS and other midrange systems. The tool provides over 450 out-of-the-box connectors for a variety of technology categories, including cloud services, databases, ERPs, OS, and extraction, transformation and loading (ETL).

- **Product architecture:** Beta Systems Software has engineered its offering to leverage cloud-native architecture by using a microservices-based design that is scalable and accessible.

- **Innovation:** The vendor has developed a unique Broadcom (Automic) scripting emulation that enables a more efficient migration process, as it removes the need for rewriting scripts. This is a product differentiator, as it helps customers focus on validating job execution outcomes.

- **Geographic presence:** ANOW! is predominantly known in European markets, but Beta Systems Software is investing to expand its geographic presence. This presents adoption challenges, as clients may not be comfortable selecting a vendor with limited installed base in their geography.

- **Observability and monitoring:** ANOW! provides standard observability, monitoring and optimization capabilities, and limited AI capabilities compared with Leaders in this Magic Quadrant.

- **Market execution:** Beta Systems Software targeted its product for large-enterprise customers, limiting its suitability for small businesses and midsize enterprises.

BMC Software

BMC is a Leader in this Magic Quadrant. Its SOAP offerings are Control-M (self-hosted) and BMC Helix Control-M (SaaS), which provide broad capabilities and innovations for workload automation and workflow orchestration across distributed hybrid environments. The products support various deployment options, including on-premises, virtual machines, containers and SaaS.

BMC's operations are geographically diversified, with a strong global footprint and support for clients of all sizes and sectors. In 2024, BMC enhanced its jobs-as-code (JaC) capabilities by providing automation REST APIs to enable integrations through CI/CD pipelines. The vendor also expanded its SaaS offering capacity and capabilities.

Strengths
- **Product strategy:** BMC provides a wide range of out-of-the-box integrations with all major ERPs, data platforms, applications and major cloud platforms. The vendor continues to add integrations both organically and through customer requests, delivering 70 new integrations in 2024. BMC also enables integration builds by partners or clients using a low-code approach.

- **Innovation:** BMC has continued to drive innovation through JaC and data orchestration capabilities. Developers can automate deployment and rollback of job changes by defining workflows as code and integrating them with CI/CD pipelines. This accelerates iterations and reduces the risk of errors during deployments. Similarly, a growth in the company's data orchestration capabilities has led to the development and release of integrations focused on data pipelines, such as Airflow and Snowflake. This allows customers to easily use Control-M with data pipelines.

- **Geographic strategy:** BMC has a global footprint and a strong value-added reseller (VAR) and partner program. It has global partner sales teams focused on growing the company's network and strategic partnerships dedicated to hyperscalers, as well as other strategic relationships, such as with Amdocs, Dell Technologies and PwC.

Cautions

- **Pricing:** Control-M can be expensive for large, complex deployments. Pricing remains complicated for clients to navigate, although changes in pricing to include additional licensed components have been observed.

- **Customer experience:** Customer satisfaction with account management and contract renewal is reported as more problematic compared with other vendors in this research. Customers have reported varying levels of satisfaction when engaging with BMC for proofs of concept and renewals.

- **Product scalability:** Clients evaluating the SaaS offering should assess the volume of jobs that they need to support and grow against BMC's roadmap for increased job execution limits. Although the Helix SaaS offering has improved its job execution limits since introduction, it still lags behind other leaders in this Magic Quadrant.

Broadcom

Broadcom is a Leader in this Magic Quadrant. Its SOAP offering is Automic Automation, which provides a comprehensive set of capabilities for workload automation and workflow orchestration to support digital businesses across distributed hybrid environments.

Broadcom's operations are geographically diversified, with global sales and support spanning North America, EMEA, Asia/Pacific (APAC) and Latin America. Automic can be deployed on-premises or as SaaS (with the release of Automic SaaS in May 2024).

Strengths
- **Product capabilities:** Automic Automation offers better scalability than other Leaders in this Magic Quadrant, and can meet high volumes of complex workloads across a broad set of verticals. It supports zero-downtime upgrades and has a long record of execution and extensive security features.

- **Observability and intelligence:** Automation Analytics & Intelligence (AAI) can provide insights across a heterogeneous vendor environment into complex, cross-vendor workloads. This feature enables customers to predict outcomes of SLAs before they impact the business, reducing risks and costs.

- **Geographic and vertical footprint:** With a global presence, Broadcom can extend both sales and support to most geographies and industry verticals. This allows for the largest enterprises to engage with Broadcom across their operating environments.

Cautions
- **Customer experience:** Customers have reported variability in their interactions with Broadcom and its partners on topics such as licensing, renewals and technical support needs.

- **Innovation:** Broadcom has been comparatively slow to provide additional integrations and support for advanced hybrid environments. The Automic SaaS offering was released significantly later than competitors in this space.

- **Product confusion**: The Broadcom automation product family has many products, which can lead to confusion in the identification and selection of the most appropriate tooling.

Fortra

Fortra is a Niche Player in this Magic Quadrant. Its SOAP, JAMS, provides a foundational set of automation and orchestration capabilities focused on repetitive task automation in a select range of vertical industries, such as financial services, retail and energy. JAMS is sold as a self-hosted solution only.

Its operations and support is primarily in North America. Fortra's product offers the Sequence feature, which helps build job flows sequentially as well as in parallel with each other. This enables customers to improve the types and scope of jobs they can create with full visibility in the diagram view.

Strengths

- **Product strategy:** JAMS is built on open standards and doesn't use any proprietary scripting languages, allowing customers to use their existing script syntax to interact with the platform features and functionality. This reduces the level of effort required to adopt JAMS.

- **Product scalability:** JAMS leverages a queuing capability to control, prioritize and load-balance jobs and setups executions across multiple agents for optimal performance.

- **Innovation:** Fortra provides a robotic process automation (RPA) add-on with JAMS, offering these two solutions as a unified experience. Adding RPA capabilities enables end-to-end process automation that provides citizen developers with a low-code solution for creating workflows.

Cautions

- **Sales strategy:** Fortra lacks a network of independent software vendors (ISVs) that extend the solution, or VARs that can sell, advise and support customers through their journey of acquiring and implementing the solution. This limits customers to Fortra's resources when it comes to deployment and adoption.

- **Product features:** JAMS provides basic monitoring capabilities that lag behind other vendors in this Magic Quadrant. AI capabilities have not been included in the JAMS roadmap. The user interface needs updates to address reported user experience concerns.

- **Deployment models:** The Fortra product is not available as a SaaS offering, limiting deployments to a self-hosted model.

HCLSoftware

HCLSoftware is a Leader in this Magic Quadrant. Its SOAP, HCL Automation Orchestrator Suite, provides a comprehensive set of capabilities for workload automation and workflow orchestration across distributed hybrid and cloud environments.

The product can be self-hosted (on-premises or customer cloud) or deployed as a SaaS or a managed service. HCLSoftware's operations are geographically diversified, with global sales and support spanning North America, EMEA, APAC and Latin America. In 2024, HCLSoftware enhanced its intelligent virtual assistant, Clara, allowing direct interaction with Workload Automation and Universal Orchestrator in natural language to execute routine tasks and diagnose problems.

Strengths

- **Deployment options**: HCL Automation Orchestrator Suite can be deployed as a self-hosted or SaaS offering. The SaaS offering can support data sovereignty and regulatory requirements for data location. The fully containerized offering supports scaling to meet high-volume execution demands and improved upgrade experience. This has enabled the creation of its SoFy proof-of-concept environment, which allows for rapid evaluation of HCLSoftware products.

- **Innovation**: The Clara AI-Assistant and AI Data Advisor (AIDA) product features enable AI- and machine learning (ML)-driven efficiency and productivity. Clara has a strong roadmap that expands its capabilities to include more operational use cases. AIDA improves the planning (including what-if analysis) and optimization of workloads executed with ML and enhances the experience of managing the platform. Both Clara and AIDA are available at no additional cost.

- **Geographic strategy**: HCLSoftware has a solid geographic footprint, with a global presence that allows it to extend both sales and support. The established structure allows for the largest enterprises to engage with the vendor across their operating environments.

Cautions

- **Marketing execution**: Automation Orchestrator Suite is not as visible in the market as competitor offerings. HCLSoftware continues to invest in the marketing of the product suite, but customer awareness remains low.

- **Licensing model**: HCLSoftware provides consumption-based licensing by default. This requires active governance to ensure that spend is managed and can make forecasting spend uncertain.

- **Reliance on software partners**: HCLSoftware and IBM have a strategic partnership to deliver the Workload Automation product. Clients report a lack of clarity about this partnership, causing confusion and concern related to their investments into a long-term product roadmap.

Honico Systems

Honico Systems is a Niche Player in this Magic Quadrant. Its SOAP, BatchMan, is focused on the management of SAP workloads and is complemented by its Easy Workload Scheduler for non-batch workflows. The products are sold as on-premises solutions.

Honico Systems' operations are focused in Europe, with direct sales and support in Germany, Austria and Switzerland. In 2024, Honico released an enhanced proof-of-concept capability, using a containerized version of its cloud module.

Strengths

- **Product strategy:** BatchMan is deeply integrated within SAP and is able to control both SAP and non-SAP workloads. It leverages its Java file and data manager agents to control and orchestrate any workflow outside of SAP. BatchMan is easy for SAP administrators to adopt without the need for extensive training.

- **Operational efficiency:** BatchMan runs inside of SAP, making it cost-effective for organizations with a primarily SAP environment. It has a minimal learning curve, integrates seamlessly with SAP and doesn't require extra hardware or software.

- **SAP expertise:** Honico Systems has more specialists and experts in SAP than other vendors, making it a less complex alternative for organizations relying heavily on SAP solutions.

Cautions

- **Product strategy:** Honico may not be suitable for organizations with a heterogeneous operating environment due to its SAP-centric focus.

- **Geographic strategy:** Honico has direct sales and support only in Germany, Austria and Switzerland. Its strategy remains focused on serving clients only in Europe.

- **Deployment models:** BatchMan is not available as a SaaS offering, limiting deployments to a self-hosted model that stands alone or within SAP.

IBM

IBM is a Leader in this Magic Quadrant. Its SOAP, IBM Workload Automation (IWA), provides a highly scalable solution with workload automation and workflow orchestration capabilities across distributed, hybrid and cloud environments, especially for large organizations. IWA supports broad deployment options, including on-premises, mainframe, customer or IBM cloud, or as a SaaS.

IBM's operations have a strong global footprint and support for clients of all sizes, sectors and in many geographies. In 2024, IBM evolved its AI capabilities in IWA to offer AI-powered anomaly detection, predictive failures and AI-infused scheduling with its latest z/OS release.

Strengths

- **Hybrid operating environment support:** IWA is part of IBM's overall workload automation strategy to support hybrid operating environments. It is capable of managing workloads, from the mainframe to the cloud and beyond. The Automation Hub feature allows users to quickly build integrations that they need.

- **Deployment options:** IWA can be self-hosted, deployed on mainframe z/OS, on the cloud or as a SaaS. It supports data sovereignty and complies with regulatory requirements for data location.

- **Geographic strategy:** With a global presence, IBM offers direct sales and support in most geographies. The vendor's established structure allows for the largest enterprises to engage with IBM across their operating environments.

- **Reliance on software partners**: IBM and HCLSoftware have a strategic partnership to deliver the IWA product. Clients report a lack of clarity about this partnership, causing confusion and concern related to product innovations and support for IWA.

- **User experience**: Customers have reported that the user interface is complex and find it overwhelming to navigate. They also expressed that IWA has a steep learning curve and mastering the tool's functionalities can be time-consuming, requiring significant training and practice.

- **Cost**: Many clients report struggling to differentiate a Processor Value Unit (PVU) licensing model from consumption-based models. They report that licensing and implementation costs of IWA can be significant, especially for larger enterprises.

Redwood Software

Redwood Software is a Leader in this Magic Quadrant. Its SOAP, RunMyJobs, is a highly scalable solution offering workload automation and workflow orchestration capabilities across distributed hybrid and cloud environments. It is delivered as both a SaaS and self-hosted offering.

Redwood's operations are geographically diversified, with a strong global footprint and support for clients of all sizes and sectors. In 2024, Redwood released the Advanced Connector Wizard, which enables users to rapidly create API-based connectors to any application in its hybrid IT landscape via a simple graphical interface.

Strengths

- **SaaS experience**: Redwood has been delivering SOAP capabilities as a SaaS offering for over 10 years. This has resulted in significant revenue increases due to wider adoption of SaaS solutions.

- **Enterprise integration expertise**: RunMyJobs' integration catalog is extensive and continually updated with new content delivered by Redwood and/or requested by its customers. Integrations are available directly in the platform, enabling customers to add an integration with a click. Redwood has a strong relationship with SAP to deliver functionality.

- **Geographic strategy**: With a global presence, Redwood can extend both sales and support to most geographies. The established structure allows for the largest enterprises to engage with Redwood across its operating environment and meet data governance and sovereignty requirements.

Cautions

- **Innovation**: Redwood's planning and optimization capabilities are robust; however, it lags behind other leaders in this market in providing advanced AI capabilities.

- **Product portfolio**: Redwood has been acquiring SOAP vendors in targeted acquisitions, leading to confusion and concern in the market about the selection of a SOAP and the future for an

acquired platform.
- **Customer experience:** Customers have reported frustration in their interactions with Redwood due to a lack of flexibility during licensing and renewal negotiations.

Resolve Systems

Resolve Systems is a Visionary in this Magic Quadrant. Its SOAP, Resolve Actions, provides robust workflow orchestration capabilities across distributed hybrid and cloud environments. Resolve Actions supports delivery on-premises, in virtual machines, in containers or as a SaaS offering.

Resolve Systems' operations are strong in Europe and North America. In 2024, Resolve Systems deployed a proprietary ML algorithm to transform large amounts of data from IT tickets into actionable insights to reduce the impact from major incidents.

Strengths
- **Workflow expertise:** The vendor has been delivering IT workflow orchestration capabilities for over 10 years and has deep expertise in enabling a user-friendly authoring and execution experience. Resolve Actions has a broad catalog of integrations to many IT systems, allowing greater coverage of workflows.

- **Product strategy:** Resolve Automation as a Service (RAaaS) allows the Resolve team to either create (or co-create with their customers) workflows that enable IT orchestration.

- **Innovation:** Resolve Actions enables AI-driven pipeline creation by leveraging native ML-based algorithms on tickets, events or log data, identifying recurring issues and high-priority IT scenarios.

Cautions
- **Workload automation:** Resolve Actions has basic workload automation capabilities (as defined in this research), restricting the use cases that it can address. This limits the vendor's ability to displace competitors.

- **Marketing execution:** Resolve Actions is less-well-known in the market than other competitive SOAP offerings. Customer awareness remains low for its primary use cases, although Resolve Systems continues to invest in marketing its product suite.

- **Sales strategy:** Resolve Systems does not provide strategic SOAP vendor displacement services or tools to help customers migrate from their existing SOAP vendors. This creates a challenge against competitors that more coherently blend workload and workflow automation.

Rocket Software

Rocket Software is a Challenger in this Magic Quadrant. Its SOAP, the Rocket Workload Automation and DevOps Orchestration suite, provides a scalable solution with workload automation and workflow orchestration capabilities across technology stacks, from mainframe to cloud.

Rocket Software operations have a strong global footprint and support for clients of all sizes and sectors, and in many geographies. In 2024, Rocket Software announced updates to its Enterprise Orchestrator solution to fully support DevOps delivery processes.

Strengths

- **Geographic strategy:** Rocket Software has a global presence, offering direct sales and support in most geographies. It has an ecosystem of over 750 partners globally to work with customers on increasingly complex modernization challenges.

- **Mainframe support:** The Rocket Workload Automation and DevOps Orchestration suite provides a centralized solution that lets customers integrate workloads from mainframe to cloud. Rocket Software is one of the few vendors that directly supports mainframe job scheduling.

- **Innovation:** Rocket's AI Predictive Pulse empowers constant observability of automations, providing insights and intelligence to ensure efficiency, speed, cost savings and mitigation of SLA misses. This capability is delivered with Digitate.

Cautions

- **Marketing execution:** Rocket's rebranded ASG Technologies acquisition is not well-known in the market. While the vendor continues to invest in marketing its product suite, customer awareness remains low.

- **Product strategy:** The lack of an integration marketplace to allow customers to extend their capabilities is a challenge. Similarly, Rocket's AI roadmap is focused primarily on initial productivity use cases, but not on more advanced capabilities.

- **Deployment models:** Rocket does not provide a SaaS solution, supporting only self-hosted deployments. This is a barrier to customers that are looking for SaaS efficiencies.

SMA Technologies

SMA Technologies is a Niche Player in this Magic Quadrant. Its SOAP, OpCon, provides a capable solution for workload automation that can be deployed on-premises and in cloud environments.

SMA Technologies' operations are focused on North America, with some expansion in Europe. In 2024, OpCon added a few capabilities, including Deploy, to manage the full life cycle of workflow change.

SMA Technologies did not respond to requests for supplemental information or to review the draft contents of this document. Gartner's analysis is therefore based on other credible sources.

Strengths

- **Support for banking/financial services:** SMA Technologies has focused on the SOAP market, particularly with regional financial institutions, and developed a great deal of expertise. The vendor provides extensive support to banks and credit union customers.

- **Product strategy:** OpCon provides customers a central dashboard with a clear view of their systems' health, including SLA monitoring and automated actions to keep things running smoothly. It also provides self-service to help nontechnical users manage their workflow automation without IT intervention. RPA integration is available to perform automation work for repetitive activities.

- **Innovation:** Deploy is a module built into the OpCon platform to help apply DevOps practices to maintain and change workflow definitions. This ensures changes in the environment are seamless, fast and safe. As changes are promoted from development to testing to production systems, the OpCon Deploy change management system assures consistency and smooth transition.

Cautions

- **Industry strategy:** SMA's vision is focused on innovation and execution in the banking/financial services verticals, which dictates the capabilities in which the vendor invests. SMA's capabilities align with the SOAP market today, but a gap will grow between customer expectations and product capabilities. This narrow focus also limits the number of integrations that are available outside the technology stack for these verticals.

- **Observability/monitoring:** OpCon's monitoring capabilities are basic. It lacks desired additional capabilities, notably optimization or predictive abilities, which are critical for identifying the impact of workloads that are not meeting service levels. It also lacks AI capabilities to support advanced troubleshooting and optimization.

- **Deployment models:** OpCon is not available as a SaaS, supporting only on-premises and cloud-hosted deployments, and a managed services offering. This is a barrier to customers that are looking for SaaS efficiencies.

Stonebranch

Stonebranch is a Leader in this Magic Quadrant. Its SOAP, Universal Automation Center, provides a highly scalable solution with workload automation and workflow orchestration capabilities across distributed hybrid and cloud environments. The offering can be self-hosted or delivered as a SaaS.

Stonebranch operates globally, with direct sales and support in all regions except Latin America. In 2024, Stonebranch delivered a new OpenTelemetry-based monitoring and observability capability, increasing visibility of workloads and workflows.

Strengths

- **Integration catalog breadth:** Stonebranch has a broad set of integrations that span both workload and workflow orchestration targets and systems. The catalog continues to expand, especially as additional use cases drive customers' technology adoption.

- **Service execution:** Stonebranch offers transition services and implementation assistance to help clients migrate and convert to it from every major job scheduler or workload automation solution on the market.

- **Product strategy:** Universal Automation Center provides a robust solution for multiple use cases, including data pipeline orchestration. It supports real-time data flows by relying on event-based triggers and empowers data operations by providing dashboards, analytics and proactive alerts. This includes JaC support and extensive migration/promotion capabilities.

Cautions

- **Innovation:** ChatGPT integration is a positive feature addition, but Stonebranch's expansion of AI capabilities remains behind other vendors evaluated in this research.

- **Market awareness:** Stonebranch remains relatively unknown compared to other vendors in the Leaders quadrant. This presents adoption challenges among organizations that may not be comfortable with selecting an emerging vendor.

- **Persona support:** The current design of the product is oriented primarily toward IT operations professionals. Clients should be aware that Stonebranch's capabilities for business technologists trail other Leaders in this Magic Quadrant.

Inclusion and Exclusion Criteria

Inclusion Criteria

SOAP vendors in this Magic Quadrant met the following criteria as of January 2024:

Market Participation Inclusion Criteria

To qualify for inclusion, each vendor must:

- Actively market, sell and support a product that provides capabilities, as defined in the market definition for SOAP.

- Have made the qualifying offering generally available as of January 2024.

- Respondents should meet one of the following criteria:

  - Have generated revenue of at least $25 million (or the equivalent in another currency) from SOAP in 2023, or

  - Have at least 200 paying customers for SOAP as of 1 March 2024.

- Providers must operate in at least two of the following geographies:

  - North America

  - Latin/South America

  - Europe, the Middle East and Africa

  - Asia/Pacific, (not including Japan)

- Sell SOAP software directly to paying customers without the need to engage professional services to deploy. The vendor may offer professional services to enable or adopt, but it cannot be a requirement of deployment.

Exclusion Criteria

- They only sell the platform along with development/professional services, where it is used exclusively by the vendor's consultants/service providers.

Evaluation Criteria

Ability to Execute

We used the following criteria to assess each vendor's Ability to Execute:

Product or Service:

For SOAP offerings, we evaluated the providers' capabilities for must-have, standard and optional capabilities as laid out in the market definition, including:

- Managing workloads in complex technology and deployment topologies.

- Managing workflows that span the operating environment.

- Managing broad integration capabilities.

- Managing jobs-as-code development capabilities to facilitate DevOps interactions with the platform.

- Managing GenAI support — for productivity and advanced AI utilization in the solution.

- Managing data pipeline support — deliver advanced data tasks, directly in support of infrastructure build and more complex workflows that cross technology domains.

- Defining, executing, managing and notifying on workloads and workflows that are executed.

- Providing job scheduling, job definition and execution, dependency management among steps, and enabling plan/predict/optimize actions that ensure SLA management.

Overall Viability:

For each vendor, we considered:

- Its relative size in terms of customers, revenue, and the scale, strength and resilience of its ecosystem.

- The impact of past acquisitions and the potential for future acquisitions.

- The financial stability and continuity of its offerings in this market.

- The ability and effectiveness of its partnerships to improve viability.

- The size and quality of its active user community relative to its target market.

- The availability and effectiveness of professional and consulting services.

Sales Execution/Pricing:

For each vendor, we considered:

- Revenue and customer growth.

- The number and business impact of the projects it has implemented, and whether (and how) professional and consulting services have eased implementations.

- The clarity and predictability of pricing models — on-premises, cloud, multicloud and hybrid — and their changes over time.

- The ability to handle large and complex deals, including support and flexibility for volume growth, seasonality and predictability.

Market Responsiveness and Track Record:

For each vendor, we evaluated its ability to:

- Quickly adapt and offer meaningful solutions in response to the dynamic requirements of SOAP platforms and the rapid pace of change that digital transformations increasingly demand.

- Respond to rapidly evolving conditions and deliver superior alternatives that align with competitive trends (even if they do not lead those trends).

- Support clients during unforeseen business disruptions and geopolitical events.

Marketing Execution:

For each vendor, we assessed the degree to which it has:

- Captured mind share, demonstrated thought leadership and gained a solid reputation in the market.

- Effectively devised and executed go-to-market strategies with substantial results.

- Executed marketing and partnership programs to expand its influence.

Customer Experience:

For each vendor, we considered:

- Its track record of resolving customer issues.

- Support outside the vendor's home region.

- The reach and availability of service implementers and efforts to expand these, such as training and certification programs.

Operations:

For each vendor, we considered:

- Its track record of meeting SLAs, data sovereignty and its privacy certifications.

- The scale of its workforce and data centers.

- Reliability in relation to its hosted service platforms (for cloud offerings), and scalability and adaptability in relation to its software platforms (for on-premises deployments).

- Use of, and adherence to, metrics for efficiency, speed of change and implementation of new features.

Table 1: Ability to Execute Evaluation Criteria

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

Evaluation Criteria ↓	Weighting ↓	æ

Completeness of Vision

We used the following criteria to assess each vendor's Completeness of Vision:

Market Understanding:
We assessed each vendor's understanding of:
Present and future customer priorities, use cases and challenges, and the evolution of such priorities:

- The role of the products in this market to support workload automation, workflow orchestration, data pipelines, DevOps automation and citizen automation.

- The impact and opportunities of AI on the SOAP market.

- General, geographic and industry-specific market opportunities.

Marketing Strategy:

We assessed each vendor's strategy for:

- Clear articulation of an offering's value proposition in the context of the customer's business.

- Top-line and differentiated messaging by buyer persona.

- Competitiveness.

- Growing user mind share and communities.

- Thought leadership, conferences, industry leadership and partnerships.

Sales Strategy:

We assessed each vendor's strategy for:

- The right balance of direct and indirect sales vehicles, including partnerships and ISVs.

- Sales in specific geographies and to specific industries, such as the financial services, healthcare and insurance sectors.

- A sound business plan and an effective strategy that uses presale work, activities that demonstrate thought leadership, and professional and consulting services.

- Focus on the benefits of SOAP for stakeholders.

Offering (Product) Strategy:

We assessed:

- Offering plans and roadmaps (with target dates).

- Track record, future maturity and completeness.

- The offering's overall design concept and architecture, including reliability and scalability.

Business Model:

We examined:

- How the vendor targets or maintains profitability.

- Alignment and positioning, packaging and pricing strategies to sell in the cloud, multicloud, hybrid or on-premises offerings.

- Partnerships and their effectiveness and viability in offering a comprehensive solution to customers.

- The vendor's professional and consulting services, how it recognizes revenue and capitalizes on investments in research and development, and its growth strategies across regions (including mergers and acquisitions).

Vertical/Industry Strategy:

We examined:

- The industries that the vendor focuses on, the industry-specific solutions (if any) that it offers, and how successful or differentiating these solutions are (or are likely to be).

- Industry-specific blueprints, accelerators and starter kits (if there are any).

- Support for specific industries undergoing active regulatory or business transformations globally.

Innovation:

We assessed:

- How the vendor plans to innovate in terms of technology, business, industry and customer service.

- How effectively and systematically innovative ideas are filtered and funneled through product development.

- Specific, planned use of AI to improve the offering and its customer-facing features.

- The vendor's track record of anticipating or leading new trends in the market.

- Novel and unique approaches, solutions and products resulting from, or likely to result in, transformative change in the market.

Geographic Strategy:

We assessed each vendor's ability to:

- Identify and engage with the most promising locations for its capabilities.

- Expand into geographies not explicitly addressed at present.

- Support complex international requirements and features, such as regional-specific compliance with local laws and regulations.

Table 2: Completeness of Vision Evaluation Criteria

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

Evaluation Criteria ↓	Weighting ↓	æ
Geographic Strategy	High	

Quadrant Descriptions

Leaders

Leaders need to stand out with a deep understanding of the SOAP platform market and a proven track record of strong execution in delivering high-performing solutions. Their vision can influence and shape the market's direction with their thought leadership and continuous innovation.

Leaders also have a feature-rich and well-defined product roadmap. They continuously anticipate their customer needs and expand and evolve their capabilities to deliver value.

These vendors need to have a wide global presence and strong market penetration across geographies, verticals and organizations of all sizes.

Leaders in this market differentiate themselves by meeting their customers where they are, providing them with a unified solution that continuously evolves. This helps customers manage their complex workloads and workflows as they modernize and adopt modern ERPs, SaaS, cloud-native infrastructure and applications.

A few of the most distinctive capabilities of Leaders in this market are:

- Their ability to provide a broad range of out-of-the-box integrations and their versatility to quickly build new integrations or enable customers or partners to do it themselves.

- Support for multiple personas from business and IT with self-service capabilities.

- AI, analytics and insights to optimize operations, cost and value delivery from the SOAP platforms.

Leaders are well-positioned to remain dominant as this mature SOAP platform market evolves. As this market changes and overlaps with adjacent markets, vendors that lose focus could fall out of the Leaders quadrant.

Challengers

Challengers offer competitive SOAP platforms capabilities that deliver value and meet the needs of the mass market. These vendors have demonstrated strong sales, showing their Ability to Execute better than the Niche Players and they continue to expand their customer base.

Although Challengers demonstrate the financial strength and commitment to compete in the SOAP platform market, they have not demonstrated the same level of vision required to deliver the differentiating capabilities compared with the Leaders.

Challengers are solid, efficient and practical choices, and can become Leaders if they improve upon their specific areas of caution.

Visionaries

Visionaries focus on innovating their SOAP platform capabilities and go-to-market strategies based on emerging technology and business trends. They offer a clear product roadmap that demonstrates a strong understanding of market and customer needs.

Unlike Challengers, they lack expertise and resources to raise awareness of their platform and expand their current focus area. This impacts their ability to consistently execute and gain market share.

To become Leaders, Visionaries must improve their marketing strategy and build stronger recognition of their platforms in new market segments to improve their sales.

Niche Players

Niche players in the SOAP platform market may be focused on specific verticals. They might be new startups, established vendors catering to unique use cases, or even companies with a limited geographic reach. For some, SOAP may not be a core product.

Niche players can be a good fit for companies needing local support or a platform tailored to their industry's specific requirements. These advantages can outweigh the potential risks sometimes associated with smaller vendors. While they may not be the biggest players, being included in this competitive market is still a noteworthy achievement.

Context

SOAPs remain an evolving market, representing the transformation of a mature market for workload automation tools to meet modern infrastructure, application, data and business process requirements. These tools expand foundational, time-based scheduling to event-based workflow orchestration that supports real-time data processing to make SOAPs visible and valuable to the consumers. Use of SOAP as part of an organization's hyperautomation implementation extends the value for both the services offered and the business processes supported.

The primary implementers and consumers of SOAPs include:
IT operations teams:

- Site reliability engineering (SRE) teams

- DevOps teams

- Dedicated automation teams within I&O

- Data operations

- Citizen developers

SOAPs provide some self-service automation capabilities aimed at business users. The use cases for each team may vary, but in each case, SOAPs not only eliminate repetitive and manual tasks but also enhance business agility.

Market Overview

The SOAP market has seen steady growth from Gartner Market forecasts, increasing from an estimated $2.9 billion in 2022 to $3.2 billion in 2023, representing 10.7% growth. [1] This market is expected to continue to increase to an estimated $6.3 billion by 2027, with a compound annual growth rate (CAGR) of 6.2%.

Market dynamics: The past year had some activity with mergers, acquisitions and investment funding. SOAP remains a mature and growing market, with incremental potential for both investors and vendors. Well-established vendors in this Magic Quadrant also exercised opportunities to acquire vendors offering unique solutions to further expand their product portfolios. A few recent influential activities are listed below:

- Redwood Software acquired Tidal Software

- Beta Systems Software acquired InfiniteDATA

- Fortra rebranded from HelpSystems

- **Venture capital (VC) and private equity (PE) investments:** Stonebranch, but others that have received investor capital (or are outright owned by investors) include Fortra, Resolve Systems, Rocket Software and SMA Technologies.

Following these trends, end users can expect decreased choice in providers; however, each provider is increasing and expanding their capabilities in the SOAP market.

This is the first version of the Magic Quadrant for Service Orchestration and Automation Platforms. It replaces the Market Guide for Service Orchestration and Automation Platforms.

Evidence

[1] Market Share Analysis: ITOM, Delivery Automation Software, Worldwide, 2023

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.

Geographic Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.