

Magic Quadrant for SaaS Management Platforms

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SaaS management platforms empower organizations to address the compounding challenges of SaaS application and generative AI usage across the business that lead to overspend, elevated risk, lack of visibility and contract sprawl. This research helps IT leaders identify suitable vendors.

Strategic Planning Assumptions

Through 2027, organizations that fail to centrally manage SaaS life cycles will remain five times more susceptible to a cyberincident or data loss, due to incomplete visibility into SaaS usage and configuration.

Through 2027, organizations that fail to attain centralized visibility and coordinate SaaS life cycles will overspend on SaaS by at least 25%, due to unused entitlements and unnecessary, overlapping tools.

Through 2028, over 70% of organizations will centralize SaaS application management using a SaaS management platform (SMP), an increase from less than 30% in 2025.

Market Definition/Description

Gartner defines SaaS management platforms (SMPs) as software tools that aim to help organizations discover, manage, optimize and automate the SaaS application life cycle from one centralized console. Core SMP capabilities include discovery, cost optimization, employee self-service via an application store, insights to increase adoption and automation of onboarding/offboarding activities.

As SaaS adoption accelerates, IT leaders will struggle to discover and support SaaS-hosted applications in accordance with company, market or geographic policies and regulations. Increased SaaS costs — combined with limited visibility into the entire SaaS portfolio (including unapproved SaaS) and high levels of overdeployed and underconsumed licenses — result in significant financial, operational and cybersecurity risk.

SMPs help mitigate these risks and offer these benefits:

- Discovery and monitoring of approved and unapproved SaaS usage
- Increased SaaS ROI due to providing data to help drive adoption
- Improved management, forecasting and decision making regarding SaaS contracts and renewals, as well as optimized costs and license entitlements
- Enhanced employee experience via a curated self-service app catalog or store to find and request access to approved SaaS apps
- Streamlined onboarding of new employees to existing SaaS apps and of new SaaS apps to the organization
- Automated employee offboarding within SaaS applications
- Reduced IT overhead with automation of configuration and policy management
- Increased collaboration between teams that participate in the SaaS application life cycle, including all stakeholders internal and external to IT
- Reduced risk with greater awareness of unapproved SaaS applications that are not integrated into corporate identity providers
- Improved ability to comply with an increasing number of new regulations that require complete awareness of where company and customer data resides, as well as accelerated disclosure of potential breaches or vulnerabilities

Common use cases include:

- Discover: Uncover sanctioned and unsanctioned SaaS use and costs, while balancing employee privacy
- Optimize: Analysis, insights, alerting and automation to optimize SaaS costs and entitlement

- **Enable:** Availability of an employee-facing application store or catalog to simplify SaaS requests, as well as analysis, insights and alerting to help drive SaaS adoption and maximize ROI
- **Automate:** Simplify SaaS administration (request fulfillment, onboarding, offboarding, license reclamation, etc.) with customizable, template-based workflows
- **Manage:** Management of configuration, policy, users and licenses via read/write API integration
- **Comply:** Identification of SaaS applications and common certification details to determine compliance with industry regulations and organizational policy

Mandatory Features

The mandatory features for this market include:

- The ability to discover authorized and unauthorized SaaS usage via browser extension, device agent, financial/expense system integration, security tool integration (including, but not limited to, secure access service edge [SASE]; security service edge [SSE]; cloud access security broker [CASB]; security information and event management [SIEM]; secure web gateway [SWG]; firewall; and endpoint detection and response [EDR]), single sign-on (SSO), identity provider (IdP) platform integration, endpoint management tool integration, email system integration or direct API integration with SaaS applications
- An automated workflow capability, including the ability to automate employee onboarding and offboarding for SaaS applications
- The ability to optimize SaaS-related expenses, including the ability to identify redundant applications, identify and reallocate unused licenses, optimize usage, forecast SaaS expenses and assign ownership of applications to business owners outside of IT with role-based access controls
- The ability to directly manage common SaaS applications from the SMP via read/write API integration

Common Features

Common features for this market include:

- A platform compliant with applicable regulatory requirements, such as General Data Protection Regulation (GDPR), California Consumer Privacy Act (CCPA) and California Privacy Rights Act (CPRA)
- IT service management (ITSM) integration, including ticketing, service catalog, self-service and a configuration management database (CMDB)
- Extensibility via APIs and integrations, as well as providing a capability for data import and export
- An employee self-service SaaS application catalog, including a high number of direct SaaS application integrations
- Providing risk and compliance ratings for discovered apps, including applicable certifications
- Pricing and adoption benchmarking reports
- Vendor and contract management capabilities
- GenAI integration for admins
- Application request form and process for employees to request SaaS applications

Magic Quadrant

Figure 1: Magic Quadrant for SaaS Management Platforms





Gartner.

Vendor Strengths and Cautions

1Password

1Password, a Challenger in this Magic Quadrant, was founded in 2005 and is headquartered in Toronto, Ontario, Canada. Its operations are based in North America and Europe, and its customers include organizations of all sizes. Its SMP, Trelica by 1Password, was launched in 2021 and acquired by 1Password in January 2025. It has earned ISO-27000-family certifications. Customers can store their data in the U.S. or Europe.

Strengths

- **Operations:** 1Password delivers major releases monthly and smaller updates weekly. All Trelica staff were retained after the acquisition, with employees located in Europe and the U.S. As a result, customers are likely to see continued releases and more globally distributed support.
- **Product:** Trelica by 1Password offers flexible workflow orchestration, with a wide array of templates and comprehensive reporting capabilities. It has highly customizable expense reporting dashboards, advanced discovery tools, rightsizing recommendations and automated workflows for license tier downgrades. It also supports numerous integrations with IT asset management solutions, identity and SSO providers, collaboration platforms, and HR information systems and offers over 350 direct SaaS application integrations.
- **Business model:** Postacquisition, 1Password is significantly larger than Trelica was, which reduces risk of failure. It is profitable and has the necessary marketing, sales and support resources, as well as partners and capital to meet the needs of global customers.

Cautions

- **Innovation:** Trelica by 1Password has limited AI capabilities (primarily to support contract ingestion), compared to other vendors in this Magic Quadrant. Limited innovation reduces effectiveness and increases the effort required to use the platform.
- **Marketing:** 1Password is less-established than many SMP competitors. Its product marketing efforts have not garnered a significant level of awareness among customers, which has led to growth rates below the market average.
- **Market understanding:** 1Password's go-to-market strategy predominantly focuses on access governance. This represents a pivot from Trelica's SMP focus on the total utility of an SMP, expanding its relevance beyond IT to security buyers.

Auvik

Auvik, a Niche Player in this Magic Quadrant, was founded in 2011 and is headquartered in Waterloo, Ontario, Canada. Its operations are based in North America, and its customers are primarily North American managed service providers and small to midmarket companies. Its SMP, Auvik SaaS Management, was launched in 2020. It is GDPR- and CCPA/CPRA-compliant, and has earned SOC 2 Type II certification. Customers can store their data in the U.S. or Germany.

Strengths

- **Sales execution:** Auvik demonstrated strong year-over-year growth and effectively sells its product directly and through managed service providers and channel partners. Its pricing is relatively low, compared to other vendors in this Magic Quadrant.
- **Operations:** Auvik delivered four major releases, and 28 total, during the 12-month analysis period. Its SMP represents a smaller, but critically important portion of its larger IT visibility and management portfolio. This increases Auvik's ability to meet the needs of SMP customers worldwide.
- **Product:** Auvik SaaS Management provides comprehensive support for managed service providers and IT organizations with complex operational models through multitenant support with role-based access control. Additionally, its AI-powered application library contains many attributes for each discovered application, including a calculated cybersecurity risk rating and a log of vendor-related security incidents.

Cautions

- **Innovation:** Auvik's roadmap includes limited innovation examples and is focused on improvements to existing AI capabilities. Limited AI innovation reduces effectiveness, increases the effort required to use the platform and will challenge the vendor's relevancy in the future.
- **Market responsiveness:** Auvik's value proposition and product are primarily focused on operations, with less emphasis on SaaS expense management, employee enablement and self-service. This may limit the platform's effectiveness for organizations focusing on these outcomes.
- **Marketing execution:** Auvik is known more for other capabilities than for SaaS management. Its marketing content primarily focuses on managed service providers and operations, and Gartner interactions indicate customer awareness of the Auvik SaaS Management platform is low. Low awareness can limit prospects' ability to find the vendor, which may impact growth.

Axonius

Axonius, a Niche Player in this Magic Quadrant, was founded in 2017 and is headquartered in New York City, U.S. Its operations are based in North America, South America, Europe and the Middle East and its customers are primarily located in North America and Europe. Its SMP, Axonius SaaS Applications Platform, was launched in 2022. It is GDPR-compliant,

FedRAMP-authorized (via Axonius Federal Systems), and has earned ISO-27000-family and SOC 2 certifications (among others). Customers can store their data in the U.S., Canada, Brazil, Germany, Ireland, the U.K., France, Sweden, UAE, Australia, Singapore, Japan and South Korea..

Strengths

- **Innovation:** Axonius' SMP uses AI/ML for anomaly detection and GenAI to provide natural-language-query assistant capabilities. The company holds four patents for the deduplication and correlation of asset information from multiple sources.
- **Product:** The SMP offers over 1,200 integrations and adapters to a wide variety of common internal IT systems and over 120 direct SaaS application integrations. Consistent with Axonius' focus on SaaS application discovery and asset management, it provides extensive security- and compliance-related details on each SaaS application profile. Details include vendor risk levels, security certifications and compliance with regional regulations.
- **Sales strategy:** Axonius has an extensive regional partner network, comprising channel partners/resellers, management security service providers, technology alliance partners and referral partners. This increases its ability to attract and sell to customers worldwide.

Cautions

- **Marketing execution:** Axonius is known more for its IT asset management (ITAM) capabilities than for SaaS management. Gartner interactions indicate that general customer awareness of its SMP is low. Low awareness can limit prospects' ability to find the vendor, which may impact growth.
- **Product strategy:** Axonius lacks an employee service catalog for SaaS application discovery and access. This can increase onboarding effort as well as SaaS application sprawl, as employees who are unaware of approved applications are more likely to select nonapproved ones.
- **Vertical industry strategy:** With the exception of the federal government vertical, Axonius does not tailor its go-to-market strategy for industry verticals. This may limit its success within markets that have specialized regulatory or security requirements.

BetterCloud, a Leader in this Magic Quadrant, was founded in 2011 and is headquartered in New York City, U.S. Its operations are based in North America and Europe, and its customers are primarily North American small businesses to small enterprises. The BetterCloud platform was launched in 2016. It is GDPR- and CCPA/CPRA-compliant and has earned ISO-27000-family and SOC 2 certifications (among others). The vendor does not enable customers to determine where their data is stored.

Strengths

- **Market understanding:** BetterCloud shows a deep understanding of customer needs. It has demonstrated the ability to pivot to the changing needs of the market, and its acquisitions of G2 Track and Tricent have bolstered expense management and file-sharing governance, respectively.
- **Sales strategy:** BetterCloud effectively targets buyers within IT, finance and security leadership. It uses a flexible discounting strategy to sell directly to customers and through numerous channel partners, resulting in a simple and fast sales cycle.
- **Product delivery:** BetterCloud follows a CI/CD release cycle and has delivered 24 updates in the past year, which improved workflow, integrations, employee self-service and file-sharing governance. BetterCloud's rapid development cadence increases the effectiveness of customer SaaS management activities and also helps to attract new customers.

Cautions

- **Geographic strategy:** BetterCloud doesn't allow customers to choose where their data is stored and only offers customer support Monday through Friday, 9 a.m. to 8 p.m. U.S. Eastern time. These limitations can lead to challenges in servicing the needs of other countries and geographies, especially as geopolitical pressures build.
- **Pricing:** BetterCloud platform pricing is based on a three-tier model, BetterCloud for Google, BetterCloud Pro and BetterCloud Complete, with an add-on for BetterCloud Governance. Though it employs a transparent and flexible discounting strategy, list pricing for BetterCloud is higher than market average. Customers should work closely with BetterCloud sales to negotiate the best deal possible.
- **Product strategy:** For SaaS application discovery, BetterCloud supports SSO and integration with financial systems, endpoint management tools and OAuth. It does not offer a browser extension, which limits its ability to discover unsanctioned (shadow) SaaS.

Calero

Calero, a Niche Player in this Magic Quadrant, was founded in 1995 and is headquartered in Rochester, New York, U.S. Its operations are based in North America, Europe and Asia/Pacific, and its customers are primarily medium to large enterprises. Its SMP, Calero SaaS Management, was launched in 2021. It is GDPR- and CCPA/CPRA-compliant and has earned ISO-27000-family and SOC 2 certifications. Customers can store their data in the U.S. and Europe.

Strengths

- **Operations:** Calero's 30-year history, and its strong geographical and effective internal operations investments, have enabled it to deliver efficient SaaS management alongside its mobility, telecom, UCaaS and market data expense management solutions.
- **Product strategy:** Calero addresses customer requests quickly and has a good sensing mechanism for collecting customer requirements. It has aggressively added a number of key features to its SMP in the past 12 months, focusing on common demands such as increased expense management, license and operational automation, and employee engagement.
- **Vertical industry strategy:** Calero invested heavily to improve its vertical industry focus. It added dedicated sales strategies for government, healthcare, financial services, professional services and education. This approach can significantly increase the effectiveness of sales and operations in those industries.

Cautions

- **Marketing:** Calero's marketing focuses on overall technology spend management, which dilutes its SMP message. Its SMP-related activities on social and other media channels are infrequent, and it has no SMP-related case studies featured on its website. Gartner client interactions show customer awareness of Calero's SMP is low. Low awareness can limit prospects' ability to find the vendor, which may impact growth.
- **Application benchmarking:** Calero's SMP does not provide SaaS application adoption benchmarking or guidance on how to increase adoption. As a result, customers may be limited in their efforts to maximize SaaS application ROI.

- **Business model:** Smaller SMP market share and lower-than-market-average SMP contribution to overall company revenue could cause Calero to deprioritize its SMP in favor of products with higher returns or greater strategic value, which includes its telecom and mobile expense management offerings. Prospective customers should monitor the product roadmap to ensure the SMP remains a priority.

CloudEagle.ai

CloudEagle.ai, a Niche Player in this Magic Quadrant, was founded in 2021 and is headquartered in Palo Alto, California, U.S. Its operations are based in North America, Central America, South America, Europe, Asia/Pacific and the Middle East. Its customers are primarily midmarket to large enterprises. Its SMP was launched in 2021. It is GDPR-compliant and has earned ISO-27000-family and SOC 2 certifications. Customers can store their data in North America, Asia or Europe.

Strengths

- **Innovation:** CloudEagle.ai's extensive usage of AI/ML is a key differentiator. Its AI-powered SaaSMap knowledge graph for over 150,000 applications provides a conversational interface to enable intelligence-driven management and renewal decisions. Currently in beta, its EagleEye AI agent shows promise of offering proactive recommendations and autonomous actions.
- **Product roadmap quality:** CloudEagle.ai has continued to prove its ability to synthesize customer and prospect feedback into a prioritized and aligned product roadmap, and rapidly develops and releases new functionality. This enhances its ability to grow as the SMP market evolves and new buyer preferences emerge.
- **Product:** CloudEagle.ai has released 100 new direct integrations, bringing the total to over 500 (second-most among vendors in this report). Its newly redesigned low-code workflow orchestration enables advanced conditional logic and branching during automation. New AI-powered license optimization, harvesting and rightsizing enable customers to optimize their SaaS portfolios.

Cautions

- **Operations:** CloudEagle.ai is significantly smaller than many of its competitors. This may hinder expansion and growth into new markets and industries. Large enterprises should evaluate its operating model to determine if it can meet their needs.

- **Vertical industry strategy:** CloudEagle.ai's primary target customers are midmarket to large enterprise organizations, with focus on the technology sector. Larger clients, or those in regulated verticals, should assess its ability to address unique requirements.
- **Marketing execution:** Despite a large increase in the number of licenses sold along with an increase in marketing volume and thought leadership, Gartner client interactions indicate that customer awareness of CloudEagle.ai remains low. Low awareness can limit prospects' ability to find the vendor, which may impact growth.

Corma

Corma, a Niche Player in this Magic Quadrant, was founded in 2023 and is headquartered in Paris, France. Its operations are based in North America and Europe. Its customers range from small businesses to medium enterprises. Its SMP was launched in 2023 and has earned ISO-27000-family and SOC 2 certifications. Customers can store their data in North America or Europe.

Strengths

- **Product delivery:** Corma follows a continuous release cadence and has delivered 71 releases in the past 12 months (the most of any vendor in the Magic Quadrant). Its roadmap is well-aligned to customer needs, and its understanding of the market is solid. Since its initial offering in 2023, Corma has quickly added features to close the gaps between it and its primary competitors.
- **Innovation:** Corma heavily infuses AI into its platform to automate common SaaS management activities, with an ambitious goal of enabling automation for 90% or more of SaaS management tasks. The strategy centers on Corma's evolving "IT Agent Force" strategy of including AI agents for procurement, access reviews, finance operations and provisioning.
- **Customer experience:** Corma provides customer success managers (CSMs) to all customers with more than 10 employees. CSMs monitor platform usage and proactively contact customers if needed. Corma's investment in customer experience increases the likelihood of success for new customers.

Cautions

- **Operations:** Corma is smaller than most competitors, with fewer employees dedicated to ongoing operations. Despite a recent significant investment in part to improve

operations, this may hinder its expansion and growth into new markets and industries until operations are scaled. Prospective customers should evaluate its operating model to determine if it can scale to meet their needs.

- **Marketing:** Corma was founded in 2023 and its marketing focuses on smaller in-person events, with limited use of social marketing. Gartner client interactions indicate customer awareness of the Corma platform is low. Low awareness can limit prospects' ability to find the vendor, which may impact growth.
- **Sales strategy:** Corma's current sales strategy relies on manual and labor-intensive methods. Though it offers a flexible discounting capability, its pricing model is based on three tiers (Essential, Pro and Enterprise) and its list pricing is slightly higher than average for this market.

Flexera

Flexera, a Leader in this Magic Quadrant, was founded in 1987 and is headquartered in Itasca, Illinois, U.S. Its operations are globally diversified, and its customers span all sizes. Its SMP, Flexera One SaaS Management, was originally launched in 2016 and relaunched in 2025 after the integration of Snow SaaS Management, acquired in 2024. It is GDPR-compliant and has earned ISO-27000-family and SOC 2 certifications. Customers can store their data in North America, Europe or Asia/Pacific.

Strengths

- **Marketing execution:** Flexera has published a high volume of thought-leading SMP content through a variety of channels, and hosted numerous webinars and in-person global events. As a result, it is well-known for SaaS management and overall software asset management.
- **Operations:** Flexera has a global operations capability, located within Canada, the U.S., Brazil, the U.K., Sweden, Australia and India. It also has an extensive global partner network for implementation services. This global capability increases the effectiveness of sales and implementation programs, though the quality of regional partners may vary.
- **Sales strategy:** Flexera effectively sells its products directly and through global channel partners. Its customer base represents all verticals and geographies, and it effectively utilizes a dedicated vertical presales plan for almost all industries. Flexera pricing is generally low compared to other vendors in this Magic Quadrant, and it has a flexible discounting strategy.

Cautions

- **Adoption benchmarking:** While Flexera continues to integrate Snow Software into its core platform, significant work remains. Its SMP lacks SaaS application adoption benchmarking or guidance to increase user adoption. As a result, customers may be limited in their efforts to use the platform to achieve SaaS adoption targets.
- **Product strategy:** Flexera provides a limited number of direct API-based SaaS application integrations. This can limit the product's ability to perform more complicated management activities (such as license reclamation and providing detailed usage data for configuration and adoption) within SaaS applications where direct API integration isn't provided.
- **Customer experience:** Though Flexera has a global support capability, Gartner client interactions and Gartner Peer Insights have revealed inconsistent customer support and implementation partner quality across accounts and geographies.

Josys

Josys, a Niche Player in this Magic Quadrant, was founded in 2021 and is headquartered in Tokyo, Japan. Its operations are based in Asia/Pacific and North America, and its customers range from small to midmarket businesses, primarily in Asia/Pacific. Its SMP, Josys SaaS Management Platform, was launched in 2021. It has earned ISO-27000-family and SOC 2 certifications. The vendor does not enable customers to determine where their data is stored.

Strengths

- **Customer experience:** Josys uses customer success managers to streamline deployments and features many customer success stories on its website. It has two proprietary metrics (Customer Score and SaaS Management Score) to track customer satisfaction and drive adoption. Reviews on Gartner Peer Insights are generally positive.
- **Marketing strategy:** Josys demonstrates thought leadership and engagement in the Asia/Pacific SMP market through extensive use of webinars and events. Consistent messaging and blog posts emphasize its value proposition, which is well-aligned to the needs of SMP buyers.
- **Geographic strategy:** Josys has a strong focus on the Asia/Pacific region, with multiple regional customer case studies illustrating its success there. Customers in this region will

benefit from its deep understanding and expertise. It is in the early stages of global expansion, with limited localized customer support for the U.S., Australia, Indonesia and India, alongside its strong focus on Asia/Pacific.

Cautions

- **Sales execution:** Josys is relatively early in its growth in the SMP market. Despite its investments in establishing a global sales channel, most customers are midmarket or smaller and concentrated in the technology sector within Japan. Until it establishes a global sales channel, its growth may continue to be limited.
- **Operations:** Josys has started to expand its support and delivery capabilities to the global market, but remains primarily suited for Asia/Pacific customers. Customers outside this region may experience limited capabilities for support and account operations.
- **Product strategy:** Josys' platform does not provide expense trending, price and adoption benchmarks, forecasting, or budgeting capabilities. As a result, clients may not be fully able to predict, manage and rationalize SaaS expenses.

Lumos

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

Strengths

- **Marketing execution:** Lumos demonstrates thought leadership with a large volume of strategic content published through multiple digital channels and many in-person events. This has resulted in increased awareness among Gartner clients and prospective customers.
- **Sales execution:** Lumos uses a modular pricing model, with a flexible discounting strategy. It also has a simplified deployment experience, enabling customers to quickly realize value. As a result, it is well-positioned for continued growth.

- **Innovation:** Lumos uses AI to rightsize SaaS licenses based on usage and contract analysis, and it uses GenAI to provide a conversational interface for advanced platform features. Its AI agent, Albus (currently in beta), shows promise in developing and executing autonomous actions.

Cautions

- **Geographic strategy:** Lumos operates solely in North America, does not utilize regional partners and does not enable data storage outside North America. As a result, it may not be suitable for organizations with geographic data residency requirements or complex multinational operations.
- **Market understanding:** Lumos has pivoted its focus toward the autonomous identity governance and administration (IGA) market. This is a significant shift in marketing strategy that could cause prospective SMP customers to leave Lumos off their vendor shortlists due to the de-emphasis of SMP capabilities.
- **Product strategy:** Lumos does not provide compliance information, risk ratings data or hosting location, or security-incident-related information within its application catalog. This could limit the platform's effectiveness for IT security and compliance buyers, as well as IT procurement's ability to easily assess new SaaS vendors.

MegazoneCloud

MegazoneCloud, a Niche Player in this Magic Quadrant, was founded in 2018 and is headquartered in Seoul, South Korea. Its operations are based in Asia/Pacific, Europe and North America, and its customers are primarily located in Asia/Pacific. No customer size data was provided. Its SMP, Space SaaSops (formerly MegazoneCloud Platform of Platforms [PoPs]), was launched in 2024. It has earned ISO-27000-family certifications. Customers can store their data in any AWS region.

Strengths

- **Geographic strategy:** MegazoneCloud's primary market is South Korea and Central Asia. The majority of employees aligned to the Space SaaSops product are located in South Korea and Vietnam. Customers in Asia/Pacific will benefit from its regional understanding and expertise.
- **Market understanding:** MegazoneCloud's experience as a managed service provider focused on AWS cloud services and solutions benefits the SMP market. It uses its

experience in managing cloud sprawl to help control the security, financial and operational risks of SaaS sprawl.

- **Product execution:** MegazoneCloud uses a continuous delivery methodology and has released 21 major releases, and 94 total, during the past 12 months (among the highest of all vendors in this report). Its consistent focus on and investment in improving its platform's key capabilities increases the effectiveness of customers' SaaS management activities and attracts new customers.

Cautions

- **Marketing execution:** Gartner client interactions indicate that general customer awareness of the Megazone platform is very low. Low awareness can limit prospects' ability to find the vendor, which may impact growth.
- **Customer experience:** Though MegazoneCloud uses customer success managers throughout its SaaS operations, Space SaaSOps is still early in its growth; it has a small customer base, and no customer case studies are available. As a result, customers may experience variable and inconsistent support until the vendor scales its sales and operations.
- **Overall product viability:** Space SaaSOps is part of the much larger MegazoneCloud organization, which has an extensive global customer and employee base. Though it is a strategic priority for MegazoneCloud, Space SaaSOps contributes little to the vendor's overall revenue. Prospective customers should monitor the product roadmap closely to ensure the SMP remains a priority.

ServiceNow

ServiceNow, a Niche Player in this Magic Quadrant, was founded in 2004 and is headquartered in Santa Clara, California, U.S. Its operations are globally diversified, and it segments its customers as marquee (largest 250), enterprise, commercial and nonprofit. Its SMP, ServiceNow Software Asset Management, was launched in 2019. It is GDPR- and CCPA/CPRA-compliant, FedRAMP-authorized, and has earned ISO-27000-family and SOC 2 certifications. Customers can store their data in any geographic region.

Strengths

- **Overall viability:** ServiceNow is a profitable publicly traded company with a history of growth and free cash flow. Its scale and the size and diversity of its customer base

uniquely position it to service all enterprises of all sizes in all industry verticals and geographies.

- **Product strategy:** ServiceNow's SMP was built on the strength of its ServiceNow AI Platform. It provides comprehensive reporting, including consumption and usage, alongside simplified workflow creation and task automation. It also integrates directly with the company's widely used IT service, asset and operations management products.
- **Operations:** ServiceNow has an extensive global operational capability, with employees located in all geographies. Its 2,000-plus partner network assists with its entire portfolio, offering comprehensive consulting, implementation and development services.

Cautions

- **Market understanding:** ServiceNow's wider Software Asset Management Professional product focuses primarily on procurement and asset management use cases. Its SMP focuses on expense and asset management. It may not fit the needs of buyers that prioritize IT operations and security use cases.
- **Product:** ServiceNow only added two direct API integrations in the past year, the lowest of all vendors. Its SMP does not natively provide SaaS risk ratings, which complicates the ability to effectively assess new and existing applications for risk.
- **Value proposition:** ServiceNow's primary value proposition focuses on the power of the complete platform, not its standalone SMP. With reliance on another module for complete SMP functionality, it is a best fit for organizations with an existing investment in the overall ServiceNow platform.

Torii

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

Strengths

- **Product strategy:** Torii's roadmap focuses on customer needs curated via a robust multichannel customer feedback program. As a result, its value proposition strongly

aligns with the core current and future needs of SMP buyers, and the significant increase in product features and capabilities reflects the progress it has made.

- **Product delivery:** Torii has had 11 major releases in the past 12 months, each containing a large volume of major feature enhancements. Its rapid development cadence increases the effectiveness of customer SaaS management activities and helps attract new customers.
- **Innovation:** Torii has a complete understanding of the SMP market and consistently delivers capabilities ahead of full demand from its customer base. It leverages GenAI for contract ingestion, application profile enrichment, no-code automation design, application discovery and identity mapping. Its industry-first agentic AI SMP capability, Torii Eko, provides real-time embedded guidance to accelerate SaaS life cycle operations.

Cautions

- **Geographic strategy:** Torii only offers data storage in North America. As a result, it may not be suitable for globally diverse organizations or those with geographic data residency requirements.
- **Sales strategy:** Torii has a three-tier sales approach (Basic, Professional and Enterprise). While it has a flexible user counting and discounting strategy, its enterprise-level license is one of the most expensive among vendors in this Magic Quadrant.
- **Business model:** Torii is smaller than others in the Leaders quadrant. It has increased its channel sales partner program slowly and carefully to avoid deterioration of the customer experience and success. This strategy can limit its growth trajectory, due to a lack of internal scalability in the sales function.

USU

USU, a Niche Player in this Magic Quadrant, was founded in 1977 and is headquartered in Möglingen, Germany. Its operations are based in Europe and North America, and its customers are primarily medium to extra-large enterprises. Its SMP, USU SAM for SaaS, was launched in 2018. It is GDPR-compliant and has earned ISO-27000-family and SOC 2 certifications. Customers can store their data in any geographic region.

Strengths

- **Market understanding:** USU has extended its established history of technology asset management to include SaaS management. It provides a deep capability to manage SaaS

spend. In March 2025, USU purchased SMP vendor saasmetrix, in part to augment its capabilities. This will likely increase its relevance to IT operations and IT security and compliance buyers after integration is complete.

- **Geographic strategy:** USU targets the U.S. and Europe, with a strong focus on Germany, Austria and Switzerland — the DACH region. It also leverages partners to extend into other regions. As a result, customers receive the benefit of deep regional focus, as well as a global sales and service model.
- **Customer experience:** USU uses customer success managers to simplify deployment and reduce time to value realization, as well as monitor ongoing engagement. It has a comprehensive customer feedback program to ensure satisfaction and prioritize the product roadmap. It also has a fully managed service offering.

Cautions

- **Product:** The capabilities of USU's platform performed below SMP market expectations, based on our assessment. Clients should examine their own critical needs to determine whether USU can fully meet their requirements.
- **Vertical industry strategy:** USU does not widely differentiate its product, marketing or sales strategies based on industry verticals. This approach may limit its ability to succeed in markets that have specialized regulatory or security requirements.
- **Marketing execution:** USU produces limited marketing content for SMP and doesn't display thought-leading content on its website or other channels. While it is known more widely for software and technology asset management, Gartner client interactions indicate that general customer awareness of its SMP is low. Low awareness can limit prospects' ability to find the vendor, which may impact growth.

Viio

Viio, a Niche Player in this Magic Quadrant, was founded in 2020 and is headquartered in Copenhagen, Denmark. Its operations are based in Europe, and its customers are primarily midmarket European companies. Its SMP was launched in 2021. It is GDPR-compliant and has earned SOC 2 certification. The vendor does not enable customers to determine where their data is stored.

Strengths

- **Business model:** Viio focuses exclusively on the European market. Its employees and customer base are entirely located in Europe. While this may limit its overall global growth, Europe-based customers are likely to benefit from its regional expertise, which could become a significant advantage if geopolitical pressure continues to increase.
- **Product:** Viio provides a comprehensive SaaS application discovery capability through a wide variety of discovery methods. Application profile data is enriched via GenAI-powered SaaS application categorization. Effective SaaS discovery and categorization increase customers' ability to accurately detect and manage SaaS sprawl.
- **Product strategy:** Viio has a comprehensive customer feedback approach to solicit and prioritize items for its product roadmap. Its continuous delivery capability enables the rapid release of new features. For example, it developed and released an integration with Microsoft Defender for Cloud applications within 30 days.

Cautions

- **Scalability:** Viio is smaller than most vendors in this report. This may cause concern among larger enterprises about its overall viability and ability to scale to accommodate their needs, should it experience rapid growth.
- **Geographic strategy:** Viio's marketing, operations and sales strategies focus exclusively on the European market. In addition, all customer data is stored in Europe. As a result, it may not be suitable for organizations outside Europe or those requiring data residency outside of Europe.
- **Marketing strategy:** Viio's marketing focuses on the European market. Gartner client interactions indicate general customer awareness of its SMP platform is low. Low awareness can limit prospects' ability to find the vendor, which may impact growth.

Zluri

Zluri, a Leader in this Magic Quadrant, was founded in 2020 and is headquartered in Milpitas, California, U.S. Its operations are based in North America, Europe and India, and its customers are midmarket to small enterprises. Its SMP was launched in 2020. It is GDPR-compliant and has earned ISO-27000-family and SOC 2 certifications. Customers can store their data in the U.S., India, Germany, the United Arab Emirates, Indonesia, Singapore and Australia.

Strengths

- **Innovation:** Zluri uses AI for contract ingestion, SaaS application analysis, user activity analysis, application owner determination and entitlement rightsizing. Its AI assistant reduces the learning curve for users and provides actionable insights. Its patented discovery engine informs policy configuration and provides SaaS insights.
- **Marketing:** Zluri frequently publishes high-quality and thought-leading material. It participates in numerous in-person events and virtual webinars to educate customers on SaaS management and its own platform. Increased thought leadership and brand awareness will help drive sales opportunities.
- **Sales strategy:** Zluri's base pricing is among the lowest of vendors in this Magic Quadrant, and it has a volume-based discounting strategy. It sells direct or through channel partners and has demonstrated high sales growth over the past 12 months.

Cautions

- **Market responsiveness:** Zluri seeks feedback from prospects and current customers to build and prioritize its product roadmap. However, its top roadmap items are misaligned with top customer requests. Not prioritizing customer-initiated roadmap items may reduce the long-term customer experience and success.
- **Geographic strategy:** While Zluri offers customers a choice in where they store their data, it charges an additional fee, which varies depending on company size, the amount of data and other dimensions. Customers with data residency requirements may find this cost-prohibitive, especially those with multinational operations.
- **Customer experience:** Feedback collected during Gartner client interactions and customer reviews on Gartner Peer Insights reveal inconsistent customer support experiences and varying opinions on product capabilities and efficacy. Some conclude that Zluri underdelivers on product capabilities and promised outcomes.

Zylo

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

Strengths

- **Marketing:** Zylo publishes a high volume of thought-leading content. Its podcast (SaaSMe Unfiltered), YouTube channel (SaaSMe Anything) and annual virtual event (SaaSMe) promote success stories, strategies and practical guidance. It has published the annual SaaS Management Index for seven years, which compiles insights gleaned from over \$40 billion in SaaS spend over the last eight years.
- **Product:** Over the last year, Zylo added 4,000 new applications to its application library, the Zybrary, which now includes over 26,000. Each includes financial, risk and functionality details to enable informed approval and purchasing decisions. Zylo also provides extensive capabilities to measure and increase application adoption, as well as portfolio rationalization recommendations and an employee-facing application store.
- **Customer experience:** Zylo has earned annual awards for its customer experience. It uses customer success managers, and its teams work collaboratively to drive adoption, optimize spend, and integrate the SMP into core business processes, leading to rapid ROI. The Zylo Outcomes Blueprint includes key metrics and methods to maximize value.

Cautions

- **Geographic strategy:** Zylo employees are located exclusively in the U.S. Though they work staggered hours to provide worldwide support, not having regional sales and operations capabilities could impede customer growth and retention if geopolitical pressures increase. Zylo also does not enable data storage outside of North America. As a result, it may not be suitable for organizations with data residency requirements.
- **Sales strategy:** Zylo's pricing model is tiered based on organization size, but also includes several product and service add-ons. The perceived complexity can make it difficult for customers to understand, estimate and forecast SMP costs.
- **Vertical industry strategy:** Except for the government and pharmaceutical industries, Zylo does not differentiate its product, marketing or sales strategies based on industry verticals. This approach may limit its ability to be successful within markets that have specialized regulatory or security requirements.

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

- 1Password, which bought Trelica
- Auvik
- Axonius
- Corma
- MegazoneCloud
- Viio

Dropped

- FinQuery, which no longer sells a stand-alone SaaS management platform.
- Oomnitza, which no longer sells a stand-alone SaaS management platform.
- Productiv, which did not completely fulfill Gartner's inclusion criteria for workflow orchestration to automate employee on/offboarding, license reallocation and other application administrative actions.

Inclusion and Exclusion Criteria

To qualify for inclusion, SMP vendors must provide:

- A single-license SKU product, generally available by 30 April 2025, that provides:
 - Discovery of authorized and unauthorized SaaS usage via three or more of the following methods:
 - Browser extension
 - Device agent

- Financial/expense system integration
- Security tool integration (including but not limited to SASE, SSE, CASB, SIEM, SWG, firewall and EDR)
- Single sign-on (SSO) and identity provider (IdP) platform integration
- Endpoint management tool integration
- Email system integration
- Direct API integration with SaaS applications
- OAuth integration
- No-/low-code workflow orchestration capability to automate employee on/offboarding, license reallocation and other application administrative actions.
- Detailed financial, usage and entitlement reporting and direct execution of administrative actions within at least 20 distinct SaaS applications via read/write API or turnkey integration. Actions must include account creation/deletion and license allocation/revocation.
- Capability to delegate application ownership to non-IT staff or leaders utilizing role-based access controls.
- All of the capabilities listed above must be first-party intellectual property and not require third-party products or partnerships.
- All capabilities listed above must be purchasable as a **stand-alone** product, not as an add-on to another product, and must not require the purchase of additional products or add-ons.
- Rank in the top 20 vendors in the Gartner's Customer Interest Index (CII) compiled by Gartner Secondary Research Service for this market in March 2025.

Honorable Mentions

The criteria for inclusion of platform providers in this Magic Quadrant are based on a combination of quantitative and qualitative measures, as noted in the Inclusion Criteria section. Below are several noteworthy providers that did not meet all inclusion criteria but

could be appropriate for clients, contingent on requirements. The following is a nonexhaustive list, presented in alphabetical order:

- **Beamy:** Beamy's application portfolio governance platform enables large enterprises to collect detailed application usage to improve the alignment of IT policies with actual usage. Through its web browser extension, Beamy provides real-time guidance — steering employees towards approved applications. The solution integrates with enterprise IT tools such as APM, ITSM, cloud security, SAM and IAM platforms. Beamy did not meet the inclusion criteria for direct API-based SaaS application integration.
- **CloudNuro:** CloudNuro's SaaS management platform combines FinOps with SaaS Ops to deliver visibility across all cloud-hosted services and to increase operational efficiency, reduce shadow IT risks, increase governance and automate cost allocation and chargeback. CloudNuro did not meet the inclusion criteria for workflow orchestration, the capability to revoke unused license entitlements, or the ability to directly manage common SaaS applications from the SMP via read/write API integration.
- **JumpCloud:** JumpCloud's SaaS management platform provides discovery of sanctioned and unsanctioned SaaS applications and contextualized warnings/redirections when an employee visits an unsanctioned application. They provide analysis of employee usage trends to spotlight underutilized and overlapping SaaS applications, as well as visibility into application-to-application connections. JumpCloud did not meet all of Gartner's inclusion criteria.
- **Nudge Security:** Nudge Security enables SaaS discovery via SSO, email system integration and direct API integration. The platform encourages application owners and other SaaS stakeholders to take action via workflow-based multichannel (email, Slack and browser) nudges. Nudge did not fully meet the inclusion criteria for SaaS expense optimization or the ability to take direct action to modify SaaS application entitlements from the platform.
- **Sonar Clarity:** Sonar Clarity enables organizations to discover, manage and constantly monitor their SaaS application portfolios to manage the cybersecurity, financial and operational risks associated with SaaS and AI sprawl. It also provides a streamlined onboarding and offboarding capability for SaaS applications. Sonar Clarity did not meet the inclusion criteria for direct API-based SaaS application integration.

Evaluation Criteria

Ability to Execute

General evaluation criteria are available at the bottom of this research. For this market, assessments were primarily based on:

- **Product:** Tool extensibility; support for standard, must-have and optional capabilities; and the vendor’s track record of delivering on its roadmap. The overall breadth of capabilities and the depth of product functionality are other important factors.
- **Overall viability:** Sustainability of investment/ownership structure, profitability, leadership stability, organizational and partner scalability, and year-over-year product revenue growth.
- **Sales execution:** Clarity and competitiveness of the vendor’s packaging and pricing model, sustainability of new business growth, and ability to replace competitors.
- **Market responsiveness:** Tenure in the market, product vision, value proposition and quality of the vendor’s roadmap.
- **Marketing execution:** Use of various channels and creation of thought-leading content, as well as overall market awareness of the vendor’s SMP tool.
- **Customer experience:** General customer feedback, availability of customer success services and related case studies.
- **Operations:** Size and scalability of the organization, partners and platform.

Ability to Execute Evaluation Criteria

<i>Evaluation Criteria</i>	<i>Weighting</i>
Product or Service	High
Overall Viability	Medium
Sales Execution/Pricing	High

<i>Evaluation Criteria</i>	<i>Weighting</i>
Market Responsiveness/Record	High
Marketing Execution	Medium
Customer Experience	High
Operations	Medium

Source: Gartner (July 2025)

Completeness of Vision

Gartner analysts evaluate vendors on their ability to understand current market opportunities and create and articulate their vision for future market direction, innovation, customer requirements and competitive forces. Ultimately, vendors are rated on their vision for the future, and how well that maps to Gartner's position.

General evaluation criteria are available at the bottom of this research. For this market, assessments were primarily based on:

- Market understanding: Unique value to the market, understanding of external market forces and alignment with customer objectives and use cases.
- Marketing strategy: Overall ability to communicate a unique value proposition, effectively use various marketing channels and address needs of target buyer personas.
- Sales strategy: Pricing and bundling, sales channels and sales partnership strategies.
- Product strategy: Vision to deliver expanded capabilities and a consistent product release cadence, as well as the ability to ensure that its roadmap addresses common customer needs and use cases.
- Business model: Business, value proposition and unique capabilities (for example, patents, people, technology and data).

- Vertical/industry strategy: Most common industries among customers, specific target industries, and compliance with common industry regulations or certifications.
- Innovation: Level of investment in product development in new areas related or adjacent to SMP, third-party and partner relationships and integrations, use of AI/ML, and other novel capabilities.
- Geographic strategy: The number of employees allocated to different regions, tailoring of go-to-market or product strategy to address regional differences, and the depth and scope of partners available in countries with existing and new customers.

Completeness of Vision Evaluation Criteria

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

Source: Gartner (July 2025)

Quadrant Descriptions

Leaders

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

Challengers

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

Visionaries

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

Niche Players

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

Context

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

Market Overview

This document was republished on 7 August. The version you are viewing is the corrected version. For more information, see Gartner's [Corrections](#) page.

The SMP market focuses primarily on addressing the operational and financial challenges associated with SaaS-hosted application portfolios. SMP providers often target four discrete buyer personas: IT asset management, IT security and compliance, IT procurement, and IT operations. However, SMP features are most often oriented toward the needs of IT procurement and IT operations, and most providers have the best success marketing and selling to them.

The Growing Need for SMPs

Organizational SaaS spend continues to grow as organizations shift from traditional on-premises application hosting strategies to operationally efficient “as-a-service” delivery models. In fact, per-employee SaaS spend currently averages \$1,562, a 51% increase since 2022.¹

However, Gartner estimates that as many as 25% of provisioned licenses are not regularly used by employees. In addition, decentralized ownership and sourcing results in increased risk, as organizations are generally only aware of 40% of applications in use.

Emerging governmental regulations also increase the urgency (see Note 1). With the growing focus on asset discovery, risk assessment and disclosure, organizations must maintain an accurate inventory of their application portfolios. Given the lack of visibility into SaaS application usage, most organizations are unable to fully comply without a centralized SMP, alongside other asset management and security tools.

Though the majority of regulations currently focus on specific industries (mainly financial services and technology providers), to date, 242 data protection and data privacy regulations exist in 154 countries across the globe.² Gartner expects these regulations to continue to expand, further driving SMP market growth.

In addition, rising regulation and global trade tensions have resulted in an emerging client focus on geocentric SaaS application data storage. Many SMPs identify the storage location for SaaS application data, helping organizations ensure compliance. Most SMPs also enable customers to store SMP-related data in multiple geographies.

The Current State of SaaS Management Efforts

Despite the growing importance of SaaS management, a poll during the 2025 Gartner Digital Workplace Summits in Texas and London revealed that only 14% of respondents actively manage all SaaS costs on an ongoing basis. Most (71%) use an incomplete strategy focused only on renewals and enterprise applications, or use an ad hoc approach. Fourteen percent don't manage SaaS costs at all, due to incomplete visibility. ³

This current state is out of step with the fact that budget and cost management are ranked highest of the ways the digital workplace is evaluated by the CIO. ⁴

Though Gartner clients' interest in this market has noticeably risen in 2025, many are not yet fully aware of the complexity and challenges presented by an unmanaged SaaS portfolio. They frequently rely instead on traditional — but ineffective — tools and methods to identify and manage discrete SaaS application entitlements and usage. For example, SaaS security posture management (SSPM), cloud access security brokers (CASBs) and security service edge (SSE) can generally identify and block visits to SaaS provider websites. However, they often lack the context to distinguish between a site visit and actual usage. These tools also lack functionality to manage, automate, optimize or enable SaaS entitlements.

Most conversations with Gartner clients remain focused on solving specific problems: trying to understand the market landscape; choosing between SMP, SaaS security and SAM tools; and overcoming resistance to adding another tool.

Considerations for Investing in an SMP

Despite low but increasing client demand, Gartner recommends implementing SMP capabilities to reduce the financial, operational and visibility risks associated with unmanaged applications and the underestimated size and spend of a SaaS portfolio.

We also recommend keeping your options open as the market evolves. Most vendors in this market are fairly nascent. Due to the relatively low market maturity and vendors' need to generate revenue, buyers have significant leverage when negotiating SMP contracts. We recommend using this leverage to negotiate relatively short-term contracts (one or two years), as it is difficult to determine the overall viability for many of the vendors in this report. Outcomes such as mergers, acquisitions and financial instability have impacted and will continue to impact the serviceability of vendors in this market.

Analyze your requirements carefully and compare them against the ratings within our [**Critical Capabilities for SaaS Management Platforms**](#) research to help refine your selection.

It is important to note that the breadth of application coverage and depth of licensing management varies among all SMP vendors.

Looking Ahead

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

- Stronger partnerships and collaboration across procurement, finance, IT security and applications, and lines of business (LOBs) to control SaaS sprawl
- More organizations balancing centralized SaaS portfolio management responsibility with LOB-led democratized digital delivery to establish effective application ownership wherever decisions are made
- An increase in demand and budget for SaaS management as organizations realize the magnitude of unmanaged SaaS cost, sprawl and risk, while adoption growth remains uncontrolled
- Increased use of SMP to monitor SaaS adoption and measure return on strategic SaaS investments.
- Growing interest in automating employee onboarding and offboarding processes
- Rising demand for simplified contract negotiation and renewal, and detailed usage data to support rightsizing of contracts
- Emerging demand for lightweight IGA, specific to SaaS applications

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

- Increased SMP vendor focus on high-value use cases within IT operations and IT procurement
- Expansion of traditional SAM market vendors' capabilities to include SMP use cases
- Continued investor interest in and further funding of SMPs
- Increased normalization in base feature sets due to the coalescing of buyer needs and vendors' needs for increased operational scalability

- Increased partnerships, as well as mergers and acquisitions, among SAM, SMP and adjacent tool vendors
 - Introduction of managed services offerings from SMP vendors to address skills gaps (few SMPs offer managed services today)
 - Increased focus on automation of common IT operations tasks, such as onboarding and offboarding, and automatic inactive license harvesting
 - A continued increase in the number of direct SaaS application integrations from the average of 222 per vendor today (which was a 96% increase from 2024)
 - Enhanced risk ratings for SaaS applications, including compliance with common certifications and data breach detection
 - ML, GenAI and agentic AI capabilities being rapidly introduced into SMPs to enable semi- (and eventually fully) autonomous operations
 - Increased capabilities for identity and access validation (i.e., lightweight IGA) for SaaS applications
-

⊕ Evidence

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

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

- The EU's **Digital Operational Resilience Act (DORA)**
- The EU's **NIS2**
- The EU's **Cyber Resilience Act (CRA)**
- The EU's **TIBER-EU**
- The U.S.' **Securities and Exchange Commission regulations**
- The **New York State Department of Financial Services** in the U.S.

- The U.K. National Cyber Security Centre's [using SaaS securely](#) and [shadow IT](#) guidelines

⊕ Evaluation Criteria Definitions

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