

Magic Quadrant for Service Orchestration and Automation Platforms

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Service orchestration and automation platforms are essential for delivering business services through complex workloads. SOAPs unify workflow orchestration, workload automation and resource provisioning, extending across data pipelines and cloud-native architectures.

Strategic Planning Assumptions

By 2029, 90% of organizations currently delivering workload automation will be using service orchestration and automation platforms (SOAPs) to orchestrate workloads and data pipelines in hybrid environments across IT and business domains.

By 2029, 75% of SOAP workflows will leverage generative AI (GenAI) to increase troubleshooting efficiency by 50% — up from less than 10% in 2025.

Market Definition/Description

Gartner defines the service orchestration and automation platform (SOAP) market as encompassing solutions that empower organizations to manage and automate their entire technology stack, including workloads, workflows, resource provisioning and data pipelines.

SOAPs empower infrastructure and operations (I&O) leaders to streamline and accelerate the delivery of business services. These platforms integrate workflow orchestration, workload automation and resource provisioning across an organization's hybrid IT

landscape. By automating and optimizing these processes, SOAPs enable organizations to rapidly deploy workloads, enhance operational efficiency and achieve significant cost savings while ensuring high availability and business continuity.

SOAPs enhance traditional workload automation by supporting use cases in data pipelines, cloud-native infrastructures and application architectures. They complement and integrate with DevOps toolchains, enabling organizations to achieve customer-centric agility, reduce costs, improve operational efficiency and establish standardized processes across their entire IT landscape.

Mandatory Features

The mandatory features for this market include:

- **Management of workloads in complex technology and deployment topologies:** This includes supporting mission-critical workload automation of business processes in various combinations and configurations of internally developed applications. It also involves supporting commercial off-the-shelf (COTS) products and infrastructure deployments, including on-premises, cloud, colocation, software as a service (SaaS) and edge locations.
- **Management of workflows spanning the operating environment:** This includes request management, integration between IT software platforms and end-user enablement, data pipelines, citizen developer enablement, and DevOps pipeline integration.
- **Broad integration capabilities:** This includes the ability to integrate with and incorporate software and infrastructure technology landscapes that span from the cloud to enterprise applications.
- **Workflow design:** This includes providing a visual workflow designer, a code-based designer and a library to create and reuse workflow templates. Additionally, it needs to support version control and collaboration, allowing multiple users to work on workflows simultaneously and track changes.
- **Error handling and recovery:** This ensures workflow stability by detecting errors, triggering recovery actions such as retries or rollbacks, and minimizing disruptions. Robust logging and alerts enable rapid diagnosis and resolution, maintaining reliability and data integrity.

Common Features

The common features for this market include:

- Mobile or web portal interaction capabilities for end users
- Cloud-native support
- Jobs-as-code development capabilities for facilitating DevOps interactions with platform
- DevOps integration
- Event-driven automation for responding to events as they occur with workflow execution
- Generative AI (GenAI) support for improved productivity and advanced AI use in the solution
- Data pipeline support for delivering advanced data tasks, directly supporting infrastructure build and more-complex workflows across technology domains
- Workload and workflow definition, execution, management and notification
- Job scheduling, job definition and execution, dependency management among steps, and enabling plan/predict/optimize actions for service-level agreement (SLA) management
- Security and compliance
- Scalability and high availability
- Multicloud support

Magic Quadrant

Figure 1: Magic Quadrant for Service Orchestration and Automation Platforms





Gartner.

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 for workloads delivered in on-premises data centers and hybrid environments. Visual TOM can be deployed as an on-premises solution or as a managed option available through partners.

Absyss' operations are mainly in France, and most of its clients are in Europe. In 2025, Absyss broadened support for hybrid orchestration and expanded on a jobs-as-code

approach to allow for greater integration with continuous integration/continuous delivery (CI/CD) pipelines.

Absyss did not respond to requests for supplemental information. Gartner's analysis is therefore based on other credible sources.

Strengths

- **User experience:** Absyss Visual TOM emphasizes usability through its low-code, drag-and-drop functionality, empowering operations staff who lack deep coding knowledge to easily design and manage complex job chains. This focus on accessibility is further highlighted by a modernized user interface, which features a web-based IT cockpit for less technical users and a mobile application for both iOS and Android, enabling on-the-go monitoring and control.
- **Product strategy:** Absyss has expanded support for Visual TOM's jobs-as-code capabilities by offering its public REST API. The API allows developers to define, store, version and deploy their automation workflows as code (e.g., in YAML or JSON format), so they can fully integrate automations into CI/CD pipelines. This approach increases agility and collaboration between development and operations teams.
- **Environmental initiative:** Absyss is strongly committed to reducing its ecological footprint. Its employees are encouraged to adopt best practices in terms of energy saving, recycling, the circular economy, and the management of electronic and electric waste. Absyss also selects trusted partners to promote a responsible approach to its various purchases.

Cautions

- **Geographic strategy:** Absyss' marketing and operational presence is heavily concentrated in Western and Northern Europe, particularly in its home market of France. Organizations located outside this region will find that direct support, local expertise and community engagement are limited.
- **Deployment models:** Absyss does not offer a customer-available SaaS version of Visual TOM. While the company's pricing page indicates that a SaaS model will be available soon, the platform currently supports only self-hosted (on-premises) or cloud-hosted deployments.

- **Innovation:** While Absyss provides some GenAI capabilities in its Visual TOM platform, it lags behind other evaluated vendors in this area.

Beta Systems Software

Beta Systems Software is a Leader in this Magic Quadrant. Its SOAP offering is ANOW!, which supports workload automation and workflow orchestration capabilities across distributed hybrid and cloud environments. ANOW! can be deployed as self-hosted software or as SaaS.

Beta Systems' operations and clients are mainly in Europe, with some presence in North America. In 2025, the company invested in adding OpenTelemetry support to ANOW! for enhanced observability and visibility.

Strengths

- **Product strategy:** ANOW! is a single platform that can orchestrate a wide range of systems, from modern cloud-based technologies like Snowflake and Databricks, to IBM Z mainframe and other IBM i systems. It provides more than 500 out-of-the-box connectors for a variety of technology categories, including cloud services, databases, ERP systems, operating systems, and extraction, transformation and loading (ETL).
- **Observability and intelligence:** Beta Systems has transformed what was a caution for the platform in 2024 into a key competitive differentiator. ANOW!'s unified observability component provides a real-time view into the health and performance of an organization's entire hybrid IT landscape. The platform also features an AI-powered PII filter that automatically detects and redacts sensitive data in any content, simplifying compliance with regulations such as GDPR and HIPAA.
- **Vendor viability:** Beta Systems has proven its ability to endure multiple technology cycles over the past four decades. It has a higher customer retention rate than most other Leaders in this Magic Quadrant, particularly in mission-critical sectors like finance, government and insurance. For risk-averse enterprise buyers, Beta Systems represents a stable and financially prudent partner.

Cautions

- **Geographic presence:** ANOW! customers are concentrated in Europe, and the vendor has not developed much brand awareness in other regions. While Beta Systems is well-established and actively expanding into new regions, its performance history is not as

deep as other Leaders in this Magic Quadrant, and it has not gained much traction yet among prospective customers in North America and Asia/Pacific.

- **Market strategy:** While ANOW! is designed to meet the needs of large enterprises managing thousands of servers and complex processes, it also supports small and midsize enterprises (SMEs). However, most SMEs do not require such extensive capabilities and may prefer simpler, more cost-effective alternatives.
- **Sales execution:** Beta Systems' heavy reliance on a direct sales model limits its market penetration. Some of the largest enterprises are unlikely to evaluate its platform because they procure SOAP technology through global system integrators (GSIs). Without strong GSI partnerships, the ANOW! platform often remains invisible in major transformation deals, restricting its ability to reach potential clients.

BMC

BMC is a Leader in this Magic Quadrant. Its SOAP offering is Control-M, available as self-hosted or SaaS. Control-M integrates and supports technologies like mainframe, multicloud and AI/ML/DataOps pipelines to orchestrate and automate services.

BMC's operations and client base are geographically diversified. In 2025, BMC continues to invest in GenAI, enterprise-grade SaaS, jobs-as-code and large-language model (LLM) ecosystem integration.

In April 2025, BMC split into two independent companies: BMC and BMC Helix.

Strengths

- **Product strategy:** BMC Control-M's orchestration capabilities span the entire enterprise IT landscape, from mainframes to multicloud and cloud-native environments. Its Unified View provides a single interface for customers to build, run and manage complex workloads across self-hosted and SaaS deployments.
- **Geographic strategy:** BMC serves a large, complex client base across all major regions, including highly regulated organizations with stringent requirements. BMC effectively supports customers worldwide with its Customer Engagement Model, which includes professional services for implementation, competitive migration services, and a strong value-added reseller (VAR) and partner program.
- **Innovation:** BMC's GenAI advisor, Jett, is embedded in Control-M, enabling users to ask natural language questions about workflows and receive graphical and textual responses.

Jett aids troubleshooting, problem resolution and workflow optimization by identifying anomalies like unusual job runtimes. Jett also assists with compliance checks, detailing who made changes and when.

Cautions

- **Pricing:** The total cost of ownership for Control-M is relatively high compared with some competing offerings, reflecting its positioning as an enterprise-grade solution that supports large, complex deployments. The licensing costs for Control-M, combined with the personnel costs for skilled administrators to manage the platform, may be difficult to justify for smaller organizations or those with less complex scheduling needs.
- **Operations:** BMC split into two independent companies in 2025: BMC and BMC Helix. Despite the relatively smooth transition, customers have expressed concerns that the split may lead to support challenges and long-term integration challenges when using products across both companies.
- **Innovation:** While BMC Control-M offers Jett as a GenAI capability, it does not currently provide native AI agents for autonomous operational purposes.

Broadcom

Broadcom is a Leader in this Magic Quadrant. Its SOAP offering, Automic Automation, provides workload automation and workflow orchestration capabilities to support digital businesses across distributed hybrid environments. It can be deployed on-premises, as containers and as SaaS.

Broadcom's operations and customer base are geographically diversified. In 2025, Broadcom invested in maturing its automation-as-code capabilities to enable modern DevOps life cycle management for automation workflows.

Strengths

- **Product capabilities:** Broadcom's Automic Automation offers a unified platform for hybrid/multicloud orchestration, from mainframe to microservices. Key strengths include its Zero Downtime Upgrade feature, AI-powered cross-vendor observability (AAI) for predictive insights and SLA management, and flexible deployment options (on-premises, SaaS, Kubernetes) with 100% feature parity. The platform provides broad integrations and advanced GenAI capabilities for intelligent workflows and troubleshooting.

- **Geographic strategy:** Broadcom's global sales and support span North America, EMEA, Asia/Pacific and Latin America, including 24/7 support through local professional services teams and partners.
- **Industry strategy:** Broadcom has developed vertical expertise in industries like finance, retail and manufacturing to support industry-specific best practices. Broadcom maintains vertical sales teams with expertise in financial services and other industries, enabling a deep understanding of each sector's critical challenges and desired business outcomes.

Cautions

- **Customer experience:** Broadcom customers have reported inconsistent experiences with Broadcom and its partners, citing complex renewal negotiations and variable licensing flexibility. Broadcom also reported a lower 12 month retention rate compared with other Leaders in this research.
- **Innovation:** Broadcom has been relatively slow to expand its massive library of integrations, compared with other Leaders. It lags in adding official, out-of-the-box support for emerging cloud services, databases or niche DevOps tools. For some cutting-edge use cases, customers will have to build and maintain their own integrations, potentially using the Action Pack Builder capability provided by Broadcom.
- **Pricing:** Automic Automation requires a substantial initial investment and has a relatively high total cost of ownership, so it is best suited for large enterprises seeking an enterprise-grade solution. Customers should therefore carefully plan for their long-term needs to avoid significant unforeseen costs.

HCLSoftware

HCLSoftware is a Leader in this Magic Quadrant. Its SOAP offering — HCL Automation Orchestrator Suite — provides workload automation and workflow orchestration capabilities across distributed hybrid and cloud environments. It can be self-hosted (on-premises or in the customer's cloud) or deployed as SaaS or a managed service.

HCLSoftware's operations and customers are geographically diversified. In 2025, HCLSoftware launched HCL Universal Orchestrator (UnO) Agentic, which complements its SOAP and serves as its strategic entry into the agentic AI and autonomous orchestration market.

Strengths

- **Deployment models:** HCLSoftware provides flexible deployment options that align with any enterprise IT strategy. Customers can self-host the platform in traditional data centers or modern, cloud-native environments, or consume it as SaaS. HCLSoftware also offers a managed SaaS model that can be deployed in specific cloud regions to meet data sovereignty requirements.
- **Innovation:** HCLSoftware is among the leaders in AI integration, offering a suite of intelligent capabilities. Its UnO AI pilot uses GenAI to create workflows and agents from natural language, while HCL Clara — its intelligent virtual assistant — provides conversational control over operations. The HCL HERO engine adds AI capabilities for proactive health monitoring and anomaly detection, accelerating development and enabling autonomous orchestration.
- **Geographic strategy:** HCLSoftware has a significant presence in every major region, including North America, EMEA, Asia/Pacific and Latin America. It has dedicated, local sales and professional services teams across the world, providing 24/7 “follow the sun” support for customers in any location.

Cautions

- **Marketing execution:** HCL Automation Orchestrator Suite has lower market visibility compared with other Leaders’ SOAP offerings. This lagging brand awareness not only causes some potential customers to overlook the platform in their evaluations, but also contributes to a smaller public talent pool of experienced administrators and a less extensive community knowledge base compared with its top competitors.
- **Product strategy:** The launch of HCL UnO Agentic, while innovative, has created confusion about how HCLSoftware’s products fit together. The new platform adds another AI layer on top of HCLSoftware’s existing Workload Automation suite and HCL AI Data Advisor (AIDA). Customers have expressed uncertainty about whether UnO is a replacement, an expensive add-on or a new strategic direction.
- **Licensing model:** HCLSoftware provides consumption-based licensing by default, which directly ties cost to usage (the number of jobs run). Customers with highly variable or unpredictable workloads will find it challenging to accurately forecast annual costs, which introduces the risk of overruns.

HONICO Systems

HONICO Systems is a Niche Player in this Magic Quadrant. Its SOAP offering, BatchMan, is focused on managing SAP workloads. BatchMan is complemented by Easy Workload Scheduler for non-SAP workflows. The products are sold as on-premises solutions.

HONICO Systems' operations are mainly in Europe, with direct sales and support in Germany, Austria and Switzerland. In 2025, HONICO has added direct integrations that allow users to orchestrate modern cloud platform services from SAP without using agents.

Strengths

- **Product strategy:** As an SAP-certified add-on, HONICO BatchMan's core strength is its native integration. It runs directly within existing SAP infrastructure and uses SAP's security and user management systems, which improve operational efficiency and reduce total cost of ownership. BatchMan's seamless integration with SAP allows for real-time, event-driven automation and simplified administration using familiar tools, guaranteeing stability and performance.
- **Pricing:** HONICO offers a more transparent and competitive pricing model than many of its competitors, which resonates with budget-conscious buyers. BatchMan's pricing is directly aligned with its specific SAP-centric use case. This results in more predictable costs, eliminates paying for unused capabilities, and provides a highly competitive price point for organizations seeking a dedicated SAP automation solution.
- **SAP expertise:** BatchMan's deep SAP expertise is rooted in its origins as a native add-on for SAP. This "born in SAP" heritage provides intrinsic insight into operating a complex SAP environment, enabling superior, native management of complex objects and event-driven workflows. Its long-standing SAP certification further validates this approach, ensuring mission-critical reliability for core ERP processes.

Cautions

- **Deployment options:** BatchMan is designed for managing both SAP and non-SAP workloads, but it requires SAP to run, making it unsuitable for organizations without an SAP environment. BatchMan's inherent dependency on the SAP ABAP stack means customers become highly reliant on their SAP environment for core workload automation — even for non-SAP applications.
- **Innovation:** BatchMan lacks native AI/ML capabilities. Unlike most competing SOAP offerings, the platform cannot predict SLA breaches or failures. To gain predictive

analytics capabilities, customers must export BatchMan's data and use a separate, third-party observability platform.

- **Geographic strategy:** HONICO Systems has direct sales and support only in Germany, Austria and Switzerland, and it remains focused on serving clients only in Europe. Customers in North America or Asia/Pacific will receive limited support from HONICO Systems.

IBM

IBM is a Leader in this Magic Quadrant. Its SOAP offering, IBM Workload Automation (IWA), provides workload automation and workflow orchestration capabilities across complex distributed, hybrid and cloud environments, especially for large organizations. It can be deployed on-premises, on mainframe, customer or IBM cloud, or as SaaS. IBM delivers IWA via a partnership with HCLSoftware.

IBM's operations and customers are geographically diversified. In 2025, IBM offered its AI-infused scheduling capabilities within IWA.

Strengths

- **Product strategy:** IWA delivers hybrid orchestration of complex workflows across numerous environments, from legacy mainframes to modern cloud services. It integrates processes in a single view, allowing users to control job streams across multiple platforms. IWA's native z/OS integration is a critical strength for large enterprises, while its Automation Hub provides a growing library of integrations to extend its reach to new technologies.
- **Innovation:** IBM includes AI Data Advisor (AIDA) as part of IWA, and integrates with watsonx AI (and other LLMs), as well as the IBM Instana Observability platform. These integrations enable customers to use natural language to generate and diagnose jobs, orchestrate AI/ML pipelines natively, and leverage AIOps to predict potential SLA breaches and detect performance anomalies before they impact business operations.
- **Geographic strategy:** IBM provides the global resources and stability that large enterprises demand, including 24/7 "follow the sun" support and access to both IBM experts and certified partners. The vendor's established services network allows for the largest enterprises to engage with IBM across their operating environments.

Cautions

- **Reliance on software partners:** IBM delivers IWA via a strategic partnership with HCLSoftware. Customers have expressed confusion about the way in which support is delivered. This reliance on a partner for current software development and support raises client concerns about the product's future direction and innovation.
- **Complexity:** Gartner customers have reported that upgrading and patching the IWA environment is a complex, time-consuming and resource-intensive process that requires extensive planning, testing and sometimes professional services. Some customers are reluctant to upgrade due to this complexity, which leaves their systems without the latest features and security updates.
- **Pricing:** Gartner clients cite high total cost of ownership (TCO) with IWA due to PVU licensing. IBM offers both PVU (unlimited jobs) and per-job licensing options. Clients holding PVU licenses may need to initiate a license exchange with IBM for solutions where per-job licensing is more appropriate. The TCO for IWA is further inflated by additional expenses for specialized partners, staff training and ongoing maintenance.

JAMS

JAMS is a Niche Player in this Magic Quadrant. Its SOAP offering, also called JAMS, provides automation and orchestration capabilities that enable management of hybrid environments. It is available as a self-hosted solution or as a managed option through partners.

JAMS's operations and customers are mainly in North America, with some presence in EMEA and Asia/Pacific. In 2025, JAMS updated its web client to bring it closer to full feature parity with the desktop client.

In June 2025, Fortra announced that it had sold the JAMS portfolio. JAMS now operates as an independent company owned by PSG, 2ndWave Software and employees.

Strengths

- **Product strategy:** JAMS is built on a foundation of open standards and is script-agnostic, allowing customers to use their existing script syntax to interact with the platform features and functionality. This approach reduces the learning curve and simplifies migration efforts.
- **Product scalability:** JAMS uses queuing mechanisms to automatically balance workloads across multiple JAMS agents, which improves performance and resource utilization. This

scalable approach helps to control and prioritize job execution and prevent system overloads.

- **Pricing:** JAMS offers a flexible licensing model centered on per-agent pricing, making it a good fit for organizations focused on managing total cost of ownership. This structure makes it easier for customers to start small and scale their deployments with predictable costs.

Cautions

- **Overall viability:** As an independent company, JAMS no longer has the financial backing of Fortra. Prospective customers should monitor JAMS's ability to fund its own operations and invest in new feature development.
- **Innovation:** Unlike most other SOAP offerings in this research, JAMS does not currently have any built-in AI capabilities to predictively forecast SLA breaches or identify performance anomalies before they occur.
- **Deployment models:** JAMS is only available as self-hosted software and does not have a SaaS offering. JAMS can be deployed on cloud infrastructure (IaaS), but the customer is fully responsible for installation, patching, upgrades and maintaining the platform's availability.

Redwood Software

Redwood Software is a Leader in this Magic Quadrant. Its SOAP offering — RunMyJobs by Redwood — is designed to automate, manage and monitor complex IT and business processes across an organization's entire technology landscape. RunMyJobs is commonly consumed as SaaS, with self-hosting options also available.

Redwood's operations and customers are geographically diversified. In 2025, Redwood introduced Redwood Insights, an AI-powered observability solution that is integrated into RunMyJobs.

Strengths

- **Innovation:** Redwood Software has made several AI-based enhancements since last year's evaluation. It launched Redwood Insights, which analyzes performance, predicts potential SLA misses and provides plain language explanations of process behavior. The company also now offers an AI assistant that provides in-product learning, document generation and scripting development.

- **User experience:** Gartner customers have provided positive feedback about RunMyJobs' intuitive, low-code interface. Its visual, drag-and-drop workflow editor enables a wide range of users — from IT operations to business analysts — to build complex automations more quickly without deep scripting knowledge.
- **Enterprise integration expertise:** RunMyJobs' integration catalog is extensive, featuring deep SAP integration for complex ERP processes and other connectors that are available within its low-code editor. Redwood actively curates this library based on customer requests, ensuring it supports integrations with the latest cloud and DevOps tools.

Cautions

- **Deployment models:** Redwood Software offers RunMyJobs primarily as a cloud-based, multitenant SaaS platform. This model is not well-suited for organizations in highly regulated industries with strict data sovereignty rules. Redwood will support on-premises installation or private cloud deployments.
- **Pricing:** Customers have expressed to Gartner frustration with some of Redwood Software's sales practices, citing significant cost increases during renewal negotiations.
- **Sales strategy:** Redwood's direct sales strategy creates friction for enterprises that rely on global system integrators (GSIs). This can result in procurement hurdles, difficult integrations and a lack of clear accountability when issues arise between the vendor and service provider. Customers must verify the specific partnership and support model between Redwood and their chosen GSI to mitigate these risks.

Resolve

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

Resolve's operations and customers are mainly in North America and Europe. In 2025, the company formally launched and integrated agentic AI into Resolve Actions.

Strengths

- **Workflow expertise:** Resolve Actions intelligently coordinates disparate tools, teams and automated processes. The platform's key differentiator is its ability to manage complex, end-to-end workflows across multiple technology silos and organizational boundaries,

uniting an organization's entire IT ecosystem. This is complemented by Resolve's vast catalog of integrations.

- **Innovation:** RITA, Resolve's conversational AI, handles complex, multistep requests and live-translates multilingual queries for end users. Meanwhile, Jarvis, its AI assistant, can generate automation logic, script snippets or automatic workflow steps based on natural language descriptions of intent.
- **User experience:** Resolve Actions provides a user-friendly automation authoring experience. Its low-code, visual, drag-and-drop designer enables a wide range of IT professionals to build and manage sophisticated workflows without deep programming expertise.

Cautions

- **Workload automation:** Resolve Actions is built for workflow orchestration and not as a direct replacement for legacy workload automation tools. Its capabilities are less suited for environments requiring complex batch processing, critical path management or deep mainframe scheduling.
- **Marketing execution:** Despite Resolve's continued investment in marketing its product suite, Resolve Actions has lower brand awareness compared with most of the larger competitor offerings in this research. For prospective customers, this means fewer independent community forums, a smaller pool of publicly available case studies, and difficulty finding extensive peer discussions.
- **Sales strategy:** While Resolve provides tooling to automate many script and workflow conversions, migrating legacy workload automation platforms may require a professional services engagement.

Rocket Software

Rocket Software is a Challenger in this Magic Quadrant. Its SOAP offering — Rocket Workload Automation — delivers workload automation capabilities with modern DevOps practices, and places emphasis on hybrid environments that include the IBM Z mainframe and IBM i midrange. It can be deployed as a self-hosted solution.

Rocket Software's operations and customers are geographically diversified. In 2025, Rocket introduced its AI Predictive Pulse, an AI assistant integrated directly into the platform.

Strengths

- **Innovation:** Rocket Software's AI Predictive Pulse offers built-in GenAI capabilities, providing conversational assistance with all scheduling needs. It also enables proactive prediction of SLA misses and failures, automated root cause analysis and prescriptive remediation recommendations.
- **Geographic strategy:** Rocket Software has a direct support presence in every major region. Its global network of more than 750 partners delivers specialized skills that help customers to solve increasingly complex modernization challenges. Rocket Software provides 24/7 "follow the sun" support and expertise for customers in any location.
- **Mainframe support:** Rocket Software differentiates itself with its deep expertise and leadership within the mainframe ecosystem. Its tools are purpose-built to manage mission-critical operations, from batch processing to integrations with the platform's core subsystems and databases. Rocket Software's platform is an option for enterprises with mainframes that are seeking stability and unified control over their entire IT environment.

Cautions

- **Product strategy:** Adopting Rocket's OEM AI solution creates a strategic dependency on its partnership with Digitate. If this relationship terminates, Rocket will continue to support the Workload Automation products, while AI Predictive Pulse will be supported directly by Digitate. Customers would then need to either transition support to Digitate organically, or find and integrate a new AI tool with their existing Rocket platform to address that gap. Therefore, customers need contractual clarity on long-term support and exit strategies.
- **User experience:** Some core modules of Rocket Software's product suite, especially those with deep mainframe roots, have UIs that are more complex and varied than those of competing offerings. The lack of a fully consistent, modern UX across the entire portfolio can create a learning curve for new users and hinder the adoption of advanced features.
- **Deployment models:** In a market that is predominantly SaaS-first, Rocket Software's lack of a multitenant SaaS solution may be a strategic vulnerability. While partners can deliver Rocket products as a SaaS, Rocket only supports self-hosted or cloud deployments, which is a barrier for the growing number of enterprises that have mandated a vendor-provided, SaaS-only policy for software.

Stonebranch

Stonebranch is a Leader in this Magic Quadrant. Its SOAP offering — Universal Automation Center (UAC) — provides workload automation and workflow orchestration capabilities across distributed, hybrid and cloud environments. It can be deployed as self-hosted software or as SaaS.

Stonebranch's operations and customers are geographically diversified. In 2025, Stonebranch launched its Universal Portal, which is designed to enable end users of various skill levels to perform self-service automation from anywhere, on any device.

Strengths

- **User experience:** Customers have shared with Gartner positive feedback about UAC's intuitive, web-based UI and its low-code, drag-and-drop workflow designer. Stonebranch's platform enables nondevelopers to build complex automations without scripting, which accelerates development and broadens adoption of automation throughout the organization.
- **Product strategy:** Stonebranch has added Data Pipeline Orchestration as a set of integrated capabilities in UAC, providing a dedicated, purpose-built solution to design, manage and monitor complex data pipelines across the entire modern data stack (for example, Snowflake, Databricks, dbt, cloud data lakes).
- **Service execution:** Stonebranch offers expert-led migration services that help customers quickly transition from their current SOAP to UAC with minimal risk. Stonebranch customers have been consistently successful in their use of Stonebranch's comprehensive services.

Cautions

- **Innovation:** Stonebranch is providing early access to its Robi AI for UAC, but capabilities are currently limited to generating documentation, task definitions and reports. Stonebranch's AI features lag those of other Leaders, most of which already offer GenAI assistants that help with troubleshooting and creating programmatic code, scripts and workflow steps.
- **Market awareness:** Stonebranch has lower brand recognition and market share compared with other Leaders in this research, given its sole focus on orchestration and automation. Although UAC can provide superior capabilities for specific use cases, Stonebranch might

not be on the radar of some organizations because users may already have a “good enough” automation module within a larger strategic platform.

- **Pricing:** Stonebranch’s lack of a freemium model or self-service trial creates a high barrier to entry. By requiring a sales-led proof of concept, the vendor prevents the quick, hands-on evaluation modern buyers expect. This also hinders bottom-up, developer-led adoption, placing Stonebranch at a disadvantage compared with competitors that offer instant access.

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

No vendors were added to this year’s Magic Quadrant.

Dropped

SMA Technologies. This vendor was dropped from the Magic Quadrant because it no longer meets the criterion of having operations in two major geographies.

Inclusion and Exclusion Criteria

Inclusion Criteria

To qualify for inclusion in this Magic Quadrant, SOAP vendors were required to meet the following criteria as of January 2025:

- Actively market, sell and support a product that provides capabilities as defined in the market definition for service orchestration and automation platforms (SOAPs).
- Have made the qualifying offering generally available as of January 2025.

- Meet one of the following criteria:
 - Have generated revenue of at least \$25 million (or the equivalent in another currency) from their SOAP in 2024, or
 - Have at least 200 paying SOAP customers as of 1 March 2025.
- 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. Vendor may offer professional services to enable or adopt, but these cannot be a requirement of deployment.

Exclusion Criteria

Vendors were excluded from this Magic Quadrant if:

- They only sell the platform bundled with development or professional services, and it is used exclusively by the vendor's consultants or 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 each provider's 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

- Broad integration capabilities
- Workflow design
- Error handling and recovery
- Mobile or web portal interaction capabilities for end users
- Cloud-native support
- Jobs-as-code development capabilities for facilitating DevOps interactions with platform
- DevOps integration
- Event-driven automation for responding to events as they occur with workflow execution
- Conversational AI for operational/end-user interactions?
- Generative AI support for improved productivity and advanced AI use in the solution
- AI code generation for workload and workflow scripts and design
- Native AI agents for operational purposes
- Autonomous actions via agent
- Data pipeline support for delivering advanced data tasks, directly supporting infrastructure build and more complex workflows across technology domains
- Workload and workflow definition, execution, management and notification
- Job scheduling, job definition and execution, dependency management among steps, and enabling plan/predict/optimize actions for service-level agreement (SLA) management
- Security and compliance
- Scalability and high availability
- Multicloud support

Overall Viability:

For each vendor, we considered:

- Its relative size in terms of customers and 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
- Competitive wins
- 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
- Licensing options and flexibility
- Delivery partners

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.
- Customer success programs.
- Implementation and migration assistance and services.

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.

Ability to Execute Evaluation Criteria

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

Source: Gartner (August 2025)

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:

- Translating product features into clear business outcomes and value drivers for the customer.
- Developing tailored and differentiated messaging that addresses the unique needs of each buyer persona (e.g., CIO, developer, I&O leader).
- A clear understanding and articulation of its competitive differentiation from key market rivals.
- Effectiveness in growing market mind share and fostering a vibrant, loyal user community.
- Executing a credible thought leadership program and strategic alliances that build industry influence.

Sales Strategy:

We assessed each vendor's strategy for:

- Effectiveness of the go-to-market (GTM) model, including the balance between a direct sales force and a robust channel ecosystem (e.g., GSIs, VARs, technology partners).
- Demonstrable success and vertical-specific expertise in penetrating key industries (e.g., finance, retail, manufacturing) and high-growth geographies.
- Execution of a value-driven sales cycle, from expert-led presales engagements to a mature professional services organization that ensures customer success post-sale.
- Ability of the sales organization to articulate and quantify the solution's business value, aligning it with the strategic initiatives of key stakeholders.

Offering (Product) Strategy:

For each vendor, we looked for:

- A clearly defined GTM strategy that effectively utilizes a mix of direct sales and channel partnerships to reach its target markets.
- A proven track record of winning and retaining customers in key vertical markets, backed by industry-specific solution messaging and expertise.

- A comprehensive customer engagement model that aligns expert presales, value-added professional services, and thought leadership to guide customers from evaluation to adoption.
- The sales team's proficiency in shifting conversations from technical features to tangible business benefits that resonate with executive-level stakeholders.

Business Model:

For each vendor, we examined:

- The viability and sustainability of its financial model, including its primary revenue streams, margin profile and path to durable profitability.
- The clarity and effectiveness of its pricing and packaging strategy across all deployment models (SaaS, hybrid, on-premises) to meet diverse customer needs and drive adoption.
- The strategic value and viability of its partner ecosystem in delivering a comprehensive, integrated solution and extending the platform's market reach.
- A coherent strategy for long-term growth, balancing organic innovation (R&D investment) with inorganic growth (mergers and acquisitions) to expand capabilities and market presence.

Vertical/Industry Strategy:

For each vendor, we examined:

- The depth and market success of its targeted industry solutions, evaluating how they address specific vertical challenges and provide clear differentiation.
- The availability and maturity of tangible, industry-specific assets like blueprints, templates and solution accelerators that speed customer time to value.
- The platform's ability to address the specific compliance, regulatory and business transformation pressures facing key vertical markets.

Innovation:

For each vendor, we looked for:

- A well-defined innovation strategy and a clear process for funneling new ideas into a customer-centric product roadmap.
- A demonstrable track record of anticipating market trends and delivering transformative solutions that influence the direction of the category.
- Practical application of generative and conversational AI to enhance user productivity, such as AI assistants for workflow creation and intelligent virtual assistants.
- Strategic use of AIOps and agentic AI to enable proactive, autonomous capabilities, including predictive analytics and self-remediating actions.

Geographic Strategy:

For each vendor, we looked for:

- A clear, data-driven strategy for identifying and penetrating high-growth and strategic geographic markets.
- Establishment of a global operational presence, including a “follow-the-sun” support model to provide continuous, 24/7 service to international customers.
- The platform’s ability to meet complex international requirements, including data sovereignty options and compliance with region-specific regulations (e.g., GDPR).

Completeness of Vision Evaluation Criteria

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

Evaluation Criteria	Weighting
Vertical/Industry Strategy	Medium
Innovation	High
Geographic Strategy	High

Source: Gartner (August 2025)

Quadrant Descriptions

Leaders

Leaders in this market distinguish themselves through a combination of market-shaping vision and a proven Ability to Execute. Leaders demonstrate a deep understanding of customer needs, which they translate into a clear and innovative product roadmap. This vision is backed by a consistent track record of delivering high-performing, reliable solutions that anticipate the market’s direction.

Leaders’ primary differentiator is meeting customers where they are in their modernization journey. Leaders provide a unified orchestration platform that can manage complex workloads and workflows across an enterprise’s entire hybrid reality — from legacy mainframes and ERP systems to modern SaaS platforms and cloud-native applications.

This combination of vision and execution translates into significant market success. Leaders have a strong global presence, deep penetration into key vertical industries, and a large, loyal customer base that relies on them for mission-critical business and IT processes.

Leaders in this market are distinguished by three core pillars:

- An extensive and extensible integration fabric for universal connectivity.
- Intuitive, self-service automation that empowers diverse personas beyond just IT operations.
- A multifaceted AI strategy that uses AI for optimization, generative AI for accelerating development and agentic AI for autonomous actions.

While these leading vendors are well-positioned, the market is dynamic and converging with adjacent categories. Continued dominance requires intense focus on innovation, as any Leader that loses focus risks falling behind.

Challengers

Challengers are characterized by a strong and proven Ability to Execute. They possess solid, feature-rich platforms that meet the needs of a significant market segment, backed by effective sales execution and a growing customer base. These vendors have demonstrated the financial strength and commitment to compete effectively against Niche Players and even Leaders on major deals.

However, Challengers typically lag behind Leaders in Completeness of Vision. Their product roadmaps are often more reactive to current customer demands rather than proactively shaping the market's future. They may be slower to adopt groundbreaking innovations, such as agentic AI or a fully unified hybrid cloud orchestration fabric. For many enterprises, this makes Challengers a solid, pragmatic choice, but their path to becoming Leaders depends on their ability to close the innovation gap and improve on their cautions.

Visionaries

Visionaries are defined by their market-leading Completeness of Vision. They push the boundaries of what is possible with compelling, innovative technology and a clear product roadmap that anticipates future customer needs. Their thought leadership often sets the tone for where the market is heading, particularly in areas like agentic AI, data pipeline orchestration and unified hybrid cloud control.

However, Visionaries' Ability to Execute on a global scale is still developing. While they may have strong initial traction, they typically lack the broad market presence, extensive partner ecosystem or proven track record in large-scale enterprise deployments that Leaders possess. For forward-thinking organizations, Visionaries represent an opportunity to partner with an innovator, but their path to the Leaders quadrant requires them to translate their powerful vision into consistent, enterprise-grade market execution.

Niche Players

Niche Players are characterized by a deliberate and narrow focus, choosing to excel in a specific segment rather than competing across the entire market. This focus can manifest in

several ways: a deep specialization in a particular vertical industry (like financial services), a strong presence in a limited geographic region, or a solution tailored to a unique technological use case (such as mainframe-only operations).

While Niche Players may not match the broad capabilities or global reach of Leaders, their concentrated expertise makes them a strong choice for organizations whose requirements align with that niche. For these customers, the benefits of a highly tailored solution and deep subject matter expertise can often outweigh the advantages of a larger, more generalized platform.

Context

The service orchestration and automation platform (SOAP) market represents the dynamic evolution of mature workload automation tools into platforms that are purpose-built for modern business demands. This transformation is marked by a critical shift from traditional, time-based scheduling to real-time, event-driven orchestration. By supporting complex data pipelines and integrating with cloud-native architectures, SOAPs make IT processes more visible and directly valuable to business stakeholders. As a core component of an enterprise's intelligent automation strategy, a modern SOAP extends its value far beyond IT efficiency, becoming the fabric for orchestrating end-to-end business processes.

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

A key trend among leading SOAP vendors is the democratization of automation through self-service capabilities aimed at business users and "citizen automators." By allowing nontechnical teams to build and manage their own automations within secure, IT-defined

governance guardrails, these platforms move beyond simple task elimination to directly enhance business agility.

Market Overview

The service orchestration and automation platform (SOAP) market continues to grow steadily, as more organizations seek a single tool to orchestrate workflows, automate workloads and provision resources.

The SOAP market once again experienced double-digit growth year-over-year, with revenue reaching \$3.8 billion in 2024 — up from \$3.3 billion in 2023 (see [Market Share: IT Operations Management Software, Worldwide, 2024](#)). This market is expected to continue to increase to an estimated \$4.9 billion by 2028 in constant currency, with a compound annual growth rate (CAGR) of 7.7% (see [Forecast: IT Operations Management Software, Worldwide, 2022-2028, 2Q24 Update](#)).

Market dynamics: Since 2024, the market has experienced yet another wave of ownership changes and investment funding. A few recent influential activities include:

- BMC split into two independent companies: BMC and BMC Helix.
- Fortra divested JAMS, making it an independent company.
- Numerous vendors — JAMS, Resolve, Rocket Software and Stonebranch — received investment from venture capital and private equity firms (or are outright owned by investors).

Vendor direction: SOAP providers are rapidly expanding beyond IT task automation by embedding intelligent automation into their platforms. Most vendors now offer integrated GenAI assistants to accelerate development, and some are deploying AI agents to support proactive, problem determination and remediation. As more vendors continue to develop and improve their agentic AI capabilities, SOAPs will increasingly enable orchestration of complex, end-to-end business workflows across the entire enterprise.

Customer expectations: The primary buyers of SOAPs are large, complex enterprises that are grappling with a hybrid IT reality that spans legacy systems, data pipelines and cloud-native applications. These organizations expect a unified platform to provide centralized control and orchestrate processes end to end. They demand mission-critical reliability and a

strategic partnership with providers, which helps them to standardize processes, drive efficiency and ensure business continuity across their entire landscape.

⊕ Evaluation Criteria Definitions

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