Magic Quadrant for Software Asset Management Managed Services

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IT skills shortages and rising software/cloud complexity are driving up IT spend. In response, sourcing, procurement and vendor management leaders are turning to SAM and FinOps managed services for support. Use this research to identify providers that address your organization's specific needs.

Strategic Planning Assumptions

By 2029, 60% of global enterprises will integrate AI-driven (software asset management) SAM and FinOps, achieving five times the ROI from cost savings while also accelerating green IT outcomes.

By 2029, 50% of SAM MS providers will fail to deliver robust and effective AI-driven SAM, FinOps and green IT, as competitors outpace them by investing over five times more in AI automation.

By 2029, over 50% of SAM MS providers will fail to achieve adequate AI-driven scale and will be acquired or exit the market, as SAM complexity demands exceed legacy capabilities.

Market Definition/Description

Gartner defines software asset management (SAM) managed services as services that expert providers deliver to manage the software, SaaS and cloud assets of end-user organizations.

Their delivery includes skills, processes, technologies and governance to transform and run the SAM discipline on behalf of the client.

SAM managed services employ the providers’ proprietary skills and methodologies to transform and run SAM and FinOps disciplines on behalf of the client, augmenting the client’s resources. Delivered by skilled resources and leveraging the provider’s expertise, intellectual property (IP), rigor and best practices, SAM managed services address the gap in available SAM and FinOps skills, enable scalability and enhance maturity. At the same time, they deliver day-to-day SAM and FinOps activities and oversee the full life cycle. SAM managed services are delivered directly to end-user customers, on either a continuous or a project basis, employing required discipline to meet software and cloud cost optimization, and governance objectives.

Mandatory Features

SAM managed services core components must be delivered by executing both transformation services, and run and operate services for each:

- **Process and transformation.** Policy and process assessment, design, development, management, transformation, continuous improvement and operation of SAM and FinOps processes.

- **Trustworthy data.** Development, delivery and maintenance of a continuous and complete view of the entire IT environment, providing trustworthy data services and estate representation across all IT assets, software, SaaS, cloud AI and related consumption and usage data.

- **Entitlements and use rights.** Continuous entitlement custodianship, management and use rights analysis of all sourcing categories, such as software, maintenance, SaaS, cloud services, AI, support and professional services.

- **FinOps.** Continuous FinOps management and optimization services, including metering all cloud infrastructure platform services (CIPS) instances and their usage. Metering includes cost allocation and monitoring, performance and consumption tracking, anomaly management, rightsizing, and governance.

- **SaaS and cloud license management.** Continuous metering of all SaaS and software assets in the cloud (including BYOL), incorporating continuous metering, license management, reporting, and optimization recommendations and realization.

- **Governance and optimization.** Development, continuous maintenance and optimization of effective license position, usage, spend recommendation services and governance reporting across all environments.
- **Life cycle management.** Continuous integrated SAM life cycle management delivery that provider takes ownership of, operates and manages day-to-day for SAM and FinOps. This includes software request approval, procurement, management, reharvest, and retirement services.
- **Continuous delivery platform.** Continuous visibility of SAM and FinOps managed services delivered using IP and automation for anytime awareness of actions, projects and deliverables.
- **Value realization.** Value commitments, including continuous improvement; removal of overhead and domain-specific challenges. This includes regular validation and reconciliation of value realized in agreement with the client.
- **Environmental sustainability.** Services that measure, manage and optimize the environmental impact of software and cloud consumption. The services delivered include continuous measurement and reporting of software and cloud consumption impacts and waste minimization.

Common Features

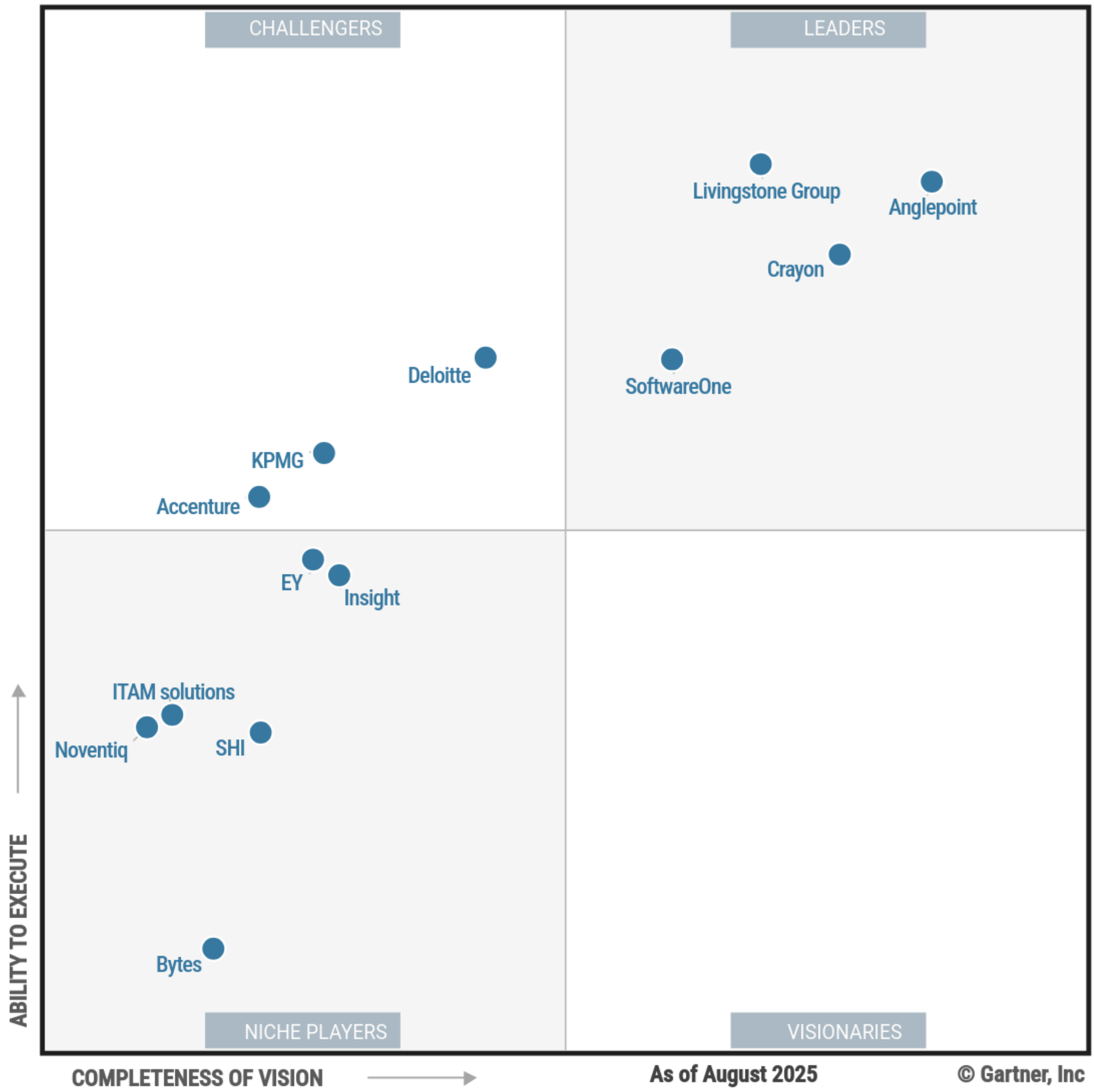
Common features may be delivered as more project-based services instead of continuously and may be positioned as stand-alone offerings:

- **SAM tools sales**. Any sales or royalties from SAM or SAM-related tools (Inventory, asset tracking, cloud/SaaS management, software metering) directly or indirectly, through any revenue stream (license, maintenance, support, implementation, subscriptions, fees).
- **SAM tools management**. SAM tools or SAM-related tools (inventory, asset tracking, cloud/SaaS management, software metering) implementation, support and maintenance contracts, SAM tool hosting, outsourcing of the SAM tool management/administration, etc.
- **Vendor SAM program**. Vendor-specific/sponsored SAM programs (e.g., Microsoft SAM engagement, IBM IASP).

- **Software audit defense**. Audit/compliance review activities for a particular software vendor's audit engagement with a client.
- **Indirect SAM services**. Where the provider's organization delivers SAM services for a third-party (e.g., an outsourcer or a SAM tool provider) or a third-party delivering the SAM services to end-clients (e.g., a partner).
- **Other SAM projects.** Packaged, project or tactical SAM services delivered in isolation or ad hoc retained services.
- **Independent FinOps services.** Stand-alone, independent FinOps services (not provided as part of the SAM managed services included under mandatory features).

Magic Quadrant

Figure 1: Magic Quadrant for Software Asset Management Managed Services



Vendor Strengths and Cautions

Accenture

Accenture is a Challenger in this Magic Quadrant. Headquartered in Ireland, its SAM managed services (MS) are part of a broader IT asset management (ITAM) MS portfolio, including hardware, telecom, FinOps and resale. Most SAM consultants are in the Asia/Pacific region (70%), with 19% in North America, 10% in EMEA and 1% in Latin America. In 2024, ITAM MS revenue grew 72% over FY23, serving global enterprises, with 65% of continuous clients managing IT estates over 10,000 devices. Accenture suits large organizations seeking a holistic ITAM approach, integrating hardware asset management and FinOps for unified technology spend management. However, high offshore dependency may affect regional support for North America and EMEA clients.

Strengths

- **Expertise and outcome-focused value:** Accenture's SAM is integrated within its ITAM MS, and supported by 400-plus ITAM specialists and 500-plus FinOps professionals, with 750-plus certifications globally. Its 360-degree value framework optimizes across six dimensions, including financial, client, inclusion and diversity, talent, sustainability, and experience. Fixed-fee pricing ties compensation to value metrics, offering flexibility and accountability for clients seeking outcome-driven and adaptable service models.

- **AI-enhanced service delivery:** Accenture's integrated AI automates the asset management life cycle, improving SAM efficiency and value. Its proprietary AI tool (AIDE) enables automated license reviews, rapid discovery, real-time insights and data processing. The SAM Wiki and unified language support consistent, scalable service delivery. Clients seeking AI-driven SAM for reduced manual effort, better decisions and faster, more reliable outcomes should find Accenture a good fit for delivering these benefits.

- **Global scale:** With over 9,000 clients, Accenture's reach and experience demonstrate significant scalability, especially for midsize-to-large enterprises with complex IT estates. Organizations needing global service delivery may find Accenture a good fit.

Cautions

- **Limited SAM commitment and focus:** Accenture relies on cross-selling to existing clients and partner referrals, with minimal direct SAM marketing investment. As a result, SAM services are often bundled within broader offerings, reducing visibility as a stand-alone solution. Potential clients should assess Accenture's ability to demonstrate SAM-specific value and leadership beyond its internal network.

- **Limited multicloud and emerging tech coverage:** While it has strong integration with Amazon Web Services (AWS) and Microsoft Azure cloud platforms, Accenture's SAM MS has limited client delivery for Google Cloud Platform (GCP) and Oracle Cloud Infrastructure (OCI), which may be a concern as over 80% of organizations use diverse cloud platforms. Its SAM MS only partially addresses cost and consumption management for AI, IoT, edge, RPA and containers, often requiring separate contracts and coordination, limiting unified insights and optimization.

- **Assess public evidence of SAM client feedback:** Clients should evaluate Accenture's thought leadership and value delivery, as limited external marketing and few public case studies reduce visibility into its expertise. Request references, success stories and proof of value to verify Accenture's SAM capabilities.

Anglepoint

Anglepoint is a Leader in this Magic Quadrant. The U.S.-based provider of SAM MS is majority owned by SoftwareOne, but is still independently operated. Most consultants are in North America (43%), EMEA (32%), Latin America (8%) and the Asia/Pacific region (17%). SAM MS revenue grew 19% from FY23 to FY24, with resources concentrated in North America and EMEA. Anglepoint targets large, global enterprises, and does not actively pursue smaller companies.

Strengths

- **Holistic market insight:** Anglepoint addresses ITAM and SAM challenges, including AI-driven consumption, rising costs and evolving licensing, by combining ITAM, SAM, FinOps and green IT into a single framework approach. Its SAM MS provides real-time observability, AI-driven anomaly detection and high entitlement data accuracy via human-in-the-loop validation, supporting data integrity.

- **24/7 global coverage:** Using a remote-first, borderless strategy, Anglepoint delivers SAM MS worldwide. Two-thirds of its staff are in the U.S., with growing hubs in the U.K., Canada, India and Australia. In FY24, 276 SAM professionals supported 300 clients in 24 countries, addressing local needs like green IT in Europe and managing complex, multicloud environments for consistent, expert SAM services.

- **Financial strength and growth:** Anglepoint has a 21% revenue CAGR since 2020, with over 85% recurring revenue, an 80% increase in revenue per client and 35% annual EBITDA growth. Serving 300 clients across 24 countries, it continues to expand its delivery team with low attrition. With rising global software spend and growing demand for cloud cost management, Anglepoint's financial strength and ongoing investments support the long-term viability of its services.

Cautions

- **Limited container and specialized IT domain visibility:** While strong in AI cost management and multicloud delivery, Anglepoint relies on scripting for tasks like access key rotation and spend aggregation, which does not provide full container architecture visibility for total cost of ownership (TCO) analysis. There is also limited detail on managing cost and consumption for serverless, IoT, edge, RPA and low code/no code. Clients with advanced needs should evaluate Anglepoint's capabilities in these areas.

- **Limited pricing models undermine ROI demonstration:** Anglepoint mainly offers fixed-fee contracts, lacking gain-share or hybrid pricing, and does not clearly adapt to changing SaaS/cloud, infrastructure and platform service (CIPS) needs. Some clients report challenges with deliverable customization, responsiveness to scope changes and proactive communication on software life cycle events. This may limit appeal for organizations seeking flexible, outcome-based models, and can make upfront ROI harder to demonstrate.

- **Innovation pace tied to third-party tools:** Anglepoint's innovation combines proprietary solutions like FlexQuote and Elevate with customization of third-party tools and AI services. This reliance on external platforms for advances can slow proprietary innovation. Organizations seeking rapid in-house innovation may be constrained by their reliance on third-party development cycles.

Bytes

Bytes is a Niche Player in this Magic Quadrant, specializing in SAM MS and actively investing in FinOps capabilities. Based in the U.K., Bytes concentrates 65% of its SAM MS resources in EMEA, 35% in the Asia/Pacific region, and none in North America. In 2024, its SAM MS revenue grew 33%, mainly from EMEA. Bytes suits clients with a strong U.K. presence and early-stage SaaS/cloud needs, rather than those with advanced or highly specialized requirements.

Strengths

- **Industry insight solutioned with proprietary tooling:** Bytes demonstrates understanding of the challenges in hybrid IT environments, leveraging proprietary platforms such as quantum analytics and a license dashboard to deliver insights, compliance and cost savings, particularly for complex U.K. public-sector environments.

- **Transparent value, skilled teams and high retention:** Bytes measures its transparency and results through the use of clear KPIs, regular scorecards and robust SLAs to ensure accountability and continuous improvement from its service offering. Its experienced, accredited teams and high retention, along with ongoing investment in automation and AI, help to provide consistent, scalable and expert support for the clients it serves.

- **Agile, value-driven pricing:** Bytes offers flexible, modular and innovative pricing models such as outcome-based and hybrid gain share to align costs with client needs. Targeted client engagements and the ability to shift SaaS, CIPS or publishers during the contract term without disruption allow clients to manage costs and maximize their cloud and software investments. Byte's agile pricing and service models provide options to help clients achieve ROI, control costs and adapt to evolving business demands.

Cautions

- **Limited global presence and early-stage regional adaptation:** Byte's geographic expansion is nascent, with most resources and revenue in EMEA and limited presence elsewhere. Regional adaptation, local investment and offshore capabilities are still developing, which limits scalability and tailored service outside EMEA. Clients requiring established SAM services beyond EMEA should closely assess Byte's current capabilities and expansion roadmap.

- **Immature SaaS, cloud and specialized IT domain capabilities:** Byte's capabilities for complex licensing and emerging technologies (such as IoT, edge and RPA) are still developing. License Dashboard offers limited SaaS and cloud management, and Byte's broader SaaS and AI solutions are in their early stages. Current offerings (like Quantum) focus on Microsoft 365 and Azure/AWS cloud consumption/optimization, with life cycle management for other vendors not yet mature. Clients with advanced needs should carefully evaluate Byte's current capabilities and needs for supplementary tools.

- **Revenue volatility and uncertain growth execution:** Byte's overall viability for its SAM MS is challenged by recent revenue declines, fluctuating financials, ambitious growth targets and a lack of clear investment plans. Modest resource growth and ongoing restructuring add further uncertainty. Potential customers should assess Byte's SAM MS financial stability and its ability to achieve its growth objectives.

Crayon

Crayon is a Leader in this Magic Quadrant. Headquartered in Norway, it is a publicly listed software and cloud service reseller that was acquired by SoftwareOne on 2 July 2025. Crayon's SAM consultants are mainly in EMEA (76%), with 16% in the Asia/Pacific region and 8% in North America. SAM MS revenue grew 8.5% from FY23 to FY24, largely from EMEA. Its acquisition by SoftwareOne is expected to expand its global reach, accelerate AI innovation and strengthen its market position. The combined company will likely better serve clients of all sizes with unified, innovative solutions.

Strengths

- **Innovation and optimization for modern SAM:** Crayon addresses SAM and FinOps challenges like shadow IT, resource shortages and cloud/AI complexity by investing in its ISO-certified GreenOps and a FinOps-certified cloud cost control platform. New offerings such as the Cloud Performance Lab (with AMD processors), AI-powered licensing tools and automated license allocation enhance efficiency and provide actionable insights, positioning Crayon as a proactive, cost-optimizing SAM partner.

- **Tool-agnostic end-to-end SAM management:** Crayon provides complete, tool-agnostic SAM MS aligned with ISO 19770 and FinOps standards. It supports leading SAM platforms or offers proprietary tools as stand-alone, end-to-end solutions. The Service-iQ delivery platform ensures transparent life cycle management, data quality, governance and optimization. Its innovation and tool flexibility give clients integration options or complete solutions.

- **Visibility and optimization for modern IT:** Crayon's data platforms handle diverse data types (including IoT, edge, RPA and containers), leveraging tool-agnostic solutions and AI automation for visibility, optimization and compliance. Licensing experts and the AI-powered SAM chatbot provide license guidance, while AI automation and KPI-driven services ensure efficiency and business relevance. This suits clients with modern, complex environments.

Cautions

- **Limited AI and SaaS tracking beyond major platforms:** Crayon's tracking and optimization for niche and AI-enabled SaaS apps is less developed, with proactive efforts focused on major vendors. Clients report issues with certain tools and vendor recognition, showing expertise may vary by client's toolset or software portfolio. Potential clients should review Crayon's plans for broader AI and SaaS coverage.

- **Gaps in regional coverage:** Crayon has no SAM resources in Latin America and only 21% of its dedicated SAM MS resources are in North America, which may limit consistent support for multinationals. Clients report delays, lack of proactive involvement and slower responses due to dispersed expertise. Potential clients should assess Crayon's regional capabilities for global support.

- **Declining investment in core delivery platforms:** Despite strong financial growth and ongoing SAM/FinOps investment, annual declines in funding for Crayon's core platform (Service-iQ) may hinder feature integration and unified service delivery, limiting visibility and increasing risk of missed deliverables. Some clients noted the lack of a unified dashboard and reliance on manual processes. The recent ownership change could exacerbate these challenges as priorities and resources shift.

Deloitte

Deloitte is a Challenger in this Magic Quadrant. It is a global professional services network headquartered in the U.K. As of FY24, Deloitte employs 1,200-plus SAM professionals worldwide, mainly in North America (52.2%) and EMEA (38.9%), with smaller teams in the Asia/Pacific region (6.7%) and Latin America (2.3%). SAM MS revenue from the Americas and EMEA grew 57.7% year over year in FY24. Deloitte typically manages 10,000 to 50,000 devices per client and is best-suited for large enterprises in complex, regulated industries, including government and public sector.

Strengths

- **Global reach enables scalable, multilingual SAM services:** Deloitte has 1,200-plus SAM professionals in 33 countries and 12 delivery centers. Supported by its approximately 460,000 Deloitte People Network, the firm rapidly deploys its specialized resources for service delivery. Its hybrid delivery model offers flexible, multilingual, standardized services, with ongoing training and expansion for consistent, high-quality multinational support.

- **Modular, end-to-end SAM services optimized for client-specific needs:** Deloitte delivers SAM MS across 500-plus software vendors and all major cloud platforms, often via modular services adaptable to client needs. Using ISO 19770 standards, AI and FinOps, Deloitte optimizes costs and reduces risk for complex environments. Advanced tools automate entitlement management for accuracy and provide insights for cost optimization, rationalization and modernization.

- **Ascend platform enables adaptive, data-driven SAM transformation:** Deloitte's AI-driven Ascend platform integrates ITAM with organizational change management, providing real-time visibility into IT assets, costs and risks, and automating reporting and workflow tasks.

GenAI and process mining drive ongoing improvements with delivery standardization, while transition management streamlines service changes and creates efficiencies. Tailored platforms within Ascend support ServiceNow integration and the modular design allows adaptation to client needs. Deloitte's global 24/7 delivery ensures consistent support for multinationals.

Cautions

- **Cyber integration may obscure SAM service clarity:** Integrating SAM MS with cybersecurity may blur the distinction between the two disciplines, confusing clients that are seeking stand-alone SAM support. Security-focused messaging can overshadow SAM benefits, making independent assessment difficult. Clients should request clear differentiation of SAM MS independence, value and delivery.

- **Sales approach limits direct SAM MS focus:** Deloitte's sales model bundles SAM with broader services, often overlooking clients seeking dedicated SAM solutions. As demand for advanced licensing and software cost management grows, clients should request clear documented distinction to ensure SAM needs are addressed separately from broader bundles.

- **Slow continuous SAM growth and limited SMB fit:** While overall SAM MS revenue has grown, continuous SAM MS shows only slight year-over-year growth. Project-based SAM MS shows stronger gains, reflecting a focus on short-term projects. Deloitte's modular services remain costly for small enterprises, limiting SMB access to full MS. Prospective clients, especially SMBs seeking ongoing SAM optimization, should assess if Deloitte's approach and pricing fit their long-term needs.

EY

EY is a Niche Player in this Magic Quadrant. Based in the U.K., EY is a global audit and professional services firm with about 400,000 employees and strong annual revenue. Its FY24 SAM MS resources are mainly in the Asia/Pacific region (75%), followed by EMEA (11%), North America (10%), and Latin America (4%). SAM MS revenue grew 6.25% year over year, primarily in EMEA and North America, driven by strategic investment in innovation. EY's SAM MS best fits large, multinational enterprises.

Strengths

- **Comprehensive ITAM integration:** EY's proprietary ITAM Platform provides automated reporting, license optimization and AI-driven insights (including chatbot support, smart cataloging, shadow IT detection and entitlement updates). Integration with leading third-party tools centralizes asset data for broad visibility and analytics, making EY suitable for clients seeking optimization of their aggregated IT asset data.

- **Flexible, outcome-based pricing and scalability:** EY offers fixed-fee and gain-share pricing, targeting quick wins in the first 10 to 12 weeks to offset fees. Clients can adjust SaaS, CIPS platform and publisher scope during contracts. Global, sector-focused sales teams tailor solutions, allowing an agile approach that supports scalable, outcome-driven SAM services.

- **Delivery via global center of excellence (COE):** EY uses a standardized global framework and COE to support its delivery. With 1,458 SAM MS professionals in a global network, EY adapts to client needs. Continuous monitoring, KPI tracking and milestone reporting drive transformation, with 99% SLA adherence and over 95% contract renewals, ensuring reliable, timely SAM MS for multinationals.

Cautions

- **Developing FinOps and SaaS capabilities:** Native FinOps and SaaS integration in EY's ITAM Platform is limited, often relying on third-party tools and manual data extraction from a few SaaS vendors (including Adobe, Microsoft and Salesforce). Automation and broader capabilities are still developing, with little detail on discovery methods. Clients seeking seamless, automated, fully integrated SAM MS may face challenges in achieving comprehensive visibility, efficiency and an integrated SAM/FinOps program.

- **Offshore delivery model:** Nearly 75% of EY's SAM MS resources are located in the Asia/Pacific region, with 50% in India considered offshore. While delivery centers are designed for time zone coverage, this concentration may cause logistical and timezone challenges, especially for clients requiring real-time collaborative engagements. Clients note that heavy reliance on offshore teams has affected service agility.

- **Marketing detail on emerging tech and AI quality:** EY's marketing highlights support for AI and FinOps, but lacks detail on support for emerging technologies (IoT, RPA, containers and low code/no code) and practical examples of their management within SAM. Transparency on AI quality assurance and governance is limited, which may concern clients seeking data reliability and a comprehensive view of how decisions are made and risks managed.

Insight

Insight is a Niche Player in this Magic Quadrant. Based in the U.S., it is a publicly listed reseller of hardware, software and cloud services. In FY24, Insight employed 205 SAM professionals in the Asia/Pacific region (40%), EMEA (35%) and North America (26%). Global SAM MS revenue grew 45% from FY23 to FY24, but continuous SAM MS revenue declined slightly, especially in EMEA. Most clients have between 1,000 and 10,000 devices managed with Insight, making it suitable for SMB enterprises, especially those with ServiceNow.

Strengths

- **Outcome-focused, metrics-driven delivery:** Insight's SAM MS uses an outcome-driven model with jointly defined OKRs and KPIs tracked by an ROI tool. Regular reviews, client feedback and an escalation process support improvement. Customizable SLAs and real-time dashboards monitor service effectiveness. Talent development and resource growth ensure consistent delivery. This suits clients seeking measurable results, adaptability and service quality.

- **Global reach and strategic expansion:** Insight's global delivery model supports SAM MS across EMEA, the Asia/Pacific region and an expanding presence in North America, enhanced by the 2024 Infocenter acquisition. Multilingual consultants support clients across regions, with resources in Madrid assisting global clients in Latin America. This strategy and focus on deeper engagement with key clients ensure high-value support for complex IT environments.

- **Scalable, data-driven operations:** Insight's matrix model combines client-facing teams, COEs and global hubs for scalable delivery. Project management tools and centralized ServiceNow operations ensure transparency and streamlined workflows. AI-driven automation and unified data improve contract management, while the Cloud FinOps tool optimizes multicloud spend, integrates SAM and cloud data, provides anomaly detection (for GCP), and enables granular metering and spend mapping for visibility, control and cost optimization.

Cautions

- **Reliance on third-party tools and manual processes:** Insight leverages third-party tools, and in some cases manual processes, to support the SaaS life cycle and modern consumption needs (IoT and edge, for example). While major SaaS vendors are covered, some advanced use cases are handled manually and ad hoc, which limits scalability, real-time insights and flexibility. This may affect efficiency and client experience in complex environments.

- **High-value client focus:** Revenue growth was driven by fewer, higher-value clients, but continuous SAM MS revenue and client numbers have declined, reducing access for clients with lesser spend. This shift increases the need for innovation, yet shrinking investment may limit value. High-value clients may benefit, while smaller organizations should assess if this approach meets their needs.

- **Slow innovation and AI availability:** Insight's reduced innovation investment and limited client-facing AI capabilities raise concerns about its ability to meet evolving client demands. Most AI initiatives remain in testing, with AI consumption (for Microsoft Copilot) and AI SAM use cases covered by third-party tooling. Potential clients should assess if Insight's slower pace and limited new offerings align with their needs for advanced automation and analytics.

ITAM solutions

ITAM solutions is a Niche Player in this Magic Quadrant. Based in the Netherlands, it is a privately owned, independent consultancy specializing in ITAM and FinOps. SAM consultants are primarily in EMEA (87.5%) and the Asia/Pacific region (12.5%), with most SAM MS revenue from EMEA. The company targets enterprise and upper midmarket clients, serving organizations with up to 50,000 managed devices. Its vendor-independent, tool-agnostic approach suits EMEA-based midsize firms with established SAM tooling for FinOps and SaaS life cycle management.

Bechtle closed its acquisition of ITAM solutions on 5 September 2025, during the research period for this Magic Quadrant. During our evaluation phase, ITAM solutions met the inclusion criteria and was evaluated for this Magic Quadrant. Bechtle was not evaluated.

Strengths

- **Focus on efficiency and centralized insights:** ITAM solutions tackles SAM challenges including siloed data, manual processes, cloud sprawl and compliance through market expertise, ITAM Academy training and a tool-agnostic, process-driven approach. Some

AI/ML automation supports service efficiency gains. Broad SAM platform experience ensures technology independence, while its service suite and delivery platform provide centralized insights.

- **Sector-aligned sales strategy:** ITAM solutions positions SAM as a business enabler by optimizing costs, mitigating risk, and supporting finance, security, cloud and sustainability. It targets enterprise and upper midmarket clients in IT-driven, cloud-first and highly regulated sectors. Strong sales metrics, with a 48% conversion rate, an over 85% renewal rate and 30% deal margin, demonstrate strong market demand and client satisfaction.
- **Marketing drives visibility and provides evidence of value:** ITAM solutions employs multichannel marketing, including online, social media, industry events and thought leadership publications, to increase its visibility and share expertise with finance, procurement and security stakeholders. Reported outcomes include €24 million in client cost savings, €14.7 million in risk mitigation and 15% time savings, demonstrating transparency and value.

Cautions

- **Limited pricing flexibility and fixed-fee model:** Reliance on fixed-fee contracts and limited innovative pricing plans restricts growth, flexibility and budget predictability. Growth is mainly from existing clients, constraining scalability. Prospective customers should evaluate ITAM solutions' ability to deliver flexible, shared-risk commercial models.
- **Limited proprietary capabilities for cloud visibility:** Cloud cost optimization depends on client-provided third-party tools, with little detail on proprietary alternatives when these are lacking. Scripting and automation support savings, but do not ensure full container visibility or TCO analysis. Clients without mature cloud cost tools may face gaps; prospective clients with these needs should closely assess ITAM solutions' stand-alone capabilities.
- **Global delivery, less comprehensive and mature automation solutions:** ITAM solutions does not focus on expanding outside EMEA or the Asia/Pacific region. Clients elsewhere rely on offshore resources, which may affect service consistency, knowledge retention and accountability. Minimal headcount growth and limited automation or AI/ML use cases raise questions about productivity and service quality as operational complexity increases.

KPMG

KPMG is a Challenger in this Magic Quadrant. Headquartered in the U.K., KPMG is a privately held audit and professional services firm. Its SAM service resources are distributed across the Asia/Pacific region (46%), EMEA (38%), North America (14%) and Latin America (1%). In 2024, KPMG's SAM MS revenue declined by 13%, mainly due to lower North America performance. KPMG manages client accounts with 1,000 to 100,000-plus devices, with 31% of those having over 50,000 devices. KPMG is suited for organizations of all sizes, particularly large enterprises with existing KPMG relationships.

Strengths

- **Global scale and modular, technology-supported delivery:** KPMG's SAM MS uses a global framework, five COEs and 400-plus licensing experts in more than 30 countries. Its modular SAMaaS leverages proprietary tools for software, SaaS and cloud management, with AI/ML for contract analysis. Tiered service levels, industry alignment, milestone reporting and structured change management enable effective delivery for clients in complex technology environments.

- **Measurable outcomes, compliance and continuous improvement:** KPMG ensures client satisfaction and measurable outcomes through structured reviews, ROI and savings tracking, and regular enterprise license position optimization. Ongoing feedback integrates client input into service optimization. Over 20 years of licensing experience supports audit-ready reporting and issue resolution. The focus on value, improvement and compliance may appeal to organizations seeking a results-oriented SAM MS provider.

- **Value-focused sales strategy with broad market reach:** KPMG's flexible sales strategy emphasizes business value, with SAMaaS delivered by 30-plus offices using standardized, but locally tailored, methods. Targeted marketing and industry partnerships enhance sales effectiveness, helping KPMG reach relevant clients and support business growth.

Cautions

- **Dated marketing limits visibility:** KPMG's limited investment in dedicated SAM MS marketing and reliance on internal channels have led to infrequent promotion of its recent achievements. Outdated marketing materials and the absence of publicly available, detailed case studies reduce visibility of current capabilities, making it harder for clients to assess service effectiveness and alignment with evolving needs.

- **Gaps in emerging technology and cloud optimization:** KPMG lacks recent, specific delivery examples for IoT, edge, containers and RPA. Cloud management focuses on bring your own license (BYOL) deployments and leveraging clients' existing tools, which offers limited cost optimization and real-time visibility into cloud-native architectures. Clients noted a need for more proactive guidance on tool selection, integration, and best practices to support usage tracking and spend optimization in complex environments.

- **Flexible pricing adoption and value measurement challenges:** No clients utilized gain-share or hybrid pricing models in FY24, and overall client numbers declined during the year. Additionally, 35% of clients did not have measured savings compared to service costs, raising concerns about consistent value tracking.

Livingstone Group

Livingstone Group is a Leader in this Magic Quadrant. Headquartered in the U.K., it specializes in SAM MS, with resources in EMEA (76%) and North America (19%). Most continuous SAM MS revenue comes from EMEA (62%), which saw 3.3% growth in SAM and FinOps revenue from 2023 to 2024. Livingstone Group is best-suited for larger organizations in EMEA or North America with complex, hybrid IT estates seeking to fully outsource SAM and FinOps.

Strengths

- **Data-driven framework and customer satisfaction:** Livingstone's SAM MS uses a data-driven, ITIL- and agile-based framework for continuous improvement and customer experience. Real-time analytics and AI insights support savings, compliance and risk tracking, with SLA performance above 90%. Hyper-Flex contracts and savings guarantee models keep services responsive and link fees to realized benefits, supporting reinvestment and measurable value.

- **Responsive solutions meet key challenges:** Livingstone tackles escalating costs, data quality and silos in complex IT environments via its Acuity platform. The platform uses AI to centralize and enhance data from multiple sources, including automated contract extraction. Business convergence and ongoing training for SAM-FinOps integration show its commitment to evolving client needs.

- **Service evolution supports consumption-based usage:** Livingstone is evolving SAM MS for consumption-based models by focusing on dynamic vendors, monitoring, demand management, deal negotiation and optimization over traditional compliance. Its AI engine manages licensing and consumption patterns for device counts, API calls and containers. It also provides analytics and optimization for cloud environments to address evolving technology demands.

Cautions

- **Limited adoption of innovative pricing:** Most clients prefer Livingstone's traditional fixed-fee pricing, and adoption of its newer, value-based and flexible models remains limited. Transparency is improving with tiered pricing, but flexible contracts are not widely used.
- **Increased contractor reliance and service consistency:** Livingstone's increased use of contractors for SAM MS, alongside flat employee numbers, may impact knowledge retention, training and skills development. Greater reliance on nonpermanent staff could affect service consistency and oversight as the business scales. Key processes still require substantial human quality assurance, highlighting the need for a stable workforce. Clients should assess whether this model supports service continuity and review Livingstone's quality and operational controls.
- **Variable uptake of new MS model:** Livingstone's new MS — designed for comprehensive support across the IT estate with activity-aligned value — is newly launched, with limited adoption. Its phased rollout may lead to inconsistent capabilities and value measurement. Marketplace tail spend data and shadow IT purchases remain largely unaddressed. Clients should be aware of the phased implementation and any early-stage ongoing manual processes when evaluating delivery capabilities of the new model.

Noventiq

Noventiq is a Niche Player in this Magic Quadrant, headquartered in London. It is an international software and cloud reseller delivering SAM MS, with 67% of SAM resources in EMEA and 33% in the Asia/Pacific region. SAM MS revenue is mainly EMEA-based, growing 4% in 2023. Noventiq serves small-to-midsize organizations in EMEA and the Asia/Pacific region, with limited presence in North America and Latin America. In 2023, it expanded FinOps and AWS services in the Asia/Pacific region via Umbrella Infocare and its uCloud platform, which is not used globally. The planned merger with Corner Growth Acquisition Corp., which could have boosted North America and Latin America growth, was canceled in July 2024.

Noventiq declined requests for supplemental information. Gartner's analysis is therefore based on other credible sources.

Strengths

- **Integrated MS and regional cloud cost management:** Noventiq provides integrated MS across SAM, cybersecurity, IT infrastructure and cloud enablement. For cloud cost management, it uses leading third-party and regional solutions like uCloud, offering advanced AWS cost management in the Asia/Pacific region and cloud cost optimization in EMEA and the Asia/Pacific region.

- **Track record in traditional SAM:** Noventiq delivers up to 30% license cost savings through optimization, audit defense and procurement improvements with major vendors. It is suited for project-based SAM engagements that are focused on compliance and audit readiness, especially with Microsoft and Adobe in traditional licensing environments.

- **Pricing flexibility**: Although Noventiq does not publicly disclose its current pricing or service terms, it has a history of providing flexible pricing models, including scope-based and outcome-based.

Cautions

- **Geographic expansion and support for North America and Latin America:** Noventiq has no established geographic support strategy or local resource presence in North America or Latin America. The canceled merger further limits expansion prospects. Clients in these regions should closely assess Noventiq's capabilities before engaging in significant projects.

- **Reliance on third-party tools and limited proprietary solutions:** Noventiq's SAM MS relies on third-party tools for SaaS and cloud cost management, limiting differentiation, integration flexibility and unified visibility. Without a proprietary platform, it may not meet advanced automation needs. Clients have reported concerns about employee capacity and slow back-end support, especially with Flexera, highlighting gaps in SAM tool oversight.

- **Consulting-led, lacking unified solution:** Noventiq's SAM MS marketing emphasizes a consulting-led, partner-driven approach that focuses on traditional software environments. It does not promote a unified or proprietary solution for SaaS life cycle management, FinOps or cloud license management. This could limit its appeal for enterprises seeking comprehensive, packaged end-to-end life cycle management across on-premises and cloud assets. This is validated by public data and case studies on Noventiq's website.

SHI

SHI is a Niche Player in this Magic Quadrant. Headquartered in the U.S., SHI is a privately owned IT solutions provider and global reseller of hardware, software and cloud services; its SAM MS are provided by its ITAM & FinOps business unit. SAM MS resources are concentrated in North America (61%), with EMEA (24%) and the Asia/Pacific region (15%). Continuous SAM MS revenue grew by 4.9% in 2024, primarily driven by North America. SHI is best-suited for SMBs in North America seeking project-based or continuous SAM MS for environments with management needs for fewer publishers and between 1,000 and 10,000 devices.

SHI did not participate in all Magic Quadrant research stages, so analysts could not clarify submitted data.

Strengths

- **Sustained growth and client retention:** SHI's SAM MS revenue grew 70% from FY23 to FY'24, with project-based revenue up 491% and continuous customers up 2.4%. Project-based customers in North America rose 1,366%. Over half of its North America continuous clients have contracts longer than five years, supporting a 94% renewal rate. Most project contracts last under two years and serve as pipelines for longer-term engagements. SHI expanded its resources with a 3% full-time equivalent increase, 11.8% higher retention and 18.4% more EMEA staff, all of which was boosted by the Locuz acquisition in India.

- **Customer-centric service improvement:** SHI drives customer experience with structured, customer-focused improvement tracked by tailored success plans, quarterly reviews and "time to value" metrics. Ninety-five percent of engagements meet or exceed value targets, with client ROI often over 200%. SHI reports over 90% SLA attainment, a 67% risk reduction and improved client health, supported by proactive customer success managers and formal corrective actions.

- **Talent development:** SHI invests in workforce expertise through structured hiring, personal development plans and a 161% year-over-year increase in certifications. Programs like the ITAM administrator apprenticeship and quarterly upskilling ensure a skilled talent pool.

Cautions

- **Operational transparency:** SHI's operational framework lacks practical details on processes like change management and does not clearly detail the mechanisms for translating strategy into transformation. Mixing revenue and operational metrics obscures the provider's true efficiency and clouds whether improvements are due to service delivery or increased sales. Clients should request clear and transparent performance reporting.

- **Publisher and multicloud coverage:** SHI is skilled with major vendors like Microsoft, Oracle and VMware by Broadcom, but its expertise with niche publishers and less common cloud platforms is limited. Multicloud support is strong for AWS, Azure and GCP, but less mature for OCI. Clients needing broad or advanced support beyond mainstream vendors should be cautious.

- **Sales strategy risks:** SHI's sales model is heavily weighted toward project-based engagements, with limited conversion to higher-value recurring services. Lower revenue per project client and a declining ratio of continuous to project clients raise questions about the sustainability of its continuous SAM MS offering. Clients should assess SHI's ability to convert short-term projects into sustainable value and seek transparency on longer-term and continuous SAM arrangements.

SoftwareOne

SoftwareOne is a Leader in this Magic Quadrant. Headquartered in Switzerland, it is a publicly listed global software and cloud service reseller. The acquisition of Crayon expands SoftwareOne's reach, client base and offerings through cross-selling and scale efficiencies. Specialists span EMEA (44%), the Asia/Pacific region (27%), North America (17%) and Latin America (12%). Continuous SAM MS revenue grew 14.6% from FY23 to FY24, led by EMEA. SoftwareOne is suited for global midsize-to-large enterprises, especially those that already use (or are willing to invest in) leading SAM tools.

Strengths

- **Flexible, outcome-based pricing:** SoftwareOne offers flexible pricing including fixed fee, gain share and ROI guarantees with service credits if targets aren't met, appealing to clients with unique financial positions. Its pricing adapts to contract needs, with discounts for bundles and multiyear deals.

- **Holistic IT portfolio management and global delivery:** Its IT Portfolio Management unifies FinOps, ITOM, sourcing and application portfolio management to maximize value. The Value Capture Platform (VCP) and client success framework have driven significant cost savings and ROI. With 555 dedicated SAM MS resources, 5,000-plus certifications and a 9% attrition rate, SoftwareOne delivers sustainable value through ongoing development and unified disciplines.

- **AI-driven automation and proactive licensing intelligence:** SoftwareOne's Zyncc platform uses AI to automate license allocation, support compliance and carry out real-time monitoring across 360-plus publishers. Its Publisher Update Portal and SaaS management/FinOps advisory services offer proactive insights. Ongoing AI enhancements position SoftwareOne as a forward-looking software and cloud partner.

Cautions

- **Limited container visibility and cost analytics:** SoftwareOne's container management focuses on image repositories and inventory, but lacks advanced analytics for effective cost and TCO understanding without third-party tooling. Clients should consider adding advanced monitoring and optimization tools and assess SoftwareOne's ability to address complex, indirect and full life cycle cloud costs.

- **North America client decline and SMB market retreat:** The vendor's North America client base declined from FY23 to FY24 due to a shift from SMBs and a consulting-led approach. Plans to re-engage SMBs may be affected by the Crayon acquisition and integration challenges, potentially impacting service consistency. Clients report frequent changes in account managers and difficulty booking consultants, hindering relationship continuity and support. Potential clients should assess SoftwareOne's ability to maintain service quality during the transition.

- **Tooling bias and limited automation for entitlement management:** Bias for leading SAM tools and reseller partnerships may limit vendor-agnostic selection and steer clients toward preferred platforms. Automated contract ingestion is still maturing and mainly supports purchases through SoftwareOne Marketplace Platform, requiring manual processes for third-party purchases. Clients with diverse procurement sources may face added complexity.

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

Bytes was added to this Magic Quadrant.

Dropped

No vendors were dropped from this Magic Quadrant.

Inclusion and Exclusion Criteria

Inclusion Criteria

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

- **Nine of the 10 essential criteria** representing required attributes of domain expertise
- **Six of the seven required criteria** demonstrating delivery of those attributes in the context of SAM MS

Essential Criteria

SAM MS providers must deliver nine of the 10 defined SAM MS core components by executing both transformation services and run and operate services for each:

1. Policy and process assessment, design, transformation, continuous improvement, and operation
2. Continuous and complete trustworthy data services and estate representation, including custodianship of trustworthy IT assets, software installed, and used and accessed data
3. Continuous entitlement custodianship, management and use rights analysis

4. Continuous FinOps management and optimization services, including metering all CIPS instances and their usage
5. Continuous metering, management and optimization of all SaaS and software assets in the cloud (including BYOL)
6. Development, continuous maintenance and optimization of effective license position, usage, spend recommendation services and governance reporting
7. Continuous integrated SAM life cycle management delivery — including software request, approval, procurement, management, reharvest and retirement services
8. Continuous delivery platform; daily maintenance of the solution, enabling delivery management, deliverable tracking, exception and noninstance data management
9. Value realization; monthly validation and reconciliation of value realized in agreement with the client
10. Environmental sustainability services, including continuous measurement and reporting of software and cloud consumption impacts

Required Criteria

SAM MS providers must meet six of the seven required criteria.

Continuous SAM MS Only

1. Deliver SAM MS across a scope of 20 or more software publishers, of which Microsoft, IBM, SAP, Salesforce, Workday, Adobe, ServiceNow, VMware by Broadcom and Oracle are mandatory.
2. Deliver SAM MS that both:
    - Manage usage and compliance of software run on Amazon Web Services, Microsoft Azure, Google Cloud Platform and Oracle Cloud Infrastructure.
    - Measure and optimize usage of Amazon Web Services, Microsoft Azure, Google Cloud Platform and Oracle Cloud Infrastructure workloads and instances.
3. Deliver SAM MS to three or more referenceable clients in the past three years, representing at least two geographical regions (see Note 1).

4. Provide SAM MS not only at clients' current SAM maturity levels, but also that transform and run the SAM discipline to higher standards.

Continuous and Project-Based SAM MS

For the purpose of the following criteria, revenue, customer quantities and resource quantities are included. Project-based services are classified as delivering the essential criteria of a SAM MS defined as "complete," but less frequently than continuous services:

5. Delivered at least $5 million in annual SAM MS revenue for FY24 billed to a minimum of 50 active unique clients (excluding partners or indirect clients). The minimum SAM MS revenue must exclude the following:
    - Any license or SAM tool revenue embedded within the service contracts
    - Revenue derived from software-publisher-sponsored SAM service activities
    - Revenue from project, packaged or tactical SAM services delivered in isolation
    - Ad hoc retained services such as a help desk
6. Invoiced no more than 90% of SAM MS revenue to unique clients in any one of the aforementioned and defined regions in 2024:
    - North America
    - EMEA
    - Asia/Pacific and Japan (the Asia/Pacific region)
    - Latin America

Multiple contracts or service deliverables for the same international organization are considered as one unique client aligned to a single location, which is deemed as the client's headquarters. **Example:** A provider located in North America would have to prove delivery and billing to at least 10% of its SAM MS revenue outside of North America.

7. Demonstrate current permanent employment of 50 or more SAM MS delivery management resources dedicated to delivery of SAM MS only.

Exclusion Criteria

Gartner sets requirements that enable organizations to approach providers directly delivering SAM MS, excluding providers (see Note 2) from the Magic Quadrant and Critical Capabilities research that:

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

Evaluation Criteria

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

For more information on Gartner's Magic Quadrant research methodology, refer to our **Research Methodologies**.

Ability to Execute

Gartner evaluates providers' Ability to Execute based on their demonstrated capacity to deliver reliable, scalable and effective SAM MS that meet the needs of enterprise clients. This evaluation considers a provider's service delivery resources and geographic reach, the maturity and automation of their delivery platforms, the quality and consistency of their customer experience, and their track record for delivering measurable outcomes such as cost optimization and risk reduction. We assess operational excellence through factors such as the depth and expertise of delivery teams, the robustness of methodologies and supporting tools, and the provider's ability to support clients across complex, multiregional environments.

Criteria that do not directly pertain to ongoing MS delivery, such as pure software resale or one-time consulting engagements, were not included, as the focus is on sustained, continuous MS. The criteria and weightings are designed to reflect the operational realities and client expectations in the SAM MS market, ensuring that providers are evaluated on their ability to consistently deliver high-quality, value-driven services at scale.

Table 1: Ability to Execute Evaluation Criteria

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

Source: Gartner (September 2025)

Completeness of Vision

Gartner assesses providers' Completeness of Vision by evaluating the clarity, innovation and relevance of their strategic direction for SAM MS. This includes the provider's ability to anticipate market trends, invest in emerging technologies such as AI and automation, and articulate a roadmap that addresses evolving customer needs for SAM across hybrid and multicloud environments. The evaluation also considers the provider's approach to service innovation, ecosystem partnerships, and the integration of sustainability and green IT principles into their offerings.

Criteria that focus solely on short-term product enhancements or incremental improvements were not emphasized, as the assessment prioritizes a holistic and forward-looking strategy that demonstrates leadership in shaping the future of SAM MS. This ensures that providers are evaluated on their ability to deliver long-term value, adapt to market changes and drive the evolution of SAM practices for enterprise clients globally.

Table 2: Completeness of Vision Evaluation Criteria

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

Source: Gartner (September 2025)

Quadrant Descriptions

Leaders

Leaders have built a considerable SAM MS track record, demonstrating their experience to successfully deliver continuous SAM discipline to large, complex enterprises, and are well-positioned to continue delivering those services. Leaders have a well-developed vision of market direction, incorporating FinOps in their SAM MS, and are innovating on their ability to deliver on current and future software and cloud challenges to sustain their leadership position in the market.

As IT sustainability becomes an important area of focus for organizations, Leaders must develop a robust sustainability discipline to meet the rapidly emerging needs of clients. The Leaders quadrant indicates the direction of the SAM MS market, and Leaders have proved their Ability to Execute and their Completeness of Vision.

Challengers

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

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

Visionaries

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

Niche Players

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

Context

This Magic Quadrant offers support for informed contracting of MS that deliver SAM and FinOps. This research assesses the Ability to Execute and Completeness of Vision of 13 SAM MS providers that meet our criteria for inclusion. The positioning of providers in this Magic Quadrant is based on factors determined by Gartner as being relevant to this market worldwide. This research provides a point-in-time analysis, with all provider profiles reflecting the status as of August 2025. Quantitative data collected was for a 12-month period ending August 2025.

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

Recent consolidation in the market, most notably SoftwareOne's acquisition of Crayon — both recognized Leaders in this and previous Magic Quadrants — signals a pivotal shift in the SAM MS landscape (see **Quick Answer: Implications of SoftwareOne's Proposed Acquisition of Crayon**). This merger signals a potential reduction in vendor plurality, raising concerns about diminished client choice and possible higher pricing. At the same time, it highlights a maturing market that increasingly demands comprehensive service delivery models, advanced technology integration (such as AI-driven SAM tools), and greater operational scale to address the escalating complexity of software licensing and compliance.

Ongoing M&A activity in the market — such as Anglepoint's acquisition of FisherITS in 2022 — indicates that further consolidation is likely. Notably, Crayon became the largest shareholder of Anglepoint in 2015, a stake now transferred to SoftwareOne following the recent merger. It is anticipated that smaller or less-capitalized providers will increasingly face pressure to merge or exit the market. For clients, this evolving landscape necessitates careful evaluation of provider capabilities and contract terms in light of fewer options and shifting service models. For providers, significant investments in technology and operational innovation will be essential to remain competitive. Investors, meanwhile, must weigh the risks and opportunities presented by consolidation as market power concentrates among a smaller set of global leaders.

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

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

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

Use this Magic Quadrant as a tool to inform your shortlist and evaluation of providers for SAM MS. The inclusion criteria for participation in the Magic Quadrant results in the analysis of the largest and most established providers in the SAM MS market. However, clients should not disqualify any potential competitor simply because it does not appear in this research.

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

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

Market Overview

SAM and FinOps are ongoing disciplines, not one-time projects, and can deliver a range of benefits when approached holistically. Increasingly, organizations are recognizing that SAM offers value beyond traditional compliance, and most providers are aligning with this broader business focus. However, developing and sustaining the specialized skill sets required to navigate the intricacies of software licensing, SaaS subscription models and cloud service agreements — along with tracking dynamic consumption patterns — remains a substantial challenge for internal ITAM and SAM teams.

Consequently, deploying advanced tooling for enhanced asset discovery, real-time usage monitoring and workflow automation has become critical for operational efficiency and risk mitigation. Progressively, providers are identifying AI resource utilization and cost optimization as emerging pain points for clients. While some are exploring methods to address AI consumption, this area remains an operational blind spot; current third-party ITAM and FinOps platforms offer limited functionality and lack robust capabilities for comprehensive AI workload tracking and management.

Providers are increasingly leveraging their own IP, SAM and adjacent tools — now enhanced with AI — to automate processes and deliver deeper analytics for continuous management. Over the next three to five years, AI adoption is poised to become a defining differentiator for SAM MSPs, driven by its potential to significantly reduce operational overhead via increased efficiencies and unlock deeper, more actionable analytics from aggregated SAM data.

Since 2023, providers have expanded their AI SAM use cases and are now tracking metrics and reporting on the analytics and operational value these enhancements provide. However, some providers’ implementations of AI are still in their infancy phase, so caution is still advised in validating its full impact. Clients should continue to monitor these developments and maintain realistic expectations about the immediate business value of AI in SAM.

ROI of SAM MS (including SaaS/cloud cost management/FinOps) is still the difference between:

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

This ROI regularly underpins the mandate for MS.

Providers assessed in this Magic Quadrant report that, in 2024, they delivered an ROI of more than 200%. Savings exceeded the costs of the managed service by a factor greater than two. For a significant portion of the assessed providers, more than half of their clients consistently achieve savings that are double or more than the cost of the managed service and breaking even (or better) for a substantial portion of clients.

This Magic Quadrant, along with the accompanying Critical Capabilities research, places extra emphasis on providers' ability to drive value realization, highlighting the importance of delivering tangible benefits to clients.

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

- Establishing a vendor scope of service that fits with the client's needs, and is neither too extensive nor too narrow
- Informing acquisition, renewals and disposal decisions
- Maintaining quality across commercial and technical inventory, leading to better management of software and cloud agreements and vendor relationships
- Identifying and eliminating obsolete or underutilized software, subscriptions and cloud services
- Rightsizing environments, instances and contracts, or migrating to optimal models
- Governing software usage and waste effectively, identifying risks, and enabling mitigating actions

- Managing the life cycle against each current license position, and validating suitability of requests (challenging requests as appropriate), changes, rationalization, retirement and reharvesting
- Maintaining a continuous delivery platform that enables visibility over SAM and FinOps MS delivery
- Maintaining a commitment to value delivery and continuous SAM MS improvement, including realizing value and demonstrating agreed-on benefits in published case studies
- Providing environmental sustainability services, including software and cloud consumption impacts

The SAM MS transition from a compliance-led activity to cost optimization has recently been accompanied by increasing delivery of FinOps services. SAM and FinOps must unite to properly enable the governance of software and cloud investments (see **Control Software, Cloud and AI costs by Integrating ITAM and FinOps**). More than 83% of SAM MS delivered by the assessed providers are reported to incorporate FinOps services.

Service provider deliverables include:

- Establish foundational practices:
  - Develop and maintain a standardized tagging taxonomy, ensuring ongoing tag management and compliance.
- Set up cost allocation and reporting:
  - Allocate and report costs by business unit or cost center, supporting chargeback and showback models.
  - Track and report cost and usage by meter, region and category, including growth rates and forecasts tailored to your requirements.
- Implement monitoring and alerting:
  - Set up and manage alerts, regularly analyzing data for anomalies and interpreting results.
- Provide regular reporting and forecasting:

    - Provide regular reports on cost trends, growth rates, consumption comparisons and budget forecasts.
- Identify and execute optimization opportunities:
    - Identify and remediate unused or underutilized resources, optimizing processor, memory and storage, and eliminating idle instances to meet efficiency targets.
    - Recommend cost optimization strategies, such as Reserved Instances and Savings Plans, based on usage analysis.
- Enable stakeholder engagement and value realization:
    - Deliver ongoing communication, including cost-aware design education and actionable optimization recommendations for engineers.
    - Act as the FinOps hub, collaborating with engineers and stakeholders to drive optimization and remediation actions.

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

SAM and FinOps also contribute to environmental sustainability initiatives, supporting the analysis of specifications, energy efficiency and GHG emissions of providers as key inputs to delivering on the enterprise's environmental sustainability objectives. SAM MS providers have begun packaging service capabilities aligned to this objective, addressing the sustainable consumption of software and CIPS, with further enhancement anticipated through 2025 and beyond.

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

When well-delivered, SAM MS demonstrates a strong fit with the client's culture and time zone and enables dialogue to address complex scenarios and support progress. Services should incorporate the provider's technical capabilities, IP and automation, which augments the data provided by SAM tools and facilitates efficient delivery. Providers may also offer proprietary automated capabilities that address:

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

For the 13 vendors analyzed in this research, Gartner has assessed the following SAM MS market key numbers:

- **Revenue:** CAGR of 16% for the past two years. Total size (scheduled and continuous SAM MS) of more than $582 million in 2024.
- **Skills:** Average increase of specialist resources of 7.3% over two years.
- **Clients:** Two-year client CAGR of 16.7%.

The following are key aspects of the market:

- **SAM MS are most used by EMEA organizations,** in terms of revenue and number of clients, followed by North America; the Asia/Pacific region and Latin America are farthest behind EMEA. However, the Asia/Pacific region is emerging as a significant area of investment and growth for several providers.
- **Market offerings are differentiated by provider category.** In this Magic Quadrant, specialist providers, resellers, and audit and professional services firms are assessed. No outsourcers, global system integrators or tool providers met the qualifying criteria:
    - Specialist providers have the highest proportion of continuous SAM MS (see Note 3) within their revenue.
    - Audit and professional services firms report the highest average contract values, with the exception of one that didn't provide this data.

  - Risk-reward cost models increased in use to more than 49% of contracts (from 39% in the prior year) and are most prevalent in the reseller category, potentially offsetting concerns regarding conflict of interest.
  - Resellers also deliver the highest volume of clients, rising in 2024 to an estimated 79% of all SAM MS clients (continuous and project-based).
- **Continuous services resemble outsourcing.** Services remain most effective when delivering continuous guidance, integrating with internal functions to enable optimization throughout the life cycle. As software licensees, the contracting party cannot outsource responsibility for license compliance. However, penalty clauses, often in the form of service credits or fee adjustments, were noted by several providers as mechanisms to align with client outcomes and address inaccuracies in advice and included in SAM MS contracts.
- Deep convergence of ITAM/SAM with FinOps and green IT/sustainability: The integration of SAM with FinOps and environmental sustainability (green IT) is no longer just a concept, but also a core offering for many. Providers are explicitly building their services around a unified view of cost, consumption and environmental impact.
- Pervasive integration and investment in AI/generative AI (GenAI): AI and GenAI are being embedded across the SAM life cycle, moving beyond just data collection to more sophisticated applications like predictive analytics, automated contract analysis, optimization suggestions and even AI-powered conversational agents.
- Focus on outcome-based value realization: There's a heightened emphasis on demonstrating tangible ROI, cost savings (both hard and avoidance), and operational efficiencies, moving beyond traditional compliance-centric reporting. Metrics are becoming more refined to quantify the value delivered.
- Talent development and retention as a strategic imperative: Recognizing the industrywide skills gap, providers are heavily investing in training, certifications,and robust talent retention programs as a competitive differentiator.

⊕ Evidence

Note 1: Regions

This Magic Quadrant addresses provider presence in regions as follows:

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

Note 2: SAM MS Exclusions

SAM MS, as measured, exclude the following:

- Packaged, project or tactical SAM services delivered in isolation, or as ad hoc, retained services, such as a help desk
- Vendor-specific/sponsored SAM programs (e.g., Microsoft SAM engagement, solution assessment, and IBM Authorized SAM Provider [IASP])
- SAM tool sales, SAM tool implementation, support and maintenance contracts, and SAM tool hosting
- Asset tracking or reporting devoid of intelligent data augmentation or application of use rights intelligence
- Sale of software licensing or cloud service subscriptions

Note 3: Continuous SAM MS Minimum Services Delivery Definitions

Process and transformation: Daily operation and measurement of SAM process adherence

Trustworthy data: Weekly or more frequent collection, update and ratification of all IT assets and software installed, used and accessed data

Entitlements and use rights: Weekly or more frequent collection and update of license entitlements and use rights

FinOps and cloud license management: Weekly or more frequent metering and optimization of software and cloud service usage

Governance and optimization: Monthly or more frequent maintenance and optimization of license positions, usage and governance reporting

Life cycle management: Daily management of software request, approval, procurement, renewal, harvest, disposal and optimization activities

Continuous delivery platform: Daily maintenance of the solution, enabling delivery management, deliverable tracking, exception and noninstance data management

Value realization: Monthly validation and reconciliation of value realized in agreement with the client

Environmental sustainability: Monthly or more frequent collection and update of environmental impacts of software and cloud consumption, along with opportunities for optimization

⊕ Evaluation Criteria Definitions