

Magic Quadrant for Supply Chain Management Suites

11 August 2026 - ID G00847048 - 45 min read

By Jan Snoeckx, Balaji Abbabatulla, [and 1 more](#)

Supply chain management suites enable organizations to manage complex supply chains with greater visibility, integration, and control. They optimize planning, execution, and collaboration. This Magic Quadrant guides CSCOs in selecting top software vendors for supply chain advancement.

Market Definition/Description

A supply chain management (SCM) suite is a portfolio of (pre)packaged applications spanning multiple supply chain process clusters. These clusters include supply chain planning, sourcing and procurement, manufacturing, logistics and fulfillment, and supply chain orchestration, which encompasses trading partner networks.

Supply chain leaders use SCM suites to manage and execute supply chain activities across multiple process clusters. These suites enable them to digitize, automate and augment several supply chain processes by selecting, implementing and deploying functionality from within the suite.

SCM suites are designed to integrate with other enterprise systems and support data and process connectivity across supply chain operations. By using SCM suites, leaders aim to improve visibility and collaboration, and enable interoperability within their supply chain operations.

Furthermore, SCM suites facilitate governance and create the foundation for supply chain leaders to invest in additional capabilities that help align operational goals with organizational

outcomes. SCM suites can also contribute to reducing application landscape complexity by reducing the number of distinct systems and vendors involved.

Mandatory Features

- A portfolio of applications that includes capabilities to digitize, automate and augment more than one of the core SCM process clusters outlined below:
- **Supply chain planning:** This cluster includes processes that cover demand forecasting, supply and replenishment planning, sales and operations planning (S&OP), and sales and operations execution (S&OE).
- **Sourcing and procurement:** This cluster includes processes covering source-to-pay, contract life cycle management, and supplier management, which includes supplier information management and supplier risk management.
- **Production:** This cluster includes processes covering production operations management, capacity management, resource allocation and quality management.
- **Logistics and fulfillment:** This cluster includes processes covering transportation, warehousing, distributed order management and global trade compliance.
- **Supply chain orchestration, including trading partner networks:** This cluster includes processes covering supply chain data governance, decision intelligence in the context of enterprise supply chain and trading partner networks.
- A generally consistent experience across supply chain process clusters — including shared tools, data models and user interface components — to support visibility, collaboration and enable interoperability.
- Embedded functional and cross-functional analytics, reporting and business intelligence.
- Consistent security and access management across all supply chain process clusters.
- Standardized integration interfaces and prebuilt connectors to enable connectivity and interoperability with adjacent supply chains, other enterprise software applications and external trading partner applications.

Optional Features

- Capabilities to support processes at the edge of traditional supply chain process clusters, such as:

- New product introduction (NPI), return service and after-markets, or supply chain finance.
- Specialty component applications, such as network design (supply chain configuration), maintenance, repair and operations (MRO) management, and yard management.
- Cross-functional applications, such as governance, risk and compliance (GRC), supply chain risk management, or sustainability.
- Applications to support specific industry or regional requirements, such as regulatory traceability and customs compliance.
- Cross-functional workflow and process automation capabilities.
- Unified user experience across all the supply chain process clusters covered by the suite.
- Composable, services-based cloud architecture.
- Enhancement and extensibility support for on-stack customization and third-party extensions.
- Tools to develop and deploy custom add-on applications.
- AI agent composites and agentic AI that support one or more supply chain process clusters.
- Support for the use of large language models, with or without certification, within the suite's AI capabilities.
- Collective AI agent architectures — such as swarm and cluster-based — in support of cross-process decision alignment across the enterprise.
- Command center capabilities such as real-time situational awareness, continuous monitoring, alerting, simulation, and proactive intervention
- AI techniques, including methods such as prediction, optimization, and anomaly detection, as well as reinforcement learning and neural networks.

Magic Quadrant

Figure 1: Magic Quadrant for Supply Chain Management Suites



Magic Quadrant for Supply Chain Management Suites



Gartner

Vendor Strengths and Cautions

Aptean (Logility)

Aptean (Logility) is a Visionary in this Magic Quadrant. Its Logility Decision Intelligence Platform provides capabilities across supply chain planning, supported by Aptean's broader portfolio following the acquisitions of Logility, OpsVeda, and Germanedge. Beyond planning, the portfolio extends into ERP-based operational processes, manufacturing execution, warehouse management, and transportation management capabilities.

The vendor operates globally and primarily serves midsize to large enterprises across industries such as retail, consumer goods, and manufacturing. Aptean emphasizes improving supply chain decision making and agility through integrated data, analytics, and user-centric processes.

Strengths

- **Planning and operational alignment:** Aptean combines Logility's integrated planning capabilities with operational visibility and analytics assets from its recent acquisitions. This enables organizations to link planning decisions with execution signals and improve responsiveness to disruptions across supply chain processes.
- **Established planning capabilities:** Logility provides a proven set of capabilities across core domains (e.g., demand, supply, and inventory planning) and includes forecasting, replenishment, and optimization. This supports organizations in structuring and aligning core planning processes.
- **Deployment and configuration flexibility:** Logility supports configurable workflows and modular deployment, enabling organizations to adapt the solution to different business processes and maturity levels. This flexibility supports phased adoption and alignment with evolving supply chain requirements.

Cautions

- **Supply chain scope limitations:** Logility's capabilities remain concentrated in planning and adjacent decision-support processes, with comparatively limited native coverage across execution domains such as logistics, fulfillment, production execution, and multienterprise business networks and collaboration. This can constrain organizations seeking a tightly integrated, end-to-end SCM solution within a single platform.
- **Platform integration complexity:** Following recent acquisitions, the Aptean (Logility) portfolio comprises an expanded set of modules. While Aptean is introducing AppCentral as a cross-application workspace layer, integration across the underlying applications is still evolving, which can create challenges in achieving consistent processes and a unified user experience (UX).
- **Limited industry and ecosystem reach:** Compared with other vendors in this Magic Quadrant, Aptean demonstrates a more limited industry focus and a smaller partner ecosystem for supply chain initiatives. While it benefits from established expertise in selected sectors and a capable partner base, its relative scale and coverage may constrain

support for diverse industry requirements and large, globally distributed transformation programs.

Blue Yonder

Blue Yonder is a Leader in this Magic Quadrant. Its Blue Yonder Platform spans planning, logistics, and multienterprise collaboration, combining capabilities from its Cognitive Solutions portfolio and the One Network Enterprises platform (acquired in 2024) into a cloud-based, data-driven architecture supported by Snowflake.

The vendor operates globally and primarily serves large enterprises across retail, consumer products, manufacturing, and logistics. Blue Yonder continues to evolve its portfolio toward a network-centric and AI-driven model, focusing on the convergence of planning, execution, and real-time collaboration across trading partners.

Strengths

- **Network-centric platform:** Blue Yonder provides a strong multienterprise collaboration foundation, significantly enhanced by its acquisition of One Network Enterprises. This enables real-time connectivity across suppliers, carriers, customers, and other trading partners, allowing organizations to coordinate decisions across ecosystems and improve disruption responsiveness.
- **Planning and execution convergence:** Blue Yonder demonstrates a clear focus on converging planning and execution processes through a unified data and orchestration approach. This enables organizations to better align demand, supply, and logistics decisions, supporting more dynamic and responsive end-to-end supply chain operations.
- **AI and data capabilities:** Blue Yonder delivers advanced analytics and AI capabilities through its Cognitive Solutions portfolio and data platform. This supports scenario modeling, optimization, and emerging agent-driven workflows, enabling organizations to leverage network and operational data to enhance decision making and improve performance.

Cautions

- **Platform integration maturity:** Blue Yonder's platform reflects the ongoing convergence of multienterprise capabilities (through One Network Enterprises) with enterprise decision making and execution. The evolving structure and positioning of its capabilities could

reduce clarity in how offerings are packaged and could increase complexity for organizations pursuing seamless, end-to-end deployments.

- **Strategic positioning:** Blue Yonder's vision spans planning, execution, network collaboration, and AI-driven decision making, reflecting the breadth of its portfolio. However, customers may find it difficult to distinguish between existing platform capabilities and emerging strategic concepts, creating ambiguity around the path toward a fully orchestrated, AI-enabled supply chain operating model.
- **Execution scalability across domains:** Blue Yonder's capabilities are strongest in supply chain planning, logistics, fulfillment, and multienterprise network use cases. Production, procurement, and some cross-functional capabilities are comparatively less mature and rely on a mix of platform components with varying levels of integration. This can create inconsistency in process execution, data sharing, and UX for organizations seeking a uniformly integrated supply chain platform.

Coupa

Coupa is a Niche Player in this Magic Quadrant. Its Coupa Total Spend Management Platform combines procurement, supplier collaboration, and supply chain planning capabilities that support sourcing, supplier management, and supply chain decision making.

The vendor operates globally and serves midsize to large enterprises across industries such as manufacturing, retail, and services. Coupa emphasizes its community, leveraging aggregated data to enable cross-functional decision making. Coupa's proposition includes source to pay, supply chain design and planning, supply chain collaboration, and treasury and cash management capabilities.

Coupa declined requests for supplemental information or to review the draft contents of this document. Gartner's analysis is therefore based on other credible sources.

Strengths

- **Sourcing and procurement focus:** Coupa integrates its source-to-pay capabilities with multienterprise collaboration through its supply chain network design, collaboration, and treasury management capabilities. This enables organizations to connect sourcing, purchasing, supplier interactions, and supply chain activities with treasury to improve visibility and coordination across upstream supply chain activities.

- **Community intelligence and data:** Coupa leverages aggregated data across its customer base to deliver community intelligence, benchmarking, and AI-driven recommendations. This allows Coupa customers to benefit from shared insights across the entire customer base to optimize spend and enhance supply chain decision making.
- **AI-native spend management:** Coupa embeds AI across spend management, sourcing, and supplier collaboration, leveraging data from its stakeholder community to improve decision making. This enables organizations to optimize sourcing, supplier, inventory, and supply chain decisions through predictive insights, recommendations, and risk-aware analysis beyond traditional transactional workflows.

Cautions

- **Supply chain scope limitations:** Coupa's capabilities are concentrated on supply chain source-to-pay processes, with comparatively limited native coverage across other supply chain processes. This can constrain its ability to support organizations requiring tightly integrated capabilities within a single platform.
- **Limited end-to-end supply chain vision:** Coupa's vision is primarily grounded in procurement, spend management, and supplier collaboration, rather than a broader supply chain operating model. As a result, its strategic direction is less focused on unifying planning, production, logistics, and orchestration capabilities, which may limit its attractiveness to organizations pursuing comprehensive supply chain transformation initiatives.
- **Limited operational support model:** Compared with other vendors in this research, Coupa provides more limited direct operational support through its in-house services in terms of scale and coverage across supply chain domains, while relying on a partner network to deliver implementation and ongoing support. This may affect organizations seeking extensive vendor-led services across complex, end-to-end supply chain initiatives.

Dassault Systèmes

Dassault Systèmes is a Niche Player in this Magic Quadrant. Its SCM capabilities are delivered through the 3DEXPERIENCE (3DX) platform, combining a portfolio of planning, scheduling, and manufacturing applications (DELMIA Quintiq, DELMIA Apriso, and DELMIAWorks) within an engineering-driven digital environment. This platform-centric approach enables organizations to coordinate planning and production processes using simulation and

constraint-based modeling, while also supporting alignment with product and engineering data from adjacent capabilities within the platform.

The vendor operates globally and primarily serves complex, asset-intensive industries, such as manufacturing, aerospace, defense, industrial equipment, and high tech.

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

Strengths

- **Advanced optimization capabilities:** Dassault Systèmes delivers strong optimization functionality, enabling organizations to model and simulate complex constraints across supply chain planning and scheduling scenarios. This supports decision making in environments requiring highly tailored, constraint-based optimization and simulation.
- **Integration with manufacturing operations:** The 3DX platform connects supply chain planning with manufacturing execution and operations management capabilities. This supports alignment between planning decisions, production scheduling, and production shop-floor processes, particularly in complex manufacturing environments.
- **Industry-specific applicability:** Dassault Systèmes demonstrates strong relevance in engineering- and production-intensive industries. Its digital twin approach aligns well with organizations that require close coordination between design, manufacturing, and supply chain planning.

Cautions

- **Solution and UX complexity:** Dassault Systèmes' model-driven architecture and portfolio of applications can introduce complexity in implementation and use. Differences in UX and workflows across applications may create challenges in achieving consistent adoption across planning and manufacturing domains.
- **Supply chain process limitations:** Compared with broader suite vendors in this research, Dassault Systèmes provides less standardized, out-of-the-box coverage across common supply chain processes. This can require additional tools or integrations to support typical end-to-end use cases.
- **Pricing and support:** Dassault Systèmes' solutions are often positioned at a premium, and its diverse solution landscape introduces complexity in pricing structures for multimodule deployments. Additionally, service expectations such as issue resolution timelines can vary

depending on contract scope, which may affect organizations preferring predictable support across all operational scenarios.

E2open

E2open is a Challenger in this Magic Quadrant. Its e2open platform provides supply chain capabilities across planning, global trade, logistics, and multienterprise collaboration, built on a network-centric architecture connecting suppliers, customers, logistics, and other trading partners. Following its acquisition by WiseTech Global in August 2025, e2open's supply chain management suite platform continues to be offered under the e2open brand and remains consistent with the prior e2open strategy.

The vendor operates globally and serves industries such as industrial manufacturing, retail, consumer goods, and logistics, with a focus on complex, multitier supply chain networks. WiseTech's strategic direction is to provide a connected supply chain platform that is purpose-built for end-to-end supply chain orchestration across planning and execution, leveraging its multienterprise partner network that spans channel, supply, logistics, and trade ecosystems.

E2open declined requests for supplemental information. Gartner's analysis is therefore based on other credible sources.

Strengths

- **Network-centric supply chain approach:** E2open delivers a multienterprise platform connecting customers, suppliers, carriers, and logistics providers across a shared network. This enables real-time visibility, collaboration, and coordination across extended supply chains, supporting decision making beyond enterprise boundaries.
- **Global trade and logistics:** The platform demonstrates differentiated capabilities in global trade compliance, transportation, and logistics visibility. This supports organizations managing complex international supply chains, regulatory requirements, and cross-border operations.
- **End-to-end network visibility:** WiseTech's e2open platform integrates planning capabilities with execution visibility across trading partners in supply, channel, logistics, and global trade processes. This enables organizations to contextualize planning decisions using near-real-time data and improve responsiveness to disruptions across the extended network.

Cautions

- **Limited execution domain breadth:** E2open provides less comprehensive native coverage across domains such as procurement and production. Some capabilities — including coordination of execution processes across planning, fulfillment, and operations — may require integration with additional solutions in more complex environments.
- **Platform coherence:** E2open's portfolio combines planning, logistics, and network collaboration capabilities, many of which stem from multiple acquisitions. While e2open is making improvements with each release, alignment of data models, workflows, and UX across these components can be challenging. Organizations may therefore encounter complexity in achieving consistent decision making across planning horizons and business units.
- **Acquisition and shifting priorities:** Following its August 2025 acquisition by WiseTech Global, e2open is now part of a broader logistics and global trade portfolio, which may influence the prioritization of platform and AI investments. Prospective customers should evaluate how service and support capabilities evolve under the new ownership structure, including expectations for responsiveness across different use cases.

Infor

Infor is a Niche Player in this Magic Quadrant. Infor offers its SCM capabilities either separately or embedded in the Infor CloudSuite — a set of industry-focused ERP suites. These solutions combine multienterprise network connectivity with planning, procurement, manufacturing, and logistics capabilities within industry-specific applications built on a common cloud platform.

Infor operates globally and serves industries such as manufacturing, distribution, healthcare, and retail, with a focus on vertically tailored solutions.

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

Strengths

- **Industry-specific solution approach:** Infor delivers supply chain capabilities through preconfigured industry CloudSuites, supported by assets such as the Infor Industry Process Catalog. This enables organizations to adopt solutions aligned with sector-specific requirements, accelerating implementation and reducing the need for customization.

- **Infor ERP integration:** Infor's supply chain capabilities are tightly integrated with its ERP foundation, enabling real-time synchronization between planning and execution processes. This supports coordinated operations across warehousing, manufacturing, and distribution within a unified application environment.
- **Broad domain coverage:** Infor provides a wide range of capabilities spanning supply chain planning, warehouse management, labor management, procurement, and transportation. Combined with platform services such as Infor OS and the Infor Velocity Suite, Infor supports end-to-end visibility, automation, and extensibility across core supply chain processes.

Cautions

- **Basic supply chain capabilities vision:** While Infor provides broad functional coverage, its differentiation in areas such as advanced optimization, autonomous orchestration, and AI-driven supply chain decision making is less pronounced compared with that of other vendors in this research. Its approach remains more focused on augmenting existing processes than enabling fully autonomous supply chain execution.
- **Product consistency across suites:** Infor's CloudSuite portfolio comprises multiple industry-specific solutions, which can introduce variability in capabilities, architecture, and UX across applications. Additionally, Infor Nexus network and collaboration capabilities are not consistently embedded across these suites, limiting organizations in achieving unified supply chain processes and network layers across business units.
- **Limited SCM market reach:** Compared with other vendors in this research, Infor demonstrates lower visibility and a more specialized ecosystem across certain supply chain domains. This may affect its ability to consistently support large-scale, cross-domain supply chain transformations, requiring broad partner coverage and global SCM-specific expertise.

Microsoft

Microsoft is a Challenger in this Magic Quadrant. Its supply chain capabilities are delivered through Microsoft Dynamics 365 Supply Chain Management and related applications, supported by Microsoft's cloud, data, AI platform, and Microsoft 365 Copilot capabilities. The platform spans planning, production, warehouse management, broader logistics capabilities,

and elements of supplier collaboration, with supply chain capabilities delivered largely as part of Microsoft's ERP foundation.

Microsoft operates globally and serves organizations across industries such as manufacturing, retail, and distribution. Microsoft continues to evolve its portfolio toward AI-driven and agent-enabled workflows, leveraging Copilot Model Context Protocol (MCP), Copilot Cowork, and its broader cloud ecosystem to support extensibility and cross-functional integration.

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

Strengths

- **ERP-centric execution footprint:** Microsoft benefits from a large installed base of Dynamics 365 customers, with supply chain capabilities delivered as part of its broader ERP environment. This provides organizations with a familiar application context and seamless UX, and supports adoption of supply chain functionality within existing business processes.
- **Embedded AI approach:** Microsoft embeds AI capabilities across its applications through Copilot MCP and platform services, supporting automation, insights, and natural-language interaction. This enables users to improve productivity and decision making while leveraging consistent AI capabilities across the broader enterprise ecosystem.
- **Ecosystem reach:** Microsoft benefits from a broad partner ecosystem and deep integration with enterprise applications, including productivity and collaboration tools. This allows organizations to connect supply chain processes with wider business workflows, improving collaboration and enabling more integrated execution across functions.

Cautions

- **Supply chain functional depth:** Microsoft's supply chain capabilities, which are tightly coupled to its ERP foundation, are functionally established but comparatively limited in depth versus more specialized or supply-chain-focused vendors in this research. This can require additional configuration or partner solutions for organizations with complex planning, execution, network, or logistics requirements.
- **Network collaboration capability:** Microsoft supports supplier collaboration through its platform and integrations but lacks a deeply embedded, differentiated multienterprise supply chain network. This limits its ability to deliver native, network-driven visibility and

orchestration compared with vendors in this research with stronger network-centric capabilities.

- **Less differentiated supply chain vision:** Microsoft's roadmap is closely aligned with its broader platform and product-centric AI ERP strategy, rather than a distinct, end-to-end supply chain management vision. This increases the need for supplementary solutions and reduces clarity for organizations seeking a tightly integrated, purpose-built supply chain suite.

Oracle

Oracle is a Leader in this Magic Quadrant. Its Oracle Fusion Cloud Supply Chain Management suite spans planning, procurement, production, and logistics, delivered on a cloud-native platform with embedded analytics and AI capabilities. This evaluation focuses on Oracle Fusion Cloud SCM as its primary strategic SaaS offering.

The vendor operates globally and primarily serves large and upper-midsize enterprises across discrete and process industries, retail, and asset-intensive industries. Oracle continues to evolve its portfolio toward agentic applications and AI-driven orchestration, supported by its data platform and ongoing investments in cross-process command centers and autonomous supply chain capabilities.

Strengths

- **End-to-end suite breadth:** Oracle delivers a broad supply chain portfolio within its Fusion Cloud applications. This enables organizations to manage sourcing, planning, and execution processes on a single platform with a unified UX, improving data consistency and coordination across core supply chain functions.
- **Integrated platform vision:** Oracle emphasizes an agentic, platform-first approach, positioning its suite as an open environment where AI agents can be developed and orchestrated across Oracle and non-Oracle applications. This supports flexible, cross-system workflows and enables organizations to evolve toward AI-driven orchestration without the need to fully consolidate on a single vendor platform.
- **AI and analytics foundation:** Oracle provides a robust analytics and AI foundation through its integrated data platform and embedded intelligence capabilities. This supports scenario analysis, predictive insights, and emerging agent-driven workflows, enabling

customers to enhance visibility and improve decision quality across supply chain operations.

Cautions

- **Network strategy and differentiation:** Oracle's network vision is less developed and less differentiated than that of other vendors in this research. Limited emphasis on industry-specific networks and ecosystem-driven value reduces its ability to deliver distinct, network-centric outcomes for customers.
- **Orchestration and autonomy maturity:** Oracle's agentic orchestration and cross-process execution capabilities remain early in adoption and are not yet proven in operational supply chain environments. Oracle has yet to consistently demonstrate scalable, end-to-end business outcomes across supply chain process clusters. As such, evidence of value realization and implementation effort remains limited.
- **Fusion platform dependency:** While Oracle's supply chain capabilities are tightly integrated within its broader Fusion platform, requiring alignment with its application architecture to realize highest value, the suite does support cross-system workflows and partner ecosystems by design. Organizations operating heterogeneous IT and applications landscapes should carefully validate the integration and migration cost and complexity of implementing Fusion Cloud SCM in their environments.

SAP

SAP is a Leader in this Magic Quadrant. Its SAP Supply Chain Management suite combines planning, procurement, production, logistics, and multienterprise collaboration across different products such as SAP Ariba, SAP Integrated Business Planning, SAP Digital Manufacturing, SAP Transportation Management, SAP Extended Warehouse Management, and SAP Business Network, supported by SAP Business Data Cloud and SAP Business AI.

The vendor has a global footprint and primarily serves large multinational enterprises across discrete and process industries, retail, and asset-intensive industries. SAP continues to evolve its portfolio toward agentic AI orchestration and network-enabled supply chains, with Joule as the AI engagement layer and a planned rollout of autonomous orchestration and agentic capabilities.

Strengths

- **End-to-end suite breadth:** SAP delivers a comprehensive supply chain portfolio, supported by its technology, data, and AI stack. This enables organizations to standardize processes and operate across domains within the SAP stack, reducing reliance on fragmented solutions and improving coordination between sourcing, planning, and execution.
- **Integrated platform vision:** SAP presents a coherent vision of enterprisewide orchestration that combines agentic AI, embedded analytics, and network-enabled execution across supply chain processes. This positions SAP to support long-term transformation by connecting sourcing decisions with operational, financial, and network risk and opportunity outcomes.
- **UX evolution:** SAP provides a consistent UX foundation through SAP Fiori. The company is advancing toward goal-oriented user interaction via Joule and unified experience workspaces, helping users coordinate activities across functions and supporting adoption of cross-process workflows in complex enterprise environments.

Cautions

- **Portfolio complexity:** SAP's supply chain offering is composed of multiple products where the only unified single entry is through a shared Fiori experience. As a result, these products retain product-optimized UXs, data models, and configuration approaches, requiring integration and coordination across applications to support end-to-end processes.
- **Maturity of AI vision and execution:** SAP's articulation of AI-driven orchestration and agent-enabled supply chain processes remains less mature compared with that of other vendors as of the date of this research. Its vision for how these capabilities converge into unified, cross-functional supply chain workflows is evolving rapidly, which may create uncertainty for organizations seeking a clearly defined path toward AI-enabled, end-to-end supply chain orchestration and execution.
- **Required migration:** While SAP's cloud SCM suite products are the focus of this evaluation, many customers operate broader SAP supply chain environments spanning multiple generations of cloud, hybrid, and legacy applications. Key innovations are not always delivered consistently across environments. Customers operating mixed SAP landscapes may require additional migration, integration, and harmonization efforts to access the latest AI, orchestration, and cross-functional supply chain capabilities, resulting in slower and more variable realization of innovation.

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.

Inclusion and Exclusion Criteria

In addition to Gartner client relevance, as determined by analyst expertise and opinion, providers need to meet the following criteria to qualify for inclusion in this Magic Quadrant:

- The vendor must have a (pre-)packaged supply chain management suite that includes cross-functional user experience, analytics, and data management, embedded in an architecture that connects native operations management capabilities in at least three out of the following five supply chain process clusters:
 - Supply chain planning
 - Sourcing and procurement
 - Production
 - Logistics and fulfillment
 - Supply chain orchestration, which includes trading partner networks
- All of the supply chain management suite capabilities must have been commercially available (in general availability) as of 3 March 2026. Eligibility for initial consideration is determined by reviewing publicly available sources of information, including the vendor's website.
- The vendor must have an official office, branch, or affiliate in at least three of the following eight regions considered for this market: North America; Latin America; Western Europe; Eastern Europe; the Middle East and North Africa; Sub-Saharan Africa; APAC (comprising mature APAC, China, emerging APAC and Eurasia); and Japan. One of the three offices must be in North America or Western Europe.

Honorable Mentions

The providers that are most relevant to our clients were selected for evaluation in this Magic Quadrant. However, the decision not to evaluate a provider does not mean that the provider lacks viability. The following are noteworthy providers not included in the formal analysis.

These providers could be appropriate for clients, contingent on their requirements:

GEP: GEP is a provider of unified procurement and supply chain management solutions, offering its flagship platform — GEP Quantum Intelligence. This cloud-native, AI-driven suite is designed to optimize end-to-end supply chain operations for large and midmarket organizations in industries such as industrial manufacturing, consumer packaged goods, retail, life sciences, and energy. GEP's strategic investment areas include the development of agentic, AI-powered orchestration capabilities and further enhancing its multitier, multiparty supplier collaboration across the planning-to-execution time horizon, as well as improving trading partner management and risk management functionalities.

IFS: IFS offers supply chain management capabilities as part of its broader enterprise software suite, IFS Cloud. IFS SCM covers a variety of process clusters — including planning, procurement, fulfillment, and collaboration — recently enhanced with the acquisition of Softeon in the warehouse space. IFS SCM is widely adopted by midsize to large enterprises, particularly in industrial manufacturing, aerospace and defense, or energy and utilities. The vendor's roadmap is centered around industrial AI and further agentic AI capabilities such as Digital Workers, as well as embedding AI more extensively across the solution portfolio.

Infios: Infios provides a supply chain execution suite spanning transportation management (TMS), warehouse management (WMS), and order management (OMS), with Infios AI delivering intelligence and automation across its portfolio. Primarily serving North America's diverse market, Infios supports organizations of all sizes, with a client base evenly split between shippers and service providers. Its strategic priorities include deeper integration across TMS, OMS, and WMS — an approach Infios calls Intelligent Supply Chain Execution — along with advancing agentic AI capabilities, enhancing the UX, and expanding its presence in Europe.

Manhattan Associates: Manhattan Associates offers a broad portfolio of supply chain management solutions covering logistics, omnichannel commerce, supply chain planning, and supplier enablement through its ActivePlatform offering. Delivered on a common microservices-based, multitenant cloud architecture, it targets higher-end midmarket and

large enterprises globally across the retail, wholesale/distribution, and industrial manufacturing industries.

sedApta: sedApta, now part of Elisa Industriq, delivers advanced supply chain and manufacturing solutions through its flagship sedApta Software Suite. Specializing in manufacturing, sedApta serves industrial, automotive, and food and beverage sectors. Its suite offers robust planning and execution capabilities. The company demonstrates a strong focus on Industry 4.0 technologies, enabling smart manufacturing transformation through real-time data utilization and manufacturing execution system integration.

Siemens: Siemens offers a broad industrial software portfolio known as Siemens Xcelerator, which encompasses Product Lifecycle Management (PLM), automation, building and energy management, digital logistics, and SCM for planning and sourcing. Siemens serves global customers across industrial manufacturing industries such as food and beverage, high tech and life sciences, transportation, and utilities industries. The company's strategic roadmap focuses on further embedding SCM capabilities across the full product life cycle supported by its broader portfolio of industrial software offerings, enhancing AI, expanding Production Copilot, advancing data management, and strengthening integrated digital twin capabilities. Siemens' acquisitions of Supplyframe, Wevolver, and Volition, combined with its Xometry partnership, strengthen its design-to-source and supply chain integration capabilities.

SupplyOn: SupplyOn's Business Network supports multitier supply chain collaboration. The suites include an array of applications, ranging from domain capabilities such as sourcing, procurement, quality, and transport management to cross-functional ones, as well as analytics and intelligence. Its operations are geographically diversified, and its clients are predominantly large industry leaders in sectors such as automotive, aerospace, rail, electronics, and industrial manufacturing, which connect their global supplier base — mainly small to midsize businesses — via SupplyOn.

Zucchetti Group: Zucchetti offers SCM through Zucchetti Digital Supply Chain, alongside a broader portfolio of business solutions, such as for ERP, hospitality, HR, and finance. The platform features dedicated capabilities across planning, production, and logistics and transportation. Zucchetti serves a broad client base, primarily midsize to large enterprises across manufacturing, retail, and distribution sectors, particularly in Italy and elsewhere in Europe. The solution is designed to optimize supply chain efficiency, enhance visibility, and support digital transformation initiatives.

Evaluation Criteria

Ability to Execute

Gartner evaluates vendors on their ability to deliver and support an SCM suite that enables organizations to plan, coordinate, and execute supply chain processes across functional clusters and trading partner networks. This evaluation considers the breadth and depth of capabilities delivered through the vendor's product portfolio, including support for planning, sourcing, manufacturing, logistics, fulfillment, and multienterprise collaboration. It also assesses the extent to which these capabilities are connected through common data, analytics, user experiences, and orchestration mechanisms to support end-to-end decision making and execution.

The evaluation examines how effectively vendors help customers deploy, adopt, operate, and evolve their supply chain capabilities over time. Consideration is given to implementation approaches, operational support, customer success programs, and the ability to help organizations realize value from emerging technologies such as AI, advanced analytics, automation, and orchestration. Gartner also evaluates how effectively vendors support user adoption and enable customers to independently manage and extend their solutions.

The evaluation criteria for **Product or Service**, **Customer Experience**, and **Operations** represent the primary drivers for vendor selection among the Ability to Execute criteria. These areas assess the maturity and quality of functional capabilities, customer satisfaction, and adoption, and the vendor's ability to successfully support customers throughout implementation and ongoing operations.

The criteria for **Sales Execution/Pricing** and **Market Responsiveness/Record** evaluate vendors' ability to successfully compete in the market and respond to evolving customer requirements. These criteria assess commercial execution, pricing, and packaging approaches, customer adoption momentum, and the vendor's demonstrated ability to deliver capabilities that address changing market needs and supply chain modernization priorities.

The criteria for **Overall Viability** and **Marketing Execution** were not evaluated separately in this research, because overall viability provides low differentiation and client decisions in this market are driven primarily by product capability and user experience. Excluding these maintains focus on factors directly relevant to buyer outcomes.

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

Source: Gartner (August 2026)

Completeness of Vision

Gartner evaluates a vendor’s Completeness of Vision by assessing its understanding of the evolution of the SCM suite market and its ability to translate that understanding into a differentiated and credible strategy. This evaluation considers how effectively vendors anticipate emerging business and technology requirements and incorporate these into product roadmaps, platform architectures, and innovation initiatives. Particular emphasis is placed on how vendors envision the role of AI, agentic workflows, automation, and decision intelligence in transforming supply chain operations, as well as their ability to converge planning, execution, multienterprise collaboration, and decision-making capabilities within increasingly interconnected supply chain ecosystems.

Vendors are evaluated on their ability to communicate a credible strategy for the next two to three years and demonstrate how that strategy will address evolving supply chain

requirements. Gartner assesses the clarity and differentiation of vendors’ visions for unified SCM suites, network-enabled operating models, and AI-driven automation and orchestration. Consideration is also given to how effectively vendors incorporate industry and regional requirements into product strategy, ecosystem investments, and innovation priorities.

The criteria for **Market Understanding**, **Offering (Product) Strategy**, and **Innovation** represent the primary drivers of Completeness of Vision. These criteria assess how well vendors understand evolving customer requirements, translate those requirements into differentiated product strategies, and invest in capabilities that advance the future of supply chain management. Particular consideration is given to vendors’ visions for unified SCM suites, network-centric operating models, AI-enabled decision intelligence, orchestration, and increasingly autonomous supply chain operations.

The criteria for **Marketing Strategy**, **Vertical/Industry Strategy**, and **Geographic Strategy** assess how effectively vendors communicate and execute their strategic direction across target markets, industries, and geographies. These criteria evaluate vendors’ ability to align their vision with industry-specific supply chain needs, support customers across global markets, and articulate a differentiated approach to supply chain modernization and transformation.

The criteria for **Sales Strategy** and **Business Model** were not evaluated separately in this research to ensure focus on elements that primarily impact buyer decisions. Commercial and price structure, as well as sales approach, are included in the **Offering (Product) Strategy** evaluation criteria.

Completeness of Vision Evaluation Criteria	
<i>Evaluation Criteria</i>	<i>Weighting</i>
Market Understanding	High
Marketing Strategy	Medium
Sales Strategy	NotRated
Offering (Product) Strategy	High

<i>Evaluation Criteria</i>	<i>Weighting</i>
Business Model	NotRated
Vertical/Industry Strategy	Medium
Innovation	High
Geographic Strategy	Medium

Source: Gartner (August 2026)

Quadrant Descriptions

Leaders

Leaders in the SCM suites market demonstrate exceptional vision and execution capabilities by offering a comprehensive “one-stop shop” for organizations. Their solutions are characterized by strong depth and breadth across the majority of core functional SCM clusters, including supply chain planning, sourcing and procurement, production, logistics and fulfillment, and supply chain network orchestration. By delivering robust, integrated capabilities on shared data models, these vendors provide the technological foundation to digitize and automate end-to-end supply chain operations within a single ecosystem.

A defining characteristic of Leaders is their cross-functional capability that connects different supply chain domains to facilitate workflow synchronization. These vendors advance integrated, intelligence-driven supply chain operating models by tightly connecting strategic decision making with operational execution. Utilizing emerging technologies such as AI agents, agentic AI, and composable architectures, their platform strategies envision that cross-process workflows are continuously optimized and self-governed, enabling day-to-day execution to remain aligned with high-level corporate objectives.

Furthermore, Leaders possess a significant global footprint, robust partner networks, and broad industry coverage required to support the world’s most complex multinational operations. They offer scalable, governed industry templates and multienterprise collaboration networks or connections that extend across diverse sectors. With a track record of sustaining customer engagement, driving year-over-year growth, and supporting

continuous innovation, Leaders demonstrate enterprise-grade stability and operational capacity to manage simultaneous, multicloud global deployments.

Challengers

Challengers possess a substantial market presence and demonstrate a strong track record of successful, large-scale deployments, offering a highly reliable “one-stop shop” solution. While they deliver robust functional capabilities that efficiently support current operational needs, they typically lack the consistent depth and breadth across the functional SCM clusters found in the Leaders quadrant. They often demonstrate particular competence in core execution areas, such as production or logistics, but their overarching, multicloud orchestration features are generally still evolving.

These vendors offer practical cross-functional capabilities that establish dependable decision and execution alignment across the supply chain. They effectively automate standard operating procedures and provide real-time optimization, though their approach to innovation is generally pragmatic rather than pioneering. Their development roadmaps focus on incremental improvements and keeping pace with market demands rather than introducing paradigm-shifting, fully autonomous agentic AI capabilities or deeply integrated, cross-cluster intelligence.

Challengers possess the operational scale and geographic reach to execute complex global deployments, supported by dedicated implementation teams and established partner networks. They exhibit a history of operational stability and proven execution. However, they may offer narrower industry coverage or rely on semiconfigured, generalized templates compared with Leaders, positioning them as providers of a dependable foundation for supply chain operations rather than drivers of visionary technological transformation.

Visionaries

Visionaries articulate a compelling, forward-looking vision for the market by driving toward a modern, AI-centric supply chain platform. They demonstrate a deep understanding of supply chain complexities, emphasizing composable architectures and emerging technologies. While their technological vision is well-defined and highly innovative, their current product portfolios are still maturing. Consequently, they do not yet exhibit the balanced, end-to-end depth and breadth across functional clusters present in more established suites.

These vendors focus on redefining decision and execution integration by emphasizing network-centric event visibility, governed information flows, and autonomous cross-process cluster workflow synchronization. By investing heavily in platform-level intelligence, multienterprise network collaboration, and agentic AI, Visionaries provide digital tools designed to build self-learning, adaptive supply chains. Their architectures are explicitly built to orchestrate complex operations through a clear separation of data, intelligence, and execution layers.

Visionaries may not yet have the extensive global footprint, broad certified partner ecosystems, or wide industry coverage required to execute complex, multicontinent deployments as consistently as Leaders. They primarily deliver strong, thought-leadership-driven value and advanced platform-level AI, offering cutting-edge digital capabilities that frequently allow early adopters to actively influence the vendor's ongoing product direction.

Niche Players

Niche Players provide viable, targeted supply chain capabilities but generally lack the defining depth and breadth across all functional clusters required to serve as a comprehensive “one-stop shop.” Rather than providing a broad, end-to-end integrated portfolio, they specialize in specific segments of the supply chain, such as distinct planning elements, procurement, or localized logistics. Their solutions are purpose-built to address specific, precise operational use cases rather than orchestrating an entire internal and external global supply chain network.

Within their specialized domains, Niche Players facilitate effective decision and execution alignment, but their cross-functional capabilities are typically much narrower in scope. They may rely more on traditional, fragmented data architectures and manually synchronized information flows, with less emphasis on automated, AI-driven cross-cluster orchestration. While they do not lead the broader market in visionary innovation or advanced agentic AI, they deliver specialized functionality that integrates execution effectively for their specific areas of focus.

Niche Players operate with a substantial global presence and maintain focused industry coverage, directing their resources toward specific geographic areas or select verticals. While they may lack the extensive implementation partner networks and broad industry reach of Leaders, they provide significant operational value and dedicated expertise for specialized requirements where broader, more generalized SCM suites may fall short or prove unnecessarily complex.

Context

Historically, organizations have preferred SCM suites from a single vendor to simplify vendor management, reduce integration complexity, and lower total cost of ownership. This preference has influenced the evolution of the SCM suite market, prompting vendors to expand their portfolios and deliver more integrated offerings.

Agentic AI is now acting as a catalyst for cross-functional integration and alignment across the supply chain. This technology enables real-time information sharing, dynamic workflows, and intelligent decision making, resulting in supply chains that are more agile and resilient.

To address market requirements, SCM suites must deliver capabilities spanning more than one core process cluster and provide a consistent UX. This consistency extends to shared tools, data models, user interface elements, and security and access management. Essential features include embedded analytics, reporting, business intelligence, standardized integration interfaces, and prebuilt connectors to enable connectivity with adjacent supply chains and external trading partners.

Beyond core requirements, SCM suites commonly offer extended features such as cross-functional workflow automation, unified user experiences, and composable, services-based cloud architectures. Extensibility is supported through on-stack customizations and the development of custom add-on applications. Suites also support edge processes, including new product introduction, returns management, yard operations, supply chain risk management, and sustainability initiatives. Advanced intelligence — now including agentic AI and large language model (LLM) support — is increasingly standard, augmenting supply chain processes with real-time, adaptive, and autonomous capabilities.

A key challenge, and differentiator, for the next generation of SCM suites is the effective integration of agentic AI within and across functional workflows. In contrast to composable, multiapplication best-of-breed environments, SCM suites are positioned to deliver technical advantages by providing canonical data models, harmonizing information, and streamlining data flows across all functional clusters. A unified architecture can simplify the deployment of agentic AI by providing access to normalized enterprise data and embedded business logic across suite capabilities. This enables agents to operate with greater contextual awareness and reduced integration complexity. By supporting harmonized, real-time data with zero latency, SCM suites facilitate intelligent, agile, and resilient supply chains, and enable comprehensive, adaptive AI-driven decision making and execution.

Market Overview

Market Outlook

The supply chain management (SCM) suite market is experiencing robust growth, driven by the imperative for digital transformation. In 2025, the market expanded by 13.4%, reaching \$37.6 billion, as organizations accelerated investments in modernizing planning, execution, and cross-functional supply chain processes (see [Market Share Analysis: Supply Chain Management Software, Worldwide, 2025](#)). While supply chain modernization efforts are still primarily driven by requirements within individual process clusters — such as planning, sourcing, procurement, production, logistics, and network orchestration — relatively few organizations currently prioritize cross-process platform capabilities as a primary selection criterion. However, organizations are increasingly recognizing the value of capabilities that connect these process clusters through shared data, analytics, AI, and orchestration.

SCM suites are therefore becoming strategic platforms for improving end-to-end visibility, integrating data and processes across the supply chain, fostering collaboration across departments and trading partners, and digitizing and automating supply chain activities. Over time, Gartner expects demand for these cross-process capabilities to increase as organizations seek to improve decision coordination, execution consistency, and supply chain resilience across functional boundaries. Organizations are also seeking to reduce IT complexity by consolidating multiple domain-specific applications into a smaller number of integrated platforms, lowering maintenance costs, reducing integration efforts, and simplifying vendor management — priorities that increasingly resonate with both chief supply chain officers (CSCOs) and CFOs.

The demand for digitalization and automation is accelerating vendor innovation, particularly in the integration of AI capabilities — such as machine learning, knowledge graph, generative AI, and, lately, agentic AI and advanced analytics to optimize planning, execution, and risk management, among other processes. Key market drivers include adoption of cloud-based platforms, AI-assisted functionalities, and tighter integration with ERP and other core enterprise applications. The market is also witnessing the emergence of composable, services-based architectures supporting extensibility, customization, and rapid deployment of new capabilities.

Current Market Landscape

The SCM suite market is characterized by mature, well-established vendors. Leading providers offer comprehensive portfolios covering planning, sourcing, manufacturing, logistics, and orchestration, delivering unified user experiences, embedded analytics and intelligence, and standardized integration interfaces/adapters. From an architectural standpoint, we see different approaches, from engineered platforms (single data and process model, single UX, single code page) to synchronized platforms (metadata mapping, single UX, different code pages) to broader portfolios (different data and process models, different code pages, a certain degree of harmonized UX). The market is evolving rapidly, with significant advancements in automation, AI, and cross-functional workflow capabilities. Many market expansions are based on acquisitions and integration of selected core capabilities to broaden portfolio offerings, next to building partnerships with solution providers offering specific, complementary capabilities, such as real-time transportation visibility or supply chain risk management.

Differentiation in the SCM suite market is driven by technological innovation, industry alignment, integration capabilities, and the ability to support evolving business and regulatory requirements. Vendors that deliver agility, intelligence, and end-to-end process coverage are best positioned for leadership, hereby differentiating through:

- Central data management with canonical models for data mapping and harmonization.
- Consistent security and access management with unified UX cross features.
- Prebuilt connectors and APIs for seamless integration.
- Breadth of available core supply chain clusters (planning, sourcing and procurement, production, logistics and fulfillment, business network and orchestration), intelligently connected.
- Advanced AI techniques (machine learning, foundation AI, agentic AI).
- Tailored features for industry-specific requirements.
- Command center capabilities for real-time monitoring, simulation, and proactive intervention (respond planning).

Key Trends and Innovations

Like in any business application market, the SCM suite market is evolving rapidly, driven by key trends and innovations:

- **Connected data:** Mergers and acquisitions, evolving business models, and the rise of external, unstructured data — even in real time — have exposed the limitations of relying solely on enterprise-centric functional applications. As a result, CSCOs are blending this approach with a broader data strategy, often referred to as a data fabric strategy, emphasizing security and completeness. In the future, this will evolve into a connected data approach, combining robust data management with process execution metadata — leveraging observability and process mining — to integrate both structured and process data, ultimately enabling greater AI-driven process efficiency and enterprise automation.
- **Composable architecture:** A composable architecture is an emerging but increasingly intentional strategy, enabling organizations to create application environments where functionality is available in individual services, accessible to not only humans but also AI agents, supporting the pathway to autonomous orchestration and adaptive experiences. While adoption is still in early stages, with many organizations just beginning to mature their composable approaches, the future will see accelerated adoption and evolution of composable SCM. This will result in more mainstream, pervasive use of networked, hybrid, and multicloud solutions that empower enterprises to rapidly adapt to business changes and drive better outcomes through flexible, integrated digital capabilities.
- **Adaptive experience:** A recurring complaint from users is the amount of effort required to execute and manage processes through the existing user interface options. User experience still lags in delivering the intuitiveness that end users expect, as a graphical web-based interface still requires users to know where to go, especially when navigating within a portfolio rather than a platform. As for the envisioned future, with the upcoming and emerging technologies, we expect the experience to become a natural-language-based experience, one that delivers a more personalized experience, including different modes of interactions from the multiple personas that use SCM suites.
- **Embedded intelligence:** Currently, embedded intelligence in SCM suites — driven by generative AI (GenAI) and machine learning (ML) — automates workflows and enhances data insights, but remains largely tied to structured, predefined scenarios (e.g., order processing). In the future, intelligent capabilities used in SCM suites are expected to become more adaptive and agentic, enabling less prescriptive, more autonomous process execution that extends beyond preset workflows, resulting in broader and more pervasive automation (e.g., anomaly detection with scenario modeling for recommending next best action).

- **Autonomous orchestration:** Currently, orchestration serves as the operational backbone, automating processes, workflows, and integrations by leveraging embedded intelligence and connected data — through a digital twin/knowledge graph — to retrieve information and invoke services across the suite and related systems. Orchestration utilizes advanced capabilities such as intelligent document processing, decision intelligence, and AI/ML, increasingly powered by large language models. Looking ahead, the effectiveness and scalability of autonomous orchestration will depend on robust connected data and composable architectures, enabling more dynamic, adaptive, and self-directed orchestration that extends automation and intelligence throughout the broader enterprise ecosystem.
- **Resilience and risk management:** There is a heightened focus on capabilities that enhance supply chain resilience. These include advanced risk analytics (with risk monitoring, risk impact analysis, risk mitigation), multitier supply chain visibility (leveraging a multienterprise business network as foundation, connecting brands with their suppliers, contract manufacturers, service providers, and customers), scenario planning, and disruption response capabilities (aka respond planning). These capabilities help supply chain organizations anticipate and mitigate supply chain shocks along their global value chains.
- **Low-code/no-code:** SCM suites are incorporating low-code and no-code tools — a software development approach — empowering business users to configure workflows, dashboards, and integrations, and even create actual business applications, without deep IT involvement. These tools rely entirely on intuitive visual tools, forms, and configuration options. This accelerates innovation and enhances time to value for supply chain organizations.
- **Acquisitions and partnerships:** Recent years have seen a notable increase in acquisitions and strategic partnerships within the SCM suite market, reflecting the sector's rapid evolution and the need for end-to-end, integrated solutions. Leading SCM vendors are acquiring competitors to close missing gaps in product offerings — such as adding a business network or entering the procurement or transport domain — and/or enhance their platform with advanced intelligence functionalities. Partnerships are then formed to strengthen interoperability and ecosystem reach. Also, private equity firms have shown growing interest in SCM technology, acquiring or investing in innovative vendors to drive consolidation and accelerate product development. These moves are aimed at delivering more comprehensive, resilient, and future-ready supply chain solutions.

Unlock more AI value

With unmatched, proprietary AI insights from Gartner

[Explore the AI Hub](#) ↗

© 2026 Gartner, Inc. and/or its affiliates. All rights reserved. Gartner is a registered trademark of Gartner, Inc. and its affiliates. This publication may not be reproduced or distributed in any form without Gartner's prior written permission. It consists of the opinions of Gartner's research organization, which should not be construed as statements of fact. While the information contained in this publication has been obtained from sources believed to be reliable, Gartner disclaims all warranties as to the accuracy, completeness or adequacy of such information. Although Gartner research may address legal and financial issues, Gartner does not provide legal or investment advice and its research should not be construed or used as such. Your access and use of this publication are governed by [Gartner's Usage Policy](#). Gartner prides itself on its reputation for independence and objectivity. Its research is produced independently by its research organization without input or influence from any third party. For further information, see "[Guiding Principles on Independence and Objectivity](#)." Gartner research may not be used as input into or for the training or development of generative artificial intelligence, machine learning, algorithms, software, or related technologies.