Magic Quadrant for Software Asset Management Managed Services

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Initiatives: Sourcing, Procurement and Vendor Management Leaders

A year of disruption has expanded demand for the software and cloud cost optimization discipline delivered by SAM managed services. Gartner profiles 11 leading providers to enable sourcing, procurement and vendor management leaders to identify, evaluate and select the right provider.

This Magic Quadrant is related to other research:
View All Magic Quadrants and Critical Capabilities

Strategic Planning Assumptions
Through 2023, the software asset management (SAM) managed services market will continue to grow at 20% compound annual growth rate (CAGR) due to client challenges managing multiple environments and employing expertise.

Through 2023, in the absence of rightsizing discipline, over 30% of the growing expenditure on software and cloud services will be unused.

By 2024, 40% of enterprises will use software asset management as the primary mechanism for reducing SaaS contract costs with “dominant” vendors.

Market Definition/Description
Software asset management managed services employ the provider’s proprietary SAM skills and methodologies to transform a client's existing processes and augment their resources. SAM managed services are delivered directly to end-user clients, on either a continuous or a scheduled basis, employing required discipline to meet software and cloud service cost optimization and governance objectives.
Applying an ongoing SAM discipline, SAM managed services combine a series of life cycle change management and optimization activities, transforming existing practices to deliver transparency and optimization. SAM managed services establish a platform of trustworthy data, incorporating management of usage rights and optimized utilization transparency, leveraging a mesh of techniques to augment SAM tool functions.

Services address ever-present complex use cases or ambiguous use rights across the enterprise. Many of these demands stem from the characteristics of cloud adoption and software use across multiple or hybrid environments, proliferation of Internet of Things (IoT) devices, the consumption of software by RPA services and other integrations. Combined, these impacts necessitate highly adept SAM resources and discipline.

Delivered by skilled resources, leveraging expertise, intellectual property and best practices, SAM managed services address the gap in available SAM skills, enable scalability and enhance SAM maturity. Consistent and sustained delivery will deliver rigor to enable greater value realization from software investments, benefits of cloud elasticity, ongoing optimization, enhanced governance and reduced risk.

Within a SAM managed service, providers are expected to deliver a complete and continuous set of SAM managed services across a broad range of software publishers. “Complete” is defined as within a SAM managed service.

The following core components are delivered as an ongoing service:

- **Policy and process assessment, design, transformation, improvement and operation.** Provider services drive SAM best practices within software life cycle management activities across the organization. Services must include assessment, design, transformation, continuous improvement and operation as a core mechanism for efficiency and sustained best practice.

- **Trustworthy estate representation.** Provider services develop and continuously maintain a view of the complete environment. Through the completion of verification and analysis, providers deliver an accurate representation of inventories and usage, addressing retired and newly provisioned workloads or equipment, across multiple platforms.
Entitlement custodianship, management and use rights analysis. Provider services take custody of all license entitlement management and use rights analysis, building a trustworthy view. They continuously manage and analyze all procurement, contractual and usage rights documentation for the purpose of providing a single source of license entitlement and use rights across a broad range of publishers.

Custodianship of trustworthy software installed, used and accessed data. Providers take custody of the management of trustworthy inventory data, eliminating duplicates, false positives, anomalies and discrepancies. Providers will deliver additional analysis, augmenting SAM tool data as necessary to represent an accurate, continuous and complete view of all software installed, used and accessed.

Cloud service metering, license management and optimization. Providers meter all software as a service (SaaS) and platform as a service (PaaS)/infrastructure as a service (IaaS) instances, their usage and the complete set of software assets in the cloud. The service provider delivers value through continuous optimization and governance of all such software and instances.

Development, maintenance and optimization of license position, usage and governance reporting. Providers deliver expertise to build and continuously evaluate usage to manage license positions and deliver governance reporting. The service provider delivers value by continually identifying risks, establishing mitigation strategies and optimization opportunities.

Integrated life cycle management, including request, approval, procurement, management, harvest and retirement services. Providers deliver services that manage day-to-day requirements, incorporating request, management, harvest, procurement advice and optimization activities integrated with customer operations and resources. The service provider will deliver value through continuous customer engagement.

“Continuous” is defined as delivery of services with minimum cadence and includes:

- Daily operation and measurement of SAM process adherence
- Monthly or more frequent ratification that the full software estate is represented
- Weekly or more frequent collection and update of license entitlement and use rights
- Weekly or more frequent collection and update of software installed, used and accessed data
- **Monthly** or more frequent metering and optimization of software and cloud service usage
- **Monthly** or more frequent maintenance and optimization of license positions, usage and governance reporting
- **Daily** management of request, harvest, procurement, renewal, disposal and optimization activities

SAM services delivered on a repeatable basis, not meeting the definition of continuous (for example, biannually or annually), are treated within this Magic Quadrant as scheduled services.

**Broad range of software publishers** is defined as SAM managed services delivered across a minimum of 20 named publishers, with capabilities to deliver across at least 200 publishers within a single managed service where required. SAM tools and SAM tool revenue are not assessed in this Magic Quadrant (see Note 1). To review the SAM tool market, see the Market Guide for Software Asset Management Tools.
Magic Quadrant

Figure 1: Magic Quadrant for Software Asset Management Managed Services

Source: Gartner (July 2021)
Vendor Strengths and Cautions

**Anglepoint**

Anglepoint is a Leader in this Magic Quadrant. It is a U.S.-headquartered specialist provider of SAM managed services to enterprise clients, independently run but majority-owned by Crayon. Anglepoint delivers continuous SAM managed services as its primary offering, representing approximately 75% of ongoing SAM services clients, with scheduled services representing approximately 25%. SAM skills are most prominent in North America, at approximately 50%, with a sales presence in the U.S., Canada, Germany, the U.K., Ireland and India. Regional breakdown of Anglepoint’s SAM managed services revenue is estimated as North America, 81%; EMEA, 18%; and LATAM and Asia/Pacific combined contributing less than 1%. Anglepoint’s SAM managed services revenue grew by an estimated 45%.

**Strengths**

- **Strong vision for SAM discipline:** Anglepoint continues to evolve the SAM discipline. It envisions the SAM role with cross-group alignment, enhancing transparency and removing silos across financial operations (FinOps), identity and access management (IAM), hardware asset management (HAM), and IT service management (ITSM). It has matured the technical discipline, applying machine learning and robotic process automation by reinvesting in its proprietary service delivery platform ELEVATE.

- **Investment responsive to clients’ needs:** Anglepoint continued to recruit and expand dedicated SAM managed services skills. It reported a two-year CAGR of 75%, exceeding its peers assessed in this Magic Quadrant, and an above-average resource-to-client ratio. It applies a sophisticated upfront service, pricing and statement of work (SOW) development methodology, anticipating evolving service scope addressed in quarterly reviews.

- **Structured development and delivery management:** Scope development is objective-based, facilitated through a sales force grounded in SAM services delivery and a managed cycle of service development. Client service reviews gauge customer satisfaction, and experience management processes include feedback, surveys and a client success management role, using KPIs and value metric realization to track possible improvements.

**Cautions**
- **Not the best match for the small and midsize business (SMB) market:** Anglepoint remains focused on large enterprises, demonstrated by delivering 100% of SAM managed services to organizations with greater than 10,000 managed devices. Smaller clients may struggle to engage Anglepoint with their requirements.

- **Limited presence in some markets:** Anglepoint remains a provider strongly focused on North American and EMEA markets. While it does deliver globally and enable engagement through international locations across languages, it has a limited APAC and LATAM presence.

- **Focused on transformation instead of low cost:** Anglepoint’s offering is oriented to delivering value through outcomes but may be challenged by organizations seeking to procure a service based on price or gainshare-based commercial models.

**Bytes**

Bytes is a Challenger in this Magic Quadrant. It is headquartered in the U.K. Bytes recently dual listed on the London and Johannesburg stock exchanges. Bytes delivers SAM managed services to predominantly small and midsize clients. Continuous SAM managed services represent approximately 60% of ongoing SAM services clients, and noncontinuous scheduled services represent approximately 40%. SAM skills are primarily oriented to Europe at approximately 70%, with a sales presence in the U.K. The breakdown of Bytes’ SAM managed services revenue regionally is estimated as EMEA, 76%; North America, 19%; and APAC, 5%. Bytes’ SAM managed services revenue grew by an estimated 45% year over year.

**Strengths**

- **Responsive to the market:** Bytes continues to rank high in innovation through its investments in automation to support cloud consumption management and rightsizing, tracking value through its SAM register and impact matrix. It has shifted its offering from license positions to commercially oriented cost management services, including public cloud services and SaaS, using Quantum.

- **Growing revenue and gainshare options:** Bytes is one of four providers in this Magic Quadrant to report having more than doubled SAM managed services revenue in the past two years. Contributing to growth has been a small number of contract wins well in excess of its typical average contract value and a fourfold increase in use of hybrid fixed-fee gainshare contracts.
Cautions

- **Focus on heritage U.K. requirements**: Bytes’ model has a limited direct presence in locations outside of the U.K. While having invested in a COE, which now sees over 35% of SAM managed services resources located offshore, over 90% of its clients are located in EMEA, primarily the U.K. Expected North American expansion has yet to materialize.

- **Limited-scope services**: Bytes represented the least depth of vendor scope among its peers assessed in this Magic Quadrant, with only 2% of its SAM managed services covering greater than 20 vendors. Bytes’ audit defense services are an optional additional module, in lieu of an incorporated deliverable within the scope of its operating SAM discipline.

- **Remains a poor fit for large enterprises**: Bytes reported the lowest resource-to-client ratio of all provider peers assessed in this Magic Quadrant. It continues to have few large or very large clients, with the least penetration of all peers in this Magic Quadrant across scales of organization size. Bytes also demonstrated limited benefit capture and messaging to support its offering.

Crayon

Crayon is a Leader in this Magic Quadrant. It is headquartered in Norway and is a publicly listed software and cloud services reseller with a global presence. Crayon delivers SAM managed services to predominantly small and midsize clients. Continuous SAM managed services represent approximately 65% of ongoing SAM services clients, with scheduled services representing approximately 35%. SAM skills are primarily European at approximately 65% with a sales presence in EMEA, Asia/Pacific and the U.S. The breakdown of Crayon’s SAM managed services revenue regionally is estimated as EMEA, 80%; North America, 12%; and Asia/Pacific, 8%. Crayon’s SAM managed services revenue grew by an estimated 30% year over year.

Strengths
- **Service breadth**: Crayon provides three sets of SAM services — Assessment, Infinity and Economics, which roll up to deliver SAM managed services. Its service desk for on-demand requirements is present in approximately half of its managed SAM clients. Its contract maturity, dedicated SAM managed services resources and contract volume are among the highest compared to its peers assessed in this Magic Quadrant.

- **Strong delivery platform supporting growth**: Crayon's Service-iQ, a global delivery and collaboration platform, provides a single-source view of mitigation, risk avoidance, and savings recommendations and realizations. Crayon continues to demonstrate strong growth in revenue, unique clients and resources. Growth is bolstered by 12% of Crayon's SAM managed services agreements being based on a hybrid fixed-fee and gainshare structure or full gainshare-based model.

- **Broad local presence**: Crayon has a local presence of SAM managed services resources in 18 of 31 markets assessed by this Magic Quadrant, including the recent addition of South Africa. Crayon's local services leverage global standards. It provides the greatest depth of resources of any provider in the Nordics.

**Cautions**

- **Limited depth-of-service value proposition**: Crayon demonstrated focus on risk and saving, but not software life cycle operations nor overcoming client resource challenges, with no clear representation of dedicated resources to client environments.

- **May not be a good fit for broad and complex requirements**: Although Crayon can deliver to large enterprises, only 2% of SAM managed services clients are reported to have over 50,000 devices. Crayon also reported the lowest average contract value and lowest average revenue per resource of all providers assessed in this Magic Quadrant.

- **Needs to be more transformative and responsive**: Crayon provided no reference to a client advisory board or similar input to service development, client satisfaction measurement or examples of ongoing improvement. It demonstrated no apparent plan for managing emerging technology scenarios, such as IoT and RPA, and provided no examples of within contract term flexibility of service scope.
Deloitte

Deloitte is a Leader in this Magic Quadrant. It is headquartered in the U.S. and is a privately held audit and professional services firm. Deloitte delivers SAM managed services predominantly to large enterprise clients. Continuous SAM managed services represent approximately 30% of ongoing SAM services clients, while noncontinuous scheduled services represent approximately 70%. SAM skills are most prominent in Europe at approximately 50%, with a sales presence in EMEA, Asia/Pacific and North America. Regionally, Deloitte's SAM managed services revenue is estimated as EMEA, 50%; North America, 48%; APAC 1%; and Latin America less than 1%. Deloitte's SAM managed services revenue grew by an estimated 25% year over year.

Strengths

- **Evolving focus and growth**: Deloitte's vision for its SAM services incorporates an evolution from compliance to cost optimization, leveraging SAM data across silos and including security practices. Meanwhile, it addresses FinOps and the demands of IoT and OT, leveraging its own IP, Compass, for data capture, reconciliation and optimization modeling. Deloitte also saw solid revenue growth over the last year and reported increasing the scope of vendors incorporated in services.

- **Global resources**: Deloitte delivers across regions globally, with a combination of local resources in a range of markets and centralized delivery centers. It has local resources in 29 of 31 markets assessed by this Magic Quadrant. It has established six SAM delivery centers: three in the U.S., two in APAC and one in EMEA, and reported the largest North American SAM resource base of its peers.

- **Relevance across organization size**: While Deloitte's business is predominantly oriented to large enterprises, it reported delivering services across the broadest range and distribution of client sizes served compared to its peers assessed in this Magic Quadrant.

Cautions

- **Limited end-to-end managed services**: Deloitte states it is not the best SAM managed services provider where clients require a provider to take complete and continuous ownership. It is better aligned to prospective clients with their own resources where it can assume a role within the SAM discipline.
EY is a Niche Player in this Magic Quadrant. It is headquartered in the U.K. and is a privately held audit and professional services firm. EY delivers SAM managed services to predominantly midsize to large enterprise clients. Continuous SAM managed services represent approximately 45% of ongoing SAM services clients, with noncontinuous scheduled services representing approximately 55%. SAM skills are primarily oriented to APAC at approximately 65%, with a sales presence in EMEA, APAC and North America. The breakdown of EY’s SAM managed services revenue regionally is estimated as North America, 60%; EMEA, 32%; and APAC, 8%. EY’s SAM managed services revenue grew by an estimated 90% year over year.

**Strengths**

- **Cross-functional approach:** EY sees SAM as a centralized enabling foundation, not only focused on compliance but also risk, cybersecurity and ITSM effectiveness, leveraging data delivered through a single pane of glass. It aligns SAM managed services to its risk management practice, promoting and applying its benchmarking and risk management framework.

- **Strong growth in revenue:** EY reported the highest rate of revenue growth among its peers in this Magic Quadrant. It reported continuous services growth, with 24 unique clients delivering approximately $17 million, an increase from 12 clients delivering $8 million last year. All contracts are reported to be delivered for large enterprises with a minimum of 10,000 managed devices on a fixed-fee basis.
**Cautions**

- **Conservative SAM vision:** EY represents SAM managed services value at a high level. It has yet to demonstrate clear value, or the detailed methodology and skill required to deliver and take ownership of the SAM discipline. It lags the market in cloud consumption management incorporated within its SAM managed services as well as in services to address new challenges to the SAM discipline, such as IoT and RPA.

- **Limited demonstrable maturity:** EY reports that almost 80% of its SAM managed services contracts have been in place for less than 12 months, a dramatic contrast to its peers assessed in this Magic Quadrant. It reported the lowest volume of direct clients, which continues to pose questions regarding how EY will take SAM managed services to market and invest in capability to deliver SAM as a key offering.

- **Offshore centric:** EY indicates that more than 60% of its SAM managed services resources are offshore. Clients must confirm how delivery quality consistency is practically achieved, yet the proposed resources and insist on continuity of resources allocated to their service.

**Insight**

Insight is a Niche Player in this Magic Quadrant. It is headquartered in the U.S. and is a publicly listed hardware, software and cloud services reseller with a global presence. Insight delivers SAM managed services to predominantly midsize to large enterprise clients. Continuous SAM managed services represent approximately 20% of ongoing SAM services clients, with scheduled services representing approximately 80%. SAM skills are primarily in Europe at approximately 75% with a sales presence in EMEA, Asia/Pacific and North America. The breakdown of Insight’s SAM managed services revenue regionally is estimated as EMEA, 77%; North America, 13%; and Asia/Pacific, 10%. Insight’s SAM managed services revenue grew by an estimated 5% year over year.

**Strengths**
- **Service management and development:** Insight measures service success through a service delivery management framework incorporating quarterly business reviews, with more complex clients serviced by a dedicated service delivery manager. It endeavors to support quality through recruitment of experienced practitioners. It is expanding its catalog through agile-oriented service design and aims to address key client requirements including FinOps.

- **Flexible pricing:** Insight's pricing strategy offers flexibility through service credits and hybrid fixed-fee plus gainshare models. Its overall business scale is linked to its core software business. Organizations concerned about any conflict with reselling activities may be reassured by its willingness to operate with a variety of pricing models.

- **Broad relevance:** Insight has a client distribution across varying scales, predominantly servicing clients between 1,000 and 50,000 managed devices. Its cross-regional approach includes resources in 11 of the 31 markets assessed in this Magic Quadrant. While 70% of its reported SAM managed services contracts are with European clients, it reported a higher proportion of APAC clients than its peers assessed in this Magic Quadrant.

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**Cautions**

- **Limited resources and growth:** While Insight showed an increase in revenue and resources, its reported client growth rate was the lowest of its peers assessed in this Magic Quadrant. In addition, both its reported revenue growth and resource-to-client ratio are among the lowest of its peers. Clients who engage with Insight must confirm the resourcing model proposed for their service.

- **Developing service scope:** While articulating a sound vision for its SAM managed services, Insight is continuing to develop services to manage the range of cloud environments and use cases, and is behind its peers in execution. It reported low penetration across the service portfolio and has no visible approach and methodology to manage challenges emerging through use of IoT and RPA within the scope of its SAM managed services.

- **Lacks transformation and continuous service delivery:** Insight reported the lowest proportion of continuous SAM managed services among its peers assessed in this Magic Quadrant, with a predominantly scheduled service approach, particularly in EMEA and APAC.
KPMG

KPMG is a Niche Player in this Magic Quadrant. It is headquartered in the Netherlands and is a privately held audit and professional services firm. KPMG delivers SAM managed services across the spectrum of client scales. Continuous SAM managed services represent approximately 55% of ongoing SAM services clients, with noncontinuous scheduled services representing approximately 45%. SAM skills are primarily oriented to Europe, at approximately 52%, with a sales presence in EMEA, Asia/Pacific and North America. The breakdown of KPMG’s SAM managed services revenue regionally is estimated as North America, 46%; EMEA, 27%; APAC, 23%; and Latin America less than 5%. KPMG’s SAM managed services revenue grew by an estimated 50% year over year.

Strengths

- **Service evolution**: KPMG links SAM managed services to complementary practices in cybersecurity, ERP and ITSM, leveraging data across disciplines. KPMG has invested in development of a proprietary service portal, SAM Navigator, to enable service delivery including exposure of methodologies, reporting and project schedules, and supporting data exchange. It embraces its Powered SAM process and four-phase framework (Vision, Validate, Construct, then Deploy and Operate).

- **International presence**: KPMG reports SAM resources in 15 of the 31 markets assessed in this Magic Quadrant, applying an “act local, think global” approach. It has five central resource hubs in the U.S., the U.K., Germany, Australia and India, applying a more modest approach to offshore resourcing than a number of its peers.

- **Positive growth performance**: KPMG reported 50% growth in SAM managed services revenue. While targeting large enterprises, it delivers services across varying scales of organizations and reports a resource-to-client ratio among the highest of its peers assessed in this Magic Quadrant.

Cautions

- **Inconsistent approach across locations**: KPMG continues to vary its offering, skills and aligned outcomes across markets. It reported a significant shift in contracted client quantities by region, with a 300% increase in EMEA clients, while APAC clients declined by almost 60%, although at much higher average contract values year over year. Prospective KPMG clients should ensure references are received from organizations with a like-for-like service in the same market.
Livingstone Group

Livingstone Group (Livingstone) is a Leader in this Magic Quadrant. It is headquartered in the U.K. and is a specialist provider of SAM managed services owned by the Carlyle Group. Livingstone delivers SAM managed services to predominantly midsize and enterprise clients. Continuous SAM managed services represent approximately 85% of ongoing SAM services clients, with noncontinuous scheduled services representing approximately 15%. SAM skills are primarily located in Europe, at approximately 81%, with a sales presence in the U.K. and the U.S. Regionally, Livingstone’s SAM managed services revenue is estimated as EMEA, 70%; North America, 29%; and APAC, less than 1%. Livingstone’s SAM managed services revenue was reported to be flat year over year.

Strengths

- **Nascent modern SAM services**: KPMG reports among the lowest proportion of cloud consumption management incorporated within its SAM managed services. It is taking limited steps to address new challenges to its SAM discipline from emergent technologies such as IoT and RPA. Gartner noted a requirement for clearer examples of benefits delivered across SAM managed services.

- **Limited transformation and ownership of SAM discipline**: KPMG did not showcase examples of its approach to transforming the SAM discipline for its clients. It reports among the lowest quantity of SAM managed services clients across peers assessed in this Magic Quadrant, and needs to develop a clear and enhanced approach to custodianship of data and ownership of the SAM discipline.

- **Evolved SAM services vision**: Livingstone represented a high proportion of continuous services. Its vision and approach incorporate a shift from compliance to optimization, taking a role as an influencer of actions in lieu of reporting, and delivery of predictive asset management. Its managed services delivery platform is the backbone of its services, incorporating all service management and data management, automation and interactions.

- **Investment in capability**: Livingstone reported among the highest rate of resource increase of its peers assessed in this Magic Quadrant and reported supporting clients’ requirements across a broad range of publishers. It primarily recruits experienced practitioners with 10 years or more of SAM execution experience, augmented by a graduate program to support an expanded resource basis.

- **Flexible commercial model**: Livingstone reported growth in its client base year over year, facilitated by offering flexible commercial alternatives including fixed-fee, multiyear managed services and a hybrid success fee model.
Cautions

- **Limited penetration of new generation services:** Livingstone's understanding of market requirements is yet to be matched by its SAM market development and influence. Livingstone needs to advance an approach to address SAM challenges associated with emergent technologies such as IoT and RPA. It reports a low quantity of SAM managed services contracts incorporating cloud consumption management.

- **Need to strengthen operations:** Livingstone has yet to realize operational maturity, including service development structure and transformation management mechanisms. Some clients comment on delivery challenges, over reliance on key individuals and the need to streamline service delivery. Livingstone is largely oriented to the U.K. and North American markets with no COE and no resources in APAC or LATAM.

- **Flat revenue performance:** Livingstone had flat revenue performance in 2020, with flat sales in APAC and shrinking sales in North America. It is heavily invested in Microsoft cloud services, but has little representation depth outside of Microsoft Azure, with minimal penetration for AWS and none for GCP.

**Softline Group**

Softline Group (Softline) is a Challenger in this Magic Quadrant. It is headquartered in Germany. It is now majority-owned by reseller Softline International, which is incorporated within the group. Softline delivers SAM managed services to predominantly small and midsize clients. Continuous SAM managed services represent approximately 40% of ongoing SAM services clients, with noncontinuous scheduled services representing approximately 60%. SAM skills are primarily oriented to Europe, at approximately 80%, with a sales presence spread across approximately 50 countries. Softline's SAM managed services revenue is estimated as EMEA, 78%; APAC, 10%; Latin America, 6%; and North America, 6%. Softline's SAM managed services revenue grew by an estimated 26% year over year.

**Strengths**

- **International presence:** Following incorporation of Softline International operations, Softline Group now has a broader presence. It has SAM managed services local resources across regions including LATAM and APAC, reporting resources in 18 of the 31 markets assessed in this Magic Quadrant, an increase from six in the prior year. It uses a structured pricing mechanism via an international bid team across multiple regions.
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**Cautions**

- **Growth of clients and resources**: Softline reported the highest unique client growth rate of providers assessed in this Magic Quadrant, with notable contributions from EMEA and APAC. It also reported among the highest rate of resource increase and having made investments in SaaS management capability.

- **Maturing value management**: Softline measures ongoing benefits, identifying potential savings upfront and reaffirming performance to expectations, while leveraging dedicated service delivery managers. It developed its own framework, “House of ITAM,” for people, process and tools, and continues to deliver services across a broad range of publishers.

**SoftwareONE**

SoftwareONE is a Leader in this Magic Quadrant. It is headquartered in Switzerland and is a publicly listed software and cloud service reseller with a global presence. SAM managed services are provided predominantly to small and midsize clients. Continuous SAM managed services represent approximately 27% of ongoing SAM service clients, with noncontinuous scheduled services representing approximately 73%. SAM skills are most prominent in Europe, at approximately 50%. Its sales presence is spread across approximately 90 countries. Regionally, SoftwareONE's SAM managed services revenue is estimated as EMEA, 62%; North America, 18%; Latin America, 13%; and APAC, 7%. SoftwareONE's SAM managed services revenue grew by an estimated 20% year over year.

- **Limited transformation and end-to-end services**: Softline reports delivering predominantly scheduled services and among the lowest continuous services revenue of its peers assessed in this Magic Quadrant. Its messaging remains tool-centric and needs to adapt to delivering transformation and discipline ownership. Softline may better suit prospective clients who don't seek a partner to transform and manage the SAM discipline.

- **Limited contract breadth**: Softline has a component-based service model. It reported that 75% of its clients have a low-cost service, below $100,000 annual contract value. It also reported among the lowest revenue per resource across providers assessed in this Magic Quadrant.

- **Limited penetration of cloud services**: Although showing some growth, Softline reports among the lowest proportion of cloud consumption management incorporated within its SAM managed services. Prospective clients seeking cloud cost management services within SAM managed services should validate references specific to delivery of this discipline.
**Strengths**

- **Vision aligned to digital challenges:** SoftwareONE recognizes the ongoing evolution of SAM and is shifting from legacy compliance to optimization of services including cloud management and open-source-code analysis options.

- **Global relevance:** SoftwareONE reported SAM delivery resources in 28 of the 31 markets assessed in this Magic Quadrant. Its approach includes offshore, onshore and nearshore to provide 24/7 support. It has global service delivery centers in Germany, Mexico and India, with regional centers in the U.S., Romania, Colombia and Malaysia. Local sales offices in 90 countries are core to its go-to-market offering.

- **Flexible tiered service model:** SoftwareONE has a five-phase delivery and service alignment approach: diagnostic, strategy, design, transition and operation. It employs requirements routing to enable solution development. During the contract term, it enables clients to swap publishers in or out of the service classified in the same service tier and also offers a gainshare model.

**Cautions**

- **Limited transformation and ownership of SAM discipline in service offering:** SoftwareONE operates among the lowest resource-to-client ratios of its peers assessed in this Magic Quadrant. Its offerings, while providing data automation and covering a number of key aspects of SAM, have little orientation to life cycle operation and are largely oriented to providing multiple services. This is in lieu of a service that transforms and delivers a fully packaged SAM discipline for clients with limited or no dedicated SAM resource.

- **Operations and resource quality:** SoftwareONE employs a service success manager role across services; however, questions remain regarding quality of delivery and resources. Clients have shared concerns about the quality of offshore resources and noted a delta to the competence of their onshore counterparts. Clients should carefully assess the competencies and availability of proposed resources.

- **Most clients get lower-end services:** SoftwareONE’s sales strategy is late to shift to a value orientation, and the bulk of SoftwareONE clients contract lower-end scheduled services. It reports among the lowest proportion of continuous services of providers assessed in this Magic Quadrant. Clients report challenges recognizing value in the form of realized cost savings.
USU

USU, formerly Aspera, is a Niche Player in this Magic Quadrant. It is an IT tools and services vendor, headquartered in Germany. USU delivers SAM managed services to midsize and enterprise clients, principally connected to its own SAM tool technology. Continuous SAM managed services represent approximately 45% of ongoing SAM services clients, and noncontinuous scheduled services represent approximately 55%. SAM skills are primarily located in Europe at approximately 80%, and the provider has a sales presence in Germany, the U.S. and the U.K. The breakdown of USU’s SAM managed services revenue regionally is estimated as EMEA, 75% and North America, 25%. USU’s SAM managed services revenue grew by an estimated 20% year over year.

Strengths

- **Single-source technology plus managed services**: USU’s vision addresses the increasing complexity of software, positioning SAM managed services that are scalable, consumable, standardized and automated, leveraging its own technology. It has good penetration of organizations across all scales, primarily targeting upper mid-markets with over 5,000 users.

- **Service evolution**: USU continues to support clients’ requirements, frequently delivering across a range of publishers in excess of its peers assessed in this Magic Quadrant. It has responded to the market through portfolio transformation, service development flows through peer exchange, piloting, and industrialization to expand capabilities.

- **Flexible commercial approach**: USU offers a commercially scalable and flexible approach. Its commercial model includes use of hybrid gainshare, adapted pricing for regional sourcing, level-tiered vendor swaps within scope and scope reductions on contract anniversary.

Cautions

- **Modest revenue and resource growth**: USU demonstrated customer growth; however, it has among the fewest number of resources compared to peers assessed in this Magic Quadrant. It also reported the lowest total SAM managed services revenue, the lowest SAM managed services revenue per resource, and among the lowest average contract value. While it employs resources in EMEA and North America, it reported no clients or revenue in APAC or LATAM.
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

The following vendor was added to the Magic Quadrant this year:

- Insight

Dropped

The following vendor was dropped from the Magic Quadrant this year:

- Elée was dropped for not meeting the minimum inclusion criteria for this year's Magic Quadrant cycle.

Inclusion and Exclusion Criteria

To be included in this Magic Quadrant for SAM managed services, each service provider needs to meet a combination of essential and required criteria. Providers must meet all of the essential criteria representing required attributes of domain expertise plus at least six of the seven subsequent required criteria demonstrating delivery of those attributes in the context of a SAM managed service.
Essential Criteria

SAM service providers must deliver each of the seven defined SAM managed services core components:

- Policy and process assessment, design, transformation, continuous improvement and operation
- Continuous and complete trustworthy estate representation
- Continuous entitlement custodianship, management and use rights analysis
- Continuous custodianship of trustworthy software installed, used and accessed data
- Continuous cloud service metering, license management and optimization
- Development, continuous maintenance and optimization of license position, usage, spend recommendation services and governance reporting
- Continuous integrated software life cycle management delivery — including request approval, procurement, management, harvest and retirement services

Required Criteria — Continuous SAM Managed Services Only

SAM managed service providers must:

- Deliver SAM managed services across a scope of 20 or more software publishers, of which Microsoft, IBM, SAP and Oracle are mandatory.
- Deliver SAM managed services that both: Manage usage and compliance of software run on Amazon Web Services, Microsoft Azure and Google Cloud Platform; Measure and optimize usage of Amazon Web Services, Microsoft Azure and Google Cloud Platform workloads and instances.
- Deliver SAM managed services to five or more referenceable clients.

Required Criteria — Continuous SAM Managed Services and SAM Scheduled Services
For the purpose of the following criteria, revenue, customer quantities and resource quantities from scheduled services are included. Scheduled services are classified as delivering the essential criteria of a SAM managed service as defined as “Complete,” but less frequently than defined as continuous:

- Delivered at least $5 million in annual SAM managed services revenue for fiscal year 2020 billed directly to end-user clients. The minimum SAM managed services revenue must exclude the following: Any license or SAM tool revenue embedded within the service contracts; Revenue derived from software-publisher-sponsored SAM services activities.

- Delivered SAM managed services directly to a minimum of 50 active unique clients (excluding partners) in fiscal year 2020.

- Delivered no more than 90% of SAM managed services revenue invoiced to clients in any one of the aforementioned and defined regions in 2020: North America, EMEA, APAC and LATAM (see Note 2).

- Demonstrate current permanent employment of 50 or more SAM managed services delivery management resources.

**Exclusion Criteria**

Gartner excludes providers that:

- Deliver SAM services predominantly through partners or subcontractors

- Deliver SAM services predominantly as a partner or subcontractor to a contracting party (such as an outsourcer) as opposed to directly to end-user clients

- Predominantly deliver packaged or tactical noncontinuous SAM services

- Provide predominantly 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 analysts evaluate service providers’ quality and efficacy of the processes, systems, methods or procedures that enable IT provider performance to be competitive, efficient and effective, and to positively impact revenue, retention and reputation. Ultimately, providers are judged on their ability to capitalize on their vision.

**Table 1: Ability to Execute Evaluation Criteria**

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Source: Gartner (July 2021)

**Completeness of Vision**

Gartner analysts evaluate providers on their ability to convincingly articulate logical statements about current and future market direction, innovation, client needs, and competitive forces and how well they map to the Gartner position. Ultimately, providers are evaluated on their understanding of how market forces can be exploited to create opportunity for the provider.
Table 2: Completeness of Vision Evaluation Criteria

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Quadrant Descriptions

Leaders

Leaders have built a considerable SAM managed services track record, demonstrating their experience to successfully deliver these services, and are well-positioned to continue delivering services in the future. Leaders have a clear vision of market direction and are actively building and improving their competencies to sustain their leadership position in the market. The Leaders quadrant indicates the direction of the SAM managed services 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 managed services, but have a less-well-defined view of the market’s direction than Leaders do. Consequently, they may be tomorrow’s Leaders, or they may not be aggressive and proactive enough in preparing for either the future or beyond their geographic focus.
Challengers have demonstrated they have solid bases of clients that are satisfied with the services they provide. Challengers’ proximity to the Leaders quadrant indicates that their vision of the SAM managed services 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 managed services market trends and directions; thus, they are focused and prepared for it. However, they may not be in a position to fully deliver and consistently execute on that vision. Accordingly, they may not be in a position to fully deliver and consistently execute on their vision at this time.

Niche Players

Niche Players have yet to achieve broad success in the SAM managed services 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 characteristics such as client size, geography or capability, or deliver services primarily on a scheduled basis (as opposed to continuous). Their Ability to Execute is limited to those areas of strength and affects a Niche Player’s 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 SAM managed services that deliver software asset management discipline. The Magic Quadrant assesses the Ability to Execute and Completeness of Vision of 11 SAM managed services 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 Magic Quadrant is a point-in-time analysis, with all provider profiles reflecting the status as of May 2021. Quantitative data collected was for a 12-month period ending April 2021.

SAM managed services providers offer an array of capabilities — 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 managed services are a vital contributor to SAM success for a growing number of organizations.
Evaluate Gartner’s Provider Positioning to Find Candidates That Meet Your Specific Requirements

The greatest benefits are derived from SAM managed services 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 Critical Capabilities for Software Asset Management Managed Services. Gartner’s positioning of providers in this Magic Quadrant does not imply that clients considering SAM managed services 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 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 initiative.

Use the Magic Quadrant as a tool to help inform your shortlist and evaluation of providers for your SAM managed services. However, the inclusion criteria in the Magic Quadrant result in the analysis of the largest and most established providers in the SAM managed services market. Clients should not disqualify any potential competitor simply because it does not appear in this Magic Quadrant.

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 is a discipline, as opposed to a technology. SAM skills required to enable effective SAM discipline are scarce in supply, with many organizations challenged to recruit and retain the necessary resource base. SAM managed services can address that shortage. Increased recognition of SAM discipline importance and appreciation of addressable benefits have led to rising volumes of SAM managed services delivered by domain specialists. Cost optimization and governance benefits, achievable through effectively managing this growing investment and associated complexity across the enterprise, regularly underpin the mandate for contracting SAM managed services.

Expanding software portfolios, continued growth in device quantities fueled by IoT and growth of RPA fueled by digital initiatives all increase demands on SAM. These, combined with complex use cases, hybrid environments, new forms of software consumption and ambiguous use rights, will continue to create management challenges.

Effective capture and management of detailed data across the broadening range of technology environments requires a “mesh” of techniques that the SAM managed services provider will run, operate and integrate. A single tool is increasingly challenged to deliver on these requirements.

Increasingly, SAM managed services incorporate the provider’s technical capabilities, intellectual property and automation, augmenting the data provided by SAM tools, and facilitating efficient delivery. Example proprietary and third-party automated capabilities include addressing data quality management requirements, identification and management of “noninstance data,” managing workflow, presentation of findings, identifying trends, tracking progress, and validating actions.

Taking ownership of SAM discipline, and custodianship of SAM data, leveraging quality data to engage clients with optimization activities, advice and risk mitigation actions, capable providers leverage core skills and methodologies to deliver cost benefits by:

- Informing software acquisition, maintenance and subscriptions renewals and disposal decisions
- Maintaining a high level of quality across commercial and technical inventory, leading to better management of software and cloud agreements and vendor relationship
- Identifying and eliminating obsolete or underutilized software, subscriptions and cloud services
Revenue from SAM managed services for the 11 vendors featured here has increased at an average CAGR for the past two years of 26%, with employed specialist resources increasing at the same rate. Two-year cumulative average client growth was 18%. Total contract value has accelerated with average contract values increasing by approximately 13% in 2020, as organizations with existing services broadened scope and deepened their investment, and large organizations committed to new services of higher value. Unique client growth was reported strongest in organizations with more than 50,000 managed devices in 2020, with logos added at a rate of over 20%; whereas organizations with less than 1,000 managed devices were reported to be weakest at 7%.

The COVID-19 pandemic may have had some impact on those growth rates. Increased focus on cost cutting and cost optimization, eradicating shelfware and unproductive software costs, a mechanism facilitated by a capable SAM function, lead more organizations to embrace SAM managed services, driving deeper investment in services.

The following are key aspects of the market:

- **Rationalizing and rightsizing contracts or migrating to optimal license models** — offsetting loss of leverage typical in SaaS contracts
- **Managing sprawl and toxic consumption of IaaS and PaaS contracts**
- **Effectively governing software use, identifying risks and enabling mitigating actions**
- **Providing operational support regarding software media and keys delivery, subscription management, tenant management, and support access**

- **Continuous access to skills and expertise**: Supply of SAM skills remains overwhelmed by the demands of organizations seeking to operate a mature SAM discipline. Additionally, developing skills that address the breadth of requirements, depth of complexity, and the nuanced and niche proficiency of effective SAM remains difficult within a discrete in-house operation. A managed service delivered end to end across the complete environment for all vendors and life cycle processes may be mandated. Alternatively, and more frequently, a hybrid model that shares responsibility between the managed service provider and internal resources may be chosen.
SAM managed services are broadly used by large enterprises: Within this Magic Quadrant, we identify providers’ suitability to organization size. Overall, SAM managed services are utilized by organizations across a range of sizes. The most typical organizations utilizing SAM managed services have between 1,000 and 10,000 devices under management. Penetration of large enterprises is very high, however, with an estimated 50% of organizations that have more than 10,000 managed devices leveraging a SAM managed service. Regionally, SAM managed services are used most in EMEA — eclipsing the combined total of North America, LATAM and APAC.

Increasingly critical role addressing cloud services: Advanced adoption of SaaS and high growth rates of public cloud consumption are increasingly relevant to SAM managed services provision. Conventionally, this includes management of SaaS applications primarily from a cost perspective and bring your own license (BYOL) use rights compliance. While internal SAM functions, often stretched to deliver on expectations, appear less likely to take on the public cloud metering and cost management duties of FinOps, SAM managed services providers regularly incorporate this discipline.

Continuous or scheduled service delivery: SAM managed services delivered on a continuous basis embody the necessity for sustained SAM discipline. Project-based activities may only deliver short-term benefits or incremental improvements in the SAM discipline. A compromise between continuous managed service delivery and one-off tactical activities may be delivered through scheduled services that deliver SAM on a regular, part-time basis. While scheduled services may cost less than half of continuous services, they will not inform continuous acquisition and renewal decisions or manage waste to the same degree.

Service characteristic by provider category: In this Magic Quadrant, specialist providers, resellers, audit and professional services firms, and a tool vendor are assessed. No outsourcers or global system integrators met the qualifying criteria. Specialist providers deliver the highest proportion of continuous SAM managed services. Audit and professional services firms have had contracts in place for shorter periods than their counterparts in other categories. Risk-reward cost models increased in use to 5% of contracts from 2% in the prior year, and are most prevalent in the reseller category, potentially to offset concerns regarding conflict of interest. Resellers also deliver the highest volumes of SAM managed services.
Continuous SAM managed services resemble SAM outsourcing: SAM managed services are most effective when delivering continuous guidance, integrating with internal functions to enable optimization throughout the cycle of requirements, request, procurement, harvest and retirement. Proficient governance made possible by robust SAM discipline through an effective SAM managed service can, in some cases, satisfy software publishers and obviate the need for audit. As software licensees, the contracting party cannot outsource responsibility for license compliance; however, a penalty clause may be included in SAM managed services contracts to recover some cost of noncompliance, should the provider supply inaccurate advice.

### Acronym Key and Glossary Terms

<table>
<thead>
<tr>
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<tr>
<td>Toxic consumption</td>
<td>Unnecessary use that results from PaaS and IaaS overprovisioning and idle instances, with “meters” continuing to run, thereby incurring unnecessary costs.</td>
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### Evidence

Evaluation in this Magic Quadrant is informed by:

- **Primary research** — Gartner inquiries with user organization clients.
- **Primary research** — A 90-minute provider briefing from each of the 11 participating service providers addressing capability proof points of each evaluation criterion in the Magic Quadrant.
- **Primary research** — A detailed provider survey, covering revenue, staffing, geographic capabilities, scale and other relevant information, totaling more than 1,800 data points.
- **Primary research** — Client satisfaction and verbatim comments on the performance of individual providers taken from client reviews.
- **Secondary research** — Briefings delivered by providers to Gartner in advance of the Magic Quadrant and Critical Capabilities process on aspects of a provider’s SAM managed services capabilities.
- **Secondary research** — Press releases and publicly available information, including company websites and financial reports.
Note 1: SAM Managed Services Exclusions

SAM managed services as measured exclude the following:

- Packaged, project or tactical SAM services delivered in isolation or ad hoc retained services.
- SAM tool sales, SAM tool subscriptions, SAM tool support and maintenance contracts, and SAM tool hosting.
- Asset tracking or reporting devoid of intelligent data augmentation or application of use rights intelligence.
- Vendor specific/sponsored programs (e.g., Microsoft SAM engagements, Microsoft assessments, IBM ISAP).
- Vendor-initiated audits, compliance reviews or assessments.
- Sale of software licensing or cloud service subscriptions.
- Organizations applying accounting rules when calculating service revenue figures, including license revenue embedded within service contracts, thus reporting excluded SAM tool revenue as service revenue, were directed to remove the excluded income.

Note 2: Regions

This Magic Quadrant addresses presence in regions as follows:

- **North America:** U.S., Canada
- **Europe, the Middle East and Africa (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 and Japan (APAC):** Australia, China, India, Japan, Philippines, Singapore, Vietnam, other APAC
- **Latin America (LATAM):** Argentina, Brazil, Chile, Colombia, Costa Rica, Mexico, other LATAM
Evaluation Criteria Definitions

Ability to Execute

Product/Service: Core goods and services offered by the vendor for the defined market. This includes current product/service capabilities, quality, feature sets, skills and so on, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

Overall Viability: Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

Sales Execution/Pricing: The vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel.

Market Responsiveness/Record: Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.

Marketing Execution: The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional initiatives, thought leadership, word of mouth and sales activities.

Customer Experience: Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements and so on.

Operations: The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure, including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.
Completeness of Vision

**Market Understanding:** Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen to and understand buyers' wants and needs, and can shape or enhance those with their added vision.

**Marketing Strategy:** A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.

**Sales Strategy:** The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service, and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

**Offering (Product) Strategy:** The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements.

**Business Model:** The soundness and logic of the vendor's underlying business proposition.

**Vertical/Industry Strategy:** The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets.

**Innovation:** Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

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

**Document Revision History**

*Magic Quadrant for Software Asset Management Managed Services - 4 August 2020*

**Recommended by the Authors**
Some documents may not be available as part of your current Gartner subscription.

How Markets and Vendors Are Evaluated in Gartner Magic Quadrants

Software Industry Transformation Requires Software Asset Management Programs to Follow Suit

Toolkit: Mission Statement and Charter to Establish a Mandate for ITAM

Toolkit: RFP Template and Evaluation Model for Selecting a SAM Managed Service Provider
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