

# Market Guide for Independent Third-Party Support for IBM, Microsoft, Oracle and SAP Software

Published 12 September 2022 - ID G00757959 - 25 min read

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Software is the second-highest IT spend category industrywide, which drives sourcing, procurement and vendor management leaders to analyze cost-saving opportunities offered by third-party providers. Use this guide to identify options that can reduce your software maintenance costs by 50% or more.

## Overview

### Key Findings

- Sourcing, procurement and vendor management (SPVM) leaders who research and analyze all viable maintenance options for their IBM, Microsoft, Oracle and SAP software are well positioned to recommend cost optimization alternatives to their stakeholders.
- Comparing the third-party software support (TPSS) offerings to the support policies and contract terms governing the IBM, Microsoft, Oracle and SAP products reduces the risk of selecting a third-party provider that has lower pricing but insufficient service offerings.
- SPVM leaders reduce cost and operational risk when they engage stakeholders for a TPSS risk-benefit analysis and then arrange proof of concept (POC) engagements for the providers to showcase their service offerings and support capabilities.

### Recommendations

SPVM leaders contracting IT services and solutions with a goal to optimize costs for IBM, Microsoft, Oracle and SAP should:

- Use the reference table and services described in this guide to evaluate TPSS as one of the options to reduce hefty software maintenance costs across these four vendors' software portfolios.
- Compare TPSS offerings to the maintenance and support policies and contract terms governing their organizations' current IBM, Microsoft, Oracle and SAP software as a key exercise when conducting the risk-benefit analysis for moving to TPSS.

- Send RFPs to all viable TPSS providers discussed in this guide to obtain information on their services and pricing. Request TPSS providers to provide at least three references and agree to POC engagements to ensure their services meet current and long-term support needs.

## Market Definition

Independent third-party software support providers give organizations a lower-cost alternative to the escalating maintenance, support and consulting service fees charged by IBM, Microsoft, Oracle and SAP. This Market Guide covers six independent third-party software support providers that offer technical support services to replace the maintenance and support programs from IBM, Microsoft, Oracle and SAP (see Figure 1).

**Figure 1. Six Independent TPSS Providers Offering Lower-Cost Software Support Solutions**



### Six Independent TPSS Providers Offering Lower-Cost Software Support Solutions



Source: Gartner  
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**Gartner.**

Independent TPSS service providers are not authorized channel partners. They offer independent support. The independent TPSS providers have no relationship with the original equipment manufacturer (OEM) or independent software vendor (ISV) and, as a result, cannot access intellectual property, software updates, firmware updates or security advisories, or obtain OEM/ISV Level 3 or backline support.

## Market Description

TPSS alternatives offer both cost-cutting and cost avoidance opportunities for organizations to reduce current- and future-year operating expenditure (opex) spend and budget. Figure 2 illustrates examples of the key offerings and capabilities of the six independent TPSS service providers discussed in this guide. These capabilities, further defined in the Market Introduction section, should be evaluated as part of the feasibility study to analyze cost-saving opportunities to reduce the rising maintenance and support fees from IBM, Microsoft, Oracle and SAP (henceforth referred to as the “megavendors”).

**Figure 2. Examples of TPSS Providers’ Service Offerings and Capabilities**



### Examples of TPSS Providers’ Service Offerings and Capabilities



Source: Gartner  
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When TPSS services are analyzed and deemed viable from a risk-benefit standpoint during a feasibility study, organizations are able to take advantage of the substantial opex savings and value-added services offered by the third-party market to:

- Reduce software budgets, specifically software maintenance profit and loss (P&L) operating expense. The average annual savings is typically 50% when comparing TPSS services costs to the annual maintenance and support pricing models and policies of the megavendors. <sup>1</sup>
- Customize contracts for increased flexibility. Organizations look to third-party providers to increase flexibility in their software maintenance and support contracts, allowing them to opt

out of new and future versions and release upgrades if these are unnecessary and costly for the business.

- Provide specialized services to support customized code, modifications and unique product-specific requirements as well as offer improved SLAs.
- Customize agreements for shorter-duration terms than the typical megavendor annual maintenance contract commitment requirements. TPSS providers are often willing to offer short-term and month-to-month support for special product-specific needs under customized service arrangements and contracts.
- Use the lower-priced TPSS proposals as leverage when negotiating with software vendors. TPSS services continue to threaten the software vendors' maintenance and support revenue stream. This enables procurement to use these lower-priced proposals for bargaining power when negotiating with some of these megavendors.

## Market Direction

Gartner predicts that this market will continue to see both the emergence of new TPSS providers as well as new and expanded service offerings by the existing providers. The TPSS market growth continues to expand, exemplified by Origina's recent announcement adding mainframe software support services.

## Market Analysis

Gartner's 2022 IT Key Metrics data reflects that software is a significant spend across industries and ranks as the second-highest spend category over the five-year period of 2017 to 2021 (see Figure 42 in [IT Key Metrics Data 2022: Industry Measures – Executive Summary](#)). In organizations with significant megavendor software portfolios, lower-priced TPSS can offset a significant percentage of the year-over-year annual maintenance and support increases typically imposed by these software vendors.

The 2021 Gartner Sourcing, Procurement and Vendor Management Survey reflected a significant percentage of third-party software support vendor negotiations across all three regions. <sup>2</sup> Third-party software support deals comprise 45% of all technology deals negotiated across North America, EMEA and Asia/Pacific (APAC). Between the 2020 and 2021 survey, these third-party deals rose by 18 percentage points, from 27% to 45%. This can be attributed to the financial disruption imposed by the impacts from COVID-19, the Russian invasion of Ukraine, inflationary headwinds and the threat of a looming recession.

When third-party support is a feasible alternative, the significant software maintenance and support cost reduction opportunity can be a "quick win." It can help keep budgets flat by eliminating the ongoing year-over-year software vendor maintenance and support increases when organizations are challenged to meet cost-saving goals and initiatives.

## Scenarios and Factors That Will Contribute to Continued TPSS Market Growth

The TPSS provider market remains relatively small. But while the number of providers is limited, the majority of services offered are mature and continue to be enhanced and expanded to offer additional service categories (see the Market Introduction section for details on each provider's service offerings).

Several factors will contribute to the continued growth in the TPSS market, which are illustrated in the five scenarios below:

- **Scenario 1: Cloud migrations** — During a migration to cloud, when phasing out some or all of the megavendor software portfolio is part of the migration plan, perpetual software licenses can continue to be used. This can occur when the customer-entitled version of the software can support the needs of the organization until the cloud migration cutover date. The customer-entitled version is the last version that was announced and made generally available by the vendor when the end-user maintenance and support was terminated. However, end users should ensure that they access and review vendor website policies and read their contracts and support policy handbooks to make sure there are no terms that contradict this standard support policy. When version upgrades are no longer needed during these cloud migrations, the TPSS providers can offer technical support for the customer-entitled version so organizations can realize the average 50% cost reduction noted above. This analysis should be part of the cloud migration planning checklist and total cost of ownership (TCO) analysis.
- **Scenario 2: Migration to alternative vendors or solutions** — When new vendors or alternate solutions are selected to replace on-premises software products, third-party support can be analyzed to determine if a viable option is to use software with perpetual licenses under the customer-entitled version until the migration cutover date, and beyond, as necessary. This TPSS option should be part of the organization's product replacement migration analysis and planning checklist.
- **Scenario 3: Low-value maintenance evidenced by low-frequency technical support tickets/incidences** — The historical volumetric analysis of all help desk and service desk technical support and incident tickets should be analyzed every six months. This analysis helps to determine the ROI when comparing the value received to the annual cost paid for the vendor maintenance and support service. This analysis should include the frequency of support calls, type of support, severity level, resolution time and results, and incident ticket close data for each of the software products in your megavendor portfolios. For low-value, low-incident software product support findings, TPSS services should be considered as an alternative for cost-saving opportunities.
- **Scenario 4: End-of-support announcements or notifications by software vendors** — Older-version software may still be used to support certain applications, but will no longer be provided by the megavendors without a customized support agreement and for an additional fee. Evaluate TPSS services to support these older-version products, which is a standard service performed by most TPSS providers. This would not only result in the average 50% cost reduction compared to the current software vendor standard maintenance and support fees, but also avoid the high customized professional service rates that software vendors would

typically charge after the end-of-support date. TPSS providers will typically commit to supporting older legacy software versions for 15 years – and in some cases, even longer.

- **Scenario 5: Absent or expiring maintenance increases caps for price protection in contracts –** In some cases, no price protection exists for ongoing maintenance and support in vendor contracts. In such cases, particularly with the three- to five-year term multiyear commitment contracts (e.g., enterprise license agreements [ELAs], enterprise agreements [EAs] and unlimited license agreements [ULAs]), there is high risk of escalating maintenance and support costs or end-of-support announcements during these multiyear terms. If there is no price protection language in your contract, or if the price increase protection is higher than the current consumer price index (CPI) rate, evaluate TPSS services to compare the pricing to that of the vendor renewal proposals. This should be done at least six to nine months before the expiration date of these multiyear contracts. We recommend a term of six months minimum to ensure there is sufficient time to evaluate the TPSS services and pricing, and to give adequate notice to the incumbent provider.

## Representative Vendors

*The vendors listed in this Market Guide do not imply an exhaustive list. This section is intended to provide more understanding of the market and its offerings.*

### Market Introduction

#### Six Independent Third-Party Support Providers for IBM, Microsoft, Oracle or SAP

The six TPSS providers selected for this Market Guide offer independent third-party software support for IBM, Microsoft, Oracle or SAP products are Alui, Origina, Rimini Street, Spinnaker Support, Support Revolution and US Cloud (see Note 1). The types of services each of these six providers offer, and the vendor products they support, are identified in the table and provider-specific summaries that follow.

#### Software and Regions Supported by TPSS Providers

Table 1 provides detailed information on each third-party software support provider. Use this table, in conjunction with the vendor profiles, to compare and contrast providers’ offerings by the software vendors’ products they support.

**Table 1: Representative Vendors in Independent Third-Party Support for IBM, Microsoft, Oracle and SAP Software**

TPSS Provider	Software Supported	Regions Supported
Alui	Oracle	EMEA NA

Origina	IBM	APAC EMEA NA
Rimini Street	IBM Microsoft Oracle SAP	International U.S.
Spinnaker Support	Microsoft Oracle SAP	APAC EMEA LATAM NA
Support Revolution	Oracle SAP	International
US Cloud	Microsoft	APAC EMEA NA
APAC = Asia/Pacific; NA = North America		

Source: Gartner (September 2022)

Note: This guide focuses on IBM, Microsoft, Oracle and SAP software only. The vendor profiles do not include service offerings by the TPSS providers for other software.

## Vendor Profiles

### Alui

Corporate Information and Customer Base:

Company Website: [www.alui.com](http://www.alui.com)

Headquarters: Hampshire, U.K., and Stamford, Connecticut

Fiscal Year-End: 31 December

Number of Current Customers: 97

Certifications to International Standards: Not provided

**Overview:** Alui offers technical support and consulting services for Oracle's Hyperion suite of enterprise performance management products. Hyperion Solutions was acquired by Oracle in 2007, and Alui was founded in 2008 by previous directors of Oracle-Hyperion Solutions to provide specialized third-party Oracle software support. Alui is an independent company and has clients in North America, the U.K. and Europe.

Alui does not provide global tax, regulatory and compliance (GTRC) services.

Alui provides value-added services as part of its standard support by assisting with updates and installations when clients perform these tasks in-house. Each client is assigned a support specialist who has consultancy expertise. Alui also provides assistance with making application changes as the client's business changes. Alui offers "mini" consulting activities, carried out remotely in four-hour blocks.

Consulting and customized services provided by Alui include remote system administration, upgrades and reinstallations, provision of documentation and procedures, and remote and on-site consulting to perform defined projects.

## Origina

### Corporate Information and Customer Base:

Company Website: [www.origina.com](http://www.origina.com)

Headquarters: Dublin, Ireland

Fiscal Year-End: 31 October

Number of Current Customers: 154

Certifications to International Standards: ISO 27001:2013, Cyber Essentials

**Overview:** Origina, founded in 2012, offers technical software maintenance and consulting services for all IBM perpetually licensed software products on open systems and mainframe. Supported IBM Passport Advantage product families include WebSphere, Db2, Informix, Domino, Netcool, Sterling, MQ, FileNet Content Manager, Cognos Analytics, Unica, Tivoli Monitoring and Rational. This includes support for former IBM Passport Advantage products such as those divested to HCL Technologies, Acoustic and SS&C Technologies Holdings. In June 2022, Origina announced its extension of its software maintenance offering to include IBM Z mainframes providing mainframe users the same types of services as its Passport Advantage customers.



Origina provides global 24/7 coverage and support using a team of 30 Level 1 resources in Dublin and Dallas, Texas. Origina pairs contractually binding service-level agreements with a service model that draws from a collection of over 600 Global IBM Experts, who are assigned on a per-product basis for the support term.

Origina does not provide GTRC services, since these services are not required for IBM software. Origina's offering extends the natural life cycle and value of IBM products through a support and maintenance program that includes value-added services in its standard support. This includes full support for all versions, entitlement capture, interoperability certification, proactive, layered security services, new fixes, product enhancements, meet-the-experts free consultancy workshops, product upgrades advisory, licensing assistance, and the ability to resolve defects and apply custom fixes. Origina also provides several additional services, including IBM Passport Advantage and Z Mainframe license analysis and consulting, to leverage Origina's Global IBM Expert team to help with complex, time-consuming projects.

## Rimini Street

### Corporate Information and Customer Base:

Company Website: [www.riministreet.com](http://www.riministreet.com)

Headquarters: Las Vegas, Nevada

Fiscal Year-End: 31 December

Number of Current Customers: More than 2,900 active customers

Certifications to International Standards: ISO 27001:2013, ISO 9001:2015

**Overview:** Rimini Street, founded in 2005, offers technical support, integrated application managed and professional services for IBM, Microsoft, Oracle and SAP software. It offers technical support for Oracle products including E-Business Suite, PeopleSoft, JD Edwards, Database, Fusion Middleware, Agile, Hyperion, Siebel CRM, Oracle Retail, Oracle ATG Web Commerce, Customer Care and Billing, Communications and Endeca. It also provides technical support for SAP products including Business Suite, S/4HANA, BusinessObjects Business Intelligence, HANA database and the SAP database family, formerly known as Sybase. Rimini Street offers technical support for IBM Db2 and Microsoft SQL Server and application management services for SAP and Oracle.

Rimini Street offers GTRC services as part of the standard support agreement at no additional charge. Its tax, legal and regulatory update process includes delivery through its proprietary and patent-pending tax engine and provides these update services for 145 countries. Rimini Street analysts gather, analyze and scope GTRC changes from over 5,300 government sites, 3,500 information sources and 26,000 jurisdictions.

Clients are assigned a primary support engineer (PSE) averaging over 20 years of experience. For each product line, Rimini Street also provides advisory services delivered by a team of experts for

24/7 global coverage and resilience. This includes security advisory, license advisory and cloud advisory, integration, interoperability, proactive support services, and functional and technical roadmap services. Rimini Street support services are facilitated by its proprietary artificial intelligence (AI) applications that the company claims have helped reduce resolution time by 23%.

Professional and customized services and solutions provided, for an additional charge, include application and database managed services for SAP and Oracle, combined with vendor replacement third-party support for unified software services offering. For SAP and Oracle, this includes operational support, system administration, system health monitoring and development support. Other offerings include advanced global security assessments and zero-day defense solutions, integration services and solutions, database health checks, proactive application monitoring tools and services, and interoperability services and solutions, including a patented browser interoperability solution.

## Spinnaker Support

### Corporate Information and Customer Base:

Company Website: [www.spinnakersupport.com](http://www.spinnakersupport.com)

Headquarters: Greenwood Village, Colorado

Fiscal Year-End: 31 December

Number of Current Customers: 1,000+

Certifications to International Standards: ISO 27001:2013, ISO 9001:2015

**Overview:** Spinnaker Support, founded in 2008, offers technical support services for Oracle and SAP. For Oracle, it delivers third-party support for Database, Fusion Middleware, E-Business Suite, JD Edwards, Siebel CRM, Agile PLM, ATG Web Commerce, Endeca, Hyperion, Retail and select Oracle-PeopleSoft modules. Spinnaker Support offers third-party support for SAP Business Suite and SAP Application, SAP Databases and technology, SAP BI components, and Sybase database. It also offers managed services and consulting services for Oracle and SAP and third-party support and managed services for Microsoft SQL Server.

Spinnaker Support provides GTRC services (except for Oracle-PeopleSoft payroll) at no additional charge. It offers a standardized, repeatable process for update services and delivers the changes tailored for the individual customer.

Spinnaker Support provides a full complement of value-added services in its standard support. This includes break/fix for standard and custom code and interoperability, security and vulnerability protection, license compliance assurance and audit defense, general inquiry for supported products, and technology advisory services, including interoperability planning, virtualization and cloud migration.

Consulting and customized services provided by Spinnaker Support include SAP Basis and BI managed services, and application and technical services for the Oracle and SAP applications. Services include application development support, system reconfiguration, staff augmentation, database managed services, JD Edwards EnterpriseOne Configurable Network Computing (CNC) managed services, performance monitoring and tuning. Spinnaker Support also offers lift-and-shift cloud consulting services, including for relocating Oracle and SAP to Amazon Web Services (AWS). It then supports those applications in the cloud.

## Support Revolution

### Corporate Information and Customer Base:

Company Website: [www.supportrevolution.com](http://www.supportrevolution.com)

Headquarters: Berkshire, U.K.

Fiscal Year-End: 31 May

Number of Current Customers: 231

Certifications to International Standards: ISO 27001:2013, ISO 9001:2015, Cyber Essentials

**Overview:** Support Revolution, founded in 1998, offers software support services for Oracle and SAP products. Oracle products supported include Database (all versions), E-Business Suite, Exadata, Hyperion, JD Edwards, PeopleSoft, Primavera, Siebel CRM, Fusion, Fusion Middleware, Business Intelligence. SAP products supported include Business Suite, S/4HANA, HANA database, Adaptive Server Enterprise (ASE; formerly SAP Sybase) and BusinessObjects Business Intelligence. Support Revolution offers consulting and customized services for Oracle and SAP, including application managed services and hosting in Amazon Web Services (AWS), Microsoft Azure and other clouds.

Support Revolution provides GTRC services within the standard service offering at no additional charge.

Support Revolution was formerly an Oracle and SAP partner. It offers a service-level agreement that includes response and resolution targets and provides service credits when there are missed SLAs. It provides value-added services as part of its standard support by moving customers from existing on-premises or hosted service providers to AWS, Azure or other clouds. Once Support Revolution completes the process, it delivers the system to the client as part of a comprehensive outsourced managed service (SaaS). Support Revolution also offers a full range of implementation services and change management services, as well as advanced security services, for an additional charge. The security services are based on Trend Micro Deep Security.

Support Revolution engages closely with existing strategic system integration (SI) partners to streamline integration and fast-track the delivery of its services.

## US Cloud

## Corporate Information and Customer Base:

Company Website: [www.uscloud.com](http://www.uscloud.com)

Headquarters: St. Louis, Missouri

Fiscal Year-End: 31 December

Number of Current Customers: 597

Certifications to International Standards: ISO 27001:2022

**Overview:** US Cloud was founded in 2017 and is a privately held company. It was a spinoff of the managed services group of Fpweb.net, which was founded in 1996. It is focused on replacing Microsoft support offerings at a lower cost to its clients. US Cloud offers an alternative to Microsoft's Premier Support for Enterprise and Unified Support offerings and reports doing so at a 30% to 60% savings.

US Cloud does not offer GTRC services.

US Cloud provides 24/7 support by U.S.-based staff and is International Traffic in Arms Regulations (ITAR)/Defense Federal Acquisition Regulation Supplement (DFARS)-compliant. US Cloud supports all Microsoft technologies, issues of all severities, and all global time zones with Levels 2, 3, and 4 engineers in-house. As part of its US Cloud Premier Support offering, US Cloud provides access to its proprietary elite MSP network with more than 400 Microsoft-certified engineers in the U.S. It offers complete replacement for Microsoft Unified or Premier Support for Enterprise for cloud, hybrid and on-premises products, including Microsoft technologies past their end-of-life support cutoffs. US Cloud guarantees a 15-minute or less initial response time for all tickets and has financially backed, contractual performance SLAs. It has comprehensive Microsoft certifications and competencies and offers rapid managed escalations to Microsoft when necessary.

US Cloud offers value-added services as part of its standard support by allowing break/fix hours to be used for proactive support and project work, including engagement of technology-specific dedicated support engineers. US Cloud's proactive services catalog contains options for engineer-led engagements around system health checks, security assessments, proprietary diagnostic tools for Azure readiness, migration support, chalk-talks and others.

## Market Recommendations

### Five Steps to Evaluate TPSS Provider Offerings and Capabilities

Those looking to evaluate TPSS offerings and engage with these providers should take the following steps to identify the viability of third-party support as well as conduct a risk-benefit assessment:

- **Step 1 – Assess TPSS Feasibility.** Use the five scenarios described in the Market Analysis section as a guide to determine whether TPSS is a viable alternative for your organization.

- **Step 2 – Use RFPs for Detailed Services and Pricing Proposals.** Send RFPs to the TPSS providers referenced in this Market Guide to request their list of services and pricing. The RFP should request the specific support requirements that align with your organization’s solution needs for each software product in your megavendor software portfolio(s).
- **Step 3 – Conduct a TPSS Risk-Benefit Assessment With IT and Key Stakeholders.** Evaluate the TPSS services and pricing for a risk-benefit assessment to determine whether:
  - TPSS aligns with your short- and long-term technology strategy. Also determine the role these four megavendors’ software products play in your technology roadmap.
  - The three- to five-year plan for your software can be supported with the versions you are entitled to download. Install these before you cancel the megavendors’ maintenance and support. Map the upgrade path and needs for each product that is a TPSS candidate. Know the version you have installed today and the version you will be entitled to use when you cancel vendor maintenance and support. Use this data in your risk-benefit analysis.
  - The TPSS provider’s support services are adequate compared to those you are entitled to receive as referenced in your software vendor support policies, handbooks and contracts. Thoroughly review each software vendor’s maintenance and support terms and website policies to ensure you understand special entitlements or use of tools that are contingent upon renewing annual maintenance such as SAP Solution Manager. <sup>3</sup> Assess any risk if you no longer have access to or use rights for these entitlements or tools.
  - The TPSS provider’s support services match the typical types of help desk and service desk incident tickets that have been submitted over the past 12 to 24 months in your organization.
  - You are at risk if you plan to cancel a portion of your support quantities while you evaluate the TPSS services. A “trial” period to determine the TPSS provider’s capabilities is recommended. However, it is important to engage your legal counsel to review governing agreement and transaction documents to understand the vendor maintenance cancellation terms and policies. For example, IBM’s International Passport Advantage Agreement stipulates an “all or none” subscription and support requirement, which would create noncompliance for a partial quantity cancellation of support. <sup>4</sup>
  - Engage the TPSS provider to explain and document their policy in the event unexpected events or situations occur resulting in the need to return to the OEM and reinstate support. This should also be negotiated and included as a term in your MSA with the TPSS provider.
  - Your compliance and audit-readiness position is strong, as canceling the software vendor maintenance and support can heighten the audit risk and, with some vendors, can even trigger a software audit when the long-term maintenance and support revenue stream is threatened.

- **Step 4 – Request and Contact References.** Request at least three relevant references (similar-size enterprise and environment) from the TPSS providers that you are considering, and contact them to discuss their experiences and satisfaction with the specific TPSS provider(s). Ask the reference what, if anything, would they have done differently if they had to evaluate and select a TPSS provider again. This will help you to gain additional insights and/or context to move forward. Use Gartner’s Peer Connect service to identify other Gartner clients that have inquired about TPSS as an alternative to either one or all four megavendor software products.
- **Step 5 – Arrange No-Charge Pilot Programs to Evaluate and Test TPSS Capabilities.** Select three to five key products to arrange a 60- to 90-day no-charge pilot program to evaluate and trial the TPSS service as a proof-of-concept engagement. Ensure that the acceptance criteria to determine a successful POC include the following to help make your TPSS “go/no-go” decision:
  - Evaluate technical support expertise and capabilities across different products.
  - Measure response time and problem resolution rate.
  - Demonstrate TPSS provider’s capabilities to meet special or unique support requirements for a particular product or application.

## Evidence

<sup>1</sup> For this research, Gartner conducted briefings with third-party software support providers and reviewed customer inquiries and interviews conducted with reference customers. These consistently reveal that the typical selling price for services that include software break/fix and scheduled regulatory updates is about 50% of what the software publisher is currently charging the customer for product maintenance and support services. This selling price may be discounted on some occasions.

<sup>2</sup> **2021 Gartner Sourcing, Procurement and Vendor Management Role Survey.** Results from the 2021 Gartner Sourcing, Procurement and Vendor Management Survey presented are based on a Gartner survey conducted to identify the greatest challenges sourcing, procurement and vendor management (SPVM) leaders are facing today when negotiating with and managing technology vendors. This primary research survey was conducted online in August through September 2021 among 289 respondents in North America (n = 142), Western Europe (n = 88) and Asia/Pacific (n = 59). Qualifying organizations span various industries, except agriculture, construction, nonprofit, real estate and services. Organizations were screened for having annual revenue of greater than or equal to \$250 million for fiscal year 2020. Organizations were required to have formal SPVM resource(s)/teams. Respondents were required to be from corporate leadership, line-of-business leadership or SPVM functional area, and be a CIO, CPO/head of procurement, sourcing director/manager, procurement director/manager, vendor manager, supplier relationship manager, contract director/manager or procurement category manager. Respondents were required to have involvement in technology/SPVM resource(s)/teams. Quotas were applied for countries/regions, organization size and function. The survey was developed collaboratively by a team of Gartner analysts and Gartner’s Research Data, Analytics and Tools team. Disclaimer: Results of this

survey do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.

<sup>3</sup> [SAP Enterprise Support](#), SAP — Refer to Section 2.4.6 of the agreement, which states: “In the event Licensee terminates SAP Enterprise Support. Licensee’s use of SAP Solution Manager Enterprise Edition under SAP Enterprise Support shall cease.”

<sup>4</sup> [Passport Advantage Agreements](#), IBM — See Section 3.8, IBM Software Subscription and Support, which states:

“If Client elects to continue IBM Software Subscription and Support for an IBM Program at a designated Client Site, Client must maintain IBM Software Subscription and Support for all uses and installations of the IBM Program at that Site.

“If Client requests to renew expiring IBM Software Subscription and Support at a lesser quantity of IBM

Program uses and installations than the expiring quantity, Client must provide a report that verifies current

IBM Program usage and installation, and may be required to provide other compliance verification information.”

## Note 1. Representative Vendor Selection

The six vendors in this guide offer independent third-party software support for IBM, Microsoft, Oracle and SAP. An independent third-party software support provider is one that offers commercialized independent support with no relationship with the OEM/ISV. The provider is not an authorized channel partner. The provider has no relationship with the OEM/ISV and, as a result, cannot access intellectual property, software updates, firmware updates and security advisories, or obtain OEM/ISV Level 3 or backline support.



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