

Procurement

17 vendors monitored · 2 HIGH · 4 MEDIUM · 2 LOW

The Broadcom VCSP deadline passed March 31 — hundreds of European partners lost VMware authorization, and the EC is now formally assessing whether to impose interim measures. Adobe's CEO succession compounds two active regulatory investigations, creating strategic uncertainty through H1 2026. Watch ServiceNow earnings April 22 and Collibra's Spring '26 premiere April 8 for pricing signals ahead of renewal season.

HIGH PRIORITY ALERTS

Broadcom (VMware)

Regulatory / Antitrust

VCSP March 31 deadline has passed — EU Commission now formally assessing CISPE antitrust complaint; post-deadline enforcement of partner cull underway.

Watch: Enterprises relying on non-authorized VCSP partners face immediate service impact; review all VMware contracts for change-of-control and continuity clauses.

Adobe

Regulatory / Leadership

CEO succession underway after 18 years; \$150M DOJ settlement finalised; UK CMA formal investigation opened into early-cancellation fees.

Watch: Review all Adobe contracts for early termination clauses; monitor for pricing or strategic policy shifts during leadership transition.

MEDIUM PRIORITY

- IBM (Red Hat / watsonx) — 11 watsonx and automation solutions FedRAMP authorized April 1 via AWS GovCloud — 4x portfolio increase in one year.
- Oracle — Agentic AI innovations announced for Fusion Cloud (23 new apps); Java audit exposure intensifying in 2026.
- Workday — Spring 2026 release: hundreds of new AI agents across HR, Finance, and Legal; Flex Credits consumption pricing introduced.
- ServiceNow — Q1 2026 earnings April 22; Carahsoft partnership expanded to full commercial channels across U.S. and Canada.
- Collibra — Spring '26 Product Premiere on April 8: automated semantic model generation and cross-platform AI traceability previewed.
- Tanium — RSAC 2026 platform innovations active: Guardian Spotlight AI inventory, OT Endpoint Management, ServiceNow AI Agent.
- BMC Software (KKR) — Helix sale valuation elevated to ~\$2B including debt; competitive bidding process ongoing; IPO for mainframe business explored.

LOW: Cloudera, QRM, JetBrains, NICE, SAS, Nasdaq, Coupa, Bottomline — no material procurement impact this week.