

Vendor Intelligence Weekly

Procurement Edition — Week 16 (9–16 April 2026) | Prepared for IT Software Procurement

Executive Summary — Top Alerts

Priority	Vendor	Category	What Happened
HIGH	BMC Software (KKR)	M&A	UPDATE: KKR enters exclusive talks to sell BMC Helix to European PE firm Montagu at ~\$900M — materially below the \$2B estimate from W14. Imminent deal announcement expected. Change-of-control risk now acute.
HIGH	Broadcom (VMware)	Regulatory / Antitrust	UPDATE: EU Commission antitrust assessment of CISPE complaint ongoing. EMEA Registered partner tier removal proceeds toward May 2026. No interim measure granted this week; regulatory clock running.
HIGH	Adobe	Regulatory / Leadership	UPDATE: CEO succession search active; no successor named as of W15. Semrush acquisition on track for H1 2026 close. Adobe stock down ~23% YTD.
MEDIUM	Collibra	Product	UPDATE: Spring '26 Product Premiere delivered April 8. Seven new features now GA: AI Trust Score, Unified AI Registry, Control Tower, Code-first AI Registration, Data Contracts, Cross-platform Automated Traceability, and expanded Data Access controls.
MEDIUM	Coupa Software (Thoma Bravo)	Product / Strategy	UPDATE: Five-year Strategic Collaboration Agreement with AWS signed April 7. Coupa Navi™ AI agents built on Amazon Bedrock.
MEDIUM	NICE (Actimize)	Product / Events	UPDATE: NICE Actimize announces ENGAGE 2026 conference (April 27–28, NYC) on April 15. Agenda covers AI for financial crime, fraud, and compliance.
MEDIUM	Cloudera (KKR / CD&R)	Product	UPDATE: Major hybrid platform release April 8 — platform support extended to 2032, Cloud Bursting, Apache Iceberg optimization (38% query acceleration, 36% storage reduction), and expanded live data sharing.
MEDIUM	Tanium	Recognition	UPDATE: Wins 2026 Cybersecurity Excellence Award for Best Cybersecurity Company (April 9). Also newly recognized as a Gartner MQ Leader for Endpoint Management Tools.
MEDIUM	ServiceNow	Financial	UPDATE: Q1 2026 earnings on track for April 22. Analyst forecast Q1 revenue of \$3.75B (21% YoY). Stock at ~\$89 on April 9, down ~46% from 52-week high.
LOW	SAS Institute	Events	UPDATE: Additional SAS Innovate 2026 track announced April 7 — dedicated healthcare and life sciences programming. Conference April 27–30 Grapevine TX.
LOW	Oracle (NetSuite)	Product	UPDATE: NetSuite 2026.1 release intensifies; highlights include AI-Powered Intelligent Close Manager, generative bank transaction matching, AI assistants in EPM, and expanded e-invoicing.

Detailed Company Reports

Broadcom (incl. VMware, CA, Symantec)

- **Regulatory — UPDATE** — The EU Commission's formal assessment of the CISPE antitrust complaint (filed March 19) continues through W15. No interim measure has been granted or denied.¹ The CISPE complaint at the General Court (Case T-503/25) challenging the original merger clearance runs in parallel.
- **Partner Program** — Broadcom's removal of the Registered tier from the EMEA Advantage Partner Program remains scheduled for May 2026. This further consolidates the partner ecosystem to Select/Premier/Pinnacle tiers only. No new developments in W15.²
- **Context** — As of March 31, hundreds of European CSPs have lost authorization to sell VMware subscriptions. In the US, only 19 providers remain from a prior pool of thousands.

Procurement watchpoints

- CISPE EC complaint clock is running — any interim measure would force Broadcom to reinstate VCSP partners. Monitor EC communications closely in April/May
- EMEA Registered tier removal in May 2026: confirm all VMware channel relationships are with Select/Premier/Pinnacle partners
- Review all VMware contracts for service continuity, price lock, and change-of-control provisions

IBM (incl. Red Hat, HashiCorp, Confluent)

- **FedRAMP (Carry-forward)** — The April 1 FedRAMP authorization of 11 watsonx and automation solutions continues to generate analyst commentary in W15.³ No new developments beyond mainstream pick-up.
- **Product — watsonx Orchestrate** — IBM published "What's New in IBM watsonx Orchestrate — March 2026" on April 12, detailing smarter human-in-the-loop workflows, tighter enterprise controls, a growing prebuilt automation catalog for finance, HR, procurement, and IT, and deeper agent observability.⁴
- **Product — Voice AI** — IBM and ElevenLabs integration adds multilingual voice-enabled AI agents to watsonx Orchestrate. Supports 70+ languages, 10,000+ voices.⁵ PCI compliance and HIPAA-aligned Zero Retention Mode included.
- **Red Hat** — March 2026 Red Hat product releases published April 13 — ACS 4.10.0 (vulnerability management for VM workloads), AAP 2.4.20260225 (Python CVE fixes), Dev Spaces 3.27.0. Incremental updates; no licensing changes.⁶

Procurement watchpoints

- watsonx Orchestrate now includes procurement-specific prebuilt automation patterns — assess against current automation tool contracts before renewal
- Voice AI integration materially expands watsonx Orchestrate's use case scope; evaluate scope creep in existing agreements
- FedRAMP portfolio expansion: relevant for any regulated-sector procurement where government-grade security certifications are required

Oracle (incl. NetSuite, Cerner/Oracle Health)

- **Product — UPDATE** — Coverage of Oracle NetSuite 2026.1 intensified in W15. Core features deploying: AI-powered Intelligent Close Manager; Generative AI bank transaction matching; AI assistants in EPM; AI Case Summarization and Customer 360 AI Overviews; Rules-Based Advanced Pricing Engine; E-invoicing expansion to Belgium (PEPPOL) and Spain (VeriFactu); NetSuite iPaaS; AI Connector Service for NetSuite Analytics Warehouse.⁷
- **Authentication Change** — NetSuite 2026.1 mandates transition away from TBA (Token-Based Authentication) for some legacy configurations. Organizations using affected legacy authentication methods must take action before deployment completes.
- **Java Licensing** — Oracle Java SE audit activity continues to intensify in 2026. Oracle's employee-based Universal Subscription model is now triggering formal audits.⁸ Oracle's Java Management Service (JMS) tool, offered as a free OCI trial, collects deployment data — license compliance specialists warn this effectively triggers Oracle LMS review.

Procurement watchpoints

- NetSuite 2026.1 TBA authentication deprecation: confirm with Oracle account team whether your configuration is affected
- E-invoicing expansion to Belgium/Spain is relevant for EU-operating entities with NetSuite
- Java SE audit risk at peak: conduct internal Java JDK inventory before Oracle LMS contacts you; avoid using Oracle's JMS tool without legal review
- Oracle support fee increases (4–15% annually): model into FY27 budget forecasts

Adobe

- **CEO Succession — UPDATE** — The special committee chaired by Frank Calderoni continues its CEO search through W15. No successor has been named. Adobe stock has declined approximately 23% YTD.⁹
- **Semrush Acquisition — UPDATE** — The \$1.9B all-cash acquisition of Semrush remains on track. Germany's Bundeskartellamt Phase 1 clearance stands. No new regulatory developments in W15. Deal expected H1 2026 close.¹⁰
- **Regulatory** — UK CMA investigation into early cancellation fees and the US DOJ \$150M settlement remain active matters. No new developments from either authority in W15.
- **Price Increase** — Adobe Acrobat Standard price increase scheduled for April 2026. Validate whether contract terms provide price protection.

Procurement watchpoints

- CEO search duration creates strategic uncertainty — licensing and pricing policy stability cannot be assumed until a new CEO is seated
- Two simultaneous regulatory investigations (CMA + DOJ) validate procurement concern about subscription cancellation fee structures; audit all Adobe contracts for early termination fee clauses
- Semrush close imminent: monitor for Experience Cloud + Semrush bundling in renewal discussions
- Acrobat Standard price increase is in-market now — confirm contract protections are in place

ServiceNow

- **Pre-Earnings Signal — UPDATE** — Q1 2026 earnings remain confirmed for April 22, after market close. Analyst consensus: Q1 revenue of \$3.75B (21% YoY), EPS of ~\$0.80. Full-year subscription revenue guidance of \$15.53–15.57B.¹¹ ServiceNow stock at ~\$89 on April 9, down ~46% from its 52-week high of \$211.48.
- **Context** — ServiceNow expanded its NVIDIA partnership to accelerate custom AI agent development in the quarter. The \$5B share repurchase authorization (January 2026) is in progress. Q1 earnings will be the first quarter fully incorporating Moveworks.

Procurement watchpoints

- April 22 earnings are next week — monitor for cRPO growth and AI product attach rate guidance
- Stock decline of ~46% from high may reduce management appetite for aggressive pricing, but long-term contract uplift of 5–10% annually is baked into renewal mechanics
- Autonomous Workforce AI Specialist expected in broader availability Q2 2026 — assess scope overlap with existing ITSM/ESM contracts

Workday

- **Flex Credits — GA** — The Workday Flex Credit framework is now available to add to existing agreements in Q1 2026. Credit consumption ranges from 1–750 credits per action; Contract Negotiation/Redlining actions cost 60–750 credits.¹² Workday Assistant will be replaced by the Self-Service Agent (credit-consuming) in 2027 R2.
- **CEO Transition** — Co-founder Aneel Bhusri became CEO on February 9, 2026. Q4 FY2026 total revenue was \$2.5B (+14.5% YoY). AI was involved in roughly half of customer-base transactions in Q4.¹³

Procurement watchpoints

- Flex Credit contract amendment is now available — do not sign without modeling total credit consumption. Contract Negotiation Agent actions at 60–750 credits per action can generate material overages
- Workday Assistant replacement (2027 R2) means current self-service workflows will migrate to credit-consuming agents — build into total cost of ownership projections
- AI upsell pressure is structurally built in: AI was in ~50% of Q4 deals and tends to increase contract size

Nasdaq (Adenza / Verafin)

- **Status** — No material news in W15 for either Adenza or Verafin beyond W14 carry-forwards. The 2026 Global Financial Crime Report (March 11) remains the most recent significant Verafin publication. The Adenza/Verafin unified data layer cross-sell is Nasdaq's primary FY2026 initiative, with no discrete product or regulatory announcements this week.

Procurement watchpoints

- Ongoing: Verafin 2026 financial crime report active; UNODC private sector summit October 20. Adenza integration under \$80M synergy target. No new developments this week.

NICE (incl. Actimize, Cognigy)

- **ENGAGE 2026 — UPDATE** — NICE Actimize announced its ENGAGE 2026 conference on April 15, to be held April 27–28 at the Sheraton Times Square Hotel, New York. The agenda covers AI technology for financial crime prevention, fraud detection and management, AML/CFT compliance.¹⁴
- **Celent Recognition** — NICE Actimize recognized as a Luminary in Celent's 2026 Know Your Customer Systems Solutionscape report.¹⁵ Planned enhancements include GenAI-powered automated processes for payments screening.

Procurement watchpoints

- ENGAGE 2026 (April 27–28) is the primary venue for Actimize product roadmap disclosures — monitor for pricing model or licensing announcements
- Celent recognition and planned GenAI enhancements signal potential premium-tier pricing changes for payments screening capabilities
- Separate procurement governance applies for Actimize (financial crime/compliance) vs. Cognigy (contact center AI)

SAS Institute

- **SAS Innovate Healthcare Track — UPDATE** — SAS announced dedicated healthcare and life sciences programming for SAS Innovate 2026 (April 27–30, Grapevine TX). New solutions: SAS Clinical Acceleration (validated cloud environment on SAS Viya for clinical trial data) and SAS Health enhanced with Viya Copilot for Clinical Data Discovery.¹⁶

Procurement watchpoints

- SAS Innovate next week: monitor for SAS Viya pricing announcements and SAS 9 legacy support timeline updates — may create negotiating leverage for organizations planning Viya migration

Tanium

- **Cybersecurity Excellence Award — UPDATE** — Tanium won the 2026 Cybersecurity Excellence Award for Best Cybersecurity Company, announced April 9.¹⁷ This is independent validation of platform maturity following RSAC 2026 announcements (W14) and the Forrester 235% ROI study.
- **Gartner MQ Recognition — UPDATE** — Tanium was named a Leader in the inaugural 2026 Gartner Magic Quadrant for Endpoint Management Tools.¹⁸ Tanium's Partner Advantage Program also received a five-star rating in the 2026 CRN Partner Program Guide for the fifth consecutive year.

Procurement watchpoints

- Inaugural Gartner MQ Leader status increases Tanium's competitive credibility and may influence pricing posture at renewal
- Two independent award recognitions in W15 strengthen Tanium's position in competitive bids
- ServiceNow AI Agent integration deepens cross-platform lock-in — assess bundling dynamics with existing ServiceNow contracts

JetBrains

- **Status** — No material new developments in W15. Java Annotated Monthly for April 2026 (published April 6) covers IntelliJ IDEA 2026.1 — the same release covered in W14. No pricing, licensing, or ownership news.

Procurement watchpoints

- Ongoing: IntelliJ IDEA 2026.1 released March 25 with AI agent support (Codex, Cursor, ACP), JavaScript/TypeScript free-tier changes, JetBrains Console for enterprise AI usage governance, and Code With Me unbundling.

Collibra

- **Spring '26 Product Premiere — UPDATE** — The Collibra Spring '26 Product Premiere was held on April 8. Seven new capabilities are now GA (2026.03 or 2026.04) or shipping imminently: (1) Control Tower — automated compliance checks and real-time violation flagging; (2) Unified AI Registry — centralized AI governance; (3) AI Trust Score — aggregated governance signal; (4) Cross-Platform Automated Traceability — end-to-end lineage for Vertex AI, SageMaker, Databricks; (5) Data Contracts — alignment across teams (GA 2026.04); (6) Data Access expansion — centralized access controls; (7) Code-first AI Registration.¹⁹
- **Scope Implication** — The Unified AI Registry and AI Trust Score features expand Collibra from data governance into AI governance tooling. Organizations with existing data governance licenses should expect commercial conversations about AI governance module pricing.

Procurement watchpoints

- Spring '26 features now shipping — assess whether current Collibra licensing covers AI governance capabilities (Unified AI Registry, AI Trust Score, Control Tower) or whether these are separately priced
- Cross-platform automated traceability for Vertex AI, SageMaker, and Databricks targets multi-cloud AI stacks
- Data Contracts (GA 2026.04) align with procurement use cases — assess scope vs. existing agreements before renewal

QRM (Quantitative Risk Management)

- **Status** — No material news in W15. QRM's IRRBB Framework extension seminar (April 15) ran as scheduled during the W15 window but is part of the recurring quarterly series noted in W14.

Procurement watchpoints

- Ongoing: IRRBB seminar series active (April 8/15/22). No M&A, regulatory, or ownership news. No new developments this week.

Cloudera (KKR / CD&R)

- **Hybrid Platform Release — UPDATE** — Cloudera announced major advances to its hybrid data and AI platform on April 8: (1) Platform stability guarantee to 2032; (2) Cloud Bursting — dynamically extends private data centers into public cloud on demand; (3) Cloudera Lakehouse Optimizer — automated Apache Iceberg table optimization delivering 38% query acceleration and up to 36% storage reduction; (4) Expanded live data sharing.²⁰
- **Significance** — The 2032 support commitment is a direct competitive response to enterprises weighing Cloudera against cloud-native alternatives. It materially reduces migration urgency and may strengthen multi-year contract negotiations.

Procurement watchpoints

- 2032 support commitment changes the on-premises migration calculus for Cloudera customers — factor into multi-year roadmap and TCO assessments before renewal
- Cloud Bursting capability may affect hybrid cloud architecture planning and associated cloud infrastructure spend
- Apache Iceberg optimization reduces storage costs — quantify savings potential against current infrastructure spend
- KKR/CD&R;: FY26 strong performance + new long-term platform announcement may signal KKR is preparing the asset for exit. Monitor for transaction activity in H2 2026.

BMC Software (KKR)

- **Helix Sale — ALERT** — Bloomberg Law reported on April 7 that KKR is in exclusive talks to sell BMC Helix to European private equity firm Montagu at a valuation of approximately \$900 million.²¹ This is a material downward revision from the \$2B estimate reported in W14. A transaction announcement is expected within weeks.
- **Valuation Context** — At ~\$900M, the transaction prices Helix at approximately 6x EBITDA (\$150M), below the 8–10x range cited by Reuters in February 2026. The compression reflects both sector multiple contraction and the challenging software M&A; environment.
- **IPO Path** — KKR's plan to prepare the mainframe/legacy BMC business for an IPO as early as 2026 remains intact.

Procurement watchpoints

- Helix sale at ~\$900M to Montagu is now imminent — activate change-of-control provisions in all BMC Helix contracts immediately
- Montagu is a European PE firm with a different operational philosophy than KKR — assess implications for product roadmap investment and support quality post-acquisition
- Significant valuation compression (~55% below earlier estimates) may indicate reduced investment capacity for the Helix platform under new ownership
- BMC mainframe IPO preparation may proceed in parallel — separate governance track required for customers using mainframe BMC products

Coupa Software (Thoma Bravo)

- **AWS Strategic Collaboration Agreement — UPDATE** — Coupa signed a five-year Strategic Collaboration Agreement (SCA) with AWS on April 7. The agreement deploys Coupa Navi™ AI agents built on Amazon Bedrock to automate procurement workflows and improve multi-tier supply chain visibility.²²
- **Context** — Coupa reported record Q4 (February 25, 2026) — highest revenue quarter ever, \$545B in quarterly spend through the platform, \$9.5T total transaction dataset, Gartner MQ Leader for Source-to-Pay Suites for third consecutive year, and ISO 42001 AI certification.²³

Procurement watchpoints

- AWS SCA means Coupa Navi agents are built on Bedrock — assess data residency, privacy, and contractual implications if AWS data processing is a concern
- Five-year SCA is a long-term commitment that signals platform direction; evaluate against your own roadmap timeline
- Gartner MQ Leader position for third consecutive year strengthens Coupa’s renewal leverage
- ISO 42001 AI certification may be relevant for organizations with AI procurement governance requirements

Bottomline Technologies (Thoma Bravo)

- **Status** — No material news in W15. The most recent significant development remains the IDC MarketScape Leader recognition (January 28, 2026, covered in W13). No product announcements, partnership news, or ownership developments in the April 9–16 window.

Procurement watchpoints

- Ongoing: IDC MarketScape Leader for AI-Enabled Midmarket Treasury and Risk Management; Paymode B2B Payments Innovation Award. No new developments this week.

Vendor Ownership Map

Vendor Group	Ownership / Status
Broadcom (VMware, CA, Symantec)	Public — EU antitrust complaint assessment ongoing; EMEA Registered tier removal May 2026
IBM (Red Hat, HashiCorp, Confluent)	Public — watsonx Orchestrate March update; FedRAMP portfolio expanded
Oracle (NetSuite, Oracle Health)	Public — NetSuite 2026.1 deploying; Java audit enforcement peak
Adobe	Public — CEO search active; Semrush pending close H1 2026; stock -23% YTD
ServiceNow	Public — Q1 earnings April 22; stock -46% from 52-week high
Workday	Public — Flex Credits now available Q1 2026; co-founder as CEO
Nasdaq (Adenza, Verafin)	Public — no material W15 news
NICE (Actimize, Cognigy)	Public — ENGAGE 2026 announced April 15
SAS Institute	Private — SAS Innovate healthcare track; conference April 27–30
Tanium	Private — Cybersecurity Excellence Award; Gartner MQ Leader
JetBrains	Private — no material W15 news

Vendor Group	Ownership / Status
Collibra	Private — Spring '26 features now GA; AI governance scope expanded
QRM	Private — no material W15 news
Cloudera (KKR / CD&R)	PE-owned (KKR + CD&R) — hybrid platform update April 8; 2032 support guarantee
BMC Software (KKR)	PE-owned (KKR) — Helix exclusive talks with Montagu at ~\$900M; deal imminent
Coupa Software (Thoma Bravo)	PE-owned (Thoma Bravo) — 5-year AWS SCA signed April 7
Bottomline Technologies (Thoma Bravo)	PE-owned (Thoma Bravo) — no material W15 news

Nothing to Report (April 9–16, 2026)

These companies had no material new news in sources checked for the W15 period. Where relevant, the W14 story is noted as ongoing.

Company	Notes
Nasdaq (Adenza / Verafin)	Ongoing: Verafin 2026 Global Financial Crime Report; Adenza/Verafin data layer cross-sell. No new developments this week.
JetBrains	Ongoing: IntelliJ IDEA 2026.1 (released March 25). No new product, pricing, or ownership news this week.
QRM	Ongoing: IRRBB seminar series (April 15 session ran per schedule). No M&A, regulatory, or product news.
Bottomline Technologies (Thoma Bravo)	Ongoing: IDC MarketScape Leader recognition (January 2026). No material news this week.

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