

VENDOR INTELLIGENCE WEEKLY

Procurement Edition

Week 16 · April 2026

17 vendors monitored

INSIDE THIS EDITION

BMC Helix sale crystallizes at \$900M — half the paper valuation. Broadcom's VMware partner cull settles. Adobe's CEO seat remains vacant. Collibra's Spring '26 ships seven new capabilities across AI governance. ServiceNow Q1 earnings next week.

This Week in Procurement

17 vendors monitored · Reporting period: April 2026

WHAT CHANGED THIS WEEK

The BMC Helix sale crystallized at a number that rewrites the story. KKR entered exclusive talks with Montagu to sell the asset for roughly \$900 million — less than half of the \$2 billion figure circulating two weeks ago. The change-of-control window for Helix customers is now measured in weeks. Separately, Broadcom's VMware partner cull has settled following the March 31 deadline: hundreds of European CSPs have lost authorization, and the European Commission's assessment of the CISPE complaint continues without an interim measure. Adobe's CEO search remains unresolved, with the stock down 23% year-to-date.

“Paper valuations became cash valuations, and the gap was a billion dollars.”

WHY IT MATTERS FOR PROCUREMENT

Three signals converge on the same discipline: contract hygiene. The Helix valuation drop suggests a new owner with less capital to invest — a different risk profile than the one priced into current multi-year agreements. The VMware contraction leaves enterprises with fewer reseller alternatives at renewal, which will show up as price. And Adobe's leadership vacuum means any licensing commitment made now will be tested by a strategy announced later. Each situation rewards teams that have already audited change-of-control, assignment, and early-termination clauses.

WHAT TO WATCH

ServiceNow reports Q1 earnings on April 22 — the first full quarter incorporating Moveworks, and the cleanest read yet on AI attach rates. Collibra's Spring '26 features went GA this week, expanding the platform into AI governance. Oracle's Java audit enforcement continues to intensify, and NetSuite 2026.1 is deploying now with a mandatory authentication change.

ARCHIE — TOPICS.WATCH

This editorial reflects the assessment of the topics.watch intelligence team based on publicly available information. It does not constitute advice. Full details, sources, and watchpoints follow in this report.

HIGH PRIORITY

Broadcom (incl. VMware, CA, Symantec)

HIGH

REGULATORY / ANTITRUST

Regulatory (Ongoing)

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. The Commission follows standard procedures; interim measures in EU antitrust cases are rare but have been imposed in past cases involving digital markets (e.g., Meta/Kabel). The CISPE complaint at the General Court (Case T-503/25) challenging the original merger clearance runs in parallel. Both tracks remain active.¹

EMEA 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 to the timeline.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. Enterprises with VCSP-delivered VMware services are operating in a post-cull landscape with constrained reseller competition.

PROCUREMENT WATCHPOINTS

- > The 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 before then
- > Review all VMware contracts for service continuity, price lock, and change-of-control provisions in light of reduced competition
- > Niche-source ruling applied: this story originated in The Register/CISPE (March 19); mainstream press picked it up later

Adobe

HIGH

REGULATORY / LEADERSHIP

CEO Succession (Ongoing)

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 — analysts note investors remain in limbo until a replacement is identified. Internal and external candidates are under consideration.⁹

Semrush Acquisition (Pending)

The \$1.9B all-cash acquisition of Semrush remains on track. Germany's Bundeskartellamt Phase 1 clearance (March 2026) stands. No new regulatory developments in W15. Deal expected H1 2026 close, pending remaining regulatory conditions and Semrush shareholder approval.¹⁰

Regulatory (Ongoing)

UK CMA investigation into early cancellation fees and the US DOJ \$150M settlement (finalized March 13) remain active matters. No new developments from either authority in W15.

Acrobat Price Increase

Adobe Acrobat Standard price increase scheduled for April 2026. If not already addressed in current contracts, 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 and strategy confirmed
- > 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: once completed, monitor for Experience Cloud + Semrush bundling in renewal discussions
- > Acrobat Standard price increase is in-market now — confirm contract protections are in place or factor into renewal budget

BMC Software (KKR)

HIGH

M&A / OWNERSHIP

Helix Sale: Exclusive Talks at ~\$900M (April 7)

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. This is a material downward revision from the \$2B (including debt) estimate reported by AKM/Reuters in W14. Montagu is also negotiating financing with third-party lenders. Bloomberg described the deal as "a test for investor appetite for a software-exposed business during a downturn for the sector." A transaction announcement is expected within weeks.²¹

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 (BMC Mainframe Business)

KKR's plan to prepare the mainframe/legacy BMC business for an IPO as early as 2026 (following the Helix sale) remains intact.

PROCUREMENT WATCHPOINTS

- > The Helix sale at ~\$900M to Montagu is now imminent — activate change-of-control provisions in all BMC Helix contracts immediately; assign/novation protections must be invoked before close
- > 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

MEDIUM PRIORITY

IBM (incl. Red Hat, HashiCorp, Confluent)

MEDIUM

PRODUCT / REGULATORY

FedRAMP (Carry-forward from W14)

The April 1 FedRAMP authorization of 11 watsonx and automation solutions continues to generate analyst commentary in W15. The story was first reported via IBM Newsroom on April 1; mainstream analysis (FinancialContent/MarketMinute, April 7) is mainstream pick-up — no new developments.³

Product — watsonx Orchestrate (April 12)

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 (March 31)

IBM and ElevenLabs integration adds multilingual voice-enabled AI agents to watsonx Orchestrate. Supports 70+ languages, 10,000+ voices. PCI compliance and HIPAA-aligned Zero Retention Mode included. Enterprise deployment targets government, banking, healthcare.⁵

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 (multi-cluster developer environments, workspace storage backups). 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
- > IBM FedRAMP High authorization targeting late 2026/early 2027 — factor into multi-year roadmap discussions

Oracle (incl. NetSuite, Oracle Health)

MEDIUM

PRODUCT / LICENSING

NetSuite 2026.1 Release (Deploying Feb–April 2026)

Coverage of Oracle NetSuite 2026.1 intensified in W15. Core features now deploying to customers: AI-powered Intelligent Close Manager with AI-generated insights into period-end trends and errors; Generative AI bank transaction matching; AI assistants in EPM Planning Module; AI Case Summarization and Customer 360 AI Overviews in CRM; Rules-Based Advanced Pricing Engine with AI-generated pricing summaries; Consigned inventory management; E-invoicing expansion to Belgium (PEPPOL) and Spain (VeriFactu with digital signatures and QR codes); NetSuite iPaaS for cross-system integration; AI Connector Service for NetSuite Analytics Warehouse (enables external AI platforms including Claude Desktop, GitHub Copilot).⁷

Authentication Change (Mandatory)

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 (Ongoing)

Oracle Java SE audit activity continues to intensify in 2026. Oracle's employee-based Universal Subscription model is now triggering formal audits. 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.⁸

PROCUREMENT WATCHPOINTS

- › NetSuite 2026.1 TBA authentication deprecation: confirm with Oracle account team whether your configuration is affected; migration required
- › E-invoicing expansion to Belgium/Spain is relevant for EU-operating entities with NetSuite — validate compliance readiness
- › AI Connector for external AI platforms introduces new integration dependencies — review data governance and contractual scope with Oracle
- › 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

ServiceNow

MEDIUM

FINANCIAL

Pre-Earnings Signal

Q1 2026 earnings remain confirmed for April 22, after market close. Analyst consensus as of W15: Q1 revenue of \$3.75B (21% YoY), EPS of ~\$0.80. Full-year subscription revenue guidance of \$15.53–15.57B. BTIG has flagged guidance may be aggressive given current macro environment. ServiceNow stock at ~\$89 on April 9, down ~46% from its 52-week high of \$211.48, as the market recalibrates AI monetization timelines.¹¹

Context

ServiceNow expanded its NVIDIA partnership to accelerate custom AI agent development in the quarter (announced before W15). 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, which will signal ServiceNow's pricing leverage at upcoming renewals
- › 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
- › Moveworks integration is now fully in-market: evaluate how EmployeeWorks expansion affects employee self-service scope in current agreements

Workday

MEDIUM

PRODUCT / PRICING

Flex Credits (GA Q1 2026)

The Workday Flex Credit framework is now available to add to existing agreements in Q1 2026. Customers must sign updated UMSA and Flex Credit agreements to begin. Credit consumption ranges from 1–750 credits per action; Contract Negotiation/Redlining actions cost 60–750 credits — the highest tier. Workday Assistant will be replaced by the Self-Service Agent (credit-consuming) in 2027 R2.¹²

CEO Transition

Co-founder Aneel Bhusri became CEO on February 9, 2026 — now in full control heading into spring customer renewals. Q4 FY2026 total revenue was \$2.5B (+14.5% YoY). AI was involved in roughly half of customer-base transactions in Q4; AI deals are larger on average.¹³

W15 Status

No new material W15 developments beyond carry-forward of the Spring 2026 release and Flex Credits rollout.

PROCUREMENT WATCHPOINTS

- › Ongoing: Flex Credit contract amendment is now available — do not sign without modeling total credit consumption against your agent use case portfolio. 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 this 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. Prepare renewal positions accordingly

NICE (incl. Actimize, Cognigy)

MEDIUM

PRODUCT / EVENTS

NICE Actimize ENGAGE 2026 (Announced April 15)

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, and case studies from major financial institutions.¹⁴

Celent Recognition (March 17)

NICE Actimize recognized as a Luminary in Celent's 2026 Know Your Customer Systems Solutionscape report for its end-to-end KYC/CLM capabilities, including customizable rules engine and AI-assisted review. Planned enhancements include GenAI-powered automated processes for payments screening.¹⁵

Cognigy (Ongoing)

No new Cognigy developments in W15. Integration into CXone Mpower proceeds following Nexus 2026 (March 10).

PROCUREMENT WATCHPOINTS

- › ENGAGE 2026 (April 27–28) is the primary venue for Actimize product roadmap disclosures — monitor for pricing model or licensing announcements, particularly around GenAI-powered AML/fraud features
- › 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) — these are distinct platforms under NICE's umbrella

Collibra

PRODUCT

MEDIUM

Spring '26 Product Premiere Delivered (April 8)

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: Control Tower (automated compliance checks, controls validation, real-time violation flagging); Unified AI Registry (centralized AI governance across use cases, models, and agents); AI Trust Score (aggregated governance signal for deploy/remediate/retire decisions); Cross-Platform Automated Traceability (end-to-end lineage for Vertex AI, SageMaker, and Databricks, GA 2026.03); Data Contracts (alignment across teams with enhanced visibility and automation, GA 2026.04); Data Access expansion (centralized access controls and masking across Snowflake, Databricks, BigQuery); and Code-first AI Registration (direct registration of AI use cases from code with version capture).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 are now shipping — assess whether current Collibra licensing covers the 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 directly targets multi-cloud AI stacks — evaluate procurement scope for organizations running AI on these platforms
- › Data Contracts (GA 2026.04) align with procurement use cases for data product governance — assess scope vs. existing agreements before renewal

Cloudera (KKR / CD&R)

MEDIUM

PRODUCT

Hybrid Platform Release (April 8)

Cloudera announced major advances to its hybrid data and AI platform on April 8. Key components: Platform stability guarantee to 2032 — extended support commitment removing forced migration risk for on-premises deployments; Cloud Bursting — dynamically extends private data centers into public cloud on demand without data duplication or application rewrites; Cloudera Lakehouse Optimizer — automated Apache Iceberg table optimization delivering 38% query acceleration and up to 36% storage reduction with minimal manual effort; Expanded live data sharing — secure access to live Iceberg tables from external platforms without copying, with maintained governance.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 total cost of ownership 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 in renewal negotiations
- › 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

Tanium

MEDIUM

RECOGNITION

2026 Cybersecurity Excellence Award (April 9)

Tanium won the 2026 Cybersecurity Excellence Award for Best Cybersecurity Company, announced April 9. This is independent validation of platform maturity following RSAC 2026 announcements (W14) and the Forrester 235% ROI study.¹⁷

Gartner Magic Quadrant Recognition

Tanium was named a Leader in the inaugural 2026 Gartner Magic Quadrant for Endpoint Management Tools — a new MQ category that validates the endpoint management market's maturation. Tanium's Partner Advantage Program also received a five-star rating in the 2026 CRN Partner Program Guide for the fifth consecutive year.¹⁸

Ongoing

RSAC 2026 innovations remain current: Guardian Spotlight (AI tool inventory), Closed-Loop Exposure Remediation, OT Endpoint Management (HMIs/PLCs/SCADA), AI Agent for ServiceNow (Now Assist integration).

PROCUREMENT WATCHPOINTS

- › Inaugural Gartner MQ Leader status increases Tanium's competitive credibility and may influence pricing posture at renewal — the absence of this recognition previously limited negotiating context
- › Two independent award recognitions in W15 strengthen Tanium's position in competitive bids; factor into vendor evaluations if alternatives are being assessed
- › ServiceNow AI Agent integration deepens cross-platform lock-in — assess bundling dynamics with existing ServiceNow contracts

Coupa Software (Thoma Bravo)

MEDIUM

PRODUCT / STRATEGY

AWS Strategic Collaboration Agreement (April 7)

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 using AWS AI/ML services to automate procurement workflows and improve multi-tier supply chain visibility. This is the first significant platform partnership announcement for Coupa since W14's "no material news" assessment.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

Inspire 2026

Coupa Inspire 2026 was announced alongside a CFO survey (March 31) showing 85% of CFOs view AI as central to strategy but 92% fear they can't execute — reinforcing Coupa's autonomous spend management positioning.

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 in your environment
- › 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; prepare competitive alternatives analysis if renewal is in 2026
- › ISO 42001 AI certification may be relevant for organizations with AI procurement governance requirements

LOW PRIORITY

SAS Institute

LOW

EVENTS

SAS Innovate Healthcare Track (April 7) — SAS announced dedicated healthcare and life sciences programming for SAS Innovate 2026 (April 27–30, Grapevine TX). New solutions showcased: SAS Clinical Acceleration (validated cloud environment on SAS Viya for clinical trial data and regulatory submissions) and SAS Health enhanced with Viya Copilot for Clinical Data Discovery (natural language exploration of clinical and operational data without advanced technical skills).¹⁶ Conference is next week. Roadmap disclosures — including any pricing or licensing model updates for SAS Viya — are expected April 27–30.

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

Nasdaq (Adenza / Verafin)

LOW

OWNERSHIP

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. Ongoing: Verafin 2026 financial crime report active; UNODC private sector summit October 20. Adenza integration under \$80M synergy target.

Watchpoints:

- No material changes in W15. Track Adenza/Verafin unified data layer cross-sell for contract scope implications in FY2026 renewals

JetBrains

LOW

PRODUCT

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. 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.

Watchpoints:

- JavaScript/TypeScript free-tier change from W14 remains relevant for Ultimate licence renewal decisions
- Code With Me sunset proceeding — assess migration path for teams relying on it for remote pair programming

QRM (Quantitative Risk Management)

LOW

EVENTS

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

Watchpoints:

- No material changes in W15. Track seminar content for regulatory-driven product roadmap signals (IRRBB, CECL, CSRBB)

Bottomline Technologies (Thoma Bravo)

LOW

OWNERSHIP

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. Ongoing: IDC MarketScape Leader for AI-Enabled Midmarket Treasury and Risk Management; Paymode B2B Payments Innovation Award; Nacha Enhanced Fraud Monitoring Phase I (March 20 deadline passed) relevant for Paymode customers.

Watchpoints:

- Thoma Bravo portfolio management approach typically emphasises margin improvement — monitor for pricing changes or product rationalisation announcements
- Track Bottomline's BSM platform roadmap for AI feature development, relevant for competitive positioning

Nothing to Report — April 9–16, 2026

These companies had no material 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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