

# 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.

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

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## 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 INTELLIGENCE TEAM

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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.

# Vendor Intelligence Weekly

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

## Executive Summary — Top Alerts

Priority	Vendor	Category	What Happened
HIGH	BMC Software (KKR)	M&A	KKR in exclusive talks with Montagu to sell BMC Helix at ~\$900M (Apr 7) — materially below W14's \$2B estimate. Change-of-control risk acute; deal announcement expected within weeks.
HIGH	Broadcom (VMware)	Regulatory / Antitrust	EU Commission assessment of CISPE complaint ongoing; no interim measure granted. EMEA Registered partner tier removal proceeds toward May 2026. Regulatory clock running.
HIGH	Adobe	Regulatory / Leadership	CEO succession search active; no successor named. Semrush acquisition on track for H1 2026. Stock down ~23% YTD. UK CMA and US DOJ matters remain open.
MEDIUM	Collibra	Product	Spring '26 Product Premiere delivered (Apr 8). Seven new features GA: AI Trust Score, Unified AI Registry, Control Tower, Data Contracts, Cross-platform Traceability, Code-first AI Registration, expanded Data Access.
MEDIUM	Coupa (Thoma Bravo)	Product / Strategy	Five-year Strategic Collaboration Agreement with AWS (Apr 7). Coupa Navi™ AI agents built on Amazon Bedrock. First material partnership news this cycle.
MEDIUM	NICE (Actimize)	Product / Events	ENGAGE 2026 conference announced (Apr 15) — Apr 27–28, NYC. Agenda: AI for financial crime, fraud, and compliance. Distinct from NICE Cognigy Nexus.
MEDIUM	Cloudera (KKR / CD&R)	Product	Major hybrid platform release (Apr 8): platform support extended to 2032, Cloud Bursting, Apache Iceberg optimization (38% query acceleration, 36% storage reduction), expanded live data sharing.
MEDIUM	Tanium	Recognition	Wins 2026 Cybersecurity Excellence Award (Apr 9). Newly recognized as Gartner MQ Leader for Endpoint Management Tools. Third-party validation of platform maturity.
MEDIUM	ServiceNow	Financial	Q1 2026 earnings April 22. Analyst consensus: \$3.75B revenue (+21% YoY). Stock ~\$89 on Apr 9, down ~46% from 52-week high — market recalibrating AI monetization timing.
LOW	SAS Institute	Events	Dedicated healthcare / life sciences track added to SAS Innovate 2026 (Apr 27–30, Grapevine TX). SAS Clinical Acceleration and SAS Health with Viya Copilot.
LOW	Oracle (NetSuite)	Product	NetSuite 2026.1 deploying Feb–Apr 2026: AI-Powered Intelligent Close Manager, generative bank transaction matching, expanded e-invoicing (Belgium via PEPPOL, Spain under VeriFactu).

## Detailed Company Reports

### Broadcom (incl. VMware, CA, Symantec) [HIGH]

- **Regulatory — ONGOING** — The EU Commission's formal assessment of the CISPE antitrust complaint (filed March 19) continues. No interim measure has been granted or denied. Interim measures in EU antitrust cases are rare but have been imposed in past digital-markets matters.<sup>1</sup> The CISPE challenge at the General Court (Case T-503/25) to the original merger clearance runs in parallel.
- **EMEA Partner Program** — Removal of the Registered tier from the EMEA Advantage Partner Program remains scheduled for May 2026, consolidating the partner ecosystem to Select/Premier/Pinnacle only.<sup>2</sup>
- **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

- CISPE EC complaint clock is running — any interim measure would force Broadcom to reinstate VCSP partners. Monitor EC communications 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 given reduced competition

### IBM (incl. Red Hat, HashiCorp, Confluent) [MEDIUM]

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

#### Procurement watchpoints

- watsonx Orchestrate now includes procurement-specific prebuilt automation patterns — assess against current automation tool contracts before renewal
- Voice AI integration materially expands scope; evaluate scope creep in existing agreements
- FedRAMP portfolio expansion relevant for regulated-sector procurement requiring government-grade certifications
- IBM FedRAMP High authorization targeting late 2026/early 2027 — factor into multi-year roadmap

## Oracle (incl. NetSuite, Oracle Health) [MEDIUM]

- **Product — NetSuite 2026.1 (deploying Feb–Apr 2026)** — Core features now deploying: AI-Powered Intelligent Close Manager; 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 (Claude Desktop, GitHub Copilot).<sup>7</sup>
- **Authentication Change (Mandatory)** — NetSuite 2026.1 mandates transition away from Token-Based Authentication (TBA) for some legacy configurations. Organizations using affected legacy methods must take action before deployment completes.
- **Java Licensing (Ongoing)** — Java SE audit activity continues to intensify. Oracle's employee-based Universal Subscription model is triggering formal audits. The Java Management Service (JMS), offered as a free OCI trial, collects deployment data — compliance specialists warn this effectively triggers Oracle LMS review.<sup>8</sup>

### 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: relevant for EU-operating entities; validate compliance readiness
- AI Connector for external AI platforms introduces new integration dependencies — review data governance and contractual scope
- Java SE audit risk at peak: conduct internal Java JDK inventory before Oracle LMS contacts you; avoid using JMS without legal review
- Oracle support fee increases (4–15% annually): model into FY27 budget forecasts

## Adobe [HIGH]

- **Leadership — CEO Succession (ongoing)** — The special committee chaired by Frank Calderoni continues its CEO search. No successor has been named. Stock down ~23% YTD; analysts note investors remain in limbo until a replacement is identified. Internal and external candidates under consideration.<sup>9</sup>
- **M&A — Semrush (pending)** — \$1.9B all-cash acquisition remains on track for H1 2026 close. Germany's Bundeskartellamt Phase 1 clearance stands. No new regulatory developments this cycle.<sup>10</sup>
- **Regulatory (ongoing)** — UK CMA investigation into early cancellation fees and US DOJ \$150M settlement (finalized March 13) remain active matters. No new developments from either authority this cycle.
- **Pricing** — 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 new CEO is seated
- Two simultaneous regulatory investigations (CMA + DOJ) validate procurement concern about cancellation fee structures; audit all Adobe contracts
- 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 or factor into renewal budget

## ServiceNow [MEDIUM]

- **Financial — Pre-Earnings Signal** — Q1 2026 earnings confirmed for April 22, after market close. Analyst consensus: Q1 revenue of \$3.75B (+21% YoY), EPS ~\$0.80. Full-year subscription revenue guidance \$15.53–15.57B. BTIG flagged guidance may be aggressive given macro. Stock at ~\$89 on April 9, down ~46% from 52-week high of \$211.48, as the market recalibrates AI monetization timelines.<sup>11</sup>
- **Context** — NVIDIA partnership expanded to accelerate custom AI agent development. \$5B share repurchase authorization (January 2026) in progress. Q1 earnings will be the first quarter fully incorporating Moveworks.

### Procurement watchpoints

- April 22 earnings: monitor cRPO growth and AI product attach rate guidance — signals ServiceNow's pricing leverage at upcoming renewals
- Stock decline of ~46% 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 now fully in-market: evaluate how EmployeeWorks expansion affects employee self-service scope

## Workday [MEDIUM]

- **Ongoing — Flex Credits (GA Q1 2026)** — Workday Flex Credit framework now available; customers must sign updated UMSA and Flex Credit agreements to begin. Credit consumption: 1–750 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.<sup>12</sup>
- **Leadership** — Co-founder Aneel Bhusri became CEO on February 9, 2026 — now in full control heading into spring 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.<sup>13</sup>

### Procurement watchpoints

- Flex Credit amendment available now — do not sign without modeling total credit consumption against agent use case portfolio; Contract Negotiation 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 TCO projections
- AI upsell pressure is structurally built in: AI was in ~50% of Q4 deals and tends to increase contract size

## NICE (incl. Actimize, Cognigy) [MEDIUM]

- **Events — Actimize ENGAGE 2026** — NICE Actimize announced ENGAGE 2026 on April 15: April 27–28 at the Sheraton Times Square, New York. Agenda: AI for financial crime prevention, fraud detection, AML/CFT compliance, and case studies from major financial institutions.<sup>14</sup>
- **Recognition** — NICE Actimize recognized as a Luminary in Celent's 2026 Know Your Customer Systems Solutionscape report for end-to-end KYC/CLM, customizable rules engine, AI-assisted review. Planned enhancements include GenAI-powered automated payments screening.<sup>15</sup>
- **Cognigy** — No new Cognigy developments this cycle. 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 or licensing announcements around GenAI AML/fraud features
- Celent recognition and planned GenAI enhancements signal potential premium-tier pricing changes for payments screening
- Separate procurement governance for Actimize (financial crime) vs. Cognigy (contact center AI) — distinct platforms under the NICE umbrella

## SAS Institute [LOW]

- **Events — Innovate Healthcare Track** — 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 regulatory submissions) and SAS Health enhanced with Viya Copilot for Clinical Data Discovery.<sup>16</sup>
- **Context** — Conference runs next week. Roadmap disclosures — including any pricing or licensing model updates for SAS Viya — are expected April 27–30.

### Procurement watchpoints

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

## Tanium [MEDIUM]

- **Recognition — Cybersecurity Excellence Award** — Tanium won the 2026 Cybersecurity Excellence Award for Best Cybersecurity Company (April 9). Independent validation of platform maturity following RSAC 2026 announcements and the Forrester 235% ROI study.<sup>17</sup>
- **Recognition — Gartner MQ Leader** — Named a Leader in the inaugural 2026 Gartner Magic Quadrant for Endpoint Management Tools — a new MQ category. Partner Advantage Program received a five-star rating in the 2026 CRN Partner Program Guide for the fifth consecutive year.<sup>18</sup>
- **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 competitive credibility and may influence pricing posture at renewal
- Two independent award recognitions strengthen Tanium's position in competitive bids
- ServiceNow AI Agent integration deepens cross-platform lock-in — assess bundling dynamics with existing ServiceNow contracts

## Collibra [MEDIUM]

- **Product — Spring '26 Delivered** — The Collibra Spring '26 Product Premiere was held April 8. Seven new capabilities now GA (2026.03 or 2026.04) or shipping imminently: (1) Control Tower — automated compliance checks; (2) Unified AI Registry — centralized AI governance; (3) AI Trust Score — aggregated governance signal; (4) Cross-Platform Automated Traceability for Vertex AI, SageMaker, Databricks; (5) Data Contracts; (6) Data Access expansion across Snowflake, Databricks, BigQuery; (7) Code-first AI Registration with version capture.<sup>19</sup>
- **Scope Implication** — Unified AI Registry and AI Trust Score 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 shipping — assess whether current Collibra licensing covers AI governance capabilities or whether these are separately priced
- Cross-platform automated traceability for Vertex AI / SageMaker / Databricks targets multi-cloud AI stacks
- 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** — Major hybrid data and AI platform advances announced April 8: (a) Platform stability guarantee to 2032 — extended support commitment removing forced migration risk; (b) Cloud Bursting — dynamically extends private data centers into public cloud on demand without data duplication; (c) Cloudera Lakehouse Optimizer — automated Apache Iceberg optimization delivering 38% query acceleration and 36% storage reduction; (d) Expanded live data sharing across external platforms.<sup>20</sup>
- **Significance** — The 2032 support commitment is a direct competitive response to enterprises weighing Cloudera against cloud-native alternatives. Materially reduces migration urgency and may strengthen multi-year contract negotiations.

### Procurement watchpoints

- 2032 support commitment changes the on-premises migration calculus — factor into multi-year roadmap and TCO assessments
- Cloud Bursting may affect hybrid cloud architecture planning and associated cloud infrastructure spend
- Apache Iceberg optimization reduces storage costs — quantify savings potential in renewal negotiations
- 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) [HIGH]

- **M&A — Helix Sale at ~\$900M** — Bloomberg Law reported April 7 that KKR is in exclusive talks to sell BMC Helix to European PE firm Montagu at a valuation of approximately \$900 million. Material downward revision from the \$2B (including debt) estimate reported in W14. Montagu is 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." Announcement expected within weeks.<sup>21</sup>
- **Valuation Context** — At ~\$900M, the transaction prices Helix at approximately 6x EBITDA (\$150M), below the 8–10x range cited by Reuters in February 2026. 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 (following the Helix sale) remains intact.

### Procurement watchpoints

- Helix sale at ~\$900M to Montagu is imminent — activate change-of-control provisions in all BMC Helix contracts immediately; assignment/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 mainframe BMC products

## Coupa Software (Thoma Bravo) [MEDIUM]

- **Strategy — Five-Year AWS SCA** — Coupa signed a five-year Strategic Collaboration Agreement with AWS on April 7. 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. First significant platform partnership announcement for Coupa since W14.<sup>22</sup>
- **Context** — 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, ISO 42001 AI certification.<sup>23</sup>
- **Inspire 2026** — 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
- 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 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

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## Vendor Ownership Map

Vendor Group	Ownership / Status
Broadcom (VMware, CA, Symantec)	Public — EU antitrust 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 H1 2026; stock -23% YTD
ServiceNow	Public — Q1 earnings April 22; stock -46% from 52-week high
Workday	Public — Flex Credits available Q1 2026; co-founder as CEO
Nasdaq (Adenza, Verafin)	Public — no material W16 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 W16 news
Collibra	Private — Spring '26 features now GA; AI governance scope expanded
QRM	Private — no material W16 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 W16 news

## Nothing to Report (W16, April 2026)

These companies had no material new news in sources checked for the period. Where relevant, prior-week stories are 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 cycle.
JetBrains	Ongoing: IntelliJ IDEA 2026.1 (released March 25). No new product, pricing, or ownership news this cycle.
QRM (Quantitative Risk Management)	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 cycle.

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