EMA™
IT & DATA MANAGEMENT RESEARCH,
INDUSTRY ANALYSIS & CONSULTING

# 2025 EMA™ Radar for Workload Automation and Orchestration

## *Summary Report Spotlighting BMC*

October 2025
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*Intelligent Automation*

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# Introduction

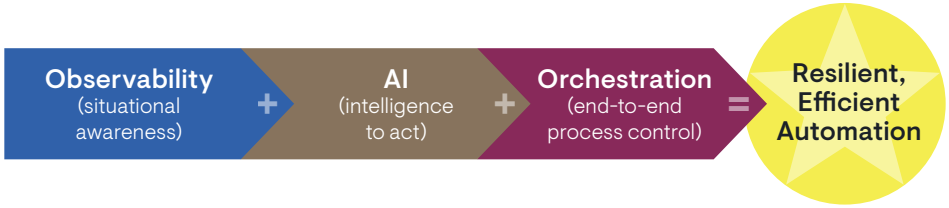
Preparing for the 2025 EMA Radar for Workload Automation and Orchestration required the most significant revision to the scoring model since the Radar was first introduced in 2009. While the framework is refreshed with each new edition, this year marks the first time that core dimensions of functionality, architecture, and vendor strength were redefined at such depth. The change reflects not only vendor innovation, but also the reality that the workload automation market has evolved into a far broader and more strategic discipline.

The industry's migration from batch scheduling to workload automation, adding the flexibility to manage event-driven, cloud-hosted, and distributed workloads, defined the 2010s. By the early 2020s, vendors largely achieved parity in supporting multi-cloud, containerized environments and data pipeline orchestration. The 2023 Radar reflected this convergence by formally recognizing orchestration as a primary category, highlighting workload automation's role in coordinating multi-domain processes.

Now, the market has shifted decisively toward orchestration as the foundation for enterprise automation. Traditional scheduling evolved into intelligent coordination across hybrid and multi-cloud environments, DevOps pipelines, and data ecosystems. What began as automation of workloads is becoming orchestration of outcomes—linking execution with awareness, reasoning, and business context. What distinguishes 2025 is the rise of agentic AI across nearly every major software category. The requirement is no longer limited to orchestrating applications and infrastructure; vendors are now expected to orchestrate the outputs and actions of intelligent agents and their own embedded orchestrators, spanning ERP, observability, service management, DevOps pipelines, and more.

In parallel, two other innovation threads continue to reshape the market. Observability is now inseparable from orchestration, with SLA monitoring, dependency awareness, and anomaly detection integrated into closed-loop remediation. Data pipelines have become a core workload class, requiring first-class orchestration of ingestion, transformation, and lineage handoffs. Together, these capabilities define the new baseline for enterprise automation maturity—breadth of orchestration, observability alignment, and intelligent, AI-assisted decision-making.

**Observability is the Fuel for Smarter Automation**




## Research Methodology

The EMA™ Radar Report provides an objective, structured evaluation of vendors in the workload automation and orchestration market. Vendors are measured against a defined set of key performance indicators (KPIs) grouped into five categories: Functionality, Architecture & Integration, Deployment & Administration, Cost Advantage, and Vendor Strength.

Each KPI is scored internally on a 10-point scale and presented externally on a five-point word scale: None, Limited, Solid, Strong, and Outstanding. This balances transparency for readers with flexibility for analysts, ensuring consistent comparative evaluation across vendors.

Vendor scoring is informed by multiple inputs, including vendor surveys, product briefings, customer references, and EMA's independent market and product analysis. The Radar model is updated for every report cycle to reflect current market realities while maintaining continuity across years.

## What's Changed in 2025

The 2025 Radar introduces the most significant update to the KPI model since the program launched in 2009. In earlier years, adjustments were incremental—adding or refining individual KPIs—and differences were shown as highlights in the appendix. For 2025, the scope of change is broader, with collapsed categories, expanded measures, and a new KPI domain for AI Capabilities. Below is a summary of the key structural changes.

## Why This Matters

- Most leading vendors achieved mid-maturity parity in foundational capabilities—cloud support, container execution, and baseline data pipeline management. The 2025 Radar deliberately raises the bar, demanding richer orchestration of data workloads, tighter integration of observability, and forward-looking capabilities in agentic AI.
- As a result, competitive differentiation is shifting away from coverage of legacy features toward the ability to deliver intelligent, observable, and orchestrated automation at scale.

## KPI Evolution: 2023 to 2025

| 2023 KPI | 2025 KPI | Change |
|---|---|---|
| Cloud Orchestration | **Data Workload Orchestration** | Refocused on pipelines, lineage, and data quality context handoff |
| *Cloud Orchestration (dependency view)* | **Observability and Dependency Awareness** | Expanded to capture SLA clocks, anomaly surfacing, and observability links |
| *Visualization & Dependency Mapping* | **Orchestration Intelligence & Visualization** | Expanded with health overlays, SLA impact projections, and risk explanation |
| *Logging and Audit* | **Logging, Traceability, & Audit Controls** | Expanded with immutability, correlated traces, and auditor-ready evidence |
| *— (No equivalent in 2023)* | **AI Capabilities (new domain)** | Introduces agentic orchestration, AI assistants, predictive analytics, and self-healing |

See Appendix A for a full review of the KPIs used in the analysis.

# Vendors Included in This Report

## Evaluation Criteria

Each product feature was required to fulfill the following three criteria to be credited with a specific element or capability.

1. **General availability:** The features needed to be generally available in the solution set at the time of the evaluation. Features that were in beta testing or were scheduled to be included in later releases of the management suite were not eligible for consideration. The cutoff date was July 31, 2025.
2. **Included in cost:** All features in the evaluation also had to be priced into the total product cost. To evaluate the total cost for each product, EMA provided each vendor with four hypothetical customer scenarios to evaluate comparable list pricing.
3. **Documentation:** All reported features had to be clearly documented for verification in publicly-available resources, such as user manuals or technical papers.

# EMA Workload Automation and Orchestration Radar Results

The total product value is defined by comparing the overall product strength of each WLA solution (y-axis) with its cost-efficiency (x-axis). Product Strength combines evaluation scores for Functionality and Architecture & Integration. Cost-Efficiency is calculated from the scores achieved from the Cost Advantage and Deployment & Administration categories. The size of each vendor's bubble indicates the vendor's strength as identified in its individual review.

## Key Changes Compared to the 2023 Radar

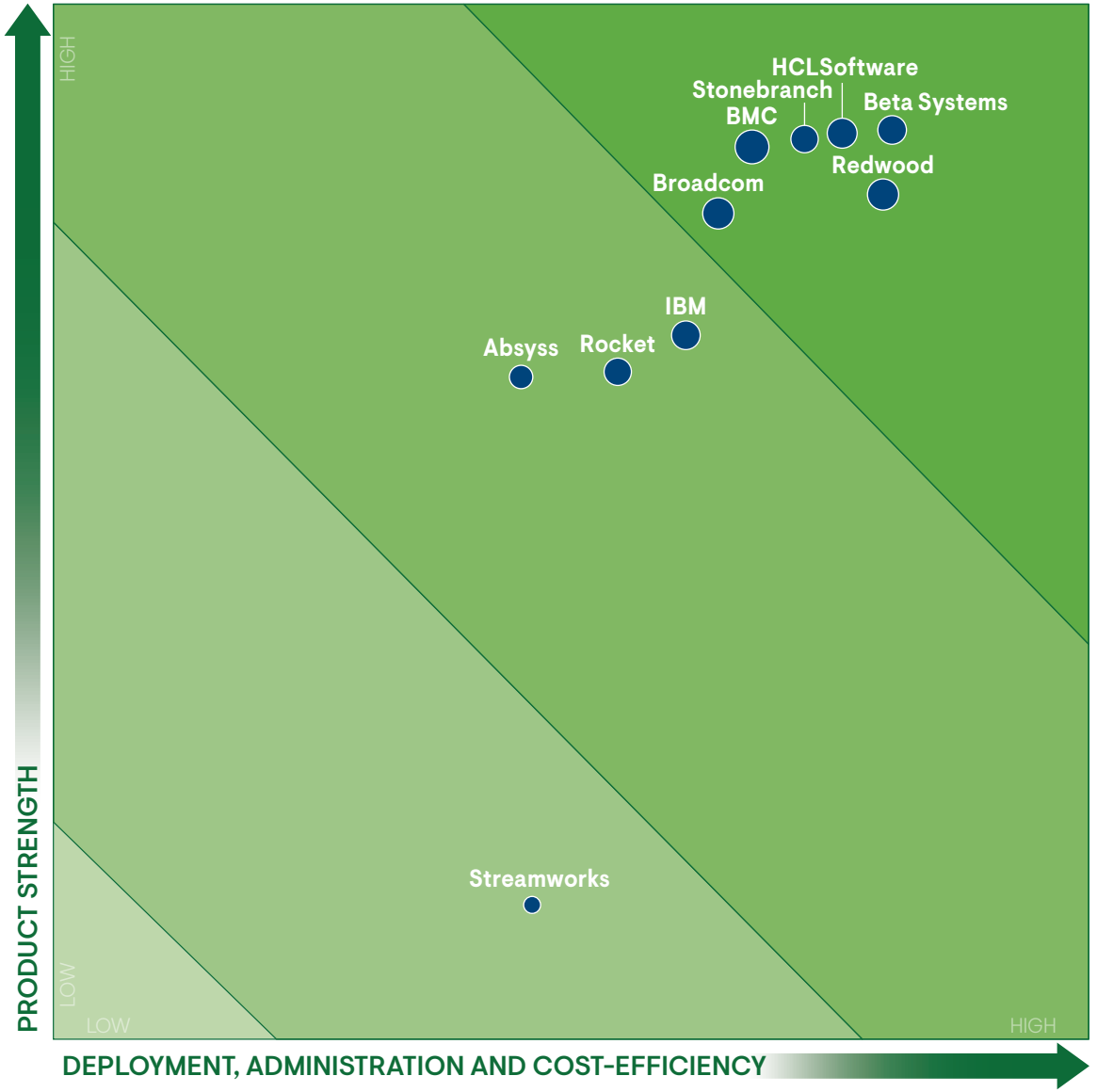
Comparing the 2025 Radar with the 2023 Radar, EMA highlights several market shifts:

- Fewer vendors in scope. Nineteen products were evaluated in 2023; only ten are included in 2025. This reflects consolidation through acquisitions and raising the bar around observability, AI, and orchestration.
- Exclusions due to limited innovation. Arcana, Flux, Vinzant, and Activeeon were not included since they are not addressing the major innovation areas.
- Vertical specialization. SMA now focuses on automation specifically for banking and credit unions, and was excluded.
- Post-acquisition consolidation. In 2023, Redwood's acquisitions of ActiveBatch and Tidal led to all three products being listed separately. For 2025, only Redwood RunMyJobs is evaluated, reflecting Redwood's strategic focus.
- Vendor evolution. InfiniteDATA's AutomateNOW! was listed under its product name in 2023 while the Beta Systems acquisition closed. In 2025, it is represented as the Beta Systems ANOW! Suite, which now includes Automate and Observe.
- Acquisition disruption. Honico did not submit data, citing limited progress in the innovation areas and the transition following its acquisition by Stonebranch.
- Spin-out effects. Fortra divested JAMS, making it an independent company. JAMS did not submit data for 2025.
- Return of prior participant. Arvato Systems (streamworks) returns to the Radar after not being included in 2023.

**VALUE RATING**

- VALUE LEADER
- STRONG VALUE
- SELECTIVE VALUE
- LIMITED VALUE

**VENDOR STRENGTH**




## BMC Control-M

BMC continues to solidify Control-M as a central orchestration layer spanning application, data, and infrastructure workflows. With embedded SLA monitoring, early agentic AI pilots, and orchestration reach across ERP, DevOps, and AI platforms, Control-M advances the "orchestrator of orchestrators" role. SaaS adoption is accelerating, supported by AWS-based deployment and a unified hybrid console, though full feature parity with on-premises remains in progress. BMC's focus on visibility, governance, and platform consistency continues to set the benchmark for enterprise orchestration maturity.

## Beta Systems ANOW! Suite

At the core of Beta Systems' portfolio, ANOW! Automate delivers powerful orchestration across ERP, DevOps, data pipelines, and cloud native environments, supported by deep SAP integration and more than 500 prebuilt connectors. Its container-native design, jobs-as-code framework, and full SaaS/on-premises feature parity make it a flexible and cost-efficient choice for large enterprises. Complementing Automate, ANOW! Observe extends the suite with OpenTelemetry-based dashboards, anomaly detection, and predictive analytics, positioning Beta Systems at the forefront of observability-driven orchestration.

## Broadcom Automic Automation/AAI

Broadcom's Automic Automation combines mainframe-grade resilience with modern orchestration and observability through Automation Analytics and Intelligence (AAI). AAI provides predictive SLA tracking, cross-scheduler correlation, and anomaly detection, while ASK_AI introduces AI-driven assistants for workflow design and troubleshooting. SaaS delivery achieves full feature parity with on-premises, supporting hybrid adoption and governance continuity. Broadcom's strength lies in scale, governance, and integration breadth, positioning Automic as an enterprise control plane bridging legacy systems and AI-enabled operations.

## HCL HWA/UNO Orchestrator

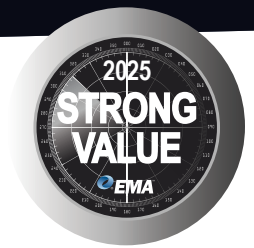
HCL advances Workload Automation (HWA) and Universal Orchestrator (UnO) as a unified suite that blends legacy scheduling depth with modern orchestration intelligence. UnO extends orchestration into human-in-the-loop workflows, observability integration, and agentic AI through the Agentic AI Builder. HCL's hybrid and SaaS options offer modernization without disruption, while its innovation cadence rivals larger incumbents. The combination of continuity and rapid innovation reinforces HCL's position as one of the most forward-looking enterprise orchestration providers.

## Redwood RunMyJobs

Redwood's RunMyJobs stands out as a true SaaS-native orchestrator with deep ERP integration and embedded managed file transfer via JSCAPE. Its declarative, goal-driven orchestration model spans finance, supply chain, data, and IT operations, supported by SLA intelligence, AI assistance, and predictive analytics. Redwood's structured migration methodology and 97%+ retention rate demonstrate execution excellence. While mainframe coverage is limited, RunMyJobs leads in SaaS maturity, extensibility, and business-aligned orchestration design.

## Stonebranch Universal Automation Center

Stonebranch's Universal Automation Center (UAC) combines real-time, event-driven orchestration with open extensibility. The platform unifies workload automation, managed file transfer, and hybrid orchestration under one framework, supported by its Integration Hub marketplace and agentless connectors. Embedded AI through Robi and an agentic framework based on MCP and LangChain elevate UAC toward goal-driven orchestration. With SaaS, on-premises, and hybrid parity, Stonebranch delivers a mature, extensible platform for enterprises pursuing event-driven and AI-augmented automation.




## Absyss Visual TOM

Absyss strengthens its midmarket leadership with Visual TOM, a workload automation platform emphasizing usability, governance, and hybrid readiness. Kubernetes-native deployment, AI-enriched workflows, and observability through Visual BAM and external exports support modern operations without complexity. Global scale remains modest, but customer satisfaction, pragmatic delivery, and cost-efficiency make Visual TOM a high-value choice for organizations seeking agility with minimal overhead.

## IBM IWA

IBM Workload Automation demonstrates balanced evolution through integration with Watsonx for predictive analytics, Instana for observability, and Turbonomic for resource optimization. This combination advances IBM's orchestration maturity across AI, capacity-aware placement, and real-time insight. SaaS availability on AWS with regional compliance and a unified console improves accessibility, though parity with on-premises is still developing. IWA remains a trusted anchor within IBM's automation stack—stable, scalable, and integrated with the broader IBM ecosystem.

## Rocket Software Rocket Orchestrator/ZEKE/Zena

Rocket's portfolio combines mainframe depth with hybrid orchestration and SaaS-based predictive intelligence. Enterprise Orchestrator unifies Zeke and Zena under a single governance layer, while Predictive Pulse adds cross-scheduler analytics and anomaly detection, spanning even competitor tools, like Control-M and AutoSys. Rocket's flexible architecture, security integrations, and high availability options make it a credible choice for enterprises seeking modernization without abandoning mainframe reliability.


## Arvato Systems Streamworks

Arvato Systems differentiates by operating Streamworks as part of its own data center service portfolio, emphasizing cost-efficient, pragmatic automation over aggressive innovation. Streamworks excels in ERP and SAP orchestration, flexible licensing, and customer-led product evolution. Observability and AI adoption remain measured, but operational reliability and strong customer intimacy define its appeal. With emerging SaaS options and a service-driven support model, Streamworks offers a dependable platform for organizations prioritizing stability and total cost control over rapid technological change.

# Innovation as the Defining Differentiator

Innovation has become the critical axis of differentiation in workload automation and orchestration. While product strength, scalability, and cost-efficiency remain essential, the market's trajectory is now shaped by vendors fusing orchestration intelligence, observability, and AI-driven reasoning into a cohesive automation fabric. EMA's 2025 analysis identifies three interconnected innovation domains—Agentic AI and Orchestration, Observability-Enabled Automation, and Next-Generation Orchestration Architecture—each capturing a distinct dimension of this transformation.

## Agentic AI and Orchestration

Agentic AI is redefining automation by enabling systems to reason, interpret context, and collaborate dynamically. Four vendors lead this evolution:

Rocket Software advances autonomous orchestration maturity, embedding reasoning-based logic that allows workflows to adjust dynamically to policy and environmental context.

Broadcom extends AI enablement across its Automic Automation suite, combining predictive analytics, contextual orchestration assistance, and early Model Context Protocol (MCP) support to enhance interoperability between orchestrators and intelligent agents.

BMC Software deepens orchestration intelligence through Control-M, leveraging predictive analytics and optimization to align workflow execution with business intent while maintaining operational precision.

HCL Software integrates reasoning directly into orchestration architecture through HWA (HCL Workload Automation) and UNO, blending contextual automation with human-in-the-loop collaboration and AI-guided orchestration design.

Together, these vendors represent the vanguard of agentic orchestration, where automation systems evolve from executing rules to interpreting goals.

## Observability-Enabled Automation

Observability has become foundational to resilient and adaptive automation. It transforms orchestration from a black-box execution engine into an insight-driven control plane capable of continuous optimization. Four vendors lead this convergence:

Beta Systems spearheads the field with its ANOW! Suite, embedding OpenTelemetry-based observability and predictive analytics directly into orchestration workflows. This integration enables proactive correction and process tuning from within the automation layer itself.

HCL Software extends observability across hybrid environments through HWA and UNO, correlating orchestration events with business outcomes and providing contextual insight into process health and dependencies.

Redwood Software delivers SaaS-native observability that connects automation performance with service-level metrics, allowing operations teams to measure business impact in real time.

Broadcom bridges observability and AI analytics through Automation Analytics & Intelligence (AAI) and MCP interoperability, turning orchestration telemetry into predictive insight and fostering closed-loop automation visibility.

Collectively, these vendors illustrate how observability is becoming intrinsic to automation intelligence, closing the loop between sensing, understanding, and acting.

## Next-Generation Orchestration Architecture

Orchestration is undergoing a structural reinvention, from schedule-driven workflow management to dynamic, service-aware coordination across automation domains. EMA identifies four vendors that exemplify this architectural modernization:

HCL Software leads with its HCL Workload Orchestration Suite, uniting the reliability of HWA with the intelligence of UNO. The result is adaptive orchestration that links business priorities, AI reasoning, and human oversight in real time.

BMC Software remains the benchmark for mission-critical orchestration with Control-M, tying with HCL on EMA's Agentic Orchestration KPI for predictive, context-aware workflow intelligence while maintaining unmatched operational governance.

Stonebranch advances event-based orchestration through its Universal Automation Center (UAC), delivering API-driven integration and real-time connectivity across hybrid, cloud, and SaaS ecosystems.

Redwood Software redefines orchestration for the digital era with a SaaS-native, service-centric platform that merges workload, event, and process orchestration within a unified, low-code environment.

These four vendors demonstrate how orchestration is expanding beyond scheduling toward full enterprise coordination by combining scale, agility, and contextual intelligence.

## Innovation Leadership Across Domains

The innovation themes collectively illustrate how leadership in workload automation and orchestration is evolving across multiple fronts. HCL Software is the only vendor to appear prominently in all three domains—Agentic AI, Observability, and Orchestration—demonstrating comprehensive innovation momentum across architecture, intelligence, and operational insight. BMC Software and Broadcom each appear in two domains, underscoring their strength in orchestration intelligence and AI enablement. Redwood Software and Stonebranch also span two innovation categories, balancing architectural modernization with enterprise readiness. Beta Systems leads one domain outright—Observability-Enabled Automation—while also showing strong advancement in Agentic AI Orchestration, reflecting a precision focus on embedding reasoning and analytics directly into automation flows. Rocket Software likewise concentrates its innovation in one domain, but does so with outsized impact, pushing the boundaries of agentic orchestration maturity across hybrid environments.

Beta Systems, in particular, is entering a pivotal phase of growth. Having driven industry innovation through its ANOW! platform well ahead of competitors, the company is channeling its focus toward enterprise scale by expanding its global reach, strengthening customer success operations, and deepening delivery capacity. This transition marks a natural progression from product innovation leadership to organizational maturity.

Together, these vendors define the innovation fabric of the 2025 Radar. HCL leads the charge toward reasoning-based orchestration, BMC and Broadcom advance intelligent control and AI integration, Redwood and Stonebranch modernize enterprise orchestration architectures, and Beta and Rocket each dominate their respective innovation lanes with precision and depth.

These overlapping innovation profiles demonstrate that leadership in automation is no longer defined by one discipline: it is achieved through convergence. The recognitions that follow reflect this balance between innovation depth, architectural maturity, and enterprise readiness across the vendor landscape.

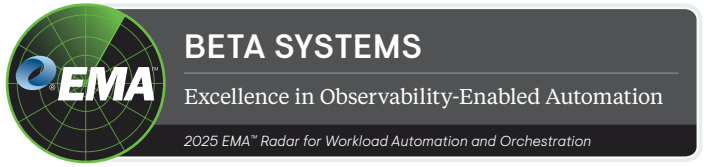
## Recognitions for Excellence


**Absyss — Recognition for Excellence in Right-Sized Automation for the Midmarket**

Absyss delivers a balanced blend of power and simplicity through Visual TOM, aligning enterprise-grade control with usability suited to midmarket and departmental teams. Its intuitive interface, governance controls, and expanding container-native capabilities make it a practical choice for organizations seeking dependable automation without unnecessary complexity.


**Arvato Systems — Recognition for Excellence in Service-Led Value**

Arvato Systems distinguishes Streamworks through its service-oriented model, combining dependable ERP orchestration with cost-efficiency and customer-driven development. Operated by the same practitioners who use it daily, Streamworks emphasizes long-term partnership, predictable pricing, and operational simplicity for enterprises prioritizing reliability over scale.




**Beta Systems — Recognition for Excellence in Observability-Enabled Automation**

Beta Systems' ANOW! Suite exemplifies the convergence of orchestration and observability, embedding OpenTelemetry-based telemetry and predictive analytics directly within automation workflows. With ANOW! Automate and ANOW! Observe forming a unified control and insight layer, Beta transforms monitoring data into actionable orchestration intelligence. This observability-enabled foundation elevates automation visibility, reliability, and adaptability across hybrid and multi-cloud environments.


**BMC Software — Recognition for Excellence in Mission-Critical Orchestration**

BMC Control-M continues to set the standard for orchestrating complex, infrastructure-intensive business processes across data, applications, and IT operations. Its unified hybrid architecture, deep policy governance, and maturing SaaS delivery demonstrate why Control-M remains foundational for large enterprises running mission-critical workloads.


**Broadcom — Recognition for Excellence in Agentic AI Orchestration**

Broadcom's Automic Automation exemplifies enterprise readiness for agentic AI, combining reasoning-based orchestration intelligence, AI-assisted workflow design, and policy-bounded governance. Early support for the Model Context Protocol (MCP) positions Automic as a broadly prepared orchestrator for multi-agent interoperability, integrating AI systems within governed enterprise frameworks. Broadcom's disciplined and scalable approach defines a practical path toward fully agentic automation across hybrid IT environments.


**HCL Software — Recognition for Excellence in Broad Orchestration Vision and Strategy**

HCL advances one of the most comprehensive orchestration strategies in the market, uniting HCL Workload Automation with the UnO Orchestrator to bridge IT operations, business workflows, and human-in-the-loop processes. This forward-looking approach extends orchestration beyond infrastructure into enterprise collaboration, demonstrating a model for next-generation automation platforms.


**IBM — Recognition for Excellence in Ecosystem Integration**

IBM distinguishes itself through seamless integration of workload automation (IWA) with complementary IBM technologies—Watsonx, Instana, and Turbonomic—creating a unified ecosystem that blends orchestration, AI, observability, and optimization. This synergy reinforces IBM's role as a trusted anchor for enterprises standardizing on an integrated automation stack.


**Redwood Software — Recognition for Excellence in Business-Centric Orchestration**

Redwood's RunMyJobs delivers SaaS-native orchestration optimized for ERP and finance-driven workflows, extending automation deep into the business layer. Its SAP Endorsed App status, integrated JSCAPE file transfer, and AI-enabled orchestration roadmap establish Redwood as a leader in aligning automation outcomes with core business objectives.


**Rocket Software — Recognition for Excellence in Predictive Orchestration Intelligence**

Rocket Software receives EMA's Recognition for Excellence in Predictive Orchestration Intelligence for its innovative use of SaaS-based predictive analytics through Predictive Pulse, delivering anomaly detection, what-if simulation, and proactive optimization across heterogeneous schedulers. Built on Digitate ignio technology, Predictive Pulse exemplifies the next generation of real-time orchestration intelligence, complementing Rocket's strong mainframe and hybrid scheduling foundation.


**Stonebranch — Recognition for Excellence in Event-Driven Orchestration**

Stonebranch's Universal Automation Center integrates real-time, event-driven orchestration with an open integration framework and embedded AI assistant, Robi. Its blend of responsiveness, extensibility, and AI enablement sets a high standard for orchestrating dynamic hybrid IT environments in which agility and control must coexist.

# EMA Perspective

The 2025 EMA Radar for Workload Automation and Orchestration represents a sharpened evaluation of an increasingly mature market. EMA raised the bar for inclusion this year by emphasizing three innovation domains—Agentic AI, Observability, and Orchestration—each requiring demonstrable advancement in design, interoperability, and intelligence. As a result, the field was deliberately narrowed to focus only on those vendors with proven enterprise depth, architectural scalability, and modernization intent. Every participant in this report is already among the most capable and forward-looking providers in the workload automation ecosystem. The analysis that follows differentiates not between strong and weak, but between the strongest among the strong—those pushing the frontier of orchestration maturity and intelligent automation.

The 2025 EMA Radar for Workload Automation and Orchestration reflects more than market movement: it captures a turning point in how enterprises define automation itself. For this year's edition, EMA raised the bar for inclusion, focusing on three interdependent innovation domains that together define the new standard for intelligent automation. In doing so, the field was deliberately narrowed to highlight vendors demonstrating not just operational excellence, but also active innovation leadership. Every vendor in this report is already among the strongest in enterprise automation; what follows is not a separation of capable from incapable, but of visionaries from followers and of strategic maturity from functional adequacy.

This year's findings make clear that the workload automation market has entered a decisive new phase. Legacy batch control has given way to continuous orchestration, and orchestration itself is evolving into systems of awareness and reasoning. Leadership no longer stems from scale alone, but from the ability to sense, decide, and act—linking intelligence to execution. The result is a market alive with purpose, in which established vendors are reinventing themselves as orchestration platforms and innovators are learning to operationalize their bold ideas at scale.

BMC Software continues to set the overall standard for enterprise orchestration, maintaining the strongest composite performance across all five Radar categories. Its dominance reflects deep operational maturity, global reach, and proven scalability—qualities that remain difficult to replicate. Yet, even BMC has accelerated its modernization initiatives in response to the innovation tempo established by younger competitors. Its move toward SaaS-native architecture and predictive analytics underscores the shifting baseline of customer expectations: orchestration must now be intelligent, adaptive, and as fluid as the hybrid environments it governs.

No vendor illustrates that shift more dramatically than Beta Systems. Born from InfiniteDATA's drive to out-innovate incumbents, Beta redefined the pace of modernization—pushing the boundaries of orchestration intelligence and establishing observability as a core dimension of automation. In many respects, BMC's SaaS modernization and Broadcom's renewed AI investment can be traced to the disruptive benchmark Beta set years earlier. The acquisition of InfiniteDATA by Beta Systems marked not a pause in innovation, but a recognition that breakthrough technology required enterprise-scale execution to realize its full potential. Since then, Beta has continued to advance observability-enabled automation through the ANOW! Suite, embedding analytics and real-time insight directly into orchestration flows while simultaneously strengthening its global reach, delivery operations, and customer success. The result is a product evolving from a pure innovation disruptor into a disciplined, enterprise-class leader—one that continues to shape the modernization agenda across the entire automation market.

HCL Software occupies a unique position as both an innovation engine and an enterprise powerhouse. By combining the depth of HCL Workload Automation (HWA) with the intelligence and human-in-the-loop design of UnO, HCL is the only vendor to be strongly represented across all three innovation domains. HCL's orchestration architecture clearly defines the current state of the art, and

its consistent presence across all domains underscores unmatched innovation breadth. The company's pace of development continues to shape the leading edge of orchestration modernization, and its growing enterprise adoption reflects the success of aligning architectural evolution with practical delivery strength.

Stonebranch represents balance—innovating steadily while maintaining an execution-first mindset. Its Universal Automation Center (UAC) continues to stand out for real-time orchestration, extensibility, and cross-domain integration. The recently announced HONICO acquisition—occurring after the scoring period—will further deepen Stonebranch's already strong SAP automation capabilities and expand its footprint in enterprise application orchestration. Stonebranch exemplifies measured innovation: the ability to scale methodically without losing precision, reliability, or customer intimacy.

IBM remains a trusted cornerstone of enterprise automation, but has become increasingly dependent on shared innovation within the HCL Workload Automation (HWA)/IBM Workload Automation (IWA) codebase. IBM continues to advance its own AI and ecosystem integrations, particularly within its hybrid cloud and observability frameworks, but the most significant platform innovation now originates from HCL. With UnO emerging as a distinctly HCL-driven evolution beyond HWA, IBM currently lacks an equivalent innovation path of its own. As HCL continues to focus its next-generation orchestration strategy around UnO, IBM risks a gradual differentiation gap unless it develops complementary innovation beyond the shared foundation.

Among mid-tier leaders, Rocket Software demonstrates the most forward momentum. Its progress in Agentic AI Orchestration—linking reasoning-based logic with hybrid mainframe and distributed automation—positions Rocket as one of the few vendors genuinely bridging legacy reliability with AI-driven adaptability. While its enterprise footprint remains smaller than BMC's or IBM's, Rocket's focused innovation strategy and pragmatic AI enablement suggest it is poised for significant upward mobility.

Broadcom and Redwood Software both operate in transitional phases. Broadcom's integration of CA Technologies and Automic Automation has advanced and renewed investment in MCP-based interoperability and AI assistance signals a reawakening of innovation capacity. Redwood, conversely, remains strong on SaaS-native orchestration, but faced the operational strain of rapid expansion and leadership transition. Each must convert their architectural strengths into sustained innovation rhythm to regain differentiation among the leaders.

At the value end of the spectrum, Absyss (Visual TOM) and Streamworks continue to deliver reliable, cost-effective workload automation, appealing to managed service providers and regional markets that prioritize stability over experimentation. They remain proof that strong execution and focused use-case delivery can sustain relevance even in a market dominated by modernization narratives.

Taken together, these dynamics portray a market defined by convergence rather than consolidation. BMC retains the broadest enterprise command, Beta Systems exemplifies innovation evolution into scale, HCL sets the innovation tempo across multiple domains, and Stonebranch provides architectural agility with operational precision.

Broadcom and Redwood Software both operate in transitional phases. Broadcom's investment in CA Technologies and Automic Automation is now fully bearing fruit, as the company's focus shifts decisively toward innovation. Emerging capabilities in MCP-based interoperability and AI assistance highlight how Broadcom is now translating strategic investment into visible innovation momentum. Redwood, likewise, is managing the challenges of rapid expansion following the integration of ActiveBatch, Redwood, and Tidal under new ownership. The company scaled quickly, expanding its team, customer reach, and product scope while maintaining a clear focus on innovation. Redwood is transitioning from the top of the midsized vendors toward the scale and presence of the industry's largest providers.

Absyss and Streamworks round out the field with focused, dependable offerings that serve specific operational niches.

Collectively, these trajectories confirm that workload automation has entered the age of agentic orchestration—in which reasoning, observability, and adaptability replace schedule-driven control as the defining measures of platform intelligence and enterprise value.

## Future Outlook

The introduction of observability, agentic AI, and expanded orchestration in 2025 marks a structural transformation in workload automation. These domains will not evolve at the same pace, but their convergence will define the next era of automation maturity. Unlike prior shifts—such as cloud integration or container orchestration—that reached parity within a few release cycles, this wave introduces deeper architectural, operational, and cultural complexity.

No vendor can lead in all three domains simultaneously. Instead, EMA observes distinct patterns of specialization:

some vendors lead with reasoning and agentic orchestration, others extend dominance through observability and closed-loop intelligence, and others focus on scaling orchestration architectures to span enterprise and cloud native ecosystems. This asymmetry is not a weakness—it is the signature of a market in active transformation. As vendors deepen their capabilities, enterprises gain flexibility to align automation investments with their own maturity path. Over time, EMA expects renewed convergence as these disciplines fuse into unified, self-optimizing orchestration fabrics in which sensing, reasoning, and action occur as one continuous loop.

By 2027, orchestration platforms will evolve into autonomous control systems capable of:

- Coordinating both human and AI agents within governed workflows
- Integrating observability data directly into execution logic
- Delivering dynamic optimization against business outcomes rather than static SLAs

EMA anticipates that the next phase of Radar evaluation will move beyond measuring functional maturity to assessing orchestration intelligence—the degree to which automation platforms can understand, predict, and adapt in real time.

The journey from workload automation to agentic orchestration has begun; by the next Radar cycle, the leaders will be those that make it operational, measurable, and inseparable from enterprise decision-making.



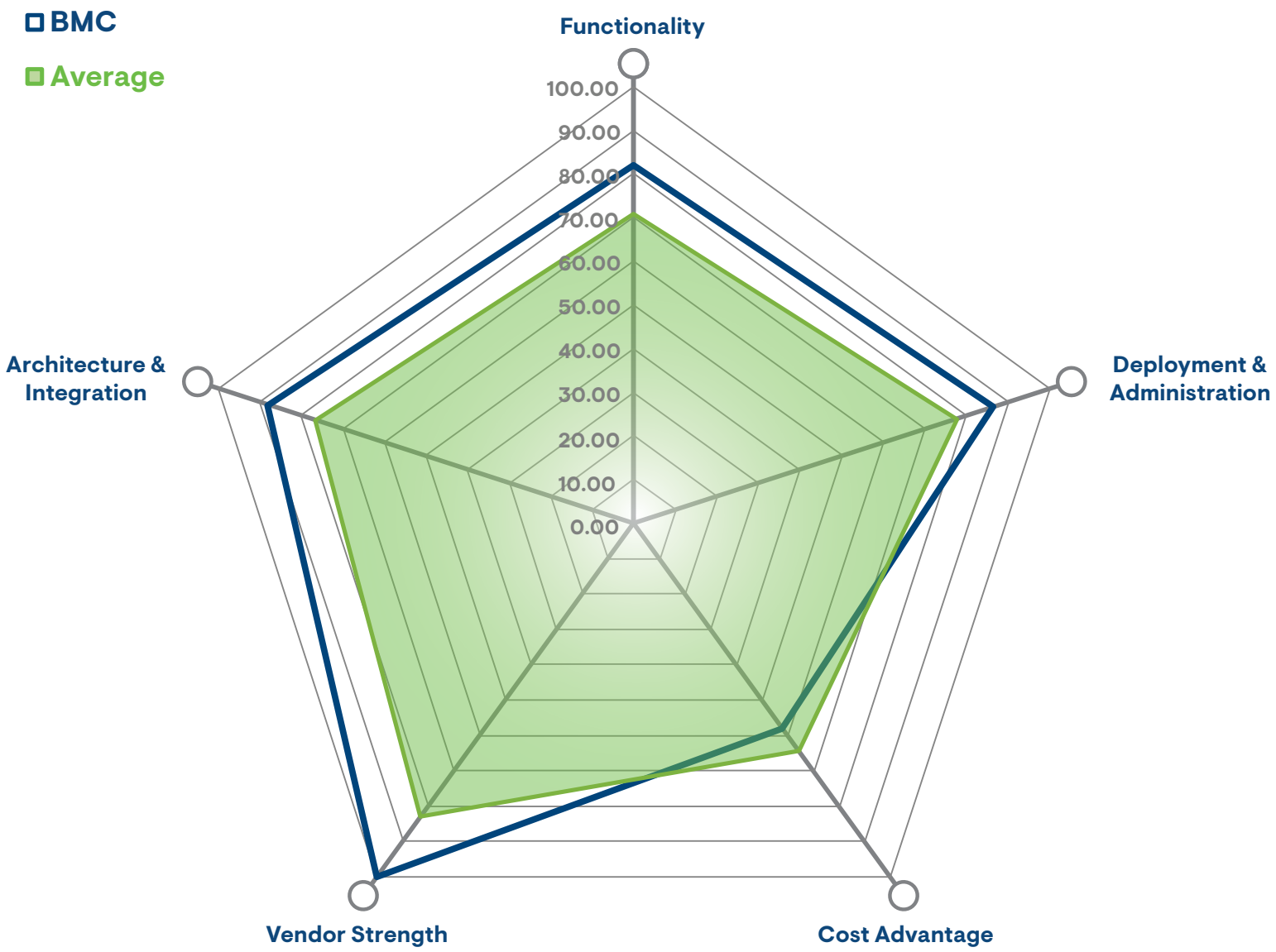
# Overview

BMC is positioned in the 2025 EMA Radar for Workload Automation and Orchestration as a Value Leader and the overall highest performer, with Control-M continuing to define the benchmark for enterprise-class orchestration. Control-M earns EMA's Recognition for Excellence in Mission-Critical Orchestration for its leadership in managing complex, infrastructure-intensive business processes. As one of the most established platforms in the market, Control-M combines decades of workload automation maturity with a modern, API-first architecture that spans data pipelines, cloud native services, and DevOps toolchains. Feature parity across SaaS and on-premises deployments allows enterprises to adopt Control-M at their own pace while maintaining consistent governance and operational capabilities.

Control-M distinguishes itself through proven scalability, one of the broadest integration libraries in the industry, and a consistent cadence of innovation. Customers consistently highlight its integration flexibility, operational stability, and usability improvements as strengths. These qualities, combined with balanced capabilities across functionality, administration, and architecture, reinforce BMC's placement in the top tier of workload automation and orchestration.

Looking forward, BMC is leaning heavily into its "orchestrator of orchestrators" strategy, articulating and executing on a vision to coordinate automation across diverse domains—including ERP, observability, service operations, DevOps, and AI-driven systems—and positioning Control-M as the central orchestration fabric for enterprise IT.

Headquartered in Houston, Texas, BMC was founded in 1980 and acquired by KKR in 2018. In October 2024, the company announced it would operate as two independent entities: BMC, which retains the automation and mainframe businesses—including Control-M (self-hosted and SaaS)—and BMC Helix, which focuses on service and operations management. Control-M SaaS is no longer branded under Helix and is positioned directly as part of the BMC portfolio.


BMC
Average
Functionality
100.00
90.00
80.00
70.00
60.00
50.00
40.00
30.00
20.00
10.00
0.00
Deployment & Administration
Cost Advantage
Vendor Strength
Architecture & Integration

# Key Features Summary

Control-M and Control-M SaaS deliver a broad set of capabilities that extend beyond traditional scheduling to provide full orchestration of applications, data pipelines, and infrastructure across hybrid and multi-cloud environments.

## Hybrid and Multi-Cloud Orchestration

Control-M provides orchestration across mainframe, distributed, containerized, and cloud platforms, enabling end-to-end management of complex workflows. The platform integrates natively with AWS, Microsoft Azure, Google Cloud, Oracle Cloud, and Kubernetes, allowing workflows to span multiple environments without fragmentation. Customers can take advantage of ephemeral cloud compute resources to dynamically scale workloads while maintaining governance and reliability. Enterprise-wide orchestration covers applications, file transfers, data sources, and infrastructure components, ensuring SLA-driven execution across diverse IT landscapes. This capability is particularly valuable in hybrid models in which on-premises and cloud environments must be coordinated seamlessly.

## Data Pipeline and DataOps

Control-M expanded its role into full data pipeline orchestration, supporting ingestion, transformation, and delivery of data from raw sources into analytics platforms. It integrates with Apache Airflow, Snowflake, Databricks, Spark, Hadoop, Amazon EMR, and Azure Data Factory, along with a Python client that allows pipelines to be scripted, tested, and versioned. Data engineers can orchestrate both batch and streaming data flows as part of broader enterprise workflows, simplifying the move from data collection to business insights. By consolidating pipeline management with application workflows, organizations eliminate reliance on multiple tools and improve observability into end-to-end processes. This unification is a key enabler for modern DataOps initiatives.

## Integration Breadth

A core differentiator of Control-M is its extensive library of out-of-the-box integrations, which span enterprise applications, databases, cloud services, RPA platforms, and collaboration tools. More than 40 new integrations were added in the last 18 months, and the Application Integrator allows customers to design their own job types for proprietary systems. BMC also maintains a GitHub-based integrations community in which customers can share and reuse plug-ins, extending coverage without requiring formal vendor development. This combination provides depth for widely used enterprise platforms, such as SAP and Oracle, and flexibility for unique environments. The approach ensures enterprises can orchestrate complex workflows without costly custom development or vendor lock-in.

## Mainframe Modernization

Control-M continues to play a central role in helping enterprises transition legacy workloads into modern environments. Integrations with AWS Mainframe Modernization Service, Google Dual Run, and Micro Focus enable customers to migrate or re-platform applications while maintaining continuity in orchestration. Customers running parallel workloads across mainframe and cloud environments can coordinate dependencies without disruption, giving them flexibility in the pace of modernization. Control-M ensures that orchestration practices remain consistent across legacy and new platforms, reducing risk and preserving reliability during multi-year transformation programs. This support aligns with a growing need for hybrid strategies in industries with deep mainframe investments.

## Workflow Insights

Workflow Insights delivers enhanced observability for orchestration environments, providing dashboards and analytics that track workflow health, SLA performance, workload distribution, and user activity. The feature applies telemetry and KPI tracking to highlight anomalies and potential bottlenecks before they affect business services. IT teams can visualize error trends, drill into root causes, and measure the downstream impact of irregularities on business processes. This early detection reduces resolution times, improves stability, and helps organizations meet SLA commitments consistently. Insights extend Control-M beyond scheduling into the domain of operations analytics, supporting more proactive and data-driven IT management.

## Managed File Transfer (MFT)

Managed file transfer is tightly integrated into Control-M's orchestration framework, aligning data movement directly with application workflows. Features include secure transfers across AWS, Azure, Google Cloud, and Oracle Cloud, centralized configuration for transfer policies, automatic recovery from interruptions, and directory synchronization for high-volume use cases. A built-in transfer server and B2B file exchange capabilities further extend coverage, providing a single pane of glass for file-related and application-related workflows. This eliminates the need for standalone file transfer tools, reduces risk, and ensures compliance with data protection requirements. By embedding MFT into enterprise orchestration, BMC helps organizations manage data flows as part of business-critical processes rather than as siloed operations.

## Self-Service and Persona-Based Access

Control-M extends orchestration to different roles in the organization through intuitive interfaces and role-specific tools. Business users can access real-time service views via web or mobile devices, enabling them to monitor workflows and perform limited operational actions, such as rerun or hold. Developers and data teams can take advantage of the Automation API, Workbench, and Workload Change Manager to design, test, and promote workflows using standard coding practices. Meanwhile, Jett, BMC's embedded generative AI assistant, supports natural language interaction for workflow creation and troubleshooting, lowering barriers for less technical users. This broad access model increases organizational agility while ensuring governance through permissions and controls.

## DevOps and Jobs-as-Code

Control-M integrates directly with DevOps toolchains by supporting jobs-as-code, allowing workflows to be defined in JSON or Python and embedded in CI/CD pipelines. REST APIs and automation frameworks make it possible to version, test, and promote workflows alongside application code. The Workbench provides a dedicated environment for developers to code and debug job flows before they are promoted into production. Workload Change Manager enforces enterprise standards and accelerates approval processes, bridging development and operations. These features make Control-M a strong fit for organizations pursuing agile delivery models in which automation must move at the pace of application development.

## Innovation Cadence

BMC follows a predictable, date-driven release cadence across Control-M, Control-M SaaS, and related tooling. New features, integrations, and enhancements to developer resources are delivered on a regular schedule, allowing customers to adopt innovation without waiting for major upgrades. This approach provides stability for long-term planning and helps organizations align adoption of new orchestration capabilities with their internal release cycles. The cadence reflects BMC's commitment to sustained product evolution and responsiveness to customer feedback.

## SaaS Deployment and Administration

Control-M is available as SaaS, built on AWS Bedrock services with design support from Amazon's SaaS experts. Customers gain hybrid visibility through a single console view spanning on-premises and cloud instances, allowing phased adoption without loss of control. Multiple global regions are supported to address data sovereignty and compliance requirements, and the SaaS model reduces administrative overhead while preserving enterprise-grade scalability and resilience.

# Innovation Focus

BMC is advancing across the three defining innovation areas of 2025—observability, agentic AI, and broader orchestration—while also strengthening SaaS delivery and maturing innovations first highlighted in the 2023 Radar cycle.

## Observability

Control-M continues to embed SLA clocks, dependency awareness, and anomaly detection directly into orchestration flows, moving observability from a reporting layer into the execution fabric. These capabilities allow closed-loop operations in which SLA events can automatically trigger remediation or escalation through integrations with monitoring and ITSM systems. Enhanced Workflow Insights dashboards now expose richer SLA telemetry across data pipelines, strengthening compliance and performance visibility.

## Agentic AI

BMC is piloting AI assistants that support workflow design, troubleshooting, and SLA prediction. These copilots apply generative AI to accelerate development while operating within a policy-bounded autonomy model, ensuring that decision-making remains auditable and subject to human-in-the-loop approvals. Importantly, these assistants also reduce the complexity of harnessing Control-M's full breadth, lowering the learning curve for new users while helping experienced teams accelerate orchestration at enterprise scale. The roadmap extends toward AI-enhanced optimization and dynamic rerouting of workflows, with careful attention to balancing autonomy against enterprise governance requirements.

## Broader Orchestration

BMC is articulating a clear "orchestrator of orchestrators" vision, positioning Control-M not only as a scheduler, but also as a coordination layer that spans ERP systems, DevOps pipelines, service management tools, and AI platforms. Expanding integrations with Snowflake (including Snowpipe ingestion), Databricks, Azure Data Factory, AWS data services, and GCP Dataplex extend Control-M's reach into data pipeline quality, lineage, and compliance-aware orchestration. Enhanced managed file transfer (MFT) further strengthens secure, role-based data movement, while Kubernetes-native agents and multi-cloud workload placement continue to support scale and resilience.

## SaaS Delivery and Global Reach

Control-M SaaS adoption is accelerating as enterprises migrate large portions of their workloads to the cloud. While feature expansion is ongoing, BMC provides a single console view that unifies SaaS and on-premises environments, giving customers holistic visibility across hybrid deployments. Many clients retain certain processes on-premises where SaaS functionality is still maturing, but increasingly move critical pipelines into SaaS for agility and reduced administrative burden. Control-M SaaS was designed in partnership with AWS SaaS consulting teams, leveraging services such as Amazon Bedrock for scale and resilience. With several global SaaS regions now in operation, BMC supports customer requirements for data location and sovereignty while delivering faster time to value and predictable upgrade cycles.

In addition to these 2025 themes, BMC continues to refine innovations introduced in the 2023 Radar cycle. Data pipeline orchestration expanded significantly, Workflow Insights dashboards are more comprehensive, and cloud/container orchestration—once differentiators—are now mainstream, but still evolving under BMC's continuous improvement model.

# EMA Perspective

BMC positions Control-M as one of the most mature workload automation platforms, evolving directly into the 2025 themes of observability, AI, and orchestration. By embedding SLA clocks, dependency awareness, and anomaly detection into workflows, Control-M shifts observability from a reporting layer to a closed-loop system that integrates with monitoring and ITSM for proactive remediation.

BMC earns EMA's Recognition for Excellence in Orchestrating Complex Enterprise Workflows, underscoring Control-M's mastery of largescale, IT-intensive business processes. This recognition reflects BMC's deep orchestration reach across applications, data pipelines, and file movement—domains where precision, reliability, and scale are nonnegotiable. Control-M's unified orchestration model bridges hybrid and SaaS deployments with mature SLA management and embedded AI forecasting, making it the benchmark for orchestrating mission-critical automation in complex enterprise environments.

In AI, BMC is pragmatic—piloting assistants for workflow design, troubleshooting, and SLA prediction within a policy-bounded, human-in-the-loop model. These copilots not only accelerate workflow creation, but also help offset the complexity of exploiting Control-M's full breadth, lowering barriers for new users while preserving governance for large enterprises.

Control-M's role as an "orchestrator of orchestrators" extends beyond workload scheduling into ERP systems, DevOps pipelines, data platforms, and service management tools. Its strong data pipeline integrations with Snowflake, Databricks, and major cloud services reinforce its relevance in analytics-driven enterprises.

Control-M SaaS, built on AWS with Bedrock services and now offered in multiple global regions, provides a single console view that unifies SaaS and on-premises deployments. While full SaaS feature parity is still in progress, this hybrid visibility allows organizations to shift workloads into SaaS at their own pace while retaining control where needed.

While Control-M offers unmatched breadth, the platform's depth can introduce complexity that often benefits from collaboration with BMC's professional services or certified partners to accelerate configuration and maximize value in enterprise-scale environments. Pricing remains at a premium relative to challengers, but the SaaS model brought costs more in line with the market, improving BMC's standing in this Radar cycle. Balanced against these considerations, Control-M's ecosystem depth, credible SaaS strategy, and forward-looking roadmap reinforce its role as a trusted orchestration backbone for complex enterprises.

# Evaluation Summary

| Deployment & Administration | |
|---|---|
| Deployment Time/Effort | Outstanding |
| Conversion Facilities | Strong |
| Job Discovery and Import | Outstanding |
| Staff Training | Outstanding |
| SaaS Deployment | Strong |
| **Support and Services** | |
| Customer Support | Strong |
| Professional Services | Strong |
| **Ease of Administration** | |
| Console Ease of Use | Strong |
| Automation of Management | Outstanding |
| Upgrade Process | Strong |
| SaaS Administration | Outstanding |

| Cost Advantage | |
|---|---|
| Flexibility of Pricing Model | Strong |
| Pricing Scenarios | $$$ |
| SaaS Offering | Strong |

| Architecture & Integration | |
|---|---|
| **Architecture** | |
| Automation Triggers and Dependencies | Outstanding |
| Scalability | Strong |
| Dynamic Workload Placement and Execution Targeting | Outstanding |
| Capacity-Aware Orchestration & Resource Optimization | Outstanding |
| Disaster Protection | Strong |
| Execution Environments | Strong |
| DevOps/GitOps Enablement | Outstanding |
| Observability and Dependency Awareness | Outstanding |
| Data Workload Orchestration | Strong |
| SaaS Architecture | Strong |
| Mainframe Support | Outstanding |

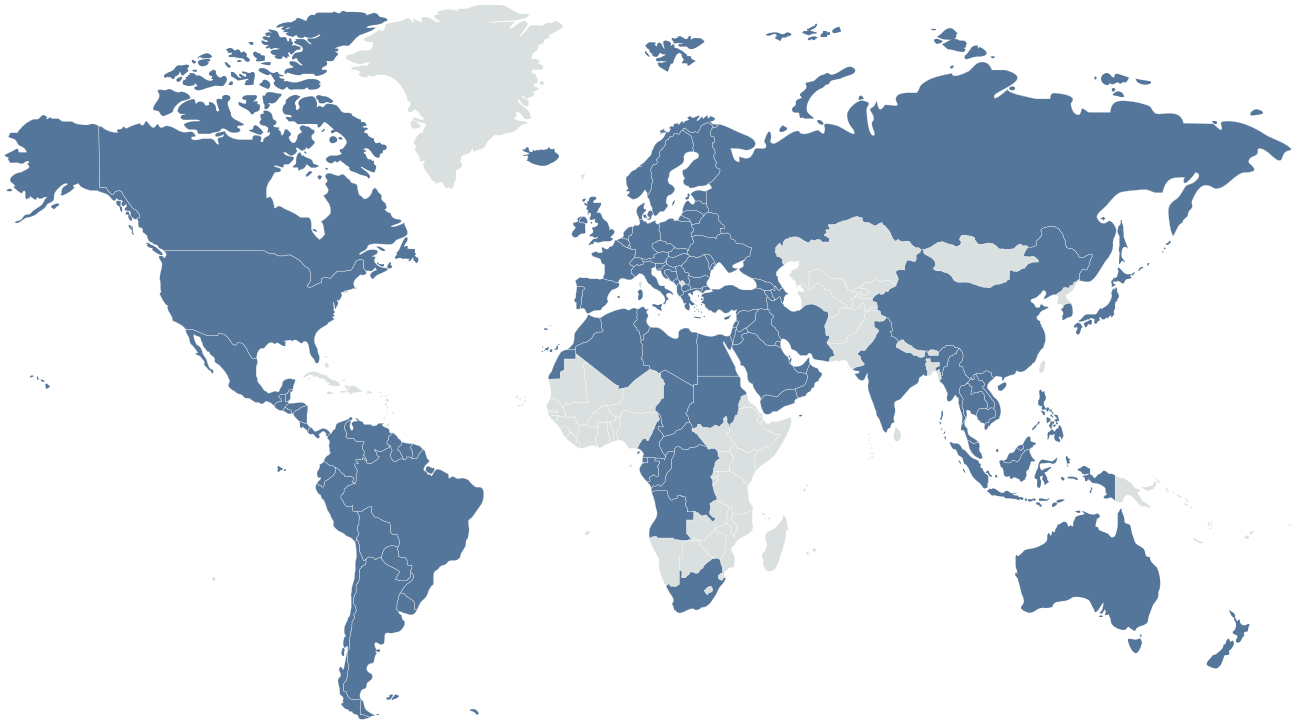
| Architecture & Integration | |
|---|---|
| **Integration & Interoperability** | |
| Third-Party and Cross-Tool Integration | Strong |
| IT Infrastructure Integrations | Outstanding |
| Analytics, Machine Learning, and BI Platform Integrations | Outstanding |
| SQL Database Support | Outstanding |
| ETL and Data Pipeline Tool Integrations | Outstanding |
| ERP System Integrations | Strong |
| Robotic Process Automation (RPA) Integrations | Solid |
| Enterprise Messaging and Communication Integrations | Strong |
| ITPA Integration | Strong |
| Third-Party MFT Integrations | Outstanding |
| Support for Custom and Unsupported Business Applications | Outstanding |
| Identity Management Integration | Strong |

| Functionality | |
|---|---|
| **Features** | |
| Automation Design Flexibility | Outstanding |
| Monitoring and Event Sensors | Outstanding |
| Critical Path Analysis | Outstanding |
| Runtime Variables and Context Passing | Strong |
| Reusability and Parameterization | Strong |
| Load Distribution and Endpoint Optimization | Solid |
| External Data Enrichment | Outstanding |
| Business User Features | Outstanding |
| Dashboard Views and Execution Monitoring | Strong |
| Orchestration Intelligence and Visualization | Strong |
| Business Context Awareness | Outstanding |
| Human Workflow Automation | Strong |
| Triggering Mechanisms and Event Initiators | Outstanding |
| SLA Monitoring and Response Capabilities | Outstanding |
| Container-Based Workload Support | Strong |
| Compliance-Aware Automation Capabilities | Outstanding |
| Scenario Simulation and Prescriptive Recommendations | Outstanding |

| Functionality | |
|---|---|
| **Features** | |
| Forecasting, Analytics, and Reporting | Strong |
| Alerting | Outstanding |
| Security | Strong |
| Tenant Isolation and SaaS Readiness | Strong |
| Logging, Traceability, and Audit Controls | Outstanding |
| Native File Transfer Capabilities | Strong |
| **AI Capabilities** | |
| Agentic Orchestration | Strong |
| AI-Driven Interfaces & Assistants | Strong |
| Root Cause Analysis & Self-Healing | Strong |
| Predictive Analytics | Strong |
| AI-Enhanced Migration & Optimization | None |
| Agentic Automation Capabilities | Solid |
| **Ease of Use** | |
| Simplicity of GUI | Outstanding |
| Mobile Device Support | Strong |
| Language Support | Outstanding |
| Available Help Resources | Strong |

| Vendor Strength | |
|---|---|
| Vision | Outstanding |
| Strategy | Outstanding |
| Financial Strength | Outstanding |
| Research & Development | Outstanding |
| Partnerships/Channel | Outstanding |
| Customer Success Engagement | Outstanding |
| Market Credibility | Outstanding |
| Geographic Coverage | Outstanding |

## Active Clients



## Product Available In:

English, French, German, Spanish, Chinese, Japanese, Korean, Hebrew

## Number of Customers:

+

= 100 = 1000

# Appendix A

The EMA Radar scoring model evaluates vendors against a structured set of key performance indicators (KPIs). This appendix describes what each KPI measures in the 2025 evaluation model.

The scoring framework was substantially reorganized this year; the items highlighted below reflect only the major new areas rather than a full enumeration of all structural changes. The KPIs are described in their new form below.

## What's New in 2025

- **AI Capabilities (New 2025):** Agentic orchestration, AI-driven interfaces/assistants, predictive analytics, and self-healing
- **Observability (Expanded 2025):** Built-in insights, dependency awareness, SLA monitoring, and auditability integrated with orchestration
- **Broader Orchestration (Expanded 2025):** Evaluates maturity toward an "orchestrator of orchestrators" role across domains

| Ease of Deployment (Deployment & Administration) | |
|---|---|
| KPI | Description |
| Deployment Time/Effort | Measures initial setup speed, prerequisite complexity, and availability of automation to provision, configure, and harden environments across on-prem and cloud targets |
| Disaster Protection | HA/DR patterns, RPO/RTO targets, quorum behavior, cross-region options, and backup/restore validation processes |
| Execution Environments | Runtime breadth (mainframe, distributed, containers, serverless), agent models, runners, and controlled remote execution |
| DevOps/GitOps Enablement | Jobs-as-Code flows, versioning, policy checks in CI, artifact promotion, and environment consistency gates |
| Observability and Dependency Awareness | Provides native visibility into dependencies and critical path execution, SLA countdowns, and anomaly detection, with direct tie-ins to ITSM and monitoring tools for closed-loop operations. Expanded in 2025 to emphasize observability alignment, integrating orchestration health with broader system, application, and network monitoring. |
| Dynamic Workload Placement and Execution Targeting | Policy-based placement across clusters/clouds/zones with constraints, affinities, and fallbacks, evaluates cost/perf/SLA tradeoffs |
| Capacity-Aware Orchestration & Resource Optimization | Incorporates live capacity/queue metrics into dispatch and throttling, preemption and back-pressure handling to protect SLAs |
| Data Workload Orchestration | First-class orchestration for data pipelines, including ingestion, transformation, and load (ETL/ELT) workflows, with lineage and context handoff to analytics and observability systems |
| Automation Triggers and Dependencies | Supported trigger types (time, event, API, message, file, data quality, custom) and richness of dependency graphs with conditional/latency handling |

| Support and Services | |
|---|---|
| KPI | Description |
| Customer Support | Coverage hours, channels, SLAs, escalation practices, cloud vs. self-hosted parity, and effectiveness of knowledgebases and community resources |
| Professional Services | Depth of advisory/implementation services, repeatable accelerators, migration toolkits, health checks, and collaboration with partners |

| Ease of Administration (Deployment & Administration) | |
|---|---|
| KPI | Description |
| Console Ease of Use | Information design, navigation, task ergonomics, search/filter, and consistency across web/mobile, assesses learning curve for frequent ops tasks |
| Automation of Management | Degree of policy-driven admin (auto-discovery, agent lifecycle, patch/upgrade orchestration, drift detection), including templated standards enforcement |
| Upgrade Process | Predictability and automation of upgrades/patches, rollback, compatibility assurances, and blue/green or canary patterns for low-risk change |
| SaaS Administration | Admin experience unique to SaaS: change windows, tenant controls, log/export access, audit views, and transparency into release cadence |

| Cost Advantage | |
|---|---|
| KPI | Description |
| Flexibility of Licensing Model | Mix of subscription/perpetual/SaaS options, metering dimensions (nodes, jobs, endpoints, capacity), and ability to shift models as usage evolves |
| Pricing Scenarios | Assesses competitiveness of licensing and subscription costs across realistic deployment mixes, including hybrid and cloud native environments. Expanded in 2025 to evaluate data-intensive and container-heavy workloads, elastic scaling patterns with sharp demand spikes, and modeled growth step-ups. Also considers multi-year total cost of ownership under varied expansion paths. |
| SaaS Offering | Currency/region support, data egress considerations, included platform services, and cost transparency for hybrid connectivity and scale out |

| Architecture & Integration | |
|---|---|
| **Architecture** | |
| KPI | Description |
| Automation Triggers and Dependencies | Supported trigger types (time, event, API, message, file, data quality, custom) and richness of dependency graphs with conditional/latency handling |
| Scalability | Proven scale (jobs/day, endpoints), horizontal elasticity, queue management under burst, and capacity planning signals |
| Dynamic Workload Placement and Execution Targeting | Policy-based placement across clusters/clouds/zones with constraints, affinities, and fallbacks, evaluates cost/perf/SLA tradeoffs |
| Capacity-Aware Orchestration & Resource Optimization | Incorporates live capacity/queue metrics into dispatch and throttling, preemption and back-pressure handling to protect SLAs |
| Disaster Protection | HA/DR patterns, RPO/RTO targets, quorum behavior, cross-region options, and backup/restore validation processes |
| Execution Environments | Runtime breadth (mainframe, distributed, containers, serverless), agent models, runners, and controlled remote execution |
| DevOps/GitOps Enablement | Jobs-as-Code flows, versioning, policy checks in CI, artifact promotion, and environment consistency gates |
| Observability and Dependency Awareness | Provides native visibility into dependencies and critical path execution, SLA countdowns, and anomaly detection, with direct tie-ins to ITSM and monitoring tools for closed-loop operations. Expanded in 2025 to emphasize observability alignment, integrating orchestration health with broader system, application, and network monitoring. |
| Data Workload Orchestration | First-class orchestration for data pipelines, including ingestion, transformation, and load (ETL/ELT) workflows, with lineage and context handoff to analytics and observability systems |
| SaaS Architecture | Isolation model, multi-tenant safeguards, noisy-neighbor controls, and data residency/compliance features |
| Mainframe Support | Depth of integrations, security/auth, dataset scheduling, and cross-domain orchestration with distributed/cloud |

| Architecture & Integration | |
|---|---|
| **Integration/Interoperability** | |
| KPI | Description |
| Third-Party and Cross-Tool Integration | Breadth of off-the-shelf connectors, SDKs, and plugin frameworks, speed to add new tech via templates or low-code adapters |
| IT Infrastructure Integrations | Hooks to virtualization, cloud infrastructure, serverless, storage, and network events for policy-driven orchestration |
| Analytics, Machine Learning, and BI Platform Integrations | Native steps/connectors for ML/BI stacks and model/data refresh orchestration with dependency management |
| SQL Database Support | Operational support for major RDBMS engines (connectivity, credentialing, error handling, transaction control) |
| ETL and Data Pipeline Tool Integrations | Airflow/ADF/Informatica/Databricks/Snowflake/Spark connectors, parameter/secret handling, and return-code normalization |
| ERP System Integrations | SAP/Oracle/other ERP orchestration steps, transactional safety, and alignment to business calendars/closing cycles |
| Robotic Process Automation (RPA) Integrations | RPA bot invocation/coordination, error policies, and reconciliation with application/data workflows |
| Enterprise Messaging and Communication Integrations | Triggers/actions via queues, topics, webhooks, and chat/notification platforms, dead-letter and retry strategies |
| ITPA Integration | Integration with IT process automation tools for remediation and service request fulfillment under policy control |
| Third-Party MFT Integrations | Coordinating external MFT platforms with job flows; error handling, retries, and SLA alignment |
| Support for Custom and Unsupported Business Applications | Low-code/custom plugin patterns to cover proprietary systems without brittle scripting |
| Identity Management Integration | SSO/SAML/OIDC support, SCIM/JIT provisioning, role mapping, and credential vault partnerships |

| Functionality | |
|---|---|
| **Features** | |
| KPI | Description |
| Automation Design Flexibility | Modeling richness (templates, subflows, parameters), reusability, and standards enforcement in design time |
| Monitoring and Event Sensors | Event sources, correlation, severity handling, and tie-ins to remediation playbooks |
| Critical Path Analysis | Identification and tracking of path-of-record jobs with projected SLA impact and slack |
| Runtime Variables and Context Passing | Secure, typed variables and context propagation across steps/tools/environments |
| Reusability and Parameterization | Library quality, parameter substitution, and inheritance to reduce duplication |
| Load Distribution and Endpoint Optimization | Workload placement balancing, queue control, and intelligent fan-out/fan-in |
| External Data Enrichment | Incorporating reference data/metadata to influence orchestration decisions |
| Business User Features | Role-appropriate views/actions for non-technical users (status, rerun/hold with guardrails) |
| Dashboard Views and Execution Monitoring | Real-time and historical views; filters, drilldowns, and custom perspectives |
| Orchestration Intelligence and Visualization | Delivers visual dependency maps, critical-path overlays, and health/risk indicators. Expanded in 2025 to include real-time explanation of blocking factors, SLA risks, and bottlenecks for proactive resolution. |
| Business Context Awareness | Calendars, fiscal/closing windows, and business-hour policies embedded in flows |
| Human Workflow Automation | Tasking/approval steps with SLAs, reminders, and escalation policies |
| Triggering Mechanisms and Event Initiators | File, message, webhook, API, schedule, and data-condition triggers |
| SLA Monitoring and Response Capabilities | SLA definitions, countdowns, risk flags, preemptive actions, and reporting |
| Container-Based Workload Support | Native steps/agents for Kubernetes/containers; image, secret, and namespace handling |
| Compliance-Aware Automation Capabilities | Policy controls that enforce separation of duties, approvals, and audit capture |
| Scenario Simulation and Prescriptive Recommendations | “What-if” runs and prescriptive adjustments based on modeled constraints |

| Functionality | |
|---|---|
| **Features** | |
| KPI | Description |
| Forecasting, Analytics, and Reporting | Historical trend analysis, capacity forecasts, and KPI reporting packs |
| Alerting | Multi-channel, deduplicated, and policy-aware notifications with on-call routing |
| Security | Encryption, secrets handling, key rotation, and least-privilege enforcement |
| Tenant Isolation and SaaS Readiness | Logical/physical segregation, data boundaries, and noisy-neighbor protections |
| Logging, Traceability, and Audit Controls | Provides immutable logs, correlated traces, and end-to-end audit trails suitable for compliance and regulatory review. Expanded in 2025 to highlight auditor-ready evidence exports, correlation of events across domains, and immutability of records. |
| Native File Transfer Capabilities | Built-in MFT features linked to workflows (retries, resumes, checksum, and policy) |
| **AI Capabilities** | |
| Agentic Orchestration | Ability to coordinate AI/agent actions as first-class workflow steps; policy-bounded autonomy with human-in-the-loop controls |
| AI-Driven Interfaces & Assistants | Generative assistants for design/troubleshooting; guardrails, approval capture, and audit of AI-assisted changes |
| Root Cause Analysis & Self-Healing | Analytics and rule/ML-driven remediation to shorten MTTR; validated action libraries and rollback safety |
| Predictive Analytics | Forecasting of SLA risk, queue/capacity hotspots, and proactive throttling/placement recommendations |
| AI-Enhanced Migration & Optimization | Evaluates the use of AI to streamline migration from legacy schedulers or adjacent tools, including intelligent mapping of job definitions, parameter conversion, anomaly detection in migrated flows, and automated tuning of workloads for cost, performance, or SLA adherence after cutover. |
| Agentic Automation Capabilities | Measures the platform's ability to embed autonomous, agent-based decision logic into orchestration flows. Includes support for policy-bounded agents that can negotiate dependencies, coordinate across multiple domains (e.g., ERP, observability, ServiceOps), and adapt actions dynamically while maintaining auditability and human-in-the-loop control. |

| Functionality | |
|---|---|
| **Ease of Use** | |
| KPI | Description |
| Simplicity of GUI | Clarity, responsiveness, and cognitive load for frequent tasks, consistency across modules |
| Mobile Device Support | Mobile-friendly status, approvals, and limited safe operations for on-call |
| Language Support | Localized UI/docs and cultural conventions (time/date, numeric formats) for global teams |
| Available Help Resources | In-product help, contextual tips, searchable docs, tutorials, and community content |
| **Vendor Strength** | |
| Vision | Long-term view of enterprise automation, road-map coherence, and alignment to industry shifts |
| Strategy | Execution clarity, market focus, and investment priorities that back the vision |
| Financial Strength | Revenue/stability signals (private/public), funding, and ability to sustain R&D/support globally |
| Research & Development | Release cadence, quality, and the ratio of net-new capabilities vs. maintenance work |
| Partnerships/Channel | Breadth/quality of alliances, SI/MSP strength, and co-sell/co-build velocity |
| Customer Success Engagement | Proactive success motions, adoption programs, and lifecycle health management |
| Market Credibility | Enterprise penetration, references, wins, and sentiment among practitioners |
| Geographic Coverage | Sales/support presence, localization, and regional partner ecosystems |

## About Enterprise Management Associates, Inc.

Founded in 1996, Enterprise Management Associates (EMA) is a leading IT research and consulting firm dedicated to delivering actionable insights across the evolving technology landscape. Through independent research, market analysis, and vendor evaluations, we empower organizations to make well-informed technology decisions. Our team of analysts combines practical experience with a deep understanding of industry best practices and emerging vendor solutions to help clients achieve their strategic objectives. Learn more about EMA research, analysis, and consulting services at **www.enterprisemanagement.com** or follow EMA on **X** or **LinkedIn**.



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