

Procurement & Source-to-Pay

The 2026 Buyer's Guide & Vendor Landscape

A practitioner's guide to evaluating, costing, and selecting source-to-pay and procurement software, including supplier risk: what these systems do, how the market and vendors stack up in 2026, what they cost, how to run the selection, and how to de-risk the implementation.

Prepared by **Supply Chain Research** · June 2026 · Vendor-neutral: we take no payment from the vendors covered.

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1. Executive summary

Source-to-pay (S2P) software runs the full procurement lifecycle, from finding and qualifying suppliers through sourcing, contracts, purchasing, and invoice payment, with spend analytics and supplier management threaded throughout. After two decades of suite consolidation, the category is being reshaped from two directions at once: enterprise suites are embedding agentic AI and autonomous sourcing, while a wave of intake-and-orchestration challengers is unbundling the buying experience and layering it over existing systems. For buyers in 2026, the decision is less about which suite has the most modules and more about how to balance an integrated suite against best-of-breed speed and user adoption.

This guide is written for procurement, finance, and IT leaders evaluating an S2P investment, and the teams who must implement it and drive adoption. It is deliberately vendor-neutral: we accept no payment from the vendors covered, and we name no single best platform, because the right choice depends on your ERP, spend profile, supplier base, and regulatory exposure. The pages that follow define the category and its modules, size the market honestly across its very different definitions, profile the suite leaders and the intake and supplier-risk challengers, lay out an evaluation framework, and explain why adoption and spend-under-management, not feature counts, determine the return.

\$4-26B range of 2025 market estimates, depending on whether the category is spend management or broad business spend management	91.5% spend under management achieved by best-in-class procurement organizations (Ardent Partners)	\$53B Gartner's 2030 forecast for SCM software with agentic AI, including procurement
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What the evidence says

The category boundary drives a 6x spread in market size. Narrow spend management is sized near \$4B, broad procurement software at roughly \$8B to \$10B, source-to-pay specifically at about \$6B to \$8B, and broad business spend management at \$23B to \$26B. Always check the definition.

Five vendors anchor the suite market. SAP Ariba, Coupa, GEP, Ivalua, and Oracle were Leaders in the 2025 Gartner Magic Quadrant for Source-to-Pay Suites, with Zycus promoted to Leader in the 2026 edition.

Intake and orchestration is the hottest category. Challengers such as Zip, Omnea, and Levelpath are winning on user experience by orchestrating buying over existing ERPs rather than replacing them, and Zip reached a \$2.2B valuation.

Supplier risk became its own market. Gartner published its first Magic Quadrant for Supplier Risk Management Solutions in 2025, with Everstream, Exiger, Prewave, and Resilinc as Leaders, driven by regulation and disruption.

Adoption, not features, determines ROI. Value comes from putting more spend under management and capturing negotiated savings; maverick, off-contract buying can lose roughly 16 percent of negotiated savings.

2. What source-to-pay software is

Source-to-pay describes the end-to-end procurement process and the software that runs it. It spans the strategic upstream (finding suppliers, sourcing, and negotiating contracts) and the transactional downstream (purchasing, receiving, and paying), with spend analytics and supplier management connecting the two. Understanding the module map, and the overlapping acronyms, is the first step to scoping the right purchase.

The core modules

- **Strategic sourcing:** running events, bids, and negotiations to select suppliers and award business.
- **Contract lifecycle management (CLM):** authoring, negotiating, storing, and managing supplier contracts and obligations.
- **Procure-to-pay (P2P):** the transactional core, from requisition and purchase order through receipt.
- **Invoicing and accounts-payable automation:** matching, approving, and paying supplier invoices.
- **Spend analytics:** classifying and analyzing spend to find savings and compliance gaps.
- **Supplier management and risk:** onboarding, performance, and risk and resilience monitoring across the supply base.

How the categories relate

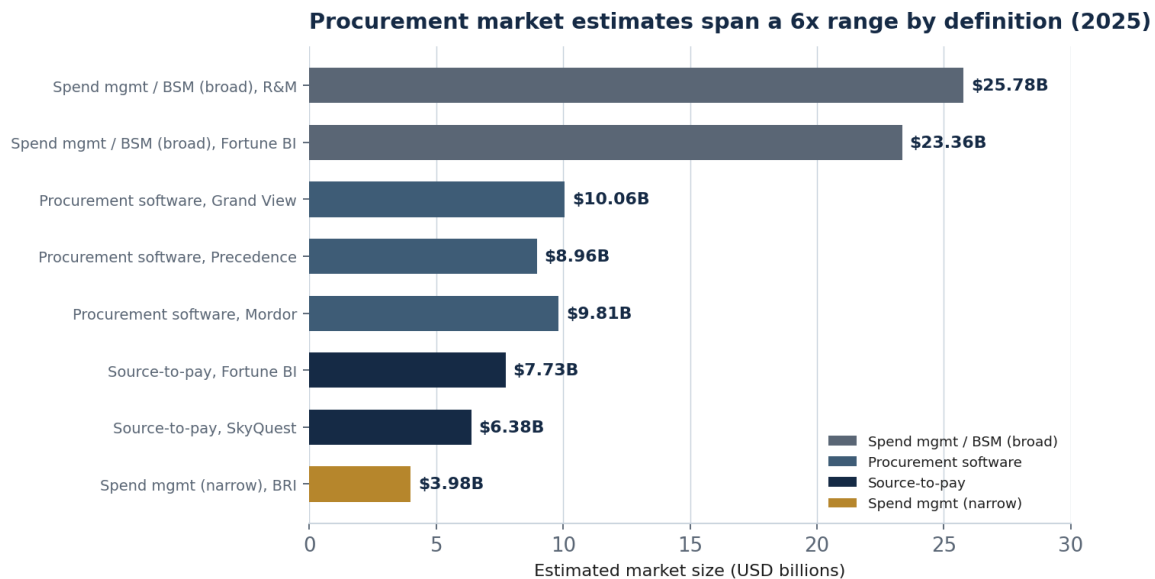
Term	What it covers	Scope
Source-to-pay (S2P)	Sourcing + contracts + P2P + invoicing + analytics	End to end
Procure-to-pay (P2P)	Requisition to payment, transactional	Downstream
E-procurement	Digital catalogs and purchasing	Subset of P2P
Spend management / BSM	Often adds AP, expenses, and travel	Broad
CLM	Contract authoring and management	Module or standalone
Supplier risk (SRM)	Supplier risk and resilience monitoring	Adjacent layer

Direct versus indirect, and the ERP question

Procurement software handles both indirect spend (the goods and services a company buys to operate, where most S2P suites are strongest) and direct spend (the materials that go into products, which is closer to supply chain planning). It also sits in a deliberate relationship with the ERP: some organizations run procurement inside SAP or Oracle, while others layer a best-of-breed suite or an intake-and-orchestration tool over the ERP to improve usability and control. That choice, suite versus orchestration layer, is the central architectural decision in this market.

3. The procurement software market in 2026

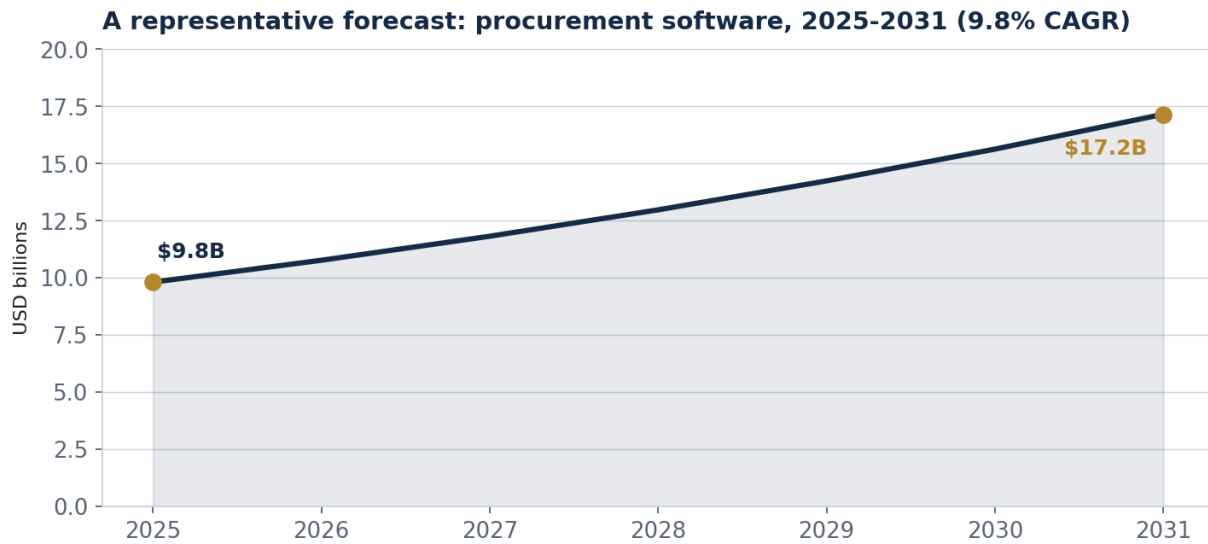
Procurement software is a large, steadily growing market, but its size depends entirely on where the boundary is drawn. Narrow spend management, broad procurement software, source-to-pay specifically, and broad business spend management are sized very differently, and the gap between them is roughly sixfold. Treat the figures as directional and check the definition before comparing.



Source: Supply Chain Research analysis of published estimates, 2024-2025. The category boundary, from narrow spend management to broad business spend management, drives the spread.

Figure 1. Published 2025 estimates by category definition. The spread, from narrow spend management to broad business spend management, is about sixfold.

Category and firm	2025 size	Forecast	CAGR
Business spend mgmt (broad), R&M	\$25.78B	\$45.93B / 2030	12.0%
Procurement software, Grand View	\$10.06B	\$21.29B / 2033	10.0%
Procurement software, Mordor	\$9.81B	\$17.11B / 2031	9.8%
Procurement software, Precedence	\$8.96B	\$22.88B / 2035	9.8%
Source-to-pay, Fortune BI	\$7.73B	\$12.04B / 2026	~11%
Source-to-pay, SkyQuest	\$6.38B	\$14.5B / 2033	10.8%
Spend mgmt (narrow), BRI	\$3.98B	\$7.26B / 2034	7.2%



Source: Mordor Intelligence, 2025 (mid-range of the field). Source-to-pay-specific estimates grow at a similar ~10-11% pace.

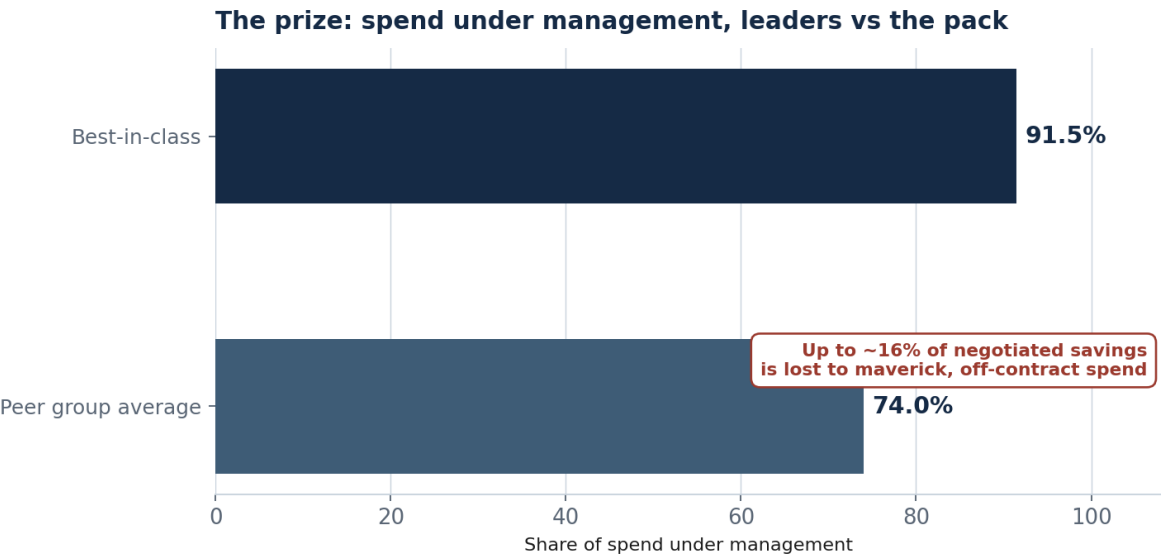
Figure 2. A representative trajectory for procurement software at about 9.8% CAGR (Mordor Intelligence).

Why the estimates diverge

The spread is a definition problem. The narrowest figures count only dedicated spend-management software, the broadest add accounts payable, expenses, and travel into a business-spend-management total, and source-to-pay sits in between. Cloud deployment dominates at roughly 68 percent, large enterprises account for the majority of spend, manufacturing is the leading vertical at about 22 percent, North America is the largest region at roughly 33 to 35 percent, and Asia-Pacific is the fastest-growing. For planning, treat broad procurement software (about \$8B to \$10B in 2025, growing near 10 percent) as the most consistent baseline.

The prize: spend under management

The reason to buy S2P software is not the software, it is the spend it brings under management and the savings that follow. The gap between the best procurement organizations and the rest is large, and it is where the business case lives.



Source: The Hackett Group (best-in-class 91.5% spend-under-management; peer group ~74%) and Hackett maverick-spend research. Analyst-sourced.

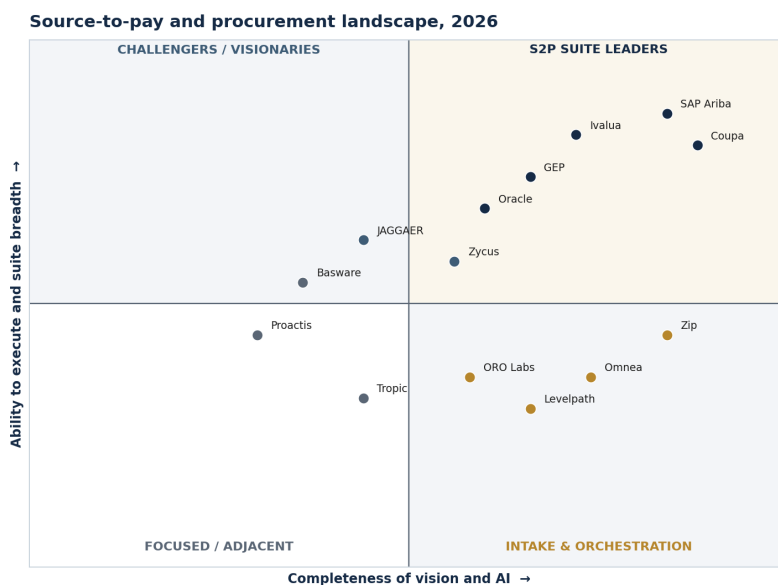
Figure 3. Spend under management, best-in-class versus the peer group (Ardent Partners and Hackett Group). Maverick spend erodes a meaningful share of negotiated savings.

4. The vendor landscape

The field spans enterprise S2P suites, ERP-adjacent platforms, a fast-rising class of intake-and-orchestration challengers, contract and accounts-payable specialists, and a distinct supplier-risk layer. This section profiles the vendors that matter in 2026, grouped by role, with strengths and limitations for each.

What the analysts say

- **The Gartner Magic Quadrant for Source-to-Pay Suites** named SAP Ariba, Coupa, GEP, Ivalua, and Oracle as Leaders in its 2025 edition (Coupa highest on execution), with Zycus a Visionary. In the January 2026 edition, Zycus was promoted to Leader and JAGGAER positioned as a Visionary.
- **Supplier risk got its first Magic Quadrant.** Gartner's inaugural 2025 Magic Quadrant for Supplier Risk Management Solutions named Everstream Analytics, Exiger, Prewave, and Resilinc as Leaders, with a companion Critical Capabilities and a 2026 update.
- **Other coverage rounds out the picture.** Gartner also publishes a Magic Quadrant for Accounts Payable Applications, IDC MarketScapes name Zycus a Leader in AI-enabled source-to-pay and Zip a Leader in spend orchestration, and Spend Matters and Ardent Partners provide specialist rankings; Gartner added procurement orchestration as a category in 2024.



Structured after the 2025-2026 Gartner Magic Quadrant for Source-to-Pay Suites (Leaders SAP, Coupa, GEP, Ivalua, Oracle; Zycus promoted to Leader in 2026). Intake players are positioned separately. SCR's directional interpretation, not analyst coordinates.

Figure 4. A landscape view of the field. Suite Leaders anchor the upper right; intake and orchestration players are positioned separately. SCR interpretation, not analyst coordinates.

Enterprise source-to-pay suites

SAP Ariba and Coupa

The two most prominent enterprise suites. SAP Ariba anchors SAP's broader spend portfolio, which includes Fieldglass for contingent labor, Concur for expenses, and the Business Network, and is the natural default for SAP-centric estates. Coupa, taken private by Thoma Bravo in an \$8B transaction in 2023, is a unified business-spend-management platform positioned highest on execution in the 2025 Magic Quadrant. The strengths are breadth and a single data model; the limitations are long implementations, rigid workflows, high total cost, and adoption friction.

GEP, Ivalua, JAGGAER, and Oracle

GEP SMART pairs a unified suite with consulting and managed services; Ivalua is a highly configurable single-platform suite and one of the few vendors present across multiple Magic Quadrant editions; JAGGAER (which absorbed BravoSolution) is strong in direct and complex sourcing and was a Visionary in 2026; and Oracle Fusion Cloud Procurement, a 2025 Leader, is the natural choice within Oracle estates. Zycus, promoted to Leader in 2026, rounds out the suite tier with an AI-forward approach.

Intake and orchestration challengers

The fastest-growing segment does not replace the suite or ERP but orchestrates the buying experience over it, winning on user experience. **Zip** (valued at \$2.2B after a \$190M Series D, with roughly \$371M raised) pioneered the intake-to-procure category; **Omnea** (which raised a \$50M Series B in 2025 and counts Spotify, Wise, and MongoDB as customers) is expanding into supplier management; and **Levelpath, ORO Labs, Tonkean, Fairmarkit, and Tropic** round out the field. The strength is adoption and speed; the limitation is that they depend on the systems beneath them and do not, by themselves, replace a full suite.

Contract, accounts-payable, and supplier-risk specialists

Several adjacent categories matter to an S2P decision. In contract lifecycle management, **Icertis, Sirion, Agiloft, and DocuSign CLM** lead. In accounts-payable automation, **Tipalti, Stamplicy, AvidXchange, Medius, and Esker** are prominent. And in the increasingly distinct supplier risk and resilience layer, **Everstream Analytics, Resilinc, Exiger, Prewave, Interos, EcoVadis** (supplier sustainability ratings), and **Sphera** monitor risk across the supply base, driven by regulation and disruption.

Vendor summary

Vendor	Category	Best fit	Notes
SAP Ariba	S2P suite	SAP estates	2025 Leader; broad spend portfolio
Coupa	S2P / BSM suite	Unified spend	2025 Leader, highest execution; Thoma Bravo-owned
GEP / Ivalua	S2P suite	Configurable, services	2025 Leaders
Oracle	S2P suite	Oracle estates	2025 Leader
Zycus / JAGGAER	S2P suite	AI-forward, direct sourcing	Zycus a 2026 Leader; JAGGAER Visionary
Zip / Omnea / Levelpath	Intake / orchestration	Adoption over ERP	Fastest-growing; Zip ~\$2.2B valuation
Icertis / Sirion	CLM	Contract management	Specialist contract platforms
Everstream / Resilinc / Exiger	Supplier risk	Risk and resilience	2025 Supplier Risk MQ Leaders

5. How to evaluate an S2P platform

S2P software is among the harder enterprise purchases to get right, because the winner is decided as much by adoption and ERP fit as by features. Score candidates against the same defined dimensions, weighted for your spend profile, and remember that a suite no one uses delivers less than a narrower tool everyone adopts.

The five evaluation dimensions

1. **Scope and module fit.** Match the modules to your actual needs, sourcing, contracts, P2P, invoicing, analytics, and supplier management, and decide whether you need a full suite or a focused set.
2. **ERP and architecture fit.** Decide between running procurement in your ERP, deploying a best-of-breed suite, or layering an intake-and-orchestration tool over the ERP; this is the central architectural choice.
3. **User adoption and experience.** Weight usability heavily, because the compliant path must be easier than the non-compliant one; intake players win precisely here.
4. **Supplier network and onboarding.** Assess supplier onboarding effort and any network fees, since supplier enablement is a major and often underestimated cost.
5. **Viability, cost, and risk.** Weigh total cost of ownership, vendor stability and roadmap, and, where relevant, supplier-risk and regulatory capabilities.

Suite, best-of-breed, or orchestration layer

The architectural decision shapes everything else. A single suite offers one data model and one vendor but a longer, costlier implementation and more rigidity. Best-of-breed tools offer depth in a module at the cost of integration. An intake-and-orchestration layer keeps the ERP and adds the usability and control that drive adoption, but does not replace a full suite. Let your ERP footprint, spend complexity, and adoption history drive the choice.

A selection process that works

6. **Map your spend, modules, and ERP** and the compliance gaps you most need to close.
7. **Shortlist by architecture and module fit**, comparing suite, best-of-breed, and orchestration approaches.
8. **Test adoption with real users** on your actual buying scenarios, not a scripted demo.
9. **Model total cost and supplier onboarding** over a realistic multi-year ramp.
10. **Weigh viability and roadmap**, including agentic-AI direction and supplier-risk capability.

6. Cost and pricing

S2P pricing varies widely by scope and is rarely a simple per-seat figure; the total cost of ownership in the first year often runs well above the subscription. The table summarizes the broad shape; validate every figure with vendor quotes against your own spend and supplier base.

Approach	Indicative pricing	Notes
Enterprise suite (Coupa)	~\$50K to \$2M+/yr	First-year total cost can run 2-4x subscription
Enterprise suite (SAP Ariba)	~\$25K to \$250K+/yr	Plus supplier network access fees
Intake / orchestration	Subscription	Often a fraction of full-suite cost
Supplier onboarding	Frequently underestimated	Enabling suppliers is a major hidden cost

What drives the cost

Pricing follows modules, managed spend, and user count, and the largest hidden costs are implementation, integration with the ERP (many organizations need third-party consulting), supplier onboarding, and the internal effort to drive adoption. A single-module deployment can go live in three to six months, while a full enterprise S2P implementation typically takes nine to eighteen months. Model the all-in cost over that horizon, not the first-year license alone.

Confirm pricing with vendor quotes on your own scope; published ranges are indicative and first-year total cost commonly runs well above the subscription.

7. Implementation: where programs succeed or fail

S2P programs fail for reasons that have little to do with the software's feature set: long timelines, ERP integration, supplier onboarding, and above all low user adoption. The compliant buying path being slower than the non-compliant one is the quiet killer of procurement value.

Why programs struggle

- **Implementations run long and over budget**, with full enterprise S2P taking nine to eighteen months and significant internal effort.
- **ERP integration is harder than expected**, and many organizations need third-party consulting to connect procurement to finance.
- **Supplier onboarding is underestimated**, leaving suppliers unenabled and transactions outside the system.
- **Users route around the system**, because the compliant path is slower; maverick, off-contract spend then erodes the negotiated savings.

9-18 mo typical timeline for a full enterprise S2P implementation	~16% of negotiated savings lost to maverick, off-contract spend (Hackett)	Adoption the compliant path must be easier than the workaround
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Three principles that separate success from failure

Make the compliant path the easy path. Prioritize user experience and intake design so buyers do not route around the system; adoption is the whole game.

Enable suppliers deliberately. Plan and resource supplier onboarding as a core workstream, not an afterthought.

Phase by spend category. Start where the savings and compliance gains are largest, prove the value, then expand module by module.

A phased rollout

The lowest-risk pattern starts with the spend categories where savings and compliance gains are largest, often indirect and tail spend, proves the value and the adoption, then extends to additional categories and modules. This sequencing delivers early returns, contains implementation risk, and builds the user habits and supplier enablement that later phases depend on.

8. Trends shaping 2026

Agentic AI and autonomous sourcing

Every major suite is embedding AI agents, from Coupa's autonomous-procurement direction to Zycus's agentic AI with autonomous negotiation for tail spend and SAP's category agents. Gartner expects SCM software with agentic AI, which includes procurement, to grow from under \$2B in 2025 to \$53B by 2030. The realistic near-term value is in narrow, supervised tasks such as tail-spend sourcing and contract analysis, not full autonomy.

Intake and orchestration

The unbundling of the buying experience is the defining structural trend. Intake-and-orchestration tools win on adoption by sitting over the ERP, and Gartner formalized procurement orchestration as a category in 2024. The tension for buyers is consolidation into a single suite versus the best-of-breed usability of an orchestration layer.

Supplier risk, resilience, and regulation

Supplier risk has become its own software market, propelled by regulation, the German Supply Chain Act, the EU Corporate Sustainability Due Diligence Directive, United States forced-labor rules, and food-traceability requirements, and by ongoing disruption. The 2025 inaugural Gartner Magic Quadrant for the category signals its arrival as a board-level concern.

Tariffs, trade, and Scope-3 data

Tariff and trade-disruption management has become a procurement priority, and sustainability reporting is pushing Scope-3 supplier data into the toolset, with EcoVadis and similar ratings increasingly embedded in supplier management. Procurement is being asked to manage cost, risk, and sustainability at once.

9. Segment-specific guidance

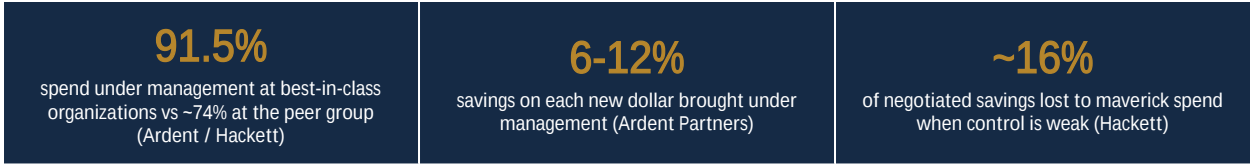
The right S2P approach depends on your size, spend, and architecture. The table summarizes what tends to dominate the decision; the notes add detail.

Operating profile	What matters most	Approaches that fit
Large SAP / Oracle estate	ERP fit, breadth, governance	SAP Ariba or Oracle, or intake over ERP
Mid-market	Speed, usability, cost	Intake / orchestration, focused suites
Indirect / tail spend	Adoption, savings capture	Intake players, tail-spend tools
Services / contingent labor	Workforce and services spend	SAP Fieldglass and services modules
Regulated / risk-heavy	Supplier risk and compliance	Add Everstream, Resilinc, Exiger, Prewave
Manufacturing / direct	Direct sourcing complexity	JAGGAER, Ivalua, GEP

Large SAP or Oracle estates usually default to the native suite for governance and breadth, though many add an intake layer for adoption. **Mid-market and indirect-spend buyers** reward usability and speed, the home turf of intake and orchestration tools. **Services and contingent-labor spend** needs dedicated modules such as Fieldglass. **Regulated and risk-heavy organizations** should add a dedicated supplier-risk platform, and **manufacturers with complex direct sourcing** often favor JAGGAER, Ivalua, or GEP. The unifying rule is to match the architecture to your ERP and the tool to the spend.

10. ROI and the business case

S2P ROI concentrates in spend under management, savings capture, compliance, and accounts-payable efficiency. The strongest figures are analyst-sourced; vendor-commissioned studies should be treated as directional, not independent.



The value levers

A credible business case rests on several levers that compound. Putting more spend under management is the foundation, because savings only accrue on spend the system actually controls, and best-in-class organizations reach about 91.5 percent. Negotiated-savings capture follows, with Ardent Partners citing 6 to 12 percent on each new dollar managed. Compliance and the reduction of maverick spend protect those savings, since roughly 16 percent of negotiated savings can otherwise leak away. And accounts-payable automation cuts processing cost and capture late-payment value. The candid caveat is that the most-cited return figures, such as a 276 percent three-year ROI with payback in ten months, come from a vendor-commissioned Forrester study and should be validated against your own baseline. Build the case on your own spend-under-management, savings, and compliance numbers, and use vendor figures only to size the opportunity.

11. Frequently asked questions

What is source-to-pay (S2P) software?

Software that runs the full procurement lifecycle, from finding and qualifying suppliers through sourcing, contracts, purchasing, and invoice payment, with spend analytics and supplier management throughout. It spans the strategic upstream and the transactional downstream.

What is the difference between S2P and procure-to-pay (P2P)?

P2P is the transactional subset, from requisition through payment. S2P adds the strategic upstream, sourcing, contracts, and supplier management, to cover the end-to-end process.

Who are the leading vendors?

SAP Ariba, Coupa, GEP, Ivalua, and Oracle were Leaders in the 2025 Gartner Magic Quadrant for Source-to-Pay Suites, with Zycus promoted to Leader in 2026. Intake-and-orchestration challengers such as Zip and Omnea are reshaping the buying experience.

What is intake and orchestration, and why does it matter?

A newer category that orchestrates the buying experience over existing ERPs rather than replacing them, winning on user adoption. Zip, Omnea, and Levelpath lead it, and Gartner formalized procurement orchestration as a category in 2024.

How big is the market?

It depends on the definition. Narrow spend management is near \$4B, broad procurement software roughly \$8B to \$10B in 2025 growing near 10 percent, source-to-pay specifically about \$6B to \$8B, and broad business spend management \$23B to \$26B.

What does S2P software cost?

It varies widely. Coupa ranges from roughly \$50,000 to \$2M or more per year and SAP Ariba from about \$25,000 to \$250,000 plus network fees, with first-year total cost often well above the subscription. Intake tools are typically a fraction of full-suite cost.

How long does implementation take?

A single module can go live in three to six months; a full enterprise S2P implementation typically takes nine to eighteen months, with ERP integration and supplier onboarding the main drivers.

What is supplier risk management software?

A distinct and fast-growing layer that monitors supplier risk and resilience, propelled by regulation and disruption. Gartner published its first Magic Quadrant for the category in 2025, with Everstream, Exiger, Prewave, and Resilinc as Leaders.

How is agentic AI changing procurement?

Suites are embedding AI agents for tasks such as tail-spend sourcing, contract analysis, and supplier management. The near-term value is in narrow, supervised use cases; full autonomy remains aspirational, and Gartner projects strong growth in agentic SCM software through 2030.

What determines ROI?

Adoption and spend under management. Value comes from controlling more spend and capturing negotiated savings, with best-in-class organizations reaching about 91.5 percent spend under management; weak control loses roughly 16 percent of savings to maverick spend.

12. Recommendations

- 11. Decide the architecture first.** Choose deliberately between running procurement in your ERP, deploying a best-of-breed suite, and layering intake and orchestration over the ERP; this choice shapes cost, adoption, and timeline more than any feature.
- 12. Match the suite to your ERP and spend.** SAP Ariba, Coupa, GEP, Ivalua, and Oracle are all 2025 Leaders; choose on ERP alignment, spend complexity, and configurability rather than quadrant position.
- 13. Use intake and orchestration to win adoption.** Where the binding constraint is usability and compliance, layer Zip, Omnea, or Levelpath over the ERP rather than replacing it.
- 14. Stand up supplier risk if you are exposed.** Add a dedicated platform such as Everstream, Resilinc, Exiger, or Prewave where regulation and disruption demand it.
- 15. Build the case on spend under management,** target a high share of controlled spend, discount vendor-commissioned ROI studies, and phase the rollout by spend category to prove value early.

13. Methodology and caveats

- **Market sizing diverges by roughly sixfold by definition** (narrow spend management near \$4B, broad procurement software \$8B to \$10B, source-to-pay \$6B to \$8B, broad business spend management \$23B to \$26B in 2025); all figures are directional, and several come from firms whose methodologies are not public. One source's \$415B source-to-pay figure is an outlier and is excluded as unreliable.
- **Analyst rankings are current as cited.** The Gartner Source-to-Pay Suites Leaders are from the 2025 and 2026 editions, and the Supplier Risk Management Leaders from the inaugural 2025 edition; positions change between editions.
- **ROI figures are mixed-source.** Spend-under-management and savings benchmarks are analyst-sourced (Ardent Partners, The Hackett Group), while the most-cited 276 percent ROI figure is from a vendor-commissioned Forrester study and is flagged as such.
- **The vendor positioning in Figure 4 is SCR's directional interpretation,** anchored on the 2025-2026 Gartner Source-to-Pay Suites Magic Quadrant, with intake players positioned separately because they are not evaluated in the same way.
- **Funding, valuation, and ownership details are accurate as reported** at the time of writing; this is a fast-moving market, so confirm current figures directly before relying on them.

14. Sources

- [1] Gartner (Mar 2025). [Magic Quadrant for Source-to-Pay Suites \(Leaders: SAP, Coupa, GEP, Ivalua, Oracle\)](#).
- [2] PR Newswire (2025). [Coupa named a Leader in the 2025 Gartner Magic Quadrant for Source-to-Pay Suites](#).
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- [4] Oracle (Mar 2025). [Oracle named a Leader in the 2025 Gartner Magic Quadrant for Source-to-Pay Suites](#).
- [5] Business Wire (Jan 2026). [Zycus named a Leader in the 2026 Gartner Magic Quadrant for Source-to-Pay Suites](#).
- [6] Gartner (Apr 2025). [Magic Quadrant for Supplier Risk Management Solutions, inaugural edition \(Leaders: Everstream, Exiger, Prewave, Resilinc\)](#).
- [7] Precedence Research (2025). [Procurement Software Market](#). \$8.96B (2025) to \$22.88B by 2035, 9.83% CAGR.
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- [9] Grand View Research (2025). [Procurement Software Market](#). \$10.06B (2025); NA ~35.2%.
- [10] SkyQuest (2025). [Source to Pay Market](#). \$6.38B (2025) to \$14.5B by 2033, 10.8% CAGR.
- [11] Zip (2025). [Zip year in review and Series D \(intake-to-procure; ~\\$2.2B valuation\)](#).
- [12] Zycus (2026). [Zycus recognized as a Leader in the 2026 Gartner Magic Quadrant for Source-to-Pay Suites](#).

Additional figures drawn from: Research and Markets and Fortune Business Insights (business spend management sizing); Business Research Insights (narrow spend management); The Hackett Group (spend-under-management and maverick-spend research); Ardent Partners (savings benchmarks); Thoma Bravo (Coupa acquisition); Omnea (Series B); and a Coupa-commissioned Forrester Total Economic Impact study (276% ROI, flagged). Vendor capability, pricing, and ROI claims are vendor-stated or vendor-commissioned unless otherwise noted.

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