

The infrastructure for the **AI economy**.

SaaS Market Dynamics

Where enterprise software spend is moving.

THE ENTERPRISE SOFTWARE MAP

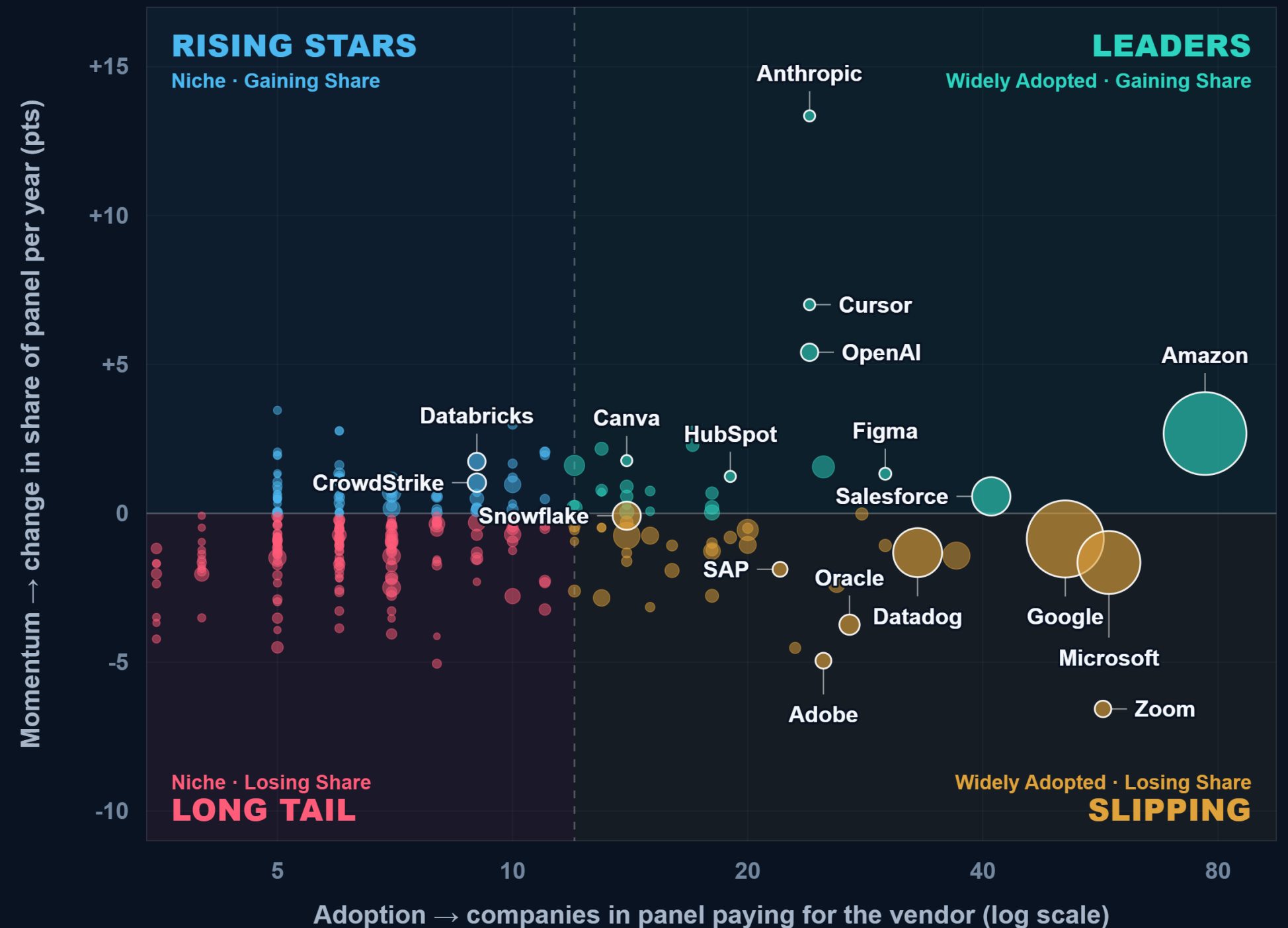
Some of the biggest names aren't gaining share

- 01** 290 vendors plotted by adoption, enterprise companies paying, against change in panel share, 2021–2026.
- 02** AI is the only group all in the top-right: Anthropic, OpenAI, and Cursor went from nothing to the steepest climbers in three years.
- 03** The incumbents are drifting down: Microsoft, Google, Adobe, Oracle, and Zoom are widely adopted but losing relative share.



The Enterprise Software Map, in Motion

Where a vendor sits is the story: top-right is widely adopted and still gaining share, bottom-left is niche and losing share. Left to right = how many companies pay for it · up or down = winning or losing panel share · bubble size = 2025 spend.



290 vendors across hundreds of enterprise SaaS buyers, 2021–2026. Momentum = annual change in each vendor's share of the panel · CA0093.

CATEGORY MOMENTUM

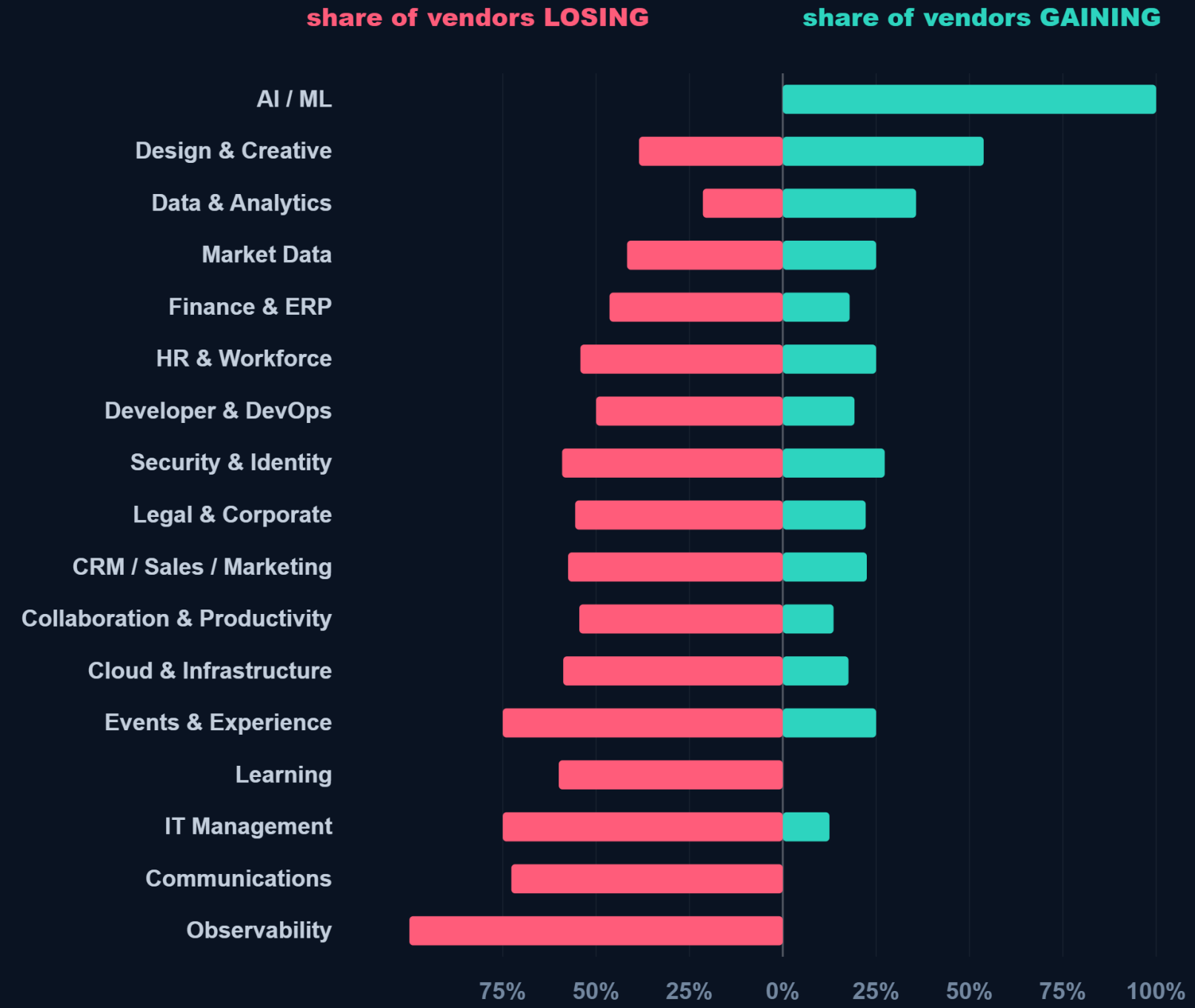
Only three categories have more winners than losers

- 01** Across 17 categories, **only AI, Design, and Data** show net share gains.
- 02** **AI is the lone category** where every vendor is gaining and none are losing.
- 03** Communications and Observability have **zero** vendors gaining share.



Which Categories Are Gaining vs Losing Share

Each software category split by the share of its vendors gaining versus losing panel share.
Only AI, Design, and Data have more vendors gaining than losing; everywhere else, more are ceding share than winning it.



290 vendors across hundreds of enterprise SaaS buyers, 2021–2026. Gaining/losing = rising/falling share of the panel per year · CA0093.