Magic Quadrant for Higher Education Student Information System Software as a Service

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By Robert Yanckello, Grace Farrell

SaaS student information systems are evolving slowly, even as customer interest and vendor investments grow. Complex SIS transitions are impacted by changing business models, limited resources or cautious leadership. Higher education CIOs can use this research to evaluate and navigate in the market.

Strategic Planning Assumption

By 2030, 25% of higher education institutions will have fully migrated to SaaS student information systems (SISs), with 75% at differing stages of deployment.

Market Definition/Description

Gartner defines student information system (SIS) software as a service (SaaS) as a core system of record for higher education institutions that serves as the central hub for storing, organizing and processing student academic and administrative activities. The SIS supports student, faculty and staff-facing functionality, including management of information assets, while also supporting back-end administrative functionality. SIS SaaS is delivered under a pay-for-use basis or as a subscription license model (with regular updates), where application support and infrastructure provisioning and management are the responsibility of the vendor.

Serving the students, faculty and administrative staff, the SIS provides a chronology of business transactions, academic activity, advising interactions and educational outcomes. Additionally, it manages vital information assets, including course offerings, course catalogs, course registration, student accounts, financial aid, grades and transcripts throughout the student life cycle. The SIS may be part of a larger administrative ERP application suite and a critical component of an education institution's larger digital technology platform.

Mandatory Features

The must-have capabilities for this market include:

- Course catalog

- Course registration/scheduling

- Degree audit

- Enrollment and matriculation management

- Grades and transcripts (that is, an academic record)

- Student accounts (that is, bill presentment and payment)

Common Features

The optional capabilities for this market include:

- Academic advising

- Admission processing

- Attendance tracking

- Curriculum management

- Delivered integration services

- Financial aid

- Operational and regulatory dashboarding/reporting

Magic Quadrant

Figure 1: Magic Quadrant for Higher Education Student Information System Software as a Service

CHALLENGERS | LEADERS

Ellucian (Colleague) ● ● Ellucian (Banner)
● Workday

Anthology ●

RIO Education ●

Jenzabar (One) ●
Thesis ●
Serosoft ● Jenzabar (SONIS) ●

Apar Technologies ●

NICHE PLAYERS | VISIONARIES

ABILITY TO EXECUTE

COMPLETENESS OF VISION → As of January 2025 © Gartner, Inc

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Vendor Strengths and Cautions

Anthology

Anthology is a Challenger in this Magic Quadrant. It offers Anthology Student as its SaaS SIS. Headquartered in Boca Raton, Florida, Anthology is a privately held company that serves clients in multiple regions, including North America, Latin America, EMEA and Asia/Pacific. Anthology Student is available in English, Spanish, French, Arabic and Portuguese. It's built on the Microsoft platform, delivered out of Azure. Since the merger with Blackboard in 2021,

Anthology's broad portfolio of solutions presents opportunities for integrating client solutions, but at the same time faces challenges to ensure data alignment and client value.

Strengths

- **Interoperability:** Anthology Student provides robust Azure iPaaS capabilities that enable users to leverage a toolbox of composable features, such as integration, workflow orchestration and extensibility tools. Clients can use these features to easily support their unique SIS requirements.

- **Market understanding:** Anthology demonstrates a thorough understanding of its target market, client needs and sector alignment, especially with the small-to-midsize market sector. Its focused strategy and product plans address the key challenges of its target customers in this market segment, such as resource constraints and resistance to change. These also align well with its product offering and near-term roadmap, which includes plans to streamline registration, automate scheduling and bolster data optimization.

- **Product delivery strategy:** Anthology's Microsoft partnership and use of Azure enable clients to leverage many out-of-the-box (OOTB) platform capabilities like security protocols, APIs and workflows. This allows Anthology to focus on faster delivery of core product capabilities to clients.

Cautions

- **Mobile delivery:** Anthology Student is not natively mobile or available on Apple or Android. It requires third-party integration if a mobile application is needed.

- **Customer support:** Anthology's customer service for promised release deliveries and clean codebase are reportedly average, according to Gartner inquiry and customer survey references.

- **Deployment:** Despite changes in sales and implementation methodologies, feedback from client interactions reveals a lack of consistency and alignment among deployment services, product roadmap and customer expectations. All professional services for U.S. implementations are performed in-house, as there are no certified implementation partners for U.S. deployments.

Apar Technologies

Apar Technologies is a Niche Player in this Magic Quadrant. It offers eLite SIS HD as its SaaS SIS solution for higher education. Apar is a private company headquartered in Singapore. Built on the Microsoft Dynamics 365 platform, eLite SIS HD is primarily an all-in-one system providing support across the entire student life cycle with embedded CRM and analytics functionalities. Apar Technologies is currently concentrating on the Asia/Pacific region with a growth strategy that is also focused on EMEA and North America.

Strengths

- **Product strategy:** In leveraging the Microsoft Dynamics platform, eLite SIS HD can provide flexibility, interoperability and extensibility. These capabilities allow users to tailor the solution to their specific needs, and encourage modernization that enhances the platform's other capabilities.

- **Pricing model:** The product is sold unbundled, allowing customers to select only the modules they need or see value in, rather than purchasing the entire product set. Apar offers customizable packages for its SIS, so clients can mix and match components based on their unique requirements and budget.

- **Sales strategy:** Apar demonstrates a thorough understanding of the Asia/Pacific region's needs and how to successfully navigate it. The company has achieved early success converting and acquiring regional clients, with deployments and configurations that have been completed in less than one year.

Cautions

- **Capability gaps:** The eLite SIS HD offering lacks some common capabilities, such as functions for student accounts and billing, degree audits, enrollment or matriculation management, and regulatory reporting in other regions.

- **Market understanding:** Sales and classification of the eLite product are confusing, as it is marketed and sold under two names, depending on the region — eLite SIS HD for Higher Education and eLite EduSenz for Adult Education (sold by Total eBiz Solutions, a 100%-owned subsidiary of Apar Technologies in Singapore). Prospective clients will need to perform thorough vetting of module choices and distinctions between the products.

- **Geographic expansion:** Apar's execution of plans and strategies for expansion into new regions lacks focus, targets and specific KPIs tied to net new expansions. Its singular presence in Asia/Pacific, combined with a lack of global partners or partner programs, may undermine the feasibility of near-term expansion to other regions.

Ellucian (Banner)

Ellucian (Banner) is a Leader in this Magic Quadrant. It is one of the two SaaS SIS solutions sold by Ellucian in this market. Ellucian is a privately held company based in Reston, Virginia. It is a global organization focused solely on the higher education industry. Ellucian has combined resources and strategies to optimize client products and services, but recognizes the differences across its client base and the market segments it serves with the two SIS offerings.

The Ellucian Banner solution is typically used by larger universities and institutions with more complex administrative and academic structures. Its scalability and comprehensive functionality make it well-suited for institutions with a large number of students and diverse program offerings, including Ph.D.-granting institutions.

Strengths

- **Product capabilities:** The long-tenured on-premises installed base has driven extensive depth and breadth in functionality across the product. SIS SaaS product innovations are now developed in the Ellucian SaaS Platform, optimizing SIS development resources and product enhancements across the solution set.

- **Market strategy:** The Ellucian Banner solution serves multiple regions. It is currently delivered in regional English dialects, 13 translations of Spanish, as well as Arabic and French.

- **Regulatory reporting:** New regulatory management capabilities within the Ellucian SaaS Platform enable users to remain compliant with regulatory reporting, compliance mandates and the changing requirements of the higher education market globally.

Cautions

- **Customer deployments:** The number of clients "live" on Banner SaaS is unclear. Although the Banner SaaS pipeline is growing with both new and legacy clients, Ellucian has not objectively defined "live" and "in production on Banner SaaS SIS." This limits the understanding of the client base that is effectively deployed and currently using the product.

- **Delivery models:** Although Ellucian sells some of its SaaS solutions as separate products that clients can pick and choose, Banner SaaS SIS continues to be sold as a one-suite

solution for core SIS, enterprise resource planning (ERP) and human capital management (HCM) functionalities.

- **On-premises migrations:** Modernization pathways for Banner's on-premises deployments are beginning to narrow. Client inquiries indicate that a phased approach of moving on-premises Banner to Ellucian's hosted or managed services is no longer an option.

Ellucian (Colleague)

Ellucian (Colleague) is a Leader in this Magic Quadrant. It is one of the two SaaS SIS solutions sold by Ellucian in this market. Ellucian is a privately held company based in Reston, Virginia. It is a global organization focused solely on the higher education industry. Ellucian offers a range of solutions to manage various aspects of college/university operations across the student life cycle. The company has combined resources and strategies to optimize client products and services, but recognizes the differences across its client base and the market segments it serves with the two SIS offerings.

The Ellucian Colleague solution is often deployed at small and midsize colleges and universities, including community colleges. Its ease of use and flexibility make it a good fit for institutions that require a comprehensive ERP solution without the complexity of larger systems.

Strengths

- **Customer experience:** Ellucian Colleague clients express a high degree of satisfaction regarding their overall user experience, product capabilities, customer service and deployment support.

- **Product strategy:** Ellucian has a thorough understanding of its client segment. Colleague's functionalities have a strong focus on student centricity. It includes robust features that support student success, such as academic advising, degree planning and student engagement tools.

- **Updates/enhancements:** Product innovations are developed on the Ellucian SaaS Platform, optimizing SaaS SIS development resources and maintaining feature parity for product enhancement across the Ellucian solution set.

Cautions

- **Geographic strategy:** Ellucian has a limited geographic strategy for Colleague with current deployments in the U.S., Canada and the Caribbean. It is offered in only two

languages, English and Spanish.

- **SaaS migration:** Migrating on-premises deployments to the Colleague SaaS solution requires considerable assessment, planning and change management. It also requires professional services support, a renewal agreement and an average 19-month implementation time frame.

- **Delivery model:** Although Ellucian sells some of its SaaS solutions as separate products, Colleague continues to be sold as a one-suite solution for core SIS, ERP and HCM functionalities.

Jenzabar (One)

Jenzabar (One) is a Niche Player in this Magic Quadrant. It is one of the two SaaS SIS solutions offered by Jenzabar. Based in Boston, Massachusetts, Jenzabar is a privately held company dedicated exclusively to the higher education sector. It offers a range of solutions designed to help colleges and universities manage their administrative operations and student life cycle engagement.

Jenzabar One is an evolving platform designed to meet the needs of both private and public two- and four-year institutions, including for-profits and nonprofits.

Strengths

- **Product capability:** Jenzabar One uses the Jenzabar Unity Platform, which provides a centralized tool to connect and synchronize systems. The Unity Platform is vendor-neutral, supports integration with a wide range of third-party solutions, and provides a range of APIs and prebuilt connectors that simplify the integration process.

- **Operational strategy:** Jenzabar One is transitioning to Google Cloud Platform. This will enable cloud-native containerization, dynamic scaling, improved efficiency, and joint R&D with Google tools and technology.

- **User community:** Jenzabar One fosters a strong user community as it is tailored to the unique challenges and requirements of the targeted segment. This community provides opportunities for collaboration and sharing through features like Office Hours (monthly open-call meetings with clients), its Ideas portal, online forums and events.

Cautions

- **Product roadmap:** Jenzabar One's product roadmap is ambitious, with a broad range of goals. It currently lacks specific timelines, which can make it challenging to clearly identify priorities, dependencies and key milestone deliverables.

- **Product features:** Jenzabar One lacks some common features and functionalities in areas of registration, fee assessment, deferrals, security configuration and Web Content Accessibility Guidelines (WCAG) compliance.

- **Continuous delivery:** Product enhancements are delivered through traditional installation packages because the solution does not support continuous delivery of new functionalities. As a result, Jenzabar One does not leverage some of the benefits of SaaS, such as simpler upgrades, agile work environments and limited business disruption.

Jenzabar (SONIS)

Jenzabar (SONIS) is a Niche Player in this Magic Quadrant. It is one of the two SaaS SIS solutions offered by Jenzabar. Based in Boston, Massachusetts, Jenzabar is a privately held company dedicated exclusively to the higher education sector. It offers a range of solutions for colleges and universities to manage their administrative operations and student life cycle engagements. Jenzabar has combined resources and strategies to optimize sales and services, but maintains distinctions in product development and capabilities in its two SIS SaaS offerings.

Jenzabar SONIS is designed to meet the needs of smaller higher education institutions, vocational schools and specialized training programs.

Strengths

- **Market strategy:** Jenzabar SONIS leverages a well-defined target market of institutions that have no more than 10,000 full-time equivalent (FTE) students. This focus ensures that its products align with its clients' specific needs and can easily adapt to an institution's IT strategy and requirements.

- **Customer experience:** Jenzabar offers experienced professional service teams and an established implementation methodology. SONIS's deployment time for small, noncomplex institutions averages one year or less.

- **Bundled offering:** SONIS is offered as a bundled solution, providing all-in-one capabilities across the entire student life cycle, with embedded CRM and analytics functionalities. It

targets small institutions with limited IT resources that are seeking comprehensive functionalities.

Cautions

- **Interoperability:** SONIS lacks some common integration platform as a service (iPaaS) capabilities such as workflow orchestration, embedded extensibility tools and the ability to integrate with plug-ins.

- **Geographic strategy:** While SONIS is delivered in five regions globally across North America, EMEA and Asia/Pacific, its geographic expansion is focused on English-speaking schools and regions.

- **Continuous delivery:** Although SaaS-based, SONIS product enhancements are delivered using traditional installation packages, as Jenzabar does not support continuous delivery of new functionalities.

RIO Education

RIO Education is a Visionary in this Magic Quadrant. RIO Education by WDCi is a privately held company headquartered in Queensland, Australia. It is a SaaS SIS solution that leverages the Salesforce platform and is deployed in North America, Europe and Asia/Pacific. RIO Education is a relatively new offering in the SIS market, with its initial deployment in 2016. As part of the Salesforce ecosystem, RIO Education is available on the Salesforce App Exchange, which offers many applications and plugins that can be used with the product.

Strengths

- **Product capabilities:** The RIO Education solution is built on the Salesforce platform and can leverage many OOTB Salesforce platform capabilities, such as mobile features, accessibility requirements, APIs and security features. This enables RIO Education's development team to focus on core SIS product capabilities.

- **Product strategy:** RIO Education has just completed its "Any Cloud" release and made it generally available. This is a version of RIO Education that is independent from the Salesforce Education Data Architecture, as well as the emerging Salesforce Education Cloud. It is a full solution offering that enables the product to be deployed from any Salesforce cloud.

- **Market understanding:** RIO Education has the ability to respond to dynamic market needs and consistently deliver product enhancements like waitlisting, room scheduling and advanced registration rules. These capabilities demonstrate the company's strong market understanding and commitment to growth and customer service.

Cautions

- **Product features:** RIO Education does not include some common cashiering or student account capabilities. It also does not currently support decentralized security administration.

- **Marketing strategy:** The vendor is a relatively small organization with a lack of brand recognition, marketing and sales support, even as a Salesforce partner. Its client base is growing but lacks a diverse and common set of institution types and use cases within the sector.

- **Innovation:** RIO Education's strategy and plans lack clarity and timelines regarding AI and analytics, and determining how best to leverage OOTB Salesforce capabilities for these features.

Serosoft

Serosoft is a Niche Player in this Magic Quadrant. It is a privately held company based in Indore, Madhya Pradesh, India. Serosoft offers Academia as its SaaS SIS solution, which is deployed in North America, EMEA and Asia/Pacific. Academia is developed on a flexible architecture and offers a wide variety of modules. These modules provide an integrated offering that covers core student life cycle activities and CRM features serving other operational needs for institutions.

Strengths

- **Presales support:** Serosoft offers proof-of-concept engagements for a fee, allowing clients to focus on critical operational areas and test key functionalities and integrations in a limited demo environment. This provides an opportunity to configure the system to an institution's unique requirements and determine if it aligns with its needs and expectations.

- **Product configuration:** Academia presents robust configuration capabilities with a flexible architecture that can support multicampus institutions. Its rule engine is delivered using the Drools business rules management system. It is a flexible rule engine that

separates business logic from application code, which enables users to manage complex business rules in a scalable and maintainable way.

- **Product viability:** Equipped with embedded analytics and a strong innovation focus on integrating AI into the Academia product, Serosoft offers a unified data view that can support informed decision making.

Cautions

- **Product capability gaps:** Academia does not offer some common capabilities needed by large or complex institutions, such as cashiering or student accounts, degree audits, compliance reporting and advising.

- **Ecosystem partnerships:** Serosoft has an ambitious growth plan but with a limited partner ecosystem. It is still establishing industry channel partnerships and systems integrator (SI) relationships that are required to meet its sales and growth objectives.

- **Operational standards:** Gartner's interactions with Serosoft clients indicate a lack of consistent practices regarding industry standards and customer expectations, despite an increased focus on security and operational compliance.

Thesis

Thesis is a Niche Player in this Magic Quadrant. It is based in Chesterfield, Missouri, and was formerly a part of Unit4. Thesis offers Elements as its SaaS SIS solution, which is built to serve small and midsize institutions. Thesis is a small organization and wholly owned subsidiary of the SilverTree Equity Partners portfolio. Generally available since August 2023, Thesis Elements is currently deployed to a limited number of institutions. It is offered in the U.S. and Canada with a primary focus on U.S. schools. Delivered via a multitenant SaaS environment, the solution includes an integration platform and is delivered via Microsoft Azure.

Strengths

- **Product capabilities:** Elements' solution set provides an easy-to-use interface with a common user experience across modules. It is optimal for small institutions that have limited IT resources/skills and leaders that have multiple roles.

- **Product strategy:** Elements offers multiple prebuilt APIs for common higher education providers and third-party solutions included in the subscription.

- **Implementation support:** Thesis demonstrates a well-formed implementation methodology for its target market, allowing plans to be tailored to each institution's needs. It also provides a rapid time to value, with the average implementation time for Elements being 10 months.

Cautions

- **Product configuration:** Elements does not include a native rule engine, thus requiring integration with other tools to design unique institution-specific processes not configurable via the delivered interface.

- **Product capability gaps:** Elements does not currently provide an extensibility or workflow orchestration component, compelling institutions to reengineer their business processes to align with the product's application capabilities.

- **Market growth:** Thesis' growth plans are limited and require a more detailed vision to expand both in terms of net new clients and geographically.

Workday

Workday is a Leader in this Magic Quadrant. It is a publicly traded company headquartered in Pleasanton, California. It offers Workday Student as its SaaS SIS product. As a relative newcomer to the SIS market, the product is natively SaaS. It has been generally available since 2018 and is not tied to any legacy products. Workday Student's client base and product capabilities continue to grow but still require more feature parity to compete across the sector. Workday Student is deployed across a variety of institution types and multiple market segments.

Strengths

- **Extensibility:** The "Built on Workday" program enables Workday's partner ecosystem to build on top of the SIS to address unique customer requirements. It allows partners to deliver applications for those requirements to customers without needing a license for the Extend SKU.

- **Innovation:** In leveraging the R&D of the broader company, Workday's ERP platform quickens the pace of innovative AI use cases for the SIS product, especially for heavily manual processes like transfer credit articulation, program advising or tracking, and administrative tasks.

- **Customer service:** A well-structured and focused SI and partner strategy provides clients with options and assurance of specified levels of service for Workday Student. The breadth of SIs and professional services teams have ramped up Workday's bandwidth to onboard multiple institutions into a joint implementation.

Cautions

- **Geographic strategy:** Although Workday is expanding its SIS product globally, with availability recently announced in the Australia and New Zealand regions, current deployments are limited to the U.S. and Canada. Currently, Workday Student is only available in English.

- **Product usage:** The Workday Student offering is not a stand-alone application. Institutions must be operating the Workday HCM and Finance platforms to use the SIS application.

- **Pricing:** Gartner's interaction with Workday clients reveals that Workday Student's pricing is complex. Clients also find it challenging to interpret the details of each SKU purchased. Deployment options require thorough vetting to ensure complete understanding of go-live status for each module and product evolution thereafter.

Inclusion and Exclusion Criteria

Gartner's Magic Quadrant report identifies and analyzes the most relevant providers and products in the higher education SIS SaaS market. The inclusion criteria represents the specific attributes that Gartner analysts believe are necessary for inclusion in this research.

To qualify for inclusion, providers needed to demonstrate they met the following criteria:

Business Criteria:

- **Revenue:** Each vendor's SIS SaaS offering must have generated revenue of at least $2 million, and the vendor must have acquired at least five net-new SIS SaaS customers in the 12 months leading up to July 2024.

- **Sales:** Each vendor had to have been selling and branding an SIS SaaS to a tertiary, degree seeking institution since at least December 2023.

- **Go-to-market approach:** Each vendor's go-to-market approach had to demonstrate explicit mention of its SIS SaaS in its go-to-market activities, such as positioning,

marketing, messaging, pricing and packaging for its SIS SaaS. Vendors must be able to present aspects such as thought leadership, product marketing and product management, public presentations, events, customer experience, partner channel, word of mouth, and sales strategy.

- **Licensing:** Licensing for the SIS SaaS product must be on a subscription base or pay for metered use.

Product Criteria:

- The vendor has a separate and distinct SKU (stock keeping unit) that clearly identifies a SIS SaaS product.

- The SIS SaaS must be able to deliver on all capabilities:

  - **Manage enrollments:** Student records, status changes, registration, degree audit, graduation processing, transfers, grades, academic history.

  - **Student accounts:** Tuition and fees, billing, payments and refunds.

  - **Composable:** Modular architecture that can be deployed and integrated alongside other applications or platforms outside the primary SIS SaaS application suite to fulfill a composable business strategy. This can include the extension of the data model and/or functionality and the ability to consume, provide and exchange data/metadata.

This Magic Quadrant does not cover the following type of offering:

- Learning management system (LMS) applications and/or functionality

Evaluation Criteria

The evaluation criteria are composed of the Ability to Execute and Completeness of Vision. The criteria and weights describe the specific characteristics and their relative importance that support Gartner's view of the market. These criteria are used to comparatively evaluate SIS SaaS providers in this research.

Ability to Execute

Product/Service

Core goods and services that compete in and or serve the defined market. This includes current product and service capabilities, the functional capabilities in all of the core modules, ability to support the needs of multiple types of institutions, quality, feature sets, skills, etc. This can be offered natively or through OEM agreements/partnerships as defined in the market definition.

Overall Viability

Viability that includes an assessment of the organization's overall financial health, as well as the financial and practical success of the business unit. This also views the likelihood of the organization to continue to offer and invest in the product as well as the product position in the current portfolio.

Sales Execution/Pricing

The organization's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support and the overall effectiveness of the sales channel.

Market Responsiveness and Track Record

Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve, and market dynamics change. This criterion also considers the provider's history of responsiveness to changing market demands. The market for SaaS SIS is dynamic, and customer feedback is one of the key factors that is considered in this element.

Marketing Execution

The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand, increase awareness of products and establish a positive identification in the minds of customers.

Customer Experience

Products and services and/or programs that enable customers to achieve anticipated results with the product evaluated. Specifically, this includes quality supplier/buyer interactions, technical support, migrations/implementations or account support. This may also include ancillary tools, customer support programs, availability of user groups, service-level agreements, etc.

Operations

The ability of the organization to meet goals and commitments. Factors include quality of the organizational structure, skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently, whether directly or through partners.

Table 1. Ability to Execute Evaluation Criteria

Evaluation Criteria	Weighting
Product or Service	High
Overall Viability	Medium
Sales Execution/Pricing	High
Market Responsiveness/Record	High
Marketing Execution	Low
Customer Experience	High
Operations	High

Source: Gartner (March 2025)

Completeness of Vision

Market Understanding

Ability to understand customer needs and translate them into products and services. Vendors that show a clear vision of their market — listen, understand customer demands, and can shape or enhance market changes with their added vision.

Marketing Strategy

Clear, differentiated messaging consistently communicated internally and externalized through social media, advertising, customer programs and positioning statements. This also includes the effectiveness of the marketing strategy in creating market awareness in this new and evolving market.

Sales Strategy

A sound strategy for selling that uses the appropriate networks, including direct and indirect sales, marketing, service and communication. Partners that extend the scope and depth of market reach, expertise, technologies, services and their customer base.

Offering (Product) Strategy

The approach to product development and delivery that emphasizes market differentiation, functionality, methodology, and features as they map to current and future requirements.

Business Model

The design, logic and execution of the organization's business proposition to achieve continued success.

Vertical/Industry Strategy

The strategy to direct resources (sales, product, development), skills and products to meet the specific needs of individual market segments, including verticals.

Innovation

The strategy and resources to introduce and deliver new ways of bringing innovation to SaaS SIS, including AI and GenAI, embedded analytics, automation and user experience.

Geographic Strategy

The plan to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries, as appropriate for that geography and market. This includes the approach for providing localizations and translations required to support multinational and global organizations, including regional/local compliance requirements.

Table 2. Completeness of Vision Evaluation Criteria

Evaluation Criteria	Weighting
Market Understanding	High
Marketing Strategy	Medium
Sales Strategy	High
Offering (Product) Strategy	High
Business Model	Low
Vertical/Industry Strategy	NotRated
Innovation	Medium
Geographic Strategy	Medium

Source: Gartner (March 2025)

Quadrant Descriptions

Leaders

Providers in the Leaders quadrant have the highest combined measures of Ability to Execute and Completeness of Vision. They are performing well, are prepared for the near-term and the future, and have a robust and evolving understanding of the market. They are positioned to be responsive to dynamic market needs, offer products and services that enable clients to realize the value of their investment, and introduce and deliver new ways of bringing innovation to SaaS SIS. These new ways can include AI, embedded analytics, automation and user experience.

Challengers

Challengers offer functionalities across all the evaluated product capabilities, but they may lack the depth of Leaders in certain places like student-facing functionality, regional requirements or security. A Challenger's product roadmap doesn't expansively address the dynamic, emerging issues that the market requires. They tend to have a viable and proven solution, but focus on a specific size of institution or industry segment.

Visionaries

Visionaries have an ambitious and strong vision for the future and are making pointed investments to develop unique options in this market. They understand where the market is going or have a vision for changing market rules, but they have yet to take action that delivers on that understanding. Their solution is still emerging, and they have a handful of capabilities in development. Visionaries may have a developing customer base, but they might not yet serve a broad range of use cases.

Niche Players

Niche Players focus on a narrow view of the market, which makes their offering appropriate for a very specific market sector. They usually offer limited functional capabilities and a more simplified product experience in comparison to Leaders. They satisfy the product requirements through a basic set of functions, rarely demonstrate a target mid- or long-term vision, and generally address a narrower scope of clients in certain geographic regions or more commonly, small to midsize institutions.

Context

Evolving Market

Buyers find it challenging to distinguish SaaS SIS from legacy offerings in the current evolving SaaS SIS market, but vendors are committed to creating new solutions that are distinct from their legacy products and leveraging the operational innovations that SaaS provides. Institutions are often not prepared or willing to transform their traditional SIS services as they have done in other business areas, such as recruiting/admission, learning management and ERP. This is primarily because these systems have been heavily customized to meet specific business needs, making change complex and resource-intensive.

Innovation

Gartner client inquiry indicates that SIS remains a primary focus of many institutions' technology modernization efforts. With the changing modernization landscape and advances in technology like integration, automation tools, AI, robust rule engines and extensibility tools, the traditional makeup of SIS is evolving. The SaaS SIS strategy is morphing into a composable technology platform of student engagement technologies across a portfolio of SaaS applications. It is focused on delivering business capabilities to achieve specific institutional objectives.

SaaS SIS solutions expand on functional capabilities to form a platform of technologies that accommodates dynamic business practices, supports new business models and delivers a modern student experience, all while reducing the burden of sustaining the legacy SIS. However, ongoing financial and human talent resource constraints, revolving leadership changes, risk management priorities, political and economic uncertainty, combined with the fast pace of technological change add further complexity that impacts decision making about core student systems transformation.

The SIS market had achieved mature, commonly accepted capabilities long ago, all of which are expected to be incorporated into SaaS SIS offerings. Existing capabilities are increasing minimally viable standards and provide limited opportunity for differentiation. Vendors in this research were primarily reviewed on their ability to demonstrate a mid- and long-term market view, including how they plan to deliver new features and innovate. We also reviewed how they respond to changes in the market, their viability, current performance and sustainability of that performance. Their capacity to support client transformation from legacy solutions and the overall customer experience from sales through deployment and beyond were also reviewed.

Composable Platform Approach

Gartner inquiry and survey data suggest that interest in composable platform approach is increasing and higher education CIOs are preparing to drive modernization in this fashion. Evaluating and selecting vendors against business and technical requirements is the key to successful SaaS SIS transition.

IT leaders facilitating a composable business approach combine elements like business capabilities, products and services in multiple ways to realize the value of technology investments. It enables the institution to combine and reengineer processes to serve many

use cases, some of which may not be anticipated. Highly composable organizations use these practices to drive successful modernization. They link student information technology changes to specific institutional goals with measurable objectives. They do so by leveraging digital-outcome-driven metrics to pinpoint how the SaaS SIS investment delivers value by enabling growth, reducing costs or mitigating risks.

Overall, comparison of multiple SaaS SIS solutions should distinguish the:

- Current product capabilities

- Roadmap's responsiveness to future expectations around emerging technologies like AI, iPaaS features, robotic process automation (RPA) and so on

- Combined ability of the product and the roadmap to bring value to the institution and contribute to achieving institutional objectives

Market Overview

The global SaaS SIS market continues to transform as vendors move into new regions and customer demands for SaaS or cloud services grow. (See Forecast: Enterprise IT Spending for the Government and Education Markets, Worldwide, 2022-2028, 4Q24 Update.) The market is transitioning from mature on-premises SIS solutions to new SaaS offerings. The current SaaS SIS environment is limited, but is slowly growing a variety of competitive offerings in the cloud SIS space with fully featured capabilities. Although it continues to progress slowly, interest from the higher education sector in exploring options remains high. However, the slow pace of vendor development and the vigilant approach of potential buyers continues to stagnate SaaS SIS transformations across the sector.

Higher education CIOs and their teams shared several reasons for having reservations about the SaaS SIS transformation for their institution during Gartner client inquiry:

- Cost

- Time to implement

- Lack of internal IT talent to successfully transform

- Difficulty changing management process

- Explicit vendor migration paths and certified partners to deliver on-premises-to-SaaS transformation

- Limited number of institutional success stories

- Lack of stakeholder buy-in

Given the current maturity of legacy SIS applications and the changing nature of how institutions are evolving digital enterprise business capabilities, both vendors and institution leaders face a quandary regarding their migration plans and the evolution of the current SaaS SIS market. As revealed by this Magic Quadrant, there are a limited number of viable offerings to meet the current market demand across the varied spectrum of institution types and needs globally.

As illustrated in **Hype Cycle for Higher Education, 2024**, the SaaS SIS sits in the Trough of Disillusionment — accurately identifying the current stage of the market. Through this research, we have verified that the SaaS SIS market is at least five years out from reaching the Plateau of Productivity. Although multiple vendors have been viable in the market for many years, their SaaS SIS offerings are taking too long to meet client expectations. While vendors continue to develop and evolve their SaaS SIS offerings, they have not yet achieved feature parity with legacy SIS solutions.

The market continues to struggle to deliver on modern expectations. While institutions deploy strategies to support the dynamic nature of the student life cycle, vendors continue to develop all-in-one SIS products rather than solutions that deliver core processes with robust, modularized configuration capabilities that can be purchased and implemented in a flexible delivery environment.

On the other hand, higher education clients are searching for the perfect SaaS SIS solution, which many believe they have created either through years of customizing a packaged legacy solution or by developing a custom-made option. There is also a lack of readiness and unwillingness by institutions to modernize their SISs.

In addition to the disruption SIS transformation creates, institutions are continuously resource constrained, lag in workforce development, fear change and lack transformational leadership. In order to spark the market and move away from legacy SIS technology services and architectures, institutions' readiness quotient needs to be addressed across the segment. To evolve and advance the higher education SIS market and bring SIS experiences onto a level SaaS playing field with other business functions requires a move toward:

- New service delivery models for core student information business functionality

- Evolving the IT talent pool

- Modernizing capabilities

This is the first version of the Magic Quadrant for higher education student information systems SaaS. It replaces the **Market Guide for Higher Education Student Information Systems**.

⊕ Evidence

Note 1: Definition of Market Sector Size

For this research, market sector size is defined as follows:

- Small (less than 1,000 employees)

- Midsize (1,000 to 9,999 employees)

- Large (10,000 or more employees)

Note 2: Definition of Full-Time Equivalent

For this research, a full-time equivalent (FTE) student is a unit of measurement intended to represent one student enrolled full-time for one academic year. A FTE student enrollment at the undergraduate and graduate levels is estimated using instructional activity data.

⊕ Evaluation Criteria Definitions

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