Veqtor8

EXECUTIVE SUMMARY

Agentic AI Governance Buyer Directions

Optimizing agent value and managing risk

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EXECUTIVE SUMMARY

Enterprises are scaling agents faster than they can govern them

Agents have moved from pilots into daily operations across an increasing array of business activities. These include back office work in HR and finance, engaging customers in sales and service, and industry-specific tasks ranging from processing insurance claims to helping to diagnose medical conditions. One global bank told us its agents now read corporate registries and draft the suspicious transaction reports that its compliance officers once compiled manually across several systems.

A compliant agent can still waste money.

Agents have scaled quickly, and governance has not kept pace with the authority they now hold. Many of the 63 enterprises we have interviewed across North America, Europe and Asia Pacific cannot establish who is responsible for each agent, show a full record of its actions or prove the value it delivered. If they invest in governance, they tend to focus on compliance, while an increasingly significant business risk lies in agents that cost too much or deliver too little.

We have assessed 30 vendors to date across the eight market segments that make up agentic AI governance, from identity and security to cost and testing. The market is new but growing rapidly. Seven vendors rate as strong in security and six in inventory and lifecycle management, while eight are strong in cross-platform reach, governing agents on other vendors' platforms as well as their own.

Each platform ends up overseeing itself.

Every vendor in the guide has real strengths, but each covers only part of the overall agentic AI governance function. Platform vendors such as Microsoft, Salesforce, ServiceNow and Zoom govern agents well inside their own products, and less well outside them. Security, identity and data vendors such as CrowdStrike, Okta and Collibra are strong in one or two segments. No vendor brings every segment together across all platforms.

Veqtor8 identified a missing layer and calls it the Sovereign Governance Layer, or SGL. It is a single governance layer that sits above every platform and agent, runs continuously, stays independent of any one vendor and keeps policy, evidence and value measurement in the hands of the enterprise. Sovereignty here means enterprise sovereignty, the enterprise setting its own policy and holding its own record of agent activity. Today no vendor provides it in full.

> *There is often too much focus on compliance and too little on making sure agents deliver value.*
>
> GLOBAL FINANCIAL SERVICES FIRM

KEY FINDINGS

No vendor yet governs agents across every platform

30
vendors assessed across eight market segments, from the largest platforms to specialists

63
enterprise interviews across North America, Europe and Asia Pacific, in eight industries

7 of 30
vendors rate as strong in security

6 of 30
vendors rate as strong in inventory and lifecycle management

8 of 30
vendors rate as strong in cross-platform reach, governing agents on other vendors' platforms

6 of 30
vendors rate as strong in data quality and integrity

3 of 30
vendors rate as strong in risk and compliance, among the segments enterprises name most often as a priority

1 of 30
vendors rates as strong in economics and value management, the least served segment in the market

No
vendor yet provides the Sovereign Governance Layer, a vendor-independent governance layer above every platform

Weakest
area across all 30 vendors is portable governance evidence, records the organization can export and keep

Source: Veqtor8. Counts exclude ratings of strong within its own platform.

> *We had to spin up digital operations fast. Our agents have to be visible to us immediately, and we need to know they are cost effective, delivering value and complying with policy.*
>
> OIL AND GAS COMPANY

THE SOVEREIGN GOVERNANCE LAYER

A missing layer in agentic AI governance

> **Sovereignty here means enterprise sovereignty.**

Veqtor8 identified a missing layer in the agentic AI governance market and calls it the Sovereign Governance Layer, or SGL. It is a continuously operating, vendor-independent governance layer that sits above all of an organization's applications, platforms and agents. Policy, records and value measurement stay under the organization's authority.

A separate layer is needed for three reasons. A platform cannot audit itself, no platform sees the whole estate, and a neutral tool can change hands. Palo Alto Networks bought CyberArk, Cisco bought Astrix and ServiceNow bought Veza, so independence bought today may belong to a platform tomorrow.

No vendor meets all of its requirements today. The full guide sets out the requirements and four stages for building an interim SGL. It also organizes the market into eight segments, shown in Exhibit 1.

EXHIBIT 1 Agentic AI governance market segments

VISIBILITY	ENABLEMENT AND PROTECTION	ASSURANCE	VALUE
Inventory and Lifecycle Management Every agent, its owner and its stage	**Identity and Access** The right access for every agent	**Risk and Compliance** Policy, regulation and audit	**Economics and Value Management** Lower cost and measured business value
Observability A full record of each agent's actions	**Security** Protection for agents and the enterprise while agents run	**Data Quality and Integrity** Trusted data going in and coming out	
		Testing and Assurance Proof before release and after each change	

Source: Veqtor8

> *We need complete control of our customer data. Sovereignty is essential. We cannot have that data locked in with a vendor or sitting in another jurisdiction, and we need complete and full visibility of it.*
>
> GLOBAL BANK

NEXT STEPS

Five actions to take now

Until a complete Sovereign Governance Layer arrives, each organization should take five actions.

- **Use platform governance for operational control** of the agents on each platform.
- **Keep ownership of policy, records, evidence and value measurement** in tools the organization controls.
- **Measure cost and value with the same discipline applied to risk.** Few vendors yet combine the two, so value should be measured independently of the vendors selling the agents.
- **Make sure governance records are portable.** This is the least developed area across all 30 vendors, so it is important to ensure that records can be exported in open formats.
- **Check who owns each vendor and its sovereign deployment options in each market the organization serves.** Identity and security vendors are consolidating, and the rules differ from one country to the next.

Inside the full guide

Agentic AI Governance Buyer Directions is an ongoing Veqtor8 research program. The full guide includes the Veqtor8 vendor grid placing all 30 vendors, a coverage matrix across the eight segments, an alignment matrix against six market shifts, a profile of each vendor, example governance stacks for four types of buyer, pricing models and contract terms to negotiate, a ten-step checklist and the full methodology.

Vendors assessed to date

Airia, Anthropic, AWS, Boomi, Cisco, Cloudera, Collibra, Credo AI, CrowdStrike, Databricks, Datadog, Dataiku, Dynatrace, F5, Google Cloud, IBM, Microsoft, Nvidia, Okta, OpenAI, Oracle, Palantir, Palo Alto Networks, Salesforce, SailPoint, SAP, ServiceNow, Snowflake, Workday, Zoom

The full guide is available on enquiry, and vendors are invited to discuss their positioning with Veqtor8 at veqtor8.com.



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