

VENDOR SELECTION MATRIX™ ENTERPRISE SERVICE MANAGEMENT SOLUTIONS

The Top Vendors For DACH
Enterprises 2023

March 2023

ABRIDGED VERSION WITHOUT FULL SCORECARDS AND SCORES

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RESEARCH IN ACTION
independent research & consulting

VENDOR SELECTION MATRIX™

ENTERPRISE SERVICE MANAGEMENT SOLUTIONS THE TOP VENDORS FOR DACH ENTERPRISES 2023



Market Leaders

ATLASSIAN
BMC
BROADCOM
DCON
EFECTE
IVANTI
MICRO FOCUS
SERVICENOW
TOPDESK
USU

Execution Leaders

IFS
MICROSOFT

Challengers

IBM
FNT
SAP

Note: Vendors are listed alphabetically.



FOREWORD

Every year, Research In Action surveys 10,000+ enterprise IT and business decision makers in order to gain insights on strategy, investments and ongoing challenges of technology innovation in the IT and Marketing Automation realm. These surveys give us access to a wealth of direct and unfiltered feedback from the buyers. It also helps us to understand how buying decisions are made in today's business environment. The Vendor Selection Matrix™ is a primarily survey-based methodology for vendor evaluation, where 63% of the evaluation is based on a survey of enterprise IT or business decision makers and 37% on the analyst's judgement. The analyst's input is fed by a combination of intensive interviews with software or services vendors and their clients, plus their informed, independent point-of-view as an analyst. All of this combines to make Research in Action **Vendor Selection Matrix™ reports so unique**. This approach is one of the key differentiators of Research In Action in market research. For this report, we interviewed 750 enterprise IT and business managers with budget responsibility in DACH* enterprises. We selected those vendors which achieved the best evaluations scores from the buyers but disregarded those with fewer than 15 evaluations.

What has become increasingly clear over the last year is that an organization's ability to adapt and change and its ability to execute its core mission is highly dependent on, and vulnerable to, how automated, secure and optimized its workflows are. Yet for all ITs genius in automating existing IT Services and leveraging modern Enterprise Service Management (ESM) technologies and data, some IT teams have partnered or enabled their business teams to automate their workflows towards the organizations' goal of a digital organization. The desire for a digital business has accelerated a fundamental shift in the ownership of intelligent workflow automation and digitalization in enterprises worldwide. The old certainties of automating processes and services within IT only and the adoption of the necessary technology and solutions are no longer true. Now IT technologies, non-IT and changemakers challenge the need for workflow automation to be done for other services outside of IT, leaving some IT teams disorientated and at real risk of being left behind.

However, there is also evidence that suggests the opposite: Digital transformation is increasing demand for ESM and dedicated ESM roles and journeys. The ESM journey is supported by many vendors offering workflow automation solutions. Our research shows that ESM is sticking with enterprises and the vendors in this space have adapted their solutions and offerings towards this fascinating and evolving ESM market.

This Vendor Selection Matrix™ report provides you with a useful guide to important ESM market trends and names the Top vendors. These details are intended to help you make an informed decision regarding which vendors could best fit your requirements. Enjoy reading it and reach out if you have questions.

To Infinity...and Beyond! **Dr. Thomas Mendel**

* DACH countries include Germany, Austria and the German-speaking part of Switzerland.



Dr. Thomas Mendel

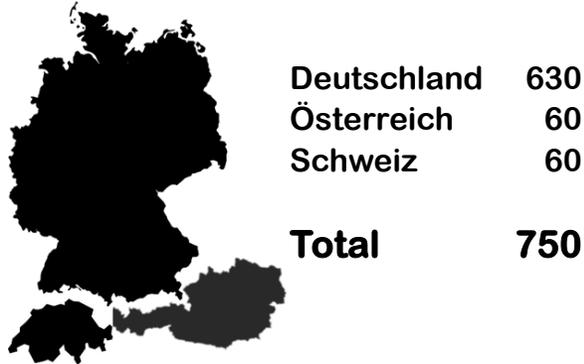
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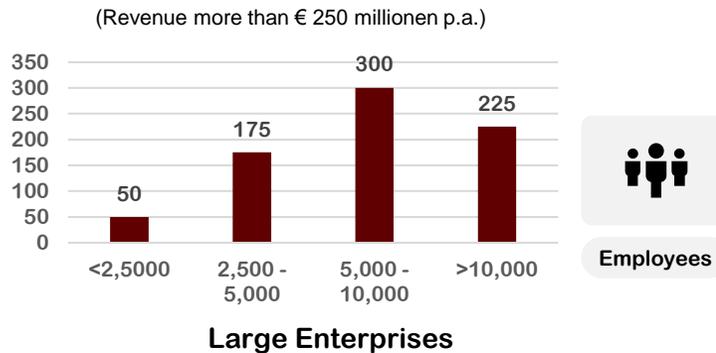


OUR SURVEY DEMOGRAPHICS: IT AUTOMATION IN DACH ENTERPRISES

Country Breakdown



Company Size Breakdown



All Research in Action surveys are gender neutral and 100% confidential.

Industry Breakdown

Energy	55
Financial Services	125
Government & Non Profit	15
Life Sciences	110
Manufacturing	210
Technology, Media, & Telecoms	75
Consumer Packaged Goods & Retail	50
Professional Services	70
Travel & Transportation	40
Total	750

Job Title Breakdown

IT Manager	105
IT Operations Manager	100
VP IT	95
CIO	80
VP Service Desk or Help Desk	70
VP IT Infrastructure	65
VP Shared Services	55
Project Manager	50
CTO	40
VP Automation	25
VP Sourcing & Vendor Management	20
Managing Director	15
VP Change Management	10
VP Application Performance Management	10
VP Process Management	5
Other	5
Total	750



90,000+
Data Points



750
IT Managers



37%
Analyst's Opinion



63%
Survey Results

The Vendor Selection Matrix™ Evaluation Methodology:

The basis of our competitive vendor evaluation reports is always an extensive buyer survey.

We then select those vendors which achieved the best evaluations scores from the buyers but disregard those with fewer than 15 evaluations.

The final matrix scores are a combination of the survey results, vendor input and analyst's opinion.



OUR MARKET IMPACT OVER 12 MONTHS



Vendor Selection Matrix™: The right mix makes all the difference
63% customer evaluations + 37% analyst's judgement = 100% success



WHAT IS ENTERPRISE SERVICE MANAGEMENT?

- Enterprise Service Management (ESM)¹ uses a variety of methods to improve the way individuals and teams throughout an organization develop, deliver, interact with, and consume applications and services across functional departments. The goal is to improve both employee productivity and effectiveness by automating many workflows.
- ESM has evolved from traditional IT Service Management (ITSM)². While some organizations are leveraging practices developed from ITSM, others are automating while re-engineering tasks, processes and/or decisions without using ITSM.
- ESM solutions automate workflows, correlate and orchestrate data and manages assets, and leverage intelligence to analyze, manage and deliver applications and services. While some solutions focus primarily on the automating IT workflows (hence the name ITSM), other solutions automate business services in areas such as (1) human resources, (2) vendor management, (3) technical services, (4) field services, (5) financial management, (6) shared services organizations.
- An ESM solution should include, but is not limited to:
 - Centralize, integrate, optimize and enable the automation of enterprise services across an organization and its business functions for internal customers
 - Digitize the multitude of service processes through automation to achieve quality service experiences and continuous improvement
 - Standardize processes and workflows to optimize employee experience and their ability to serve external customers

¹ Enterprise Service Management, see https://en.wikipedia.org/wiki/Enterprise_service_management.

² IT Service Management, see https://en.wikipedia.org/wiki/IT_service_management.

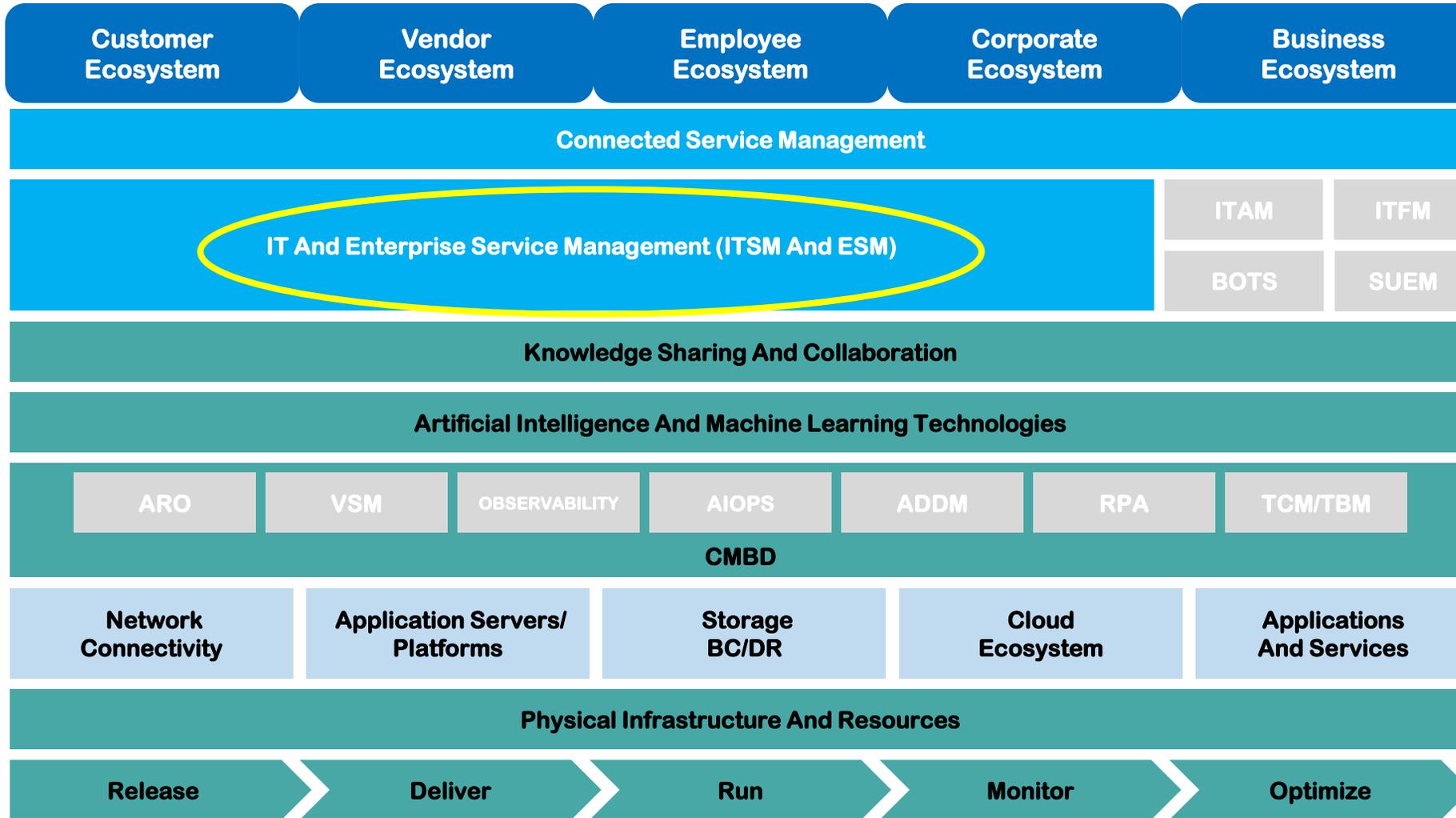


ADDITIONAL DEFINITIONS ESSENTIAL FOR ESM

- **Employee Experience (EX)** is the total experience an employee has with its employer throughout their journey or relationship. The start of the journey typically begins during the recruitment phase and continues through the various stages such as onboarding, learning and development, day-to-day work processes, tasks and decisions (independent but also related to business function), until the employee leaves the organization.
- **Customer Experience (CX)** is the total experience a customer has with an organization or institution and/or its functions and/or employees throughout the customer journey. The start of the journey varies depending on the type of engagement, channel, and topic.
- **Connected Service Experience (CSX)** is the experience an employee, customer, partner or other constituent has during a specific engagement with an organization or institution. It is typically shaped and dependent on the speed, quality and efficiency of integrations across tasks, processes and decisions demanded and provided.



THE IT AUTOMATION MARKETEXTURE



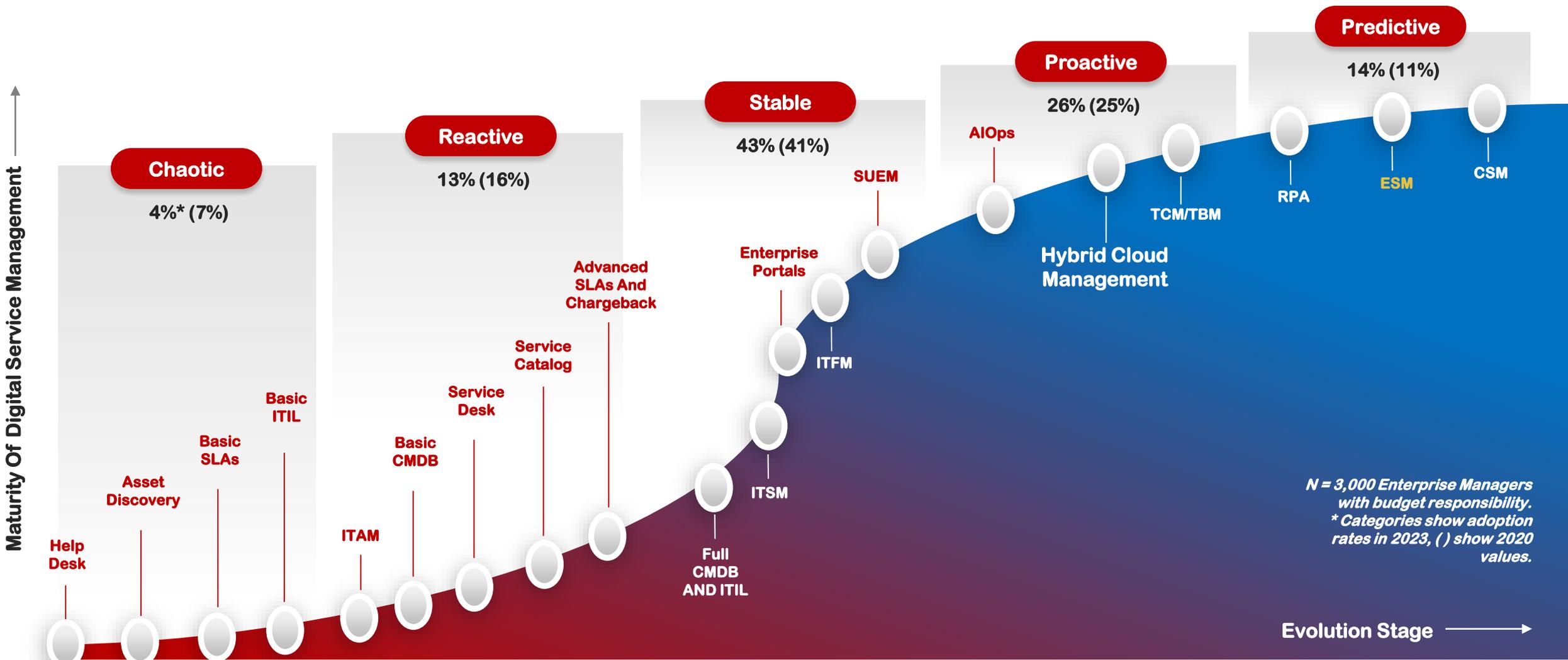
IT Automation solutions are necessary for a modern digital operating model.

IT Automation solutions are foundational for any transformation to reduce toil and decrease manual errors.

IT Automation solutions can enforce good practices to optimize digital service quality and speed of service delivery.

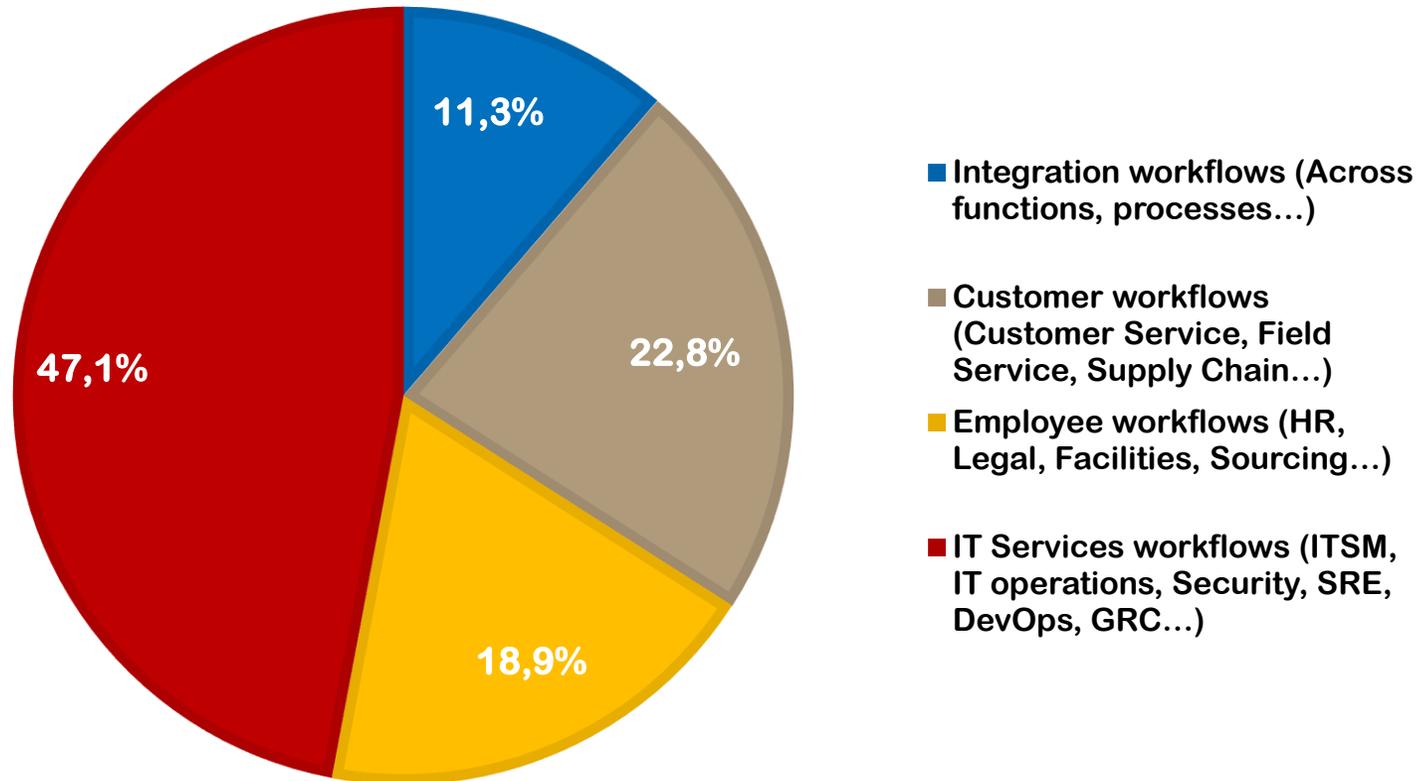


WELCOME TO THE CONNECTED SERVICE MANAGEMENT MATURITY S-CURVE 2023



RESEARCH:

DACH ENTERPRISE ESM PRIORITIES FOR 2023: IT SERVICES WORKFLOW AUTOMATION IS THE TOP PRIORITY



N = 750 IT and Business Managers with budget Responsibilities in DACH enterprises.

Question:
Which domain is your highest priority for the automation of workflows within the next 12 month?

Automating IT Services Workflows Remain The Top Priority For DACH Enterprises.

The automation of IT Services workflows will remain the highest priority for automation across DACH enterprises in 2023.

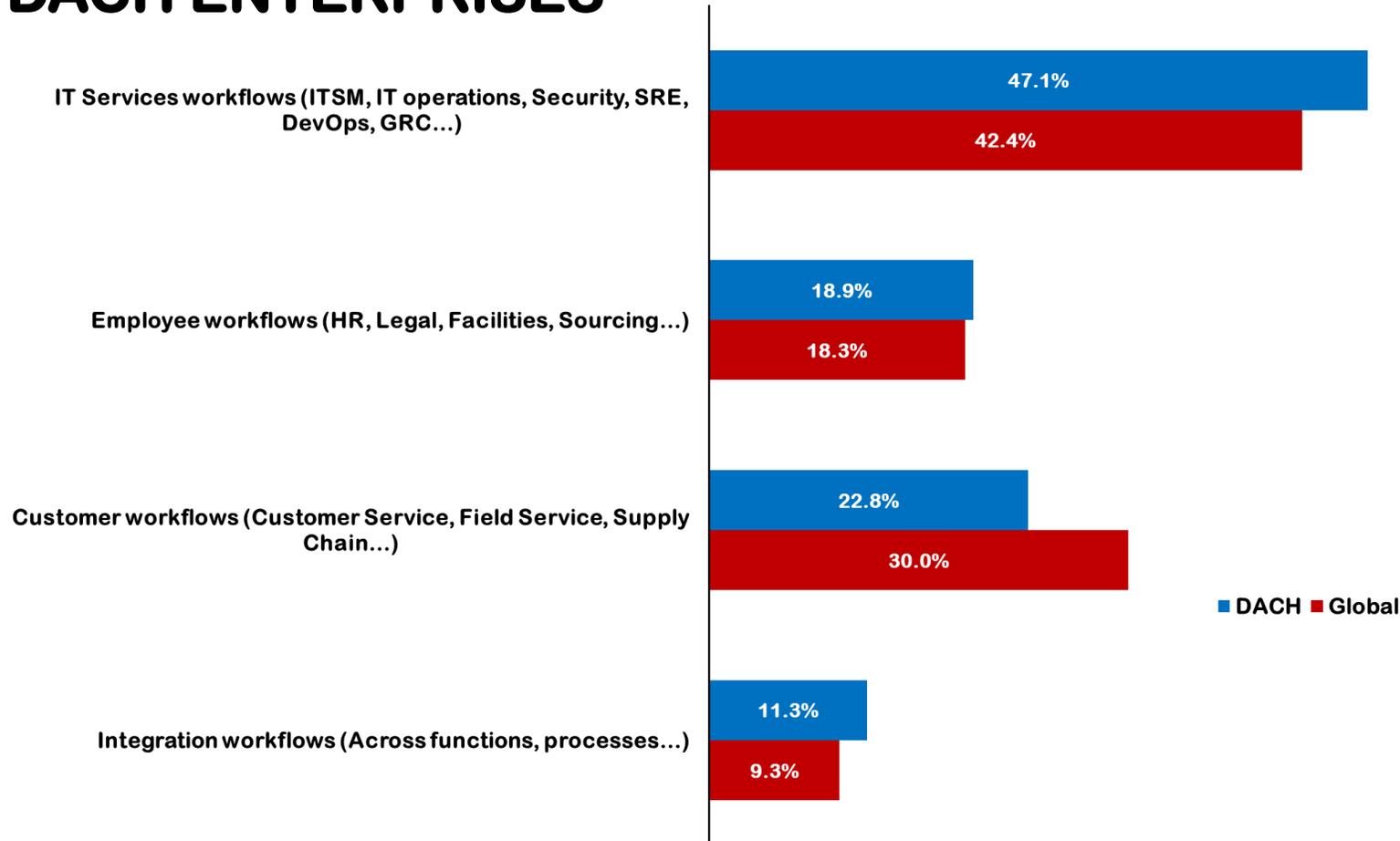
The automation of customer workflows is the second highest priority for automation across DACH enterprises in 2023.

Employee workflows will be the third highest priority for automation across DACH enterprises in 2023.



RESEARCH:

PRORITY DIFFERENCES BETWEEN GLOBAL AND DACH ENTERPRISES



N = 2,250 IT and Business Managers with budget Responsibilities in global and DACH enterprises.

Question: Which domain is your highest priority for the automation of workflows within the next 12 month?

The Biggest Priority Difference Between Global And DACH Enterprises Lies In Customer Workflows.

Both global and DACH organizations prioritize the automation of IT Services workflows.

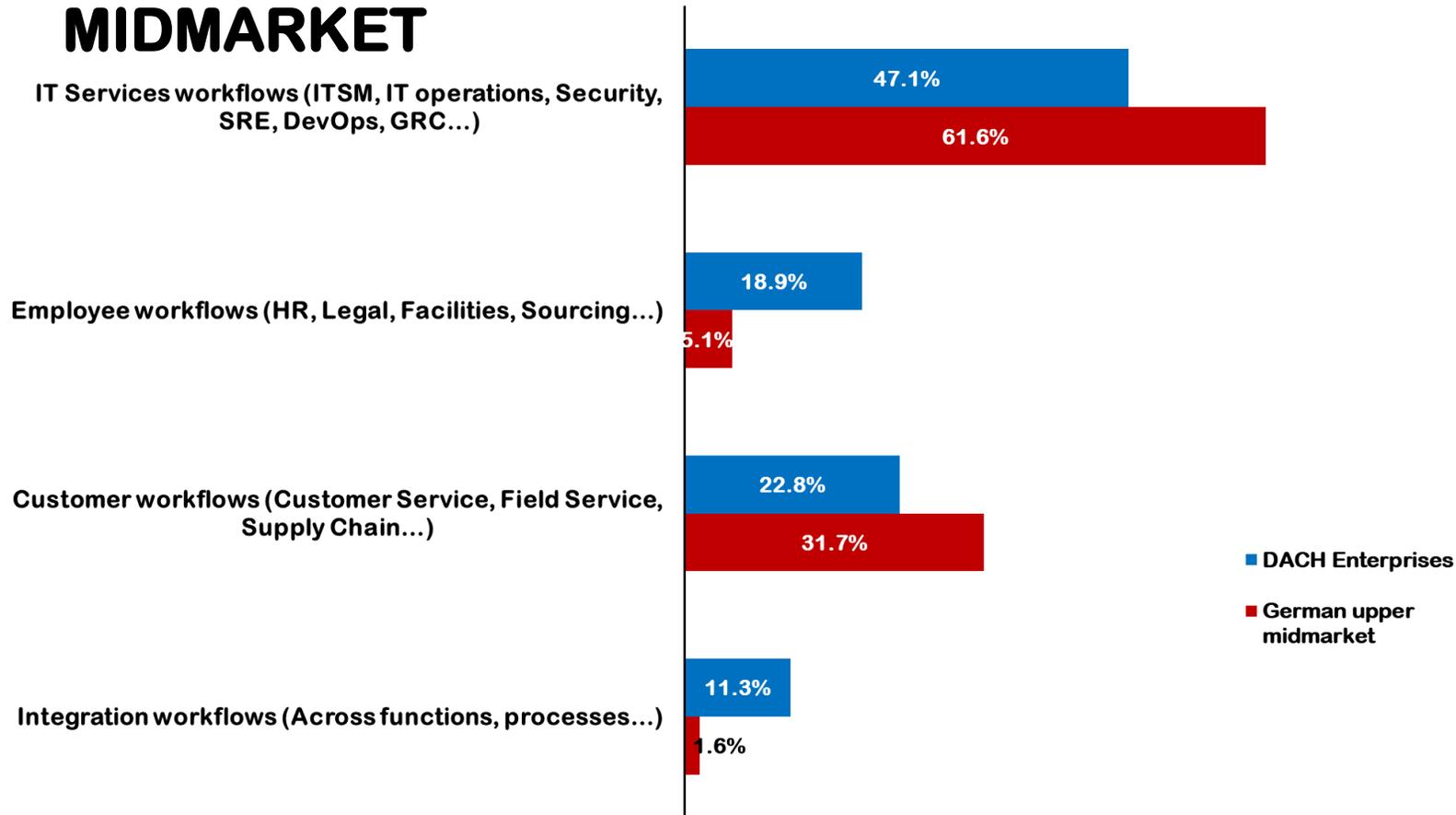
Global organizations place a higher priority on automating customer workflows than DACH enterprises.

Employee workflows are equally important for both global and DACH enterprises.



RESEARCH:

PRORITY DIFFERENCES BETWEEN DACH ENTERPRISES AND THE GERMAN UPPER MIDMARKET



N = 1,500 IT and Business Managers with budget Responsibilities in DACH enterprises and the German upper midmarket.

Question: Which domain is your highest priority for the automation of workflows within the next 12 month?

The Automation Of Workflows Differs Between DACH Enterprises And The German Upper Midmarket.

The highest automation priority (62%) for German upper midmarket companies is the IT Services workflows, followed by 32% for customer workflows and 5% for employee workflows.

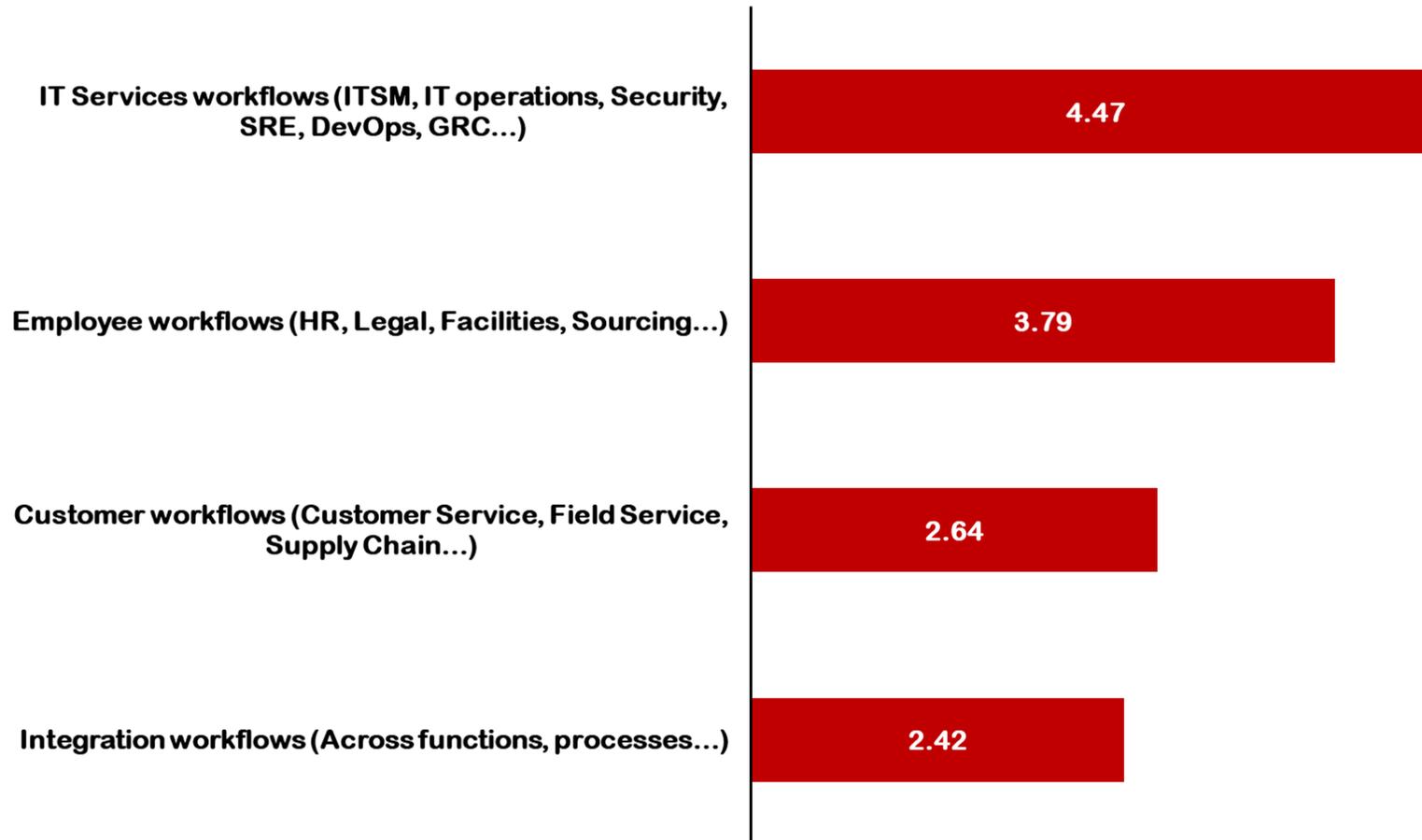
While DACH enterprises also prioritize their IT service workflows (47%), they place higher priority on customer workflows (23%) and employee workflows (19%) for 2023.

Integration of workflows across functions and processes is a higher priority for DACH enterprises (11%) than for German upper midmarket companies.



RESEARCH:

THE DACH ENTERPRISE MATURITY STATE OF ESM: IN 2023, IT SERVICES WORKFLOWS REMAIN THE MOST MATURE



N = 750 IT and Business Managers with budget Responsibilities in DACH enterprises.

Question:
At what level of automation would you say are you within these domains?

IT Services Workflows Are The Most Mature In DACH Enterprises Today.

This is not surprising, as almost all DACH enterprises today have invested in some type of ITSM solution to automate IT workflows already.

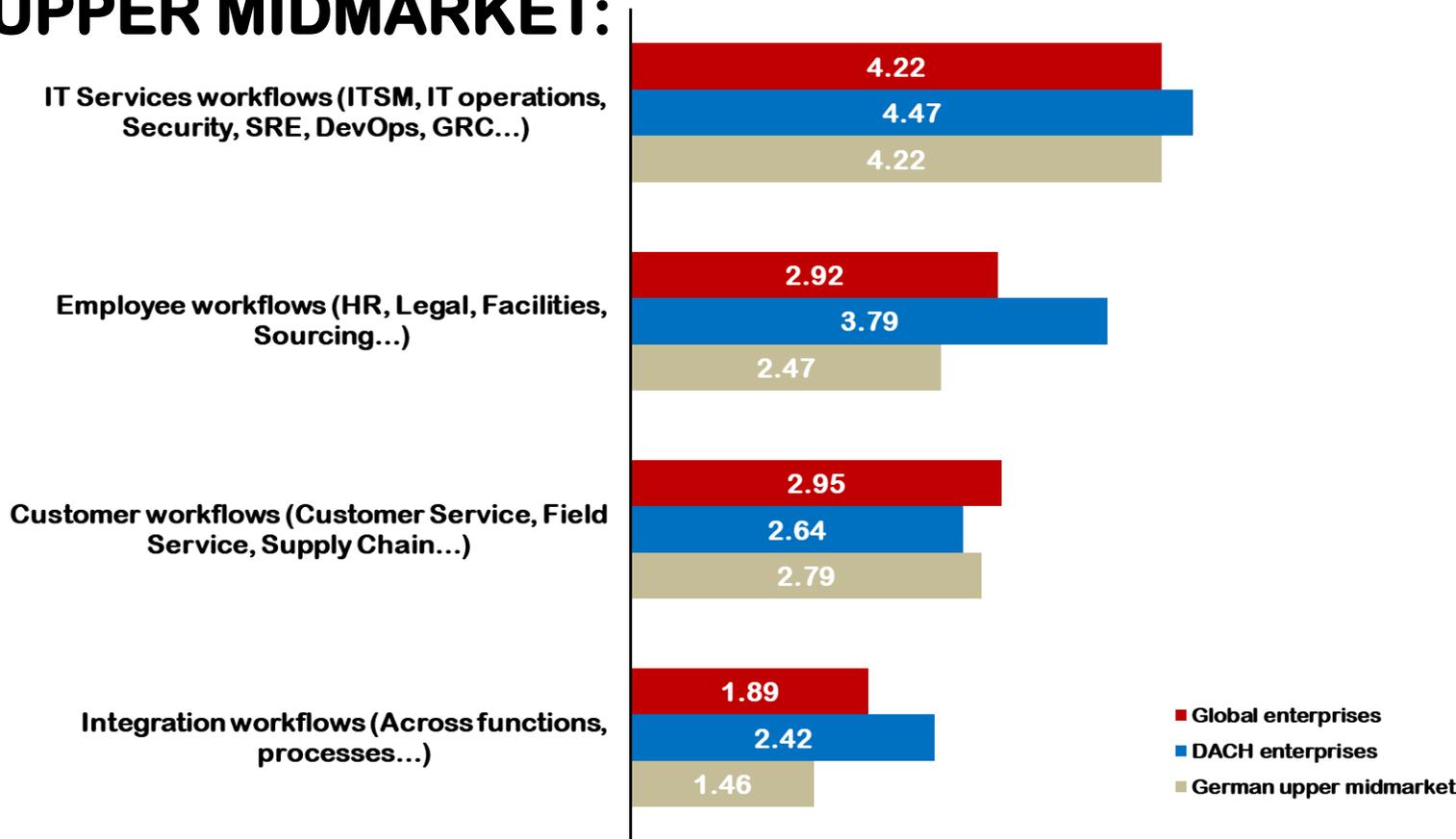
Maturity Scale:

- 1 - Just started
- 2 - At about 25%
- 3 - At about 50%
- 4 - At about 75%
- 5 - More than 75% automated



RESEARCH:

MATURITY STATE COMPARISON BETWEEN GLOBAL AND DACH ENTERPRISES AND THE GERMAN UPPER MIDMARKET:



IT Services Workflows And Employee Workflows Are The Most Mature in DACH Enterprises Compared To Global Enterprises And German Upper Midmarket Organizations.

Maturity Scale:

- 1 - Just started
- 2 - At about 25%
- 3 - At about 50%
- 4 - At about 75%
- 5 - More than 75% automated

N = 3,000 IT and Business Managers with budget Responsibilities in global and DACH enterprises And the German upper midmarket.

Question: At what level of automation would you say are you within these domains?



WHAT THE DATA MEANS: DACH ENTERPRISES ARE MOVING TO ESM WITH THE GOAL OF IMPROVING THE SERVICE EXPERIENCE FOR EMPLOYEES AND CUSTOMERS AND GERMAN UPPER MIDMARKET ORGANIZATIONS MUST FOLLOW THIS TREND



The benefits of workflow automation are opportunities not concerns.

While there are opportunities for workflow automation in business functions such as HR, legal, and facilities, and it can allow for employees to shift to a more creative and meaningful work, there are still concerns. One major concern is the potential replacement of human labour, which may have significantly slowed down the adoption of business workflow automation in Germany in the past. However, DACH enterprises are more mature than their global or German upper midmarket counterparts when it comes to employee workflow automation and have successfully overcome these concerns.



German upper midmarket organizations must act now to automate more than IT Services workflows.

While both DACH enterprises and German upper midmarket organizations have done a lot of work to automate IT workflows, DACH enterprises have made significantly more progress in automating employee and customer experience workflows. German upper midmarket companies need to evaluate workflow automation opportunities outside of IT to avoid employee and customer experience challenges.



ESM provides a great opportunity for IT and business teams to collaborate.

The key to successful workflow automation is for both business and IT teams to work together to understand which parts of the business functions can be automated. The goals of what expected outcomes can be achieved must be understood and then delivered. Across DACH enterprises, many large organizations are moving to automate customer and employee workflows and within this region, ESM has a strong growth potential for many years to come.



INSIGHTS: TOP MARKET TRENDS 2023 TECHNOLOGY



SaaS growth will continue, driven by security and reliability requirements, but consolidation at the vendor level may occur.

The rise of Cloud technology in recent years has made it possible to move entire business operations off-site through the use of SaaS. We predict that SaaS will grow around 15% to 20% in 2023, with continuing significant growth through 2026. Despite the existing SaaS myth of the past, SaaS tools offer many benefits such as robust security, scalability, easy update capabilities, accessibility from anywhere, adaptable to support change, improved collaboration and finally flexible payment models. While there have been very few acquisitions across the ESM and ITSM space in 2022, there may be a significant number to come in 2023.



Advanced capabilities and architectures are a must for competitive advantage.

The capabilities and architectures to automate back-office workflows will not excite those who want to automate the customer and employee experience on the front-end. Capabilities such as personalization, AI, intelligent chatbots, virtual agents and integration with modern collaboration (e.g., Metaverse) are essential. While data quality has always been a challenge, in 2023, rapid decision making will require AI capabilities. Finally, security and observability capabilities, are of high importance to IT operations and should therefore be on the capability list to improve the reliability and availability of everything to everyone.



Solutions must include four key capabilities and your ability to measure improvements are essential to prove benefits.

While significant progress has been made in automating IT workflows, the next steps in customer and employee workflow automation must be driven by the following critical success factors before selecting your workflow automation solution: (1) It must integrate with your existing systems and infrastructure without a heroic act, (2) It must connect workflows and processes across functional departments, (3) It must also allow for changes to the workflow and (4) It must scale up to support the growth within the function or business. In addition, you need to measure the benefits across all to show improvements.



INSIGHTS: DACH ENTERPRISE MARKET TRENDS 2023



As the Cloud Computing trend continues, the ease of moving from on-premises to the Cloud is a key differentiator.

Cloud Computing continues to grow within DACH enterprises and German upper midmarket organizations with initiatives such as migrating workloads to the Cloud or moving from on-premises to SaaS solutions. This has further accelerated the trend of ESM and ITSM vendors to offer their portfolio as hybrid solutions. However, moving from on-premises to the Cloud requires resources and skills, and those vendors that can support and facilitate the migration have a huge advantage.



The reluctance to adopt Artificial Intelligence (AI) within ESM and ITSM is diminishing.

The use of AI to automate existing tasks, provide insights and improve decision making is beginning to gain traction in enterprise IT organizations. Particularly at the IT operations level, where teams are looking for efficiencies across the entire workflow for their teams and for their business partners, the usage of AI within the service management solution is an attractive capability.



Integration and interoperability are driving demand for a single platform.

While some enterprise organizations have relied on siloed ITSM or ESM software solutions, this approach has limited collaboration, increased automation and data redundancy, and added unnecessary costs and resources. With an uncertain economy in 2023 and an increased focus on cost-reduction, siloed tools may be traded in for platforms that can address broad and deep use cases.



VENDOR SELECTION MATRIX™

ENTERPRISE SERVICE MANAGEMENT SOLUTIONS

THE TOP VENDORS FOR DACH ENTERPRISES 2023



These are the Top 15 vendors as selected by 750 users from buyer companies based upon product, company and service quality.

VENDOR NAME	SOLUTION
ATLASSIAN	Jira Service Management
BMC SOFTWARE	BMC Helix Service Management
BROADCOM	CA Service Management
DCON	Servity
EFACTE	Efecte Service Management
FNT	FNT Command Platform
IBM	IBM Maximo, IBM Control Desk
IFS	IFS assyst
IVANTI	Ivanti Enterprise Service Management Platform
MICRO FOCUS	Micro Focus Service Management Automation X (SMAX)
MICROSOFT	System Center Service Manager, Power Automate, Dynamics 365
SAP	SAP Solution Manager, SAP S/4HANA
SERVICENOW	ServiceNow IT Service Management with optional Employee, Customer and Creator Workflows
TOPDESK	TOPdesk Enterprise Service Management
USU	USU Enterprise Service Management

NOTE: If a vendor does not respond, Research in Action will complete its scoring assessment based on analyst experience and desk research. The vendor's products and quick facts will be documented in the report, though a full vendor scorecard will not be written.

This list is alphabetical and includes all relevant Enterprise Service Management solution vendors for DACH enterprises named by the survey respondents.

For this report we interviewed 750 enterprise IT and business managers with budget responsibility in DACH enterprises. We selected those vendors which achieved the best evaluations scores from the buyers but disregarded those with fewer than 15 evaluations.

Additional vendors that were cited but did not list in the Top 15, or had less than 15 ratings:

- ASG
- HORNBILL
- MATRIX42
- SERVICEWARE
- SOFTEXPERT
- SOLARWINDS

In January 2023, OPENTEXT completed the acquisition of MICRO FOCUS.



VENDOR SELECTION MATRIX™

ENTERPRISE SERVICE MANAGEMENT SOLUTIONS THE TOP VENDORS FOR DACH ENTERPRISES 2023



Vendor Quick Facts

VENDOR NAME	MARKET PRESENCE	GROWTH RATE	CUSTOMER TRACTION	GOOD TO KNOW
ALTASSIAN	Medium	High	Good	Provides fluent Service Management for high performing product and service delivery.
BMC SOFTWARE	Big	High	Good	Continues to accelerate enterprise-wide digital transformation leveraging its low code platform.
BROADCOM	Medium	Low	Good	Enables IT and other business functions with data driven decisions and actions.
DCON	Small	Medium	Strong	Delights customers with its platform and implementation capabilities.
EFACTE	Medium	High	Strong	Helps organizations digitize and automate work in a flexible way.
FNT	Small	Low	Good	Leading the integration of hybrid IT, data center and telecoms infrastructures.
IBM	Medium	Low	Medium	Manages different types of service, classes of assets and resources, in a single environment.
IFS	Small	Low	Good	Offers out-of-the-box ITSM which are configurable and scaleable.
IVANTI	Medium	High	Strong	Offers automation and intelligence for IT and other business functions.
MICRO FOCUS	Big	Medium	Good	Enables intelligent automation with its AI driven platform.
MICROSOFT	Medium	Medium	Good	Continues to bundle Service Management with its solutions.
SAP	Medium	Medium	Medium	Offers ITSM, customer and field Service Management.
SERVICENOW	Very Big	Very High	Good	Continues to accelerate enterprise-wide digital transformation leveraging its low code platform.
TOPDESK	Medium	Very High	Strong	Continues to delight its customers across key industry verticals.
USU	Medium	High	Strong	Enables both IT and business teams towards value creation.

MARKET PRESENCE	GROWTH RATE	CUSTOMER TRACTION
Very Big	Very High	Strong
Big	High	Good
Medium	Medium	Medium
Small	Low	Low

NOTES:

- Market Presence combines the market share and perceived Mindshare (or Share of Mind).
- Growth Rate is the anticipated growth rate for this year where Medium is the average growth for this market.
- Customer Traction combines the vendor's customer retention rate and the Research In Action Recommendation Index (RI). The RI is collected and calculated by asking the survey participants: "Would you recommend this vendor in this market to your peers - Yes or No?".



VENDOR SELECTION MATRIX™

EVALUATION CRITERIA

STRATEGY		
 Vision And Go-To-Market	30%	<ul style="list-style-type: none"> › Does the company have a coherent vision in line with the most probable future market scenarios? › Does the go-to-market and sales strategy fit the target market and customers?
 Innovation And Differentiation	30%	<ul style="list-style-type: none"> › How innovative is the company in this market? › Does the solution have a unique selling proposition and clear market differentiators?
 Viability And Execution Capabilities	15%	<ul style="list-style-type: none"> › How likely is the long-term survival of the company in this market? › Does the company have the necessary resources to execute the strategy?
 Recommendation Index	25%	<ul style="list-style-type: none"> › Would customers recommend this vendor in this market to their peers?



EXECUTION		
 Breadth And Depth Of Solution Offering	30%	<ul style="list-style-type: none"> › Does the solution cover all necessary capabilities expected by customers?
 Market Share And Growth	15%	<ul style="list-style-type: none"> › How big is the company's market share and is it growing above the market rate?
 Customer Satisfaction	25%	<ul style="list-style-type: none"> › How satisfied are customers with the solution and the vendor today?
 Price Versus Value Ratio	30%	<ul style="list-style-type: none"> › How do customers rate the relationship between the price and perceived value of the solution?



NOTES:

- 63% of the evaluation is based on the survey results, 37% is based on the analysts' assessment.
 - 40% of the evaluation is based on the survey results: (1) Recommendation Index, (2) Customer Satisfaction, (3) Price Versus Value.
 - 15% of the evaluation is based on the analysts' assessment: (1) Viability And Execution Capabilities, (2) Market Share And Growth.
 - 45% of the evaluation is based on a combination of survey results and analysts' assessment: (1) Vision And Go-To-Market (2) Innovation And Differentiation (3) Breadth And Depth Of Solution Offering.
- The Research In Action Recommendation Index (RI) is collected and calculated by asking the survey participants: "Would you recommend this vendor in this market to your peers - Yes or No?".



VENDOR SELECTION MATRIX™

ENTERPRISE SERVICE MANAGEMENT SOLUTIONS THE TOP VENDORS FOR DACH ENTERPRISES 2023



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Execution Leaders

IFS
MICROSOFT

Challengers

IBM
FNT
SAP

Note: Vendors are listed alphabetically.



RESEARCH IN ACTION
vendor selection matrix®

VENDOR SELECTION MATRIX™

ENTERPRISE SERVICE MANAGEMENT SOLUTIONS

Atlassian is a market leader for DACH Enterprise Service Management Solutions and provides fluent service management for high performing product and service delivery.



GENERAL

Atlassian is an Australian technology firm with global headquarters in Sydney, Australia, and US headquarters in San Francisco, USA serving customers in over 190 countries. The company has reported \$ 2.8 billion in 2022 revenue and today has more than 10,000 employees internationally. It has established itself as an automation software for software developers and project managers to manage teamwork but has expanded its offerings way beyond that.

BOTTOM LINE

The success Atlassian had with developers across enterprise organizations across the globe is fueling its growth and success with its Jira Service Management. It recently announced great incentives for customers to switch over to Jira Service Management. For any organization who wishes to improve its relationship and a tighter alignment with sales, HR, finance, and other teams across the business Jira Service Management is a great choice.



VENDOR SELECTION MATRIX™

ENTERPRISE SERVICE MANAGEMENT SOLUTIONS

BMC Software is a market leader for DACH Enterprise Service Management Solutions and delivers intelligent, interconnected service experience across employee, customers, developers, and technology partners.



GENERAL

BMC Helix offers a robust multi-Cloud and hybrid Cloud service management solution based on an open platform. BMC Helix helps organizations improve their productivity, control costs, increase visibility, and operate in secure environments. The BMC Helix solution portfolio is focused on elevating service experiences across all users through automation, intelligence, and personalization. BMC Helix Service Management empowers enterprises to digitize and to adopt to ongoing changes and market trends. As a software company with 40 years of experience in Service Management, BMC has a broad portfolio of solutions and innovations including AI, no-code visual workflow modelling, and more to help customers modernize. It has continuously shaped and enabled the Enterprise Service Management and IT service management agenda across global enterprises. Today, the company has more than 10,000 customers across the globe. Its total revenue in 2022 was around \$ 2.1 billion.

BOTTOM LINE

The BMC Helix solution portfolio and its partner ecosystem are an excellent choice for organizations interested in breaking down the silos across IT, lines of business, employees, and customers. BMC Helix Service Management (SM) integrates intelligent automation, an AI/ML process engine, AISM and RPA for predictive incident management and auto-correlation of events, remediation and additional insights and actions. BMC Helix SM can be leveraged to deliver services and workflow automation outside of IT while enabling enterprises to easily integrate their applications and data of choice. BMC has the broadest portfolio coverage (breadth and depth of the solution offering) of all vendors in the market.



VENDOR SELECTION MATRIX™

ENTERPRISE SERVICE MANAGEMENT SOLUTIONS

Broadcom is a market leader for DACH Enterprise Service Management Solutions and enables IT and other business functions with data driven decisions and actions.



GENERAL

Broadcom Software, which homes the Agile Operations Division, includes a variety of product portfolios and solutions. As a division of Broadcom, the Software group includes what was Computer Associates (CA), Symantec, Brocade, and AppNeta. Broadcom Software and its solutions are present within 80% of Fortune 500 customers. Some of its solution segments have enjoyed a 50% growth rate year over year. In May 2022, Broadcom announced the intention of acquiring VMware, a key server virtualization software provider.

BOTTOM LINE

Broadcom's Software of IT and ESM solution (CA Service Management) growth is focused on its installed base. Almost all existing customers have specific challenges while shifting their siloed operating models and waterfall development towards digital high performing teams. Its installed base is satisfied with its solutions and are valuing the partnership with Broadcom Software. These customers need to scale their digital transformations including mainframe and across complex and hybrid architectures, services, and ecosystems. For these customers, Broadcom Software and its CASM solution are a great fit.



VENDOR SELECTION MATRIX™

ENTERPRISE SERVICE MANAGEMENT SOLUTIONS

DCON is a market leader for DACH Enterprise Service Management Solutions and delights customers with its platform and implementation capabilities.



GENERAL

DCON Software & Service AG is a German software company founded in 1994. The company has more than 120 employees which are spread amongst three different locations in Germany. It targets enterprise and public offices in DACH and has delivered far more than 1.000 successful IT or Enterprise Service Management projects. Today more than 1 million workplaces are managed with its platform and services.

BOTTOM LINE

For DACH customers looking for a partner and platform for their IT or Enterprise Service Management journey, DCON is an excellent choice. Its platform is broad and deep and in combination with the expertise across its team members delivers great value. The licensing model for its solution is a subscription model based on named users. The company offers on premises (Cloud) and software as a service operation models. DCON has achieved the second highest score within breadth and depth of its solution offering (portfolio coverage).



VENDOR SELECTION MATRIX™

ENTERPRISE SERVICE MANAGEMENT SOLUTIONS

Efecte is a market leader for DACH Enterprise Service Management Solutions and helps organizations digitize and automate work in a flexible way.



GENERAL

Efecte helps people to digitalize and automate their work. Customers across Europe leverage Efecte's Cloud service to operate with greater agility, to improve the experience of end-users, and to save costs. The use cases for Efecte solutions range from IT service management and ticketing to improving employee experiences, business workflows, identity & access management and customer service. Efecte has approx. 200 employees, over 500 customers and 25 years of experience in service management. Efecte's headquarters is located in Finland and regional hubs in Germany, Poland, Sweden and Spain. Efecte is listed on the Nasdaq First North Growth Market Finland marketplace.

BOTTOM LINE

This vendor has a practical and easy to use platform which when combined with its fair licensing model, is an excellent choice for mid-size customers and public institutions. Its leadership and staff are extremely focused on delivering excellent customer experience, while delivering value and outcomes. Its culture defines not only what the company delivers but also how they are delivering. Efecte has achieved the second highest score within breadth and depth of its solution offering (portfolio coverage).



VENDOR SELECTION MATRIX™

ENTERPRISE SERVICE MANAGEMENT SOLUTIONS

Ivanti is a market leader for DACH Enterprise Service Management Solutions and offers automation and intelligence for IT and other business functions.



GENERAL

Headquartered outside of Salt Lake City, Utah, Ivanti has been present in the IT automation space and its IT Service Management portfolio goes back to two primary corporate entities of LANDesk Software and HEAT Software. Its target customers are mid- to large enterprises which are served and supported through 36 offices across 23 nations. The company has more than 3,000 employees today and its partners have grown to over 4,000 serving more than 38,000 customers globally.

BOTTOM LINE

Ivanti is an excellent choice for organizations looking for unified endpoint management, zero trust security and service management solutions from a single vendor. The solutions provide a single pane of glass for enterprises to secure and heal devices, and to service end users across all business functions. Additionally, the solution is customizable to fit a broad and deep set of requirements. Its excellence in support has most likely added to the high customer satisfaction.



VENDOR SELECTION MATRIX™

ENTERPRISE SERVICE MANAGEMENT SOLUTIONS

Micro Focus is a market leader for DACH Enterprise Service Management Solutions and enables intelligent automation with its AI driven platform.



GENERAL

Micro Focus leads the category of Enterprise Service Management with its Service Management Automation X (SMA) platform engineered for scale, productivity improvements and continuous improvement through automation and analysis of IT and business processes. The company has 14,000 employees in 43 countries worldwide. Micro Focus was acquired by OpenText. The acquisition was completed in January 2023.

BOTTOM LINE

Micro Focus SMA enables extensible, efficient and affordable service management with its intelligent automation engine. It provides contextual user experiences which are essential for ongoing and satisfying service supply and demand work across IT and other functional areas. The OpenText acquisition is expected to accelerate Micro Focus Cloud growth and improve Micro Focus renewals. The solution will leverage the proven OpenText Business System to drive accretive integration of Micro Focus. Micro Focus has the broadest portfolio coverage (breadth and depth of the solution offering) of all vendors in the market.



VENDOR SELECTION MATRIX™

ENTERPRISE SERVICE MANAGEMENT SOLUTIONS

ServiceNow is a market leader for DACH Enterprise Service Management Solutions and continues to accelerate enterprise-wide digital transformation leveraging its low code platform.



GENERAL

Since its inception in 2004, ServiceNow has grown to become a platform for digital business, enabling its customers to automate almost any workflow. With a focus on enterprise and commercial accounts, the company serves over 7,700 customers, including more than 80% of the Fortune 500. Over 20,500 employees and 1,500 partners worldwide helped the company grow year-over-year revenue by 28.5%, earning \$ 6.9 billion in 2022. The company also received an award as a great place to work and is part of the Fortune World's most admired companies in 2022.

BOTTOM LINE

The ServiceNow platform and its extensions, add-ons and broad capabilities are an excellent choice for large enterprise organizations automating, reengineering or optimizing existing or developing new workflows. While its roots are in IT service management, the platform and its modules can be leveraged to connect different processes, events, data, or resources for holistic digital value streams. This provides different functions (e.g., IT, HR, Workplace, Legal, Procurement, Customer, Field Service, and more) to collaborate and deliver a connected experience in context of the relative ecosystem and needs. ServiceNow has the broadest portfolio coverage (breadth and depth of the solution offering) of all vendors in the market.



VENDOR SELECTION MATRIX™

ENTERPRISE SERVICE MANAGEMENT SOLUTIONS

TOPdesk is a market leader for DACH Enterprise Service Management Solutions and continues to delight its customers across key industry verticals.



GENERAL

TOPdesk is a Dutch software house, offering solutions across IT and Enterprise Service Management for over 25 years. The company has over 900 employees and more than 5,000 customers today. Its global footprint includes 15 offices across 11 countries. Installed base customers range from retail, government, industrial, travel to financial and insurance verticals.

BOTTOM LINE

TOPdesk has all the necessary capabilities, functionalities, and innovations of an excellent ESM and ITSM automation vendor to enable enterprises automating while optimizing their workflows. It allows service teams to quickly and easily implement customer experience workflows in verticals such as health care, B2B and non-profit. For organizations who want to grow into ESM, its attractive pricing models, its capabilities to service and support its customers are well known and touted in the ESM market globally already.



VENDOR SELECTION MATRIX™

ENTERPRISE SERVICE MANAGEMENT SOLUTIONS

USU is a market leader for DACH Enterprise Service Management Solutions and enables both IT and business teams towards value creation.



GENERAL

USU Software AG is headquartered in Möglingen, Germany, and is a holding company for various subsidiaries that operate as international software and service companies. The company was founded in 1977 and has continued its growth and expansion across regions, target markets and with partners. USU has over 800 employees and more than 1,200 customers. With a holistic solution portfolio for IT and Enterprise Service Management, USU addresses customers ranging from medium-sized businesses, large companies and IT service providers. The USU brand has achieved great recognition and popularity among German IT and business decision-makers.

BOTTOM LINE

For enterprises in search of an easy-to-use, scalable, broad and integrated service management solution, USU and its ITSM and ESM portfolio is an excellent choice. Its AI-based general-purpose platform, with its integrated variety of applications such as AI-based ticket classification, smart baselines for monitoring and more, accelerates the productivity and enables IT and business teams towards value creation for the organization. USU has the broadest portfolio coverage (breadth and depth of the solution offering) of all vendors in the market.



THE RESEARCH IN ACTION GMBH VENDOR SELECTION MATRIX™ METHODOLOGY

Vendor Selection Matrix™ Disclaimer:

The Vendor Selection Matrix™ is a primarily survey-based methodology for comparative vendor evaluation. Research In Action GmbH does not endorse any vendor, product or service depicted in our research publications, and does not advise technology users to select only those vendors with the highest ratings. The information contained in this research has been obtained from both enterprise as well as vendor sources believed to be reliable. Research In Action GmbH's research publications consist of the analysts' opinions and should not be considered as statements of fact. The opinions expressed are subject to change without further notice. Research In Action GmbH disclaims all warranties, expressed or implied, with respect to this research, including any warranties of merchantability or fitness for a particular purpose. All trademarks are recognized as the property of the respective companies.

About:

Research In Action GmbH is a leading independent information and communications technology research and consulting company. The company provides both forward-looking as well as practical advice to enterprise as well as vendor clients.



APPENDIX: IT AUTOMATION MARKET TEXTURE DEFINITIONS

- **Application Discovery and Dependency Mapping (ADDM)** solutions automatically discover various applications running on server and network devices within the business hybrid infrastructure and maps the dependencies between them providing a holistic view of all the resources running and the relationships between them.
- **Application Performance Management (APM)** solutions manage the performance and health of applications within a IT enterprise.
- **AI Powered Chatbot Platforms** which are used to build applications that answer questions, provide advice and/or recommendations using natural language processing and other dialog related technologies.
- **Artificial Intelligence and Machine Learning (AI/ML)** are both technologies and are leveraged in automation solutions. Artificial intelligence (AI) is the ability of a computer program or machine to think and learn (AI can mimic human cognition). Within IT Automation AI is used to correctly interpret a variety of data, to learn from such data, and to use those learnings to achieve specific goals and tasks through flexible adaptation. Machine learning enables computers with the ability to learn without being programmed (explicit algorithms). It explores the study and construction of algorithms which can learn and make predictions on data. The algorithms follow programmed instructions or can make predictions or decisions based on the data. Machine learning is used when explicit algorithms cannot be done (e.g., computer vision, search engines, optical character recognition).
- **Artificial Intelligence for Operations (AIOps)** solutions equip IT enterprise teams with analysis of volumes and categories of data to improve key processes, tasks and decision making. The adoption of these tools automates the ingestion of fast volumes of data; leverage machine learning to analyze the data, present findings to either predict or alert on issues, and leverage the knowledge for automation or decision making.
- **Application Release Orchestration (ARO)** solutions equip IT enterprise organizations and their teams with the automation of the software deployment cycle across hybrid technology environments.
- **Configuration Management Database (CMDB)** is a database which captures IT components referred to as configuration items (CIs), which can be software, hardware, a document, article, or any such item that is part of the information system of the organization.
- **Continuous Hybrid Management (CHM)** platforms or solutions that empower, automate and continuously manage the ongoing demands of all digital functions within an enterprise no matter if they are within IT or business teams.
- **Connected Service Management (CSM)** platforms or solutions are part of the management domain which manage the entire spectrum of customer, employee and digital experiences.
- **Digital Process Management (DPM)** solutions automate and manage the digital processes across different business functions.
- **Enterprise Service Management (ESM)** is a category of business management software - typically a suite of integrated applications that a service organization uses to capture, manage, save and analyze data critical to their service business performance. It automates service offerings across internal functional areas such as (1) Human resources, (2) Vendor management, (3) Technical services, (4) Field services, (5) Financial management and (6) Shared services organizations.
- **Hybrid Cloud Management (HCM)** solutions manage the Cloud infrastructures and applications from an end-to-end perspective.



APPENDIX: IT AUTOMATION MARKETEXTURE DEFINITIONS

- **IT Asset Management (ITAM)** software manages the full lifecycle of IT assets which typically includes all software, hardware, networking, Cloud services, and client devices. In some cases, it may also include non-IT assets such as buildings or information where these have a financial value and are required to deliver an IT service. IT asset management can include operational technology (OT), including devices that are part of the Internet of Things. These are typically devices that were not traditionally thought of as IT assets, but that now include embedded computing capability and network connectivity.
- **IT Financial Management (ITFM)** software enables the accurate and cost-effective management of IT assets and resources with the aim to plan, control, recover (or overall manage) costs which are occurring while providing IT and Enterprise Services to the organization.
- **The IT Infrastructure Library (ITIL)** is the de facto standard for IT Service Management process definitions today.
- **IT Operations Management (ITOM)** solutions monitor and control IT Services and infrastructure and enable IT to execute routine tasks necessary to support the operation of applications, services and hardware components within an organization; typically included are the provisioning of IT infrastructure, capacity management, cost-control activities, performance and security management and availability management for all IT infrastructure and assets.
- **IT Service Management (ITSM)** refers to the entirety of activities – directed by policies, organized and structured in processes and supporting procedures – that are performed by an organization to plan, design, deliver, operate and control Information Technology (IT) services offered to internal customers. It is thus concerned with the implementation of IT Services that meet customers' needs, and it is performed by the IT service provider through an appropriate mix of people, process and information technology.
- **Observability** solutions enable the aggregating, correlating and analyzing of steady streams of performance data from distributed applications and the hybrid infrastructure which support the applications.
- **Robotic Process Automation (RPA)** solutions enable the automation of tasks, processes and procedures which are normally conducted by a human. RPA solutions create software robots that mimic human actions. Typically, these are tasks that a human would do. (Ro)Bots and Virtual Agents are part of RPA solutions.
- **Secure Unified Endpoint Management (SUEM)** software enables the management and securing of mobile applications, content, collaboration and provides for the management of all endpoints like smartphones, tablets, laptops, printers, ruggedized devices, Internet of Things (IoT) and wearables.
- **Technology Cost Management (TCM) or Technology Business Management (TBM)** software enables the planning, management and visibility of the supporting and required business and IT technology resources from a cost and capacity perspective by visualizing, planning, prioritizing and optimizing the usage and demands of technology resources (people, processes and technologies) for the enterprise.
- **Value Stream Management (VSM)** software solutions capture, visualize, and analyze the flow of work across the entire Agile software delivery project. The capabilities include end-to-end visibility, traceability and governance over the entire process and help to plan, track, and steer work at the team, program, portfolio, and enterprise levels. It includes the people working on a project, the systems which are operated and leveraged, and the flow of information and materials between teams. It enables the measurement of speed and quality for digital transformations.



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