



# Magic Quadrant for IT Service Support Management Tools

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IT service support management tools are vital for infrastructure and operations organizations to manage support and delivery of IT services. This Magic Quadrant research profiles key vendors of enterprise ITSSM tools to help I&O leaders make better selections.

## Additional Perspectives

-  Company Size: [Small & Midsize \(<1000 Employees\)](#)
-  Geography: [Asia-Pacific](#) | [Europe](#) | [Middle East](#)

## Market Definition/Description

This document was revised on 26 August 2015. The document you are viewing is the corrected version. For more information, see the [Corrections](#) page on gartner.com.

IT service support management (ITSSM) tools help infrastructure and operations (I&O) organizations manage the consumption of IT services, the infrastructure that supports the IT services and the IT organization's responsibility in supporting these services. These are most heavily used by IT service desks and IT service delivery functions.

ITSSM tools are classified based on IT service management (ITSM) capabilities and integration with IT operations management (ITOM) solutions (see "ITSSM Tool Selections Require an ITSM and ITOM Tooling Strategy") and include:

- Basic ITSSM tools that have some ITSM capabilities and limited integration with ITOM solutions
- Intermediate ITSSM tools that have good ITSM capabilities, and provide some basic ITOM functions or integrate with intermediate third-party ITOM solutions
- Advanced ITSSM tools that have a full range of ITSM capabilities, and provide broad ITOM functionality natively or integrate with advanced third-party ITOM solutions

More than 400 vendors<sup>1</sup> offer ITSSM products, but the majority are basic or intermediate tools that focus on IT service desk and ticketing functions targeted at lower maturity I&O organizations. Some innovation occurs in advanced ITSSM tools, but these are aimed and priced to suit few organizations. Vendors are increasingly concentrating product development on non-I&O use cases

as market saturation of basic and intermediate ITSSM tools continues. If this trend continues, the market for ITSSM tools will stagnate.

ITSSM tools are a component of the ITSM 2.0 IT operations management tools minisuite (see Note 1). The ITSM 2.0 minisuite focuses on improving the overall level of quality and efficiency with which the I&O organization supports business users. ITSSM tools may optionally integrate with other tools from the automation minisuite or the availability and performance minisuite for deeper overall ITOM capability (see "Choose IT Operations Management Tools Based on Your Requirements").

# Magic Quadrant

Figure 1. Magic Quadrant for IT Service Support Management Tools



Source: Gartner (August 2015)

## Vendor Strengths and Cautions

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### Axios Systems

Axios Systems offers one ITSSM product called assyst that is targeted at high I&O maturity organizations. This tool is evaluated in the Critical Capabilities companion research.

#### Strengths

- Axios Systems concentrates exclusively on providing ITSSM solutions.
- Axios Systems has maintained good relationships with customers and offers channels such as focus groups, customer meet-ups and online forums, and incorporates significant client feedback into product development.
- Customers can benefit from a comprehensive implementation program, including customized training and guidance to ensure knowledge transfer.

#### Cautions

- Growth in customer numbers and revenue was positive yet minimal during 2014.
- Axios Systems has invested in a SaaS platform, but relatively few of its customers are using it.
- Technical support is only provided between 9 a.m. and 5 p.m. in the customer's main time zone, unless extended coverage is purchased.

### BMC Software

BMC Software offers four ITSSM products (Remedy ITSM Suite, Remedyforce, FootPrints and Track-It) that are targeted at high to low I&O maturity organizations, respectively. Remedy and Remedyforce are evaluated in the Critical Capabilities companion research, with the score for Remedy contributing to the "product or service" factor of Ability to Execute.

#### Strengths

- BMC Remedy's SmartIT user interface improves usability and flexibility, and demonstrates BMC's innovation in this market.
- BMC has a broad ITOM portfolio, making it a viable partner for mature I&O organizations.
- Remedy ITSM Suite is the top scorer in the critical capabilities for ITSSM tools for the advanced maturity use case.

#### Cautions

- There are too many midmarket ITSSM products in BMC's portfolio, so customers often struggle to determine which they are best suited for.

- Customers report BMC sales teams are slow to respond to potential opportunities and regularly drop off shortlists as a result.
- BMC Software's ITSSM market revenue share has consistently declined each year from 2010 to 2014.<sup>2</sup>

## CA Technologies

CA Technologies offers two ITSSM products (CA Service Management and CA Cloud Service Management) that are targeted at high to medium I&O maturity organizations, respectively. Both are evaluated in the Critical Capabilities companion research, with the score for CA Service Management contributing to the "product or service" factor of Ability to Execute.

### Strengths

- CA Technologies has a strong global reach supported by a good balance of selling directly and through partners that customers report good experiences with.
- CA Technologies have invested in research to study employee personas and behavior to better understand how it can improve their products' user experience.
- The ITSSM tools use mobile and social capabilities effectively for IT communication and collaboration.

### Cautions

- Gartner's market share analysis concludes that CA Technologies' share of the ITSSM market revenue has consistently declined each year from 2010 to 2014.<sup>2</sup>
- Gartner's database reveals that CA Technologies' marketing efforts have failed to raise significant awareness of its CA Cloud Service Management tool within the market.
- Prospective customers perceive CA Service Management as too complex, because it fails to provide a unified view across all IT product consoles.

## Cherwell Software

Cherwell Software offers one ITSSM product called Cherwell Service Management that is targeted at medium I&O maturity organizations. This tool is evaluated in the Critical Capabilities companion research.

### Strengths

- Cherwell has continued to drive good customer engagement and attract a loyal following.
- ITSSM buyers are interested in Cherwell Service Management and see it as a viable competitor to expensive ITSSM tools.

- Cherwell's acquisition of Express Metrix strengthens its IT asset management capabilities for a broader ITSM 2.0 minisuite package.

### Cautions

- Some customers have reported perceived performance issues with the SaaS offering from some (but not all) customer locations.
- Seventy percent of Cherwell's total software revenue comes directly from the vendor's own sales activity, which presents a risk in terms of sales scalability as it continues to grow.
- Cherwell's efforts to additionally develop and market its product as a platform for business activities outside of ITSSM may lead to a lack of focus on the ITSSM market in future.

### EasyVista

EasyVista offers one ITSSM product called EasyVista IT Service Manager that is targeted at medium I&O maturity organizations. This tool is evaluated in the Critical Capabilities companion research.

### Strengths

- EasyVista has seen its number of customers grow approximately 10% during 2014, demonstrating its ability to sell effectively.
- EasyVista's customers have reported success in configuring workflows and custom forms within the tool without needing to write code.
- EasyVista IT Service Manager can run on-premises and via SaaS, and the installed customer base is uncommonly well-balanced across both modes.

### Cautions

- EasyVista provides a Level 1 service desk in North America, but Level 2 support is only available during Central European business hours, resulting in delayed responses for other regions.
- A limited global partner network has made it challenging for EasyVista to sell outside of Europe.
- EasyVista capabilities are focused on ITSSM and IT asset management within the ITSM 2.0 minisuite.

### Heat Software

Heat Software offers one ITSSM product called Heat Service Management that is targeted at medium I&O maturity organizations. This tool is evaluated in the Critical Capabilities companion research.

## Strengths

- Heat Software has refocused on medium maturity I&O organizations that are a good fit for its ITSSM tool, and as a result are appearing on more shortlists during the evaluation period of this research.<sup>3</sup>
- Heat Software is marketing effectively through channels that cater to low maturity to medium maturity I&O organizations.
- The acquisition of Lumension at the beginning of 2015 added endpoint operations management capabilities, and extended Heat Software's ability to integrate with broader ITOM tools.

## Cautions

- Heat Software's marketing of its ITSSM product as "hybrid" (hybrid ITSM and hybrid service management) is confusing and distracts from its strengths.
- Despite the hybrid message and investment in a multitenancy SaaS platform, few of Heat's customers are using the tool via the cloud subscription offering.
- An appreciable number of customers that were using the legacy version of Heat chose to switch to competing products in 2014 rather than upgrade to Heat Service Management.

## Hornbill

Hornbill offers an ITSSM product called Supportworks that is targeted at medium to high I&O maturity organizations. This tool is evaluated in the Critical Capabilities companion research. Hornbill did not provide supporting material for the 2015 Magic Quadrant for ITSSM tools, so evidence from the 2014 edition has been re-evaluated in addition to other credible and accepted public sources.

## Strengths

- Hornbill has good brand recognition in Europe and close connections with European IT special interest groups, such as the IT Service Management Forum (itSMF) and the Service Desk Institute (SDI).
- Hornbill has a significant customer base in the U.K. public sector and local government, which makes up approximately 50% of its total customer base; the remaining 50% of customers are made up of private and public organizations across all market sectors.
- Hornbill developed a collaboration platform that enables Level 0 support channels such as self-service and peer-to-peer, although this is not yet available to Supportworks customers without purchasing extra software or migrating to a different tool.

## Cautions

- Gartner has not seen Hornbill focus on the development of its Supportworks product in the past year as efforts seem to have concentrated on other products.
- Supportworks has been passively marketed during 2014 and 2015. Hornbill has instead promoted its other products in IT-service-support-related events and on social media.
- Growth in North America is anemic, and the vendor has a very limited international partner network.

## HP

HP offers two ITSSM products (HP Service Manager and HP Service Anywhere) that are targeted at high to medium I&O maturity organizations, respectively. HP Service Manager is evaluated in the Critical Capabilities companion research, with its score contributing to the "product or service" factor of Ability to Execute.

## Strengths

- HP has a strong brand and global reach, with its professional services organization available in all major regions.
- HP offers a broad portfolio of ITOM tools that integrate directly with its ITSSM products.
- HP's big data capabilities enable its customers to leverage Autonomy and Vertica technologies to improve search and analytics in areas such as incident management, change management and knowledge management.

## Cautions

- Gartner's market share analysis concludes that HP's share of the ITSSM market revenue has consistently declined each year from 2009 to 2014.<sup>2</sup>
- We have seen minimal interest in HP Service Anywhere (HP's SaaS offering for intermediate ITSSM) from ITSSM tool buyers. It appeared on just 2% of Gartner client shortlists during 2014.
- HP's ITSSM tools can integrate with its stand-alone service broker catalog tool (HP Propel), but this can overlap with the native service catalog capabilities included in its ITSSM products, resulting in an uncertain roadmap for ITSSM buyers.

## Landesk

Landesk offers one ITSSM product called Landesk Service Desk that is targeted at intermediate and high I&O maturity organizations. This tool is evaluated in the Critical Capabilities companion research.



## Strengths

- The Total User Management packaging gives Landesk a solid portfolio of ITSSM tools backed by good automation for enterprise devices.
- Landesk Service Desk scores comparatively high in the critical capabilities for ITSSM tools for intermediate and advanced I&O maturity use cases.
- Landesk has brought innovative ideas to market (such as SnapIT that uses mobile devices and optical character recognition [OCR] to enable business users to solve their own IT issues).

## Cautions

- Despite an increase in ITSSM marketing efforts, Landesk is still commonly recognized for endpoint management but not for its ITSSM portfolio.
- Landesk has invested in a dual-licensing model where the tool can be provided either on-premises or in the cloud, but relatively few of its customers are using the SaaS option.
- Customers have reported difficulties obtaining access to expert assistance from the vendor directly, as Landesk relies heavily on partners.

## ServiceNow

ServiceNow offers two ITSSM products (ServiceNow Service Management Suite and ServiceNow Express) that are targeted at high to low I&O maturity organizations. ServiceNow Service Management Suite is evaluated in the Critical Capabilities companion research, with its score contributing to the "product or service" factor of Ability to Execute.

## Strengths

- ServiceNow has very effective marketing and sales, which has led to widespread brand recognition and a strong customer following.
- ServiceNow has developed a strong partner network, which supports growth and global scalability in the key regions of North America, Europe and Australia/New Zealand.
- The acquisition of Neebula in 2014 (for features found in the ServiceWatch complementary solution) bolsters its ITOM story with service dependency mapping for configuration management databases (CMDBs).

## Cautions

- ServiceNow's strategy to develop and market its product for business activities outside of ITSSM demonstrates a lack of focus on the ITSSM market for future developments.

- ServiceNow's customers find it difficult to negotiate favorable contractual terms. Some customers that initially had deep discounts with ServiceNow are finding that those discounts are not honored for subsequent renewals.
- On-premises customers pay the same as SaaS customers, even though they cover the hosting directly and do not benefit from automatic upgrades.

## Vendors Added and Dropped

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We review and adjust our inclusion criteria for Magic Quadrants and MarketScopes as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant or MarketScope may change over time. A vendor's appearance in a Magic Quadrant or MarketScope one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

### Added

None

### Dropped

The following vendors, which were included in the 2014 research, were dropped from the 2015 Magic Quadrant for ITSSM.

- IBM
- ManageEngine
- SysAid Technologies
- TOPdesk

## Inclusion and Exclusion Criteria

For inclusion in the 2015 Magic Quadrant for ITSSM tools, Gartner focuses on vendors that offer not only IT service support functions that focus on product usability and the ease of use of out-of-the box best practices, but also next-generation support capabilities specific to mobility and the use of social collaboration capabilities to increase effectiveness and efficiency levels.

To be included in the 2015 Magic Quadrant, vendors must:

- Sell and market an ITSSM product that includes functionality for IT incident management, problem management, change management, configuration management, release governance, IT user self-service (for knowledge and request management), IT knowledge management, IT service support analytics, reporting, and SLA management; with regard to incident and service requests. Also, a graphical process designer must be available to manage the above workflows.

- Offer the product optimized for use on a mobile device.
- Have at least 35% of customers using versions of software across the ITSSM product portfolio that are less than 18 months old (released after 1 September 2013).
- Have at least \$15 million in annual revenue derived from ITSSM products.
- Have sales presence or a partner network that spans at least three of the following regions: North America, South America, Europe, the Middle East, Asia, Africa and Australia/New Zealand.

Gartner also asks for seven qualifying customer references (with at least three on the version being evaluated and at least two being customers for at least two years); these references should meet the following criteria:

- They should involve ITSSM tool solutions for which the customer has paid and which are being used in production environments.
- The tools implemented should support and automate at least five of the following processes: incident management, problem management, change management, configuration management, release management, knowledge management or request management.
- They should have an organizational size of at least 5,000 business users of IT.
- The references should be located in at least three of the following regions: North America, South America, Europe, the Middle East, Asia, Africa or Australia/New Zealand.

Because Gartner bases its main evaluation on real-user experiences, rather than on future releases or recent releases that have been broadly tested, the product versions considered as part of this evaluation must have been generally available by 1 March 2015.

## Evaluation Criteria

While a vendor may meet inclusion criteria for the "Magic Quadrant for IT Service Support Management Tools," placement on the Magic Quadrant depends on its score in several categories. The evaluation criteria are based on Completeness of Vision and Ability to Execute.

### Ability to Execute

**Product or Service:** Core goods and services offered by the vendor for the defined market. This includes current product/service capabilities, quality, feature sets, skills and so on, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in these nine critical capabilities:

1. **Incident and Problem Management** — Incident ticketing and problem management is required by all IT organizations that license ITSSM tools. This enables them to manage the life cycles of IT incidents and problem records from recording to closing. These are core capabilities in which all ITSSM tools must be competent.

The success of IT service support depends on effective communications and collaboration, which is aided by the ability of the ITSSM tool to integrate with communications and collaboration platforms, such as telephony systems and chat.

These capabilities are evaluated on the support of the collection, analysis and communication of incident and problem management data and information. Features that support integration with telephony and unified communications and collaboration (UCC) systems to support core ticketing and incident management functions are also evaluated.

2. **Change, Configuration and Release** — Integrated change, configuration and release management processes are important for organizations focused on broader IT service support capabilities. These activities integrate responsibilities across a single ITSSM platform, rather than performing them in separate systems of record.

A key feature for more-advanced use cases is the utilization of discovery tools that incorporate the federation, reconciliation and synchronization of configuration items (CIs) and their relationships.

Integrated change, configuration and release management capabilities are evaluated on the ability to govern various aspects of the IT change management process, to create and maintain a complete and accurate picture of configuration across various infrastructure elements, and to enable release governance to ensure that approved changes are executed in the environment in accordance with the IT organization's defined and documented procedures.

3. **Self-Service/Request Fulfillment** — Service request fulfillment is important for IT organizations focused on providing business users with a convenient way to interact with the IT organization by presenting incident and request tracking services, technical IT components and IT services in the form of an orderable service catalog.

Higher-maturity use cases rely on the automation of basic fulfillment activities to control the complexity of large and fast-moving environments.

Service request fulfillment is evaluated on a product's ability to present an online portal to business end users who are requesting help from the IT service support organization in the form of incident reports, change requests, IT component ordering or administration. Capabilities that enable IT organizations to automate these processes to expedite common requests are also considered.

4. **IT Knowledge Management** — Knowledge management is a key area of differentiation for all use cases. The knowledge portal should enable end users to resolve simple incidents themselves. The tools should create knowledge bases for relevant, updateable content that is useful for IT and business users.

This capability is evaluated on the product's ability to collect, store and access data about IT services to enable the I&O organization to manage IT service assets throughout their life cycles.

5. **Reporting and SLA Management** — Reporting and dashboards are key for all use cases, because they support, enhance and extend collaborative decision support (strategic and tactical) and communication with IT and business leaders.

Reports, dashboards and other visualization capabilities must incorporate common critical success factors, key performance indicators (KPIs) and the ability to visualize multidimensional causal relationships between metrics. High-maturity use cases benefit from support for business value metrics and end-to-end service-level management across a line of service involving internal and external service providers.

Reporting is also evaluated on the product's ability to provide out of the box or build trend reports that measure and predict operational performance using a variety of graphical models.

6. **Processes and Workflow Design** — IT organizations in all use cases need out-of-the-box, preconfigured forms, fields, workflows and reports that are compatible with industry best practices and standards for IT service support.

IT organizations increasingly require the ability to configure these processes, create new workflows and link to other ITOM activities as I&O maturity improves. Complex environments need intuitive, graphical, interactive workflow design tools.

Products are evaluated on the presence of out-of-the-box best practices, as well as the quality of preconfigured workflows in accordance with industry best practices and ease of use with respect to modifying and supplementing those workflows as needed.

7. **Data Source/ITOM Tool Integration** — The tools' ability to integrate with other tools and the ability of those tools to integrate with ITSSM tools is increasingly important, particularly for organizations that license best-of-breed ITOM products, as opposed to multiple products from a single vendor.

Products are evaluated on the presence of out-of-the box integration capabilities (via APIs or connectors) that link to IT service asset and configuration management, IT service catalog, IT financial management, event correlation and analysis tools, application performance management, availability and performance management, and client management tools.

8. **Total Cost of Ownership** — License and subscription costs for ITSSM tools vary considerably, as do ongoing costs for support and administration. Many organizations overbuy when selecting an ITSSM tool.

Low I&O maturity requires lighter solutions that do not rely on significant time and effort to administer the application. Higher TCO is less of an issue for IT organizations with high I&O maturity, because they are able to benefit from the extended capabilities typically offered with more-complex tools.

Products are evaluated on their value for money at purchase and the ongoing TCO, plus the range of licensing and delivery models being offered.

9. **User Experience and Flexibility** — Product configuration flexibility is an important factor that distinguishes different ITSSM tools for different maturity levels. IT service desk users, in particular, benefit from a streamlined and intuitive UI.

Lower-maturity use cases require ITSSM tools that are quick and simple to configure without coding. Higher-maturity IT organizations benefit from extended options for building on the ITSSM platform to support a wider range of applications of the tool within an ITSSM scenario.

Products are evaluated on the complexity and flexibility of configuration. The suitability and intuitiveness of the UI for IT and business users are also evaluated here.

These are evaluated in the critical capabilities for IT service support management tools; see "Critical Capabilities for IT Service Support Management Tools." The critical capabilities score for the ITSSM product that is targeted at large enterprises with medium-to-high I&O maturity is used where multiple products from a vendor qualify for inclusion in that research.

**Overall Viability:** Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

**Sales Execution/Pricing:** The vendor'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/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 vendor's history of responsiveness.

**Marketing Execution:** The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This mind share can be driven by a combination of publicity, promotional initiatives, thought leadership, word of mouth and sales activities.

**Customer Experience:** Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements and so on.

Table 1. Ability to Execute Evaluation Criteria

Evaluation Criteria	Weighting
Product or Service	High
Overall Viability	Medium
Sales Execution/Pricing	High
Market Responsiveness/Record	Medium
Marketing Execution	Medium
Customer Experience	Medium
Operations	Not Rated

Source: Gartner (August 2015)

## Completeness of Vision

**Market Understanding:** Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen to and understand buyers' wants and needs, and can shape or enhance those with their added vision.

**Marketing Strategy:** A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.

**Sales Strategy:** The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service, and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

**Offering (Product Strategy):** The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements.

**Business Model:** The soundness and logic of the vendor's underlying business proposition.

**Innovation:** Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

**Geographic Strategy:** The vendor's strategy 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.

Table 2. Completeness of Vision Evaluation Criteria

Evaluation Criteria	Weighting
Market Understanding	High
Marketing Strategy	High
Sales Strategy	Medium
Offering (Product) Strategy	High
Business Model	Medium
Vertical/Industry Strategy	Not Rated
Innovation	High
Geographic Strategy	High

Source: Gartner (August 2015)

## Quadrant Descriptions

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### Leaders

BMC Software and ServiceNow are positioned in the Leaders quadrant. Both vendors have executed well, and own 26% and 29%, respectively, of the ITSSM market. Both vendors exhibit the levels of marketing and sales capabilities required to drive market acceptance.

### Challengers

Cherwell Software is positioned in the Challengers quadrant. This vendor has also executed well, growing its market share and improving its ITSSM products and its overall viability levels enough to participate well in the general-purpose market with competitive products.

### Visionaries

Landesk is positioned in the Visionaries quadrant. This vendor delivers innovative products that address operationally important I&O organizational challenges — namely, business-user engagement and IT collaboration — but have yet to gain significant market or mind share.

### Niche Players

Axios Systems, CA Technologies, EasyVista, Heat Software, Hornbill and HP are positioned in the Niche Players quadrant. Niche Players have strengths in particular areas of ITSSM, but generally have not invested in satisfying all the requirements to demonstrate Completeness of Vision and the



Ability to Execute. The vendors in this quadrant focus on a small segment, or are in the process of ramping up go-to-market efforts and have yet to develop the vision to break out.

## Context

The Magic Quadrant for ITSSM tools assesses the viability of vendors and their competitive strength in the ITSSM marketplace. The vendors featured here produce ITSSM tools that are of interest to large I&O organizations that have an intermediate-to-high I&O maturity (Gartner ITScore for Infrastructure and Operations of 2.5 or higher).

It is not a direct evaluation of the ITSSM products that these vendors offer. This analysis complements the "Critical Capabilities for IT Service Support Management Tools," which applies nine critical capabilities that differentiate the most popular large-enterprise-focused products on the market, and three I&O-maturity-related use cases (plus one for digital workplace). The use cases filter and prioritize the capabilities that will have the greatest beneficial impact of ITSSM products offered by these vendors. Gartner strongly recommends that organizations use this research in conjunction with the Critical Capabilities, inquiries with analysts, and other Gartner research to define their requirements and select solutions that match their needs.

Organizations should not base vendor choices solely on their proximity to the Leaders quadrant. IT leaders must create a list of criteria that describes their needs, and select vendors that best meet those requirements (see "Redesign Your ITSSM Tool RFP Process for Better Results"). The best vendor will meet the organization's requirements and provide integration with broader IT operations management capabilities (see "ITSSM Tool Selections Require an ITSM and ITOM Tooling Strategy").

Capabilities for processing workflows such as HR, facilities, business asset management and others that are not activities associated with IT service support management are not evaluated in this research.

Plan for a vendor that can work with you for at least five years, and that invests in the ITSSM market. Prioritize skills, training, process and proper product implementation, because these factors will influence your experience with a product more than the specific functional capabilities. Finally, select a vendor that can truly help your I&O organization reach its maturation goals.

The predominance of low I&O maturity within this market will ensure that demand for basic tools remains significant. Gartner regularly advises clients to also consider ITSSM vendors not found in this Magic Quadrant.

## Market Overview

The IT service support management (ITSSM) tools market consists of more than 400 products that claim to provide IT organizations with the ability to track and resolve issues that affect the IT production environment.<sup>1</sup> Although all ITSSM tools provide those core ticketing functions, the true

value that IT organizations can gain from ITSSM tools comes from their ability to offer and support tightly integrated processes and functions that correlate with the activities of the broader IT organization. I&O organizations looking to increase IT process maturity have looked to ITSSM tools aligned and preconfigured to industry best-practice frameworks — to integrate responsibilities across technology silos with common processes, collaboration and the reinforcement of an organizational commitment to shared objectives.

ITSSM tools integrate processes and functions that correlate with the broader IT support organization. Features should include incident and problem management capabilities for the IT service desk function, and change, configuration and release management tools for process leaders, infrastructure engineers and domain administrators. They often include a CMDB that provides visibility into the production environment, and prioritizes and resolves or escalates issues and problems, and improves root cause isolation.

ITSSM tools are a component of the IT service management (ITSM) 2.0 IT operations management tools minisuite (see Note 1). The ITSM 2.0 minisuite focuses on improving the overall level of quality and efficiency with which the I&O organization supports end users. ITSSM tools may optionally integrate with other tools from the automation minisuite or the availability and performance minisuite for deeper overall ITOM capability (see "Choose IT Operations Management Tools Based on Your Requirements").

ITSSM tools are classified into three categories based on IT service management (ITSM) capabilities and integration with ITOM solutions:

- Basic ITSSM tools have some ITSM capabilities and limited integration with ITOM solutions.
- Intermediate ITSSM tools have good ITSM capabilities, and provide some basic ITOM functions or integrate with intermediate third-party ITOM solutions.
- Advanced ITSSM tools have a full range of ITSM capabilities, and provide broad ITOM functionality natively or integrate with advanced third-party ITOM solutions.

These three categories are more fully explained in "ITSSM Tool Selections Require an ITSM and ITOM Tooling Strategy."

Many I&O organizations don't adequately understand how to choose ITSSM tools that address current needs and requirements. This is due to a lack of I&O roadmaps, which establish the people, processes and technology resources needed to reach the desired state of I&O maturity. Without a roadmap, I&O often purchases ITSSM tools that have more functionality than it needs (incurring higher costs), or that lack the capabilities or integration abilities it will require as it grows (see "IT Service Support Management Tool Acquisitions Must Be Based on I&O Maturity"). ITSSM vendors are keenly aware of this and compete aggressively for new business and for partnerships for broader ITOM capabilities and integrations.

## Small & Midsize (<1000 Employees) Context

🕒 15 September 2015

**Analyst(s):** Katherine Lord, Mike Cisek

Midsize organizations searching for a rightsized ITSSM tool will find a vast and saturated market with high levels of commoditization and little differentiation among products. This research helps I&O leaders navigate this complicated vendor landscape to identify the best fit for their environments.

### Market Differentiators

IT service support management (ITSSM) tools that appear on the "Magic Quadrant for IT Service Support Management Tools" are specifically designed and built to meet the needs of large global enterprises; consequently, midmarket organizations run the very real risk of buying overly expensive and complex solutions. Most midmarket organizations lack the resources to fully utilize all of the capabilities bundled within these larger ITSSM tools, and the versatile nature of typical midmarket IT resources weighs heavily on both product requirements and the criteria used to select potential vendors. It is important to note, however, that some midmarket organizations can have a higher level of maturity that dictates a need for a more advanced ITSSM tool with deeper capabilities.

Most midmarket organizations report via client inquiry and Gartner events an average of 10 to 40 IT full-time equivalents (FTEs) and require the ability to start with just a handful of licenses. Additionally, midmarket infrastructure and operations (I&O) leaders prefer a "pay as you grow" licensing model, with most organizations never needing to exceed 50 licensed users. It's worth noting that while there are cost implications, there is no predisposition to SaaS or on-premises deployment models.

Midmarket organization buyers put a premium on service and support quality, and ease of administration and management. Products from niche ITSSM vendors are typically lower cost and require fewer resources to implement and maintain. They tend to be less feature-rich and to align more closely to midmarket buyer criteria. However, I&O leaders who focus too much on price and soft costs may result in adopting a product that is ill-equipped to meet their long-term maturity goals.

Although features within the ITSSM tools are robust and standardized, the functional requirements within midmarket organizations remain highly fragmented. Most midmarket organizations require enterprise-class functionality in a few key areas, such as incident, problem and knowledge management, but in others (such as change and release management), varying degrees of good-enough functionality is all that may ever be required. In certain situations, the benefits of an industry-specific approach (e.g., legal and education) may trump the specific benefits of competing products.

IT Leaders in midmarket organizations evaluating ITSSM tools must understand the characteristics of the many different offerings and delivery models, and look to improve operational efficiency without impacting agility.

## Considerations for Technology and Service Selection

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Objectively evaluate people, processes and existing tools first:

- Changing platforms or adopting a more robust ITSSM solution will not resolve symptoms resulting from internal process and people deficiencies; in most circumstances, it will only serve to exacerbate the situation.

Determine maturity objectives:

- Organizational maturity weighs heavily on ITSSM vendor selection in the midmarket.
- For less mature midsize enterprises with moderate maturity goals, the SaaS model may represent a more pragmatic approach, due to shorter deployment cycles and fewer resources required for support than on-premises solutions.

Postsales support and services:

- Midmarket organizations have significantly smaller infrastructure and application portfolios than large enterprises; making each disproportionately critical. Validate each vendor's capabilities to integrate their ITSSM solution to existing infrastructure and data sources.
- Evaluate the vendor's ability to provide high-quality postsales support assistance (integration, customization), especially if these skills are absent or lacking internally.
- Price should not affect the quality of support.

Don't assume that SaaS is synonymous with simple or inexpensive:

- It is important to realize, however, that SaaS is not always the least expensive option (see "Take Control of Pricing for Your Next SaaS or On-Premises ITSSM Tool Purchase").
- Before midmarket I&O leaders sign a contract, they should fully understand the delivery model, pricing, licensing and maintenance costs to ensure that the costs make sense for their organization.

## Notable Vendors

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Vendors included in this Magic Quadrant Perspective have customers that are successfully using their products and services. Selections are based on analyst opinion and references that validate IT provider claims; however, this is not an exhaustive list or analysis of vendors in this market. Use this perspective as a resource for evaluations, but explore the market further to gauge the ability of each vendor to address your unique business problems and technical concerns. Consider this research as part of your due diligence and in conjunction with discussions with Gartner analysts and other resources.

The notable vendors chosen below were referenced frequently in survey and client inquiry data as offering the most common incumbent products for midmarket organizations.

## BMC

BMC offers four ITSSM solutions. One of those products is Remedyforce, which is well-suited for midmarket organizations. Remedyforce is a multitenant SaaS product built on the Salesforce platform, and offers solid ITSSM capabilities at an affordable price point that is well-suited for midmarket organizations.

## Dell Kace

Dell Kace provides K1000 Service Desk, a solution that's tightly integrated with IT asset management (ITAM), configuration management, reporting and alerting capabilities. Kace can also integrate to provide endpoint security support, reducing the resources required for managing devices.

## Entry Software

Entry Software's TeamHeadquarters is a solution that comes with ITSSM capabilities in both on-premises and SaaS solutions. Its solution module comes complete with core ITIL-based processes, a self-service portal, queue dashboards and asset management. TeamHeadquarters can also integrate with Entry Software's project management solution to create a holistic view of resource utilization.

## Heat Software

Heat Software offers an ITSSM product, Heat Service Management, that targets the midmarket to midenterprise. The product is available in both an on-premises and a SaaS-based model off the same codebase. Heat Service Management provides deep ITSSM capabilities, including endpoint operations management capabilities. In addition, Heat Software offers flexible licensing in terms of named and concurrent licensing, providing flexibility for an organization.

## ITinvolve

ITinvolve's Service Manager provides a SaaS offering across team workspaces for improved collaboration. The product has ITSSM capabilities with high levels of collaboration, enabling users to leverage individualized visualizations and scenarios to identify and resolve issues. The solution also includes a unified self-service portal for incidents, requests and knowledge management.

## ManageEngine

ManageEngine caters to the midmarket with its product, ServiceDesk Plus. The solution is delivered both on-premises and SaaS. It contains integration capabilities to other elements of the ManageEngine portfolio, such as OpManager or Desktop Central.

## Samanage

Samanage offers products for ITSSM and IT asset management. Samanage's offering, of the same name, is built to suit midmarket clients. The vendor offers simple pricing with annual subscriptions, and options to subscribe to ITSSM, or to ITSSM integrated with its ITAM offering.

## ServiceNow

ServiceNow provides SaaS products for ITSSM. ServiceNow Express targets midmarket clients. The product is a "lite" version of the vendor's full ITSSM suite, and is a good steppingstone for organizations looking to grow into the full suite as they grow or scale.

## SunView Software

SunView Software offers ChangeGear, an ITSSM tool, either on-premises or in the cloud. ChangeGear has codeless design and is configurable without technical expertise. It also has flexible licensing at a reasonable price point.

## SysAid

SysAid produces SysAid ITSM offered on-premises or as a SaaS model, that focuses on core ITSSM functionality, and targets the midmarket. The product includes a basic benchmarking feature that enables customers to compare several metrics against averages from other SysAid customers. SysAid offers varied subscription options; including a lifetime subscription.

## TeamDynamix

TeamDynamix provides cloud-based ITSSM software built for the higher education vertical. Its service management solution offers solid ITSSM and platform capabilities, including a brandable self-service portal and asset and configuration management. Additionally, TeamDynamix seamlessly integrates ITSSM, portfolio, project and resource management into its work management platform.

## TOPdesk

TOPdesk produces an ITSSM solution, of the same name, that is available on-premises or as SaaS, and is modular in nature. It offers simple pricing terms based on the number of business users supported.

## Asia-Pacific Context

🕒 04 November 2015

**Analyst(s):** Tapati Bandopadhyay

APAC I&O leaders buying ITSSM tools go by their previous experience with vendors, implementation partners and IT service providers, staying conscious of total cost of ownership and value. They should focus on differentiated capabilities of the tools and their fitment to specific ITSSM contexts.

### Market Differentiators

The Asia/Pacific (APAC) region doesn't have any major local IT service support management (ITSSM) vendor headquarters. However, several large-enterprise IT teams do have strong visibility into the presence of major brands in the region and their partner networks. (For a detailed region-by-region breakup and projections of the ITSSM market in APAC, refer to "Forecast: Enterprise Software Markets, Worldwide, 2012-2019, 3Q15 Update.") ITSSM tools in APAC are either brought in through the clients' previous experience with the vendors, tools and partner network, or are brought along with a host of other infrastructure management solutions. These solutions may include data integration, application performance monitoring, automation, and network performance monitoring and diagnostics. A unique attribute of tool consumption in APAC is that many end-user clients are comfortable using ITSSM tools from their IT service provider partners, which have a significant presence in this region.

### Considerations for Technology and Service Selection

While being conscious of the total cost of ownership (TCO) and maintenance, and of the strategic commitment of vendors in this region and their partnership strengths, end-user clients in this region should evaluate ITSSM tools in terms of their strengths and fitments to specific ITSSM challenges and contexts in their own scenarios.

Some of the vendors mentioned in this report have significant presence in Australia and New Zealand (ANZ), but not in other regions within APAC. Apart from the function and capability fitments, customers should also look at the quality of local support, dependability of the local partners (where the ITSSM vendor has local partners) and support history of the partners as some of the key criteria when choosing a vendor.

### Notable Vendors

Vendors included in this Magic Quadrant Perspective have customers that are successfully using their products and services. Selections are based on analyst opinion and references that validate IT provider claims; however, this is not an exhaustive list or analysis of vendors in this market. Use this perspective as a resource for evaluations, but explore the market further to gauge the ability of each vendor to address your unique business problems and technical

concerns. Consider this research as part of your due diligence and in conjunction with discussions with Gartner analysts and other resources.

The following vendors, included in the "Magic Quadrant for IT Service Support Management Tools," have a presence in APAC.

### Axios Systems

Axios Systems has around 7% of its global customer base in ANZ, less in Asia. Other than English, it also supports some regional languages in Asia, including Korean, Thai, Mandarin Chinese and Russian. Axios has offices in Australia (Melbourne and Sydney) and Malaysia (Kuala Lumpur). It has multiple partner networks in the region, including New Zealand and South Korea.

### BMC Software

BMC Software has 10% to 20% of its global customer base in Asia and ANZ. It has offices in ANZ, APAC headquarters in Singapore, and a large partner network and ecosystem in ANZ, China, India, Japan, Malaysia, South Korea, Indonesia, the Philippines, Thailand and Singapore. It supports regional Asian languages, such as Chinese, Japanese and Korean.

### CA Technologies

CA Technologies has 10% to 20% of its global customer base in APAC. It supports regional languages, such as Japanese and simplified Chinese. CA has 20 offices and more than 30 partners in APAC, as well as global service providers in APAC. ITSSM support is located in several of the local regions in APAC, and the company has engineers based in Australia, Japan and India.

### Cherwell Software

Cherwell Software has 5% to 10% of its customers in APAC, primarily in ANZ. Cherwell Service Management is not localized for any non-English language support for the region. Cherwell has partners in Australia, New Zealand and the Philippines. The partners in ANZ provide first-level support directly to customers. Other customers in APAC use Cherwell's support based in Colorado.

### Heat Software

Heat has around 10% of its customers in APAC. Currently, Heat Service Management is localized into Japanese. The Heat Service Management 2015.2 release allows partners to localize the user interface. They have partner networks in ANZ, Hong Kong, India, Vietnam, Malaysia, Indonesia, Singapore, Sri Lanka and Thailand.



## HPE

Hewlett Packard Enterprise (HPE; this is a new name after HP's separation into two entities on 1 November 2015) has 10% to 20% of its global customer base in Asia and ANZ. In addition to English, HPE offerings are localized in simplified Chinese, Korean and Japanese. HPE has offices in all major APAC locations, with operations in China, Hong Kong, India, Japan, Korea, Malaysia, Indonesia, Thailand, Singapore, Taiwan, the Philippines, Vietnam, Australia and New Zealand.

## Landesk

Landesk has 10% to 15% of its global customer base in APAC. It supports Asian languages, including Chinese and Japanese. Support in APAC is provided by a combination of Landesk and its partners in support centers in China, Japan, Australia, Singapore and India. They have a Beijing support center that can provide support in Mandarin Chinese.

## ServiceNow

ServiceNow has 5% to 10% of its global customers in ANZ and in the APAC region. They have an office in Singapore that serves as the regional headquarters. They also have offices in Japan and a large partner network in several countries in the APAC region. Regional languages are supported through internationalization (i18n), which enables translation of some of the text.

## Europe Context

🕒 17 September 2015

**Analyst(s):** Chris Matchett

European I&O leaders buying IT service support management tools often choose a regional vendor. They should expand their list of possible providers.

## Market Differentiators

Research into the IT service support management (ITSSM) tool market includes a review of the distribution of the number of customers vendors have across various geographies. One particular focus of this data collection is to look at the prevalence of the different vendors within the European market. Table 1 shows the ITSSM vendors in this Magic Quadrant that have customers in Europe. The vendors in this table are categorized by the location of their primary headquarters. (The customer information was taken from "Magic Quadrant for IT Service Support Management Tools.")

Table 1. Percentage of ITSSM Customers That Are European

Category of ITSSM Vendor	Percentage of Customers That Are European
Europe-based ITSSM tool vendors	77%
All ITSSM tool vendors	46%
U.S.-based ITSSM tool vendors	32%

Source: Gartner (September 2015)

The table shows that European infrastructure and operations (I&O) managers are more likely to select an ITSSM tool from a Europe-based vendor featured in this Magic Quadrant versus a U.S.-based vendor. Gartner also finds the same story in the United States: U.S.-based organizations purchase from U.S.-based vendors the vast majority of the time. Localization and support for multiple languages play an important role in the selection of ITSSM tools for European I&O managers. (Gartner has taken 534 inquiries between September 2014 and August 2015 on the topic of ITSSM tools; 117 of these were from clients based in EMEA.)

All the vendors covered in this Magic Quadrant support customers across at least three geographic regions (see "Criteria for the 2014 Magic Quadrant for IT Service Support Management Tools"), including Europe.

## Considerations for Technology and Service Selection

Europe-based vendors are only marginally better at tool language localization on average, but some ITSSM tools from non-European vendors actually support more languages. (Supported local languages are as provided by the vendors on or before 1 March 2015.) Vendors headquartered in Europe support an average of 9 (between 8 and 10) of the major European languages. This is compared with vendors based outside of Europe, which support an average of 8 (between 4 and 11) of those European languages. All of the vendors featured in this Magic Quadrant have multiple local offices and a strong European customer base (greater than 20%).

Any of the ITSSM tool vendors in this Magic Quadrant, regardless of their headquarters location, can be a good option for European I&O managers, as long as they evaluate the options according to the specific requirements of their organizations. European I&O leaders should look beyond the regional heritage of vendors, and base their vendor selection on tool language localization and business hour support, as well as their other specific needs.

## Notable Vendors

Vendors included in this Magic Quadrant Perspective have customers that are successfully using their products and services. Selections are based on analyst opinion and references that validate IT provider claims; however, this is not an exhaustive list or analysis of vendors in this market. Use this perspective as a resource for evaluations, but explore the market further to gauge the ability of each vendor to address your unique business problems and technical

concerns. Consider this research as part of your due diligence and in conjunction with discussions with Gartner analysts and other resources.

The headquarters location of vendors has little impact on the suitability of their ITSSM tool for a European company in most cases. All of the vendors in this Magic Quadrant have local offices in multiple locations in Europe (for more on how Gartner categorizes European subregions, see "Market Definitions and Methodology: IT Markets"), and provide local language support. The following 13 European languages are frequently supported by ITSSM tools: English, Dutch, Finnish, French, German, Hungarian, Italian, Polish, Portuguese, Russian, Spanish, Swedish and Ukrainian. Support for other European languages may be provided.

### Magic Quadrant Vendors Headquartered in Europe

#### **Axios Systems**

Axios Systems is headquartered in Edinburgh, United Kingdom, and has a significant percentage (60% to 84%) of its customer base in Europe. It has local offices in 11 European countries, covering the western and eastern European subregions. Axios' ITSSM product contains local language support for 10 of 13 listed European languages.

#### **EasyVista**

EasyVista is headquartered in Paris, France, and has a predominantly European customer base (at least 85%). It has local offices in six European countries, covering the western European subregion. EasyVista's ITSSM product contains local language support for 9 of 13 listed European languages.

#### **Hornbill**

Hornbill is headquartered in Ruislip, UK, and has a significant percentage (60% to 84%) of customers based in Europe. It has one European local office in the U.K. Hornbill's ITSSM products contain local language support for 8 of 13 listed European languages.

### Magic Quadrant Vendors Headquartered Outside of Europe

#### **BMC Software**

BMC Software is headquartered in Texas, USA, and has a moderate percentage (25% to 59%) of customers based in Europe. It has local offices in 19 European countries and covers the western European subregion. BMC's ITSSM products contain local language support for 7 of 13 listed European languages.

## CA Technologies

CA Technologies is headquartered in New York, USA, and has a moderate percentage (25% to 59%) of customers based in Europe. It has local offices in 24 European countries, covering the western and eastern European subregions. CA's ITSSM products contain local language support for 8 of 13 listed European languages.

## Cherwell Software

Cherwell Software is headquartered in Colorado, USA, and has a moderate percentage (25% to 59%) of customers based in Europe. It has local offices in three European countries and covers the western European subregion. Cherwell's ITSSM product contains local language support for 4 of 13 listed European languages.

## Heat Software

Heat Software is headquartered in California, USA, and has a minor percentage (less than 25%) of customers based in Europe. It has local offices in six European countries, covering the western European subregion. Heat Software's ITSSM product contains local language support for 7 of 13 listed European languages.

## HP

HP is headquartered in California, USA, and has a moderate percentage (25% to 59%) of customers based in Europe. It has local offices in 34 European countries, covering the western and eastern European subregions. HP's ITSSM products contain local language support for 9 of 13 listed European languages.

## Landesk

Landesk is headquartered in Utah, USA, and has a moderate percentage (25% to 59%) of customers based in Europe. It has local offices in 13 European countries, covering the western and eastern European subregions. Landesk's ITSSM product contains local language support for 7 of 13 listed European languages.

## ServiceNow

ServiceNow is headquartered in California, USA, and has a moderate percentage (25% to 59%) of customers based in Europe. ServiceNow has local offices in 14 European countries, covering the western European subregion. ServiceNow's ITSSM product contains local language support for 11 of 13 listed European languages.

## Other Vendors Based in Europe

The following vendors are not featured in the Magic Quadrant, but are headquartered in Europe and may be of interest to I&O leaders who are focused in a specific country. This sample list is

not comprehensive, and inclusion of a vendor is neither an indication of quality nor a recommendation.

### **Alvao**

Alvao is headquartered in Vysočina, Czech Republic, and has a predominantly European customer base (at least 85%). It has local offices in two European countries, covering the western and eastern European subregions. Alvao's ITSSM product contains local language support for 3 of 13 listed European languages (plus Czech).

### **Efecte**

Efecte is headquartered in Espoo, Finland, and has a predominantly European customer base (at least 85%). It has local offices in four European countries, covering the western European subregion. Efecte's ITSSM product contains local language support for 5 of 13 listed European languages.

### **Isilog**

Isilog is headquartered in Nantes, France, and has a predominantly European customer base (at least 85%). It has local offices in France. Isilog's ITSSM product contains local language support for 2 of 13 listed European languages.

### **Pat**

Pat is headquartered in Milano, Italy, and has a predominantly European customer base (at least 85%). It has local offices in three European countries, covering the western European subregion. PAT's ITSSM product contains local language support for 5 of 13 listed European languages.

### **ProactivaNET**

ProactivaNET is headquartered in Gijón, Spain, and has a moderate percentage (25% to 59%) of customers based in Europe. It has local European offices in Spain. ProactivaNET's ITSSM product contains local language support for 2 of 13 listed European languages.

### **TOPdesk**

TOPdesk, established in 1993, is headquartered in Delft, Netherlands, and has a predominantly European customer base (at least 85%). It has local offices in six European countries, covering the western and eastern European subregions. TOPdesk's ITSSM product contains local language support for 10 of 13 listed European languages.

## Wendia

Wendia is headquartered in Bern, Switzerland, and has a significant percentage (60% to 84%) of customers based in Europe. It has local offices in eight European countries, covering the western and eastern European subregions. Wendia International's ITSSM product contains local language support for 7 of 13 listed European languages.

## Middle East Context

🕒 20 October 2015

**Analyst(s):** Biswajeet Mahapatra

GCC I&O leaders buying IT service support management tools are very brand-conscious and prefer buying from well-established large and known companies. They should rather look at a solution that fits their basic requirements of ITSSM and not the largest, most feature-rich brand.

### Market Differentiators

The Gulf Cooperation Council (GCC) market is different from the other regions as there are almost no major local vendors in the IT service support management (ITSSM) space. GCC IT leaders have to rely on vendors from outside the region. Almost all the ITSSM vendors either are represented through partners in this region, or have their external offices in Europe and India help with the sales and support functions in the GCC region.

As per "Forecast: Enterprise Software Markets, Worldwide, 2012-2019, 3Q15 Update," ITSSM market in Saudi Arabia alone is forecast to grow by 3.76% in 2016 to \$2.5 million, whereas it is expected to grow by 3.78% to \$7.5 million in the rest of Middle East and Africa (not including Turkey, Saudi Arabia and Israel). This is lower than the global average forecast growth of 7.08% and North American growth of 7.92% in 2016.

Growth in this region is lower as ITSSM is still not considered critical for business; most IT leaders are still using homegrown ticketing applications or spreadsheets to track incidents; maturity of companies is lower than the global average; IT leaders are still very application (ERP)-focused; and most of the IT service support is outsourced.

Very few of the ITSSM vendors mentioned in the Magic Quadrant have their solutions "Arabized." Arabic support is always preferred in government accounts in this region. Most customers in GCC, unlike most customers in North America and Europe, buy ITSSM tools for incident and problem management capabilities. However, most of the ITSSM buying decisions are not made in isolation. ITSSM tools in this region are brought along with a host of other infrastructure management solutions, which include data integration tools, application performance monitoring, automation tools, network performance monitoring and diagnostics, IT asset and financial management tools, and IT project and portfolio management software applications.

The vendors listed in the "Notable Vendors" section are those covered in "Magic Quadrant for IT Service Support Management Tools" that have GCC presence.

## Considerations for Technology and Service Selection

IT leaders can choose any of the vendors mentioned in this report. However, apart from the functions and capabilities, customers should look at the quality of local support, dependability of the local partners and support history of the partners as some of the key criteria while choosing a vendor.

## Notable Vendors

Vendors included in this Magic Quadrant Perspective have customers that are successfully using their products and services. Selections are based on analyst opinion and references that validate IT provider claims; however, this is not an exhaustive list or analysis of vendors in this market. Use this perspective as a resource for evaluations, but explore the market further to gauge the ability of each vendor to address your unique business problems and technical concerns. Consider this research as part of your due diligence and in conjunction with discussions with Gartner analysts and other resources.

### **Axios Systems**

Axios has offices in Riyadh, Saudi Arabia, and Dubai and Abu Dhabi, United Arab Emirates. It partners with Awal IT Systems, Mobinets, Tamkeen, CNS and Paramount Computer Systems. Partners provide Level 1 and Level 2 support. "Assist" is localized in Arabic. The interface is translated out of the box, along with all core data entities.

### **BMC Software**

BMC has its own regional offices in Dubai and Riyadh, and is represented in the region through partners that include CyberMAK Information Systems, Devoteam Middle East, Diyar United Co., Momenta Global, Almoayed Group, Al Moammar Information Systems KSA, Quintica Group FZ, Emdad Solutions, Fourth Dimension Systems, and Syntax Diamond Information Systems. Partners provide the Level 1 support, and Level 2/3 support is provided from BMC centers in India, Europe and Americas. Remedy and MyIT support Arabic.

### **CA Technologies**

CA has offices in Riyadh and Dubai in the GCC region. It is also represented by local partners. Support is provided in the GCC region from Europe and India. CA Service Management and CA Cloud Service Management are not Arabized.

### **Heat Software**

Heat does not have a local office in the region, and is represented by partners such as Strategic Consultants International, Metco and InconCRM. These partners cover the entire Middle East

region, including GCC. They provide Level 1 support, whereas Heat Software provides Level 2 and Level 3 support. As of now, Heat Software does not support Arabic language.

## HP

HP has offices in Kuwait, Dubai, Abu Dhabi, Riyadh, and Doha, Qatar. HP also has a good partner network in the GCC region, which includes MDS, Emitac, Wipro, Ejada, Intertec Systems, ITPS, Mannai, Tawasul and eSense, to name a few. HP's ITSSM solution supports Arabic language out of the box for both user and administrative interfaces. Arabized manuals and training material are also available.

## Landesk

Landesk does not have a direct presence in the GCC region. GCC is covered by Landesk's office in France. Landesk software is not available in Arabic, although support is. The company works through partners in this region, including Intertec Systems, Ixcel Technologies and Tjded Technology. Level 1 and Level 2 support is provided by local partners, whereas Level 3 is provided in the first instance from Europe, with follow-the-sun support also available for high-impact requests.

## ServiceNow

Service Now does not have an office in this region, though it is supported by partners in this region. They have offices in Europe and Turkey that support this region. By default, ServiceNow does not support Arabic, but with its Dublin release, it has started supporting I18N to enable internationalization and localization.

**The other vendors listed in the Magic Quadrant are not present in the GCC region and do not support Arabic language.**

## Gartner Recommended Reading

*Some documents may not be available as part of your current Gartner subscription.*

"Critical Capabilities for IT Service Support Management Tools"

"IT Service Support Management Tool Acquisitions Must Be Based on I&O Maturity"

"ITSSM Tool Selections Require an ITSM and ITOM Tooling Strategy"

"Before Purchasing an ITSSM Tool, Compare Pricing and Licensing"

"Market Guide for IT Service Catalog Tools"

"Redesign Your ITSSM Tool RFP Process for Better Results"



## "How Markets and Vendors Are Evaluated in Gartner Magic Quadrants"

### Evidence

<sup>1</sup> As of 6 July 2015, ITSM Portal shows 420 products. Although some are duplicates, there are products that Gartner has encountered that are currently missing from that list.

<sup>2</sup> Gartner's report "Market Share: All Software Markets, Worldwide, 2014" analyzes market share data for ITSSM vendors as part of overall IT operations software revenue. This market has grown from \$1.3 in 2010 to \$1.8 billion in 2014.

<sup>3</sup> Based on 490 inquiries with Gartner clients purchasing ITSSM tools during the past 20 months.

### Note 1 Minisuites

Minisuites are composed of a small number of tools that address a defined need (for example, end-user management, server provisioning or configuration) or specific IT operations processes (for example, incident and problem management), or that are aimed at a specific user or buying center (for example, network administration). Minisuites can also reflect how vendors group, integrate, market and sell their products.

## Evaluation Criteria Definitions

### Ability to Execute

**Product/Service:** Core goods and services offered by the vendor for the defined market. This includes current product/service capabilities, quality, feature sets, skills and so on, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

**Overall Viability:** Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

**Sales Execution/Pricing:** The vendor'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/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 vendor's history of responsiveness.

**Marketing Execution:** The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional initiatives, thought leadership, word of mouth and sales activities.

**Customer Experience:** Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements and so on.

**Operations:** The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure, including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

#### Completeness of Vision

**Market Understanding:** Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen to and understand buyers' wants and needs, and can shape or enhance those with their added vision.

**Marketing Strategy:** A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.

**Sales Strategy:** The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service, and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

**Offering (Product) Strategy:** The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements.

**Business Model:** The soundness and logic of the vendor's underlying business proposition.

**Vertical/Industry Strategy:** The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets.

**Innovation:** Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

**Geographic Strategy:** The vendor's strategy 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.

### More on This Topic

This is part of an in-depth collection of research. See the collection:

- Four Kinds of Password Management

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