ISG Provider Lens™

SIAM/ITSM

Service Operation & Delivery

U.S. 2020

Quadrant Report

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

orange™ Business Services

March 2020

About this Report

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The research and analysis presented in this report includes research from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of March 2020 for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

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ISG Provider Lens

ISG Provider Lens™

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EXECUTIVE SUMMARY

SIAM/ITSM 2020

Digitalization is omnipresent and all-pervasive in the service integration and management (SIAM)/IT service management (ITSM) market. A shift from information technology (IT) to business technology (BT) is occurring across markets and with this the predicted extension of the IT value chain has become a reality. The customers of a company have direct access to business warehouse (BW) information or enterprise resource planning tools (ERPs) or even business applications for details about product design, availability or delivery dates. Commercial ERP is connected with smart factory systems to offer build-to-order services to customers and a smart factory can reach out to suppliers to ensure "just-in-time" delivery. In the healthcare industry, information can be shared easily. For instance, clinical data easily gathered through electronic health records can encourage R&D departments of pharmaceutical companies to undertake research to manage chronic conditions such as diabetes. Customers can use virtual reality (VR) and augmented reality (AR) to design a kitchen or select curtains for the living room using the smartphone camera. And extension at the other end of the IT value chain happens in B2B relations and in shop floor integration with the same pace.

The ITSM/SIAM market has been impacted twofold by digitalization. At the outset, IT4IT™ is a reality. Emerging technologies are available and systems of engagement together with the systems of record act as platforms for enterprise management systems (EMS). We, at ISG, are of the opinion that we need to talk about the extended enterprise system management (xESM) market as the one responsible for operating BT, and the need to secure business process operations beyond the boundaries of a company's BT environment.

Secondly, the market for service integration (SI) and managed services for Extended Enterprise Management Systems (EESM) is growing rapidly. SI is important as the BT management systems are driven by three forces: they need to support business process, the need to combine emerging technologies with legacy systems and user satisfaction. In this scenario, managed service providers (MSPs) are more in demand as there is a paucity of skilled resources to operate the complex solutions.

The SIAM/ITSM market is undergoing a fundamental change — moving from labor-intensive implementations to highly automated functions. Vendors are investing heavily in automation capabilities and using available/emerging modern technologies to unlock new value for their services. While the IT environment has been producing data since technology was invented, analytical tools are now being used to transform correlated data into information. With this intelligent automation (IA), IT can deliver incremental value by integrating the systems of record with the systems of engagement, even within IT itself. This integration is being used to make decisions or to automatically trigger activities based on extensive solution catalogs. User experience is improved by using highly sophisticated natural language processing (NLP) techniques across a large variety of input channels, resulting in a seamless and personalized human-machine experience. Early use cases are being built using machine learning (ML) capabilities to act faster and to prevent incidents.

As mentioned earlier, IT4IT™ is reality and emerging technologies are available and in use. In this respect, "in use" has to be understood as technologies being used by vendors to offer enhancements in the automation of processes. In some cases, for example in sourcing information management, such technologies allow better integration by helping to format unstructured data or by automatically sending an alert during pattern recognition in mass event data. In use does not necessarily mean that SIAM customers are extensively using this already operational technology. We have observed that even though such technologies are available only few, very experienced or mature clients, often working in close relationship with the vendor or system integrator, are using the available solutions. For the majority of IT organizations, the lack of internal readiness prevents them from fully utilizing them.

However, compared with last year's study, the functionalities in the product offerings have increased dramatically. We, at ISG, had to take that into account while comparing the different offers; to plot the results in the charts for this report, we had to adjust the scaling heavily to ensure that the charts were not top heavy. Hence, it is necessary to understand the position of a provider in comparison with the other providers and not in comparison with its last year's position. In some cases, it may appear that a vendor has lost ground but, in reality, it has gained ground with respect to the functionality but has lost ground relative to other offerings as they simply developed faster.

Business units need to constantly improve customer experience to win and retain customers, hence, the number of IT services underpinning business solutions is constantly growing, raising the importance of structured SIAM rapidly. Most of the business-related services need to come from a large group of outside vendors to meet the requirements of companies in the ever-increasing competitive business environment. More companies understand that running and managing the IT environment today requires a two-pronged approach. First, operational IT service management activities must evolve from people-driven actions to automated, self-managed and machine-performed executions, and second, professional orchestration of the IT supply is needed, through a large number of suppliers, to build a robust service ecosystem that can deliver end-to-end business services. IT operations management is evolving into a complex environment of service elements and providers and is changing rapidly.

Traditionally, IT organizations kept core infrastructure and application management in-house. With the increasing demand for more agility, a growing number of companies are realizing that they cannot keep pace with this evolution. Labor shortages, along with the need for deep knowledge about a variety of new and complex technologies, is compelling IT departments to re-think their management approaches. The demand for managed services is growing, and vendors are developing high-tech solutions with focus on the zero-touch operating model to guarantee a sustainable business IT environment.

Vendors in this market can be separated into three groups. One group comprises the classic vendors that focus on developing feature-rich tool sets that are easy to implement, easy to enrich and can be leveraged by IT department, MSPs or system integrators. Even though the IT market is moving toward anything-as-a-service (XaaS) delivery models, the market is still favorable for on-premise installations. Local legal requirements and legacy installations are the driving forces here. This market segment is mainly split between ServiceNow, BMC Software, Cherwell, Microfocus, Broadcom/CA Technologies, Atlassian, and Ivanti. However, there are some smaller players that offer feature-rich products that have gained a certain market share, such as 4me, Matrix42 or Mphasis.

The second group comprises consulting and IT service companies that use the platforms of the first group and enhance the base functionality with specific features based on their industry-specific or other specialized knowledge. These vendors range from global IT services companies such as Accenture, Deloitte or EY to focused local players such Plat4mation, Trianz, Fusion GBS, FlyCast Partners and RightStar. These companies offer a variety of services, including implementation consultancy and managed services.

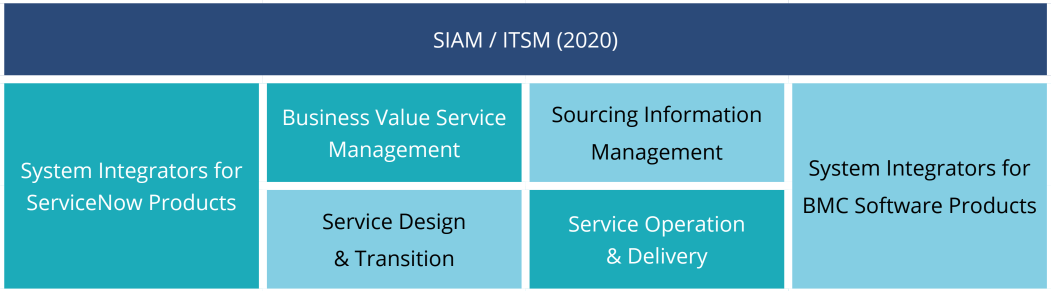
The third group comprises IT service companies that have, over time, developed feature-rich, proprietary tool sets normally used only in a managed service environment. Some of the companies in this group are Capgemini, HCL, Infosys, LTI, Orange and TechM. This study looks at all of these product solutions independent from the delivery model and provisioning.

Given the high variances in client maturity regarding SIAM, the success of vendors in the market depends on their ability to demonstrate extensive knowledge of ITSM, SIAM and governance, risk and compliance (GRC) processes. This knowledge needs to feed an internal reference model used to define a robust, agile and secure SIAM framework that combines people, processes and tools seamlessly. In some cases, the reference model is being supplemented with some already established models in the market such as IT4IT™, defined by The Open Group. Proprietary assessment and coaching methodologies, together with high transformation skills and a flexible pricing model, are additional and important success factors in this market.

Even though this market is not large, it is one of the fundamental pillars of every digital transformation strategy. With IT operational budgets still tight, and margins somewhat skinny, this market is clearly a very attractive one for vendors; given their strategic position inside client organizations, SIAM/ITSM vendors are playing a key role and are about to get a seat at the internal IT and business-decision table. Achieving such a position requires a great deal of trust. This is either being gained through long-term, trusted relationships or through high delivery quality, resulting in better user experience or a high customer satisfaction (CSat) or net promoter score.

Introduction

Simplified illustration



Source: ISG 2020

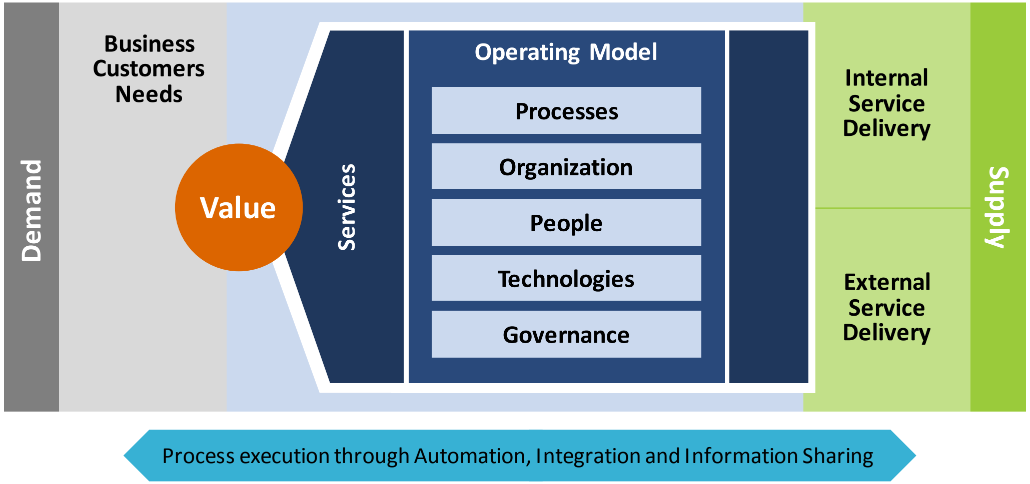
Definition

SIAM, as a part of enterprise service management (ESM), is a holistic approach used to manage a dynamic, multivendor and multiservice ecosystem. It is the result of the evolution of ITSM, IT operations management (ITOM) and the governance, risk and compliance (GRC) discipline. While ITSM is historically focused on designing business-related services based on existing IT services and on managing individual service performance, SIAM focuses on adding additional services through a full-scale service lifecycle; at the same time, it integrates such individual services into an end-to-end, business process-oriented approach that includes vendor performance and management issues. While the integration of the various processes and management disciplines become important, enterprises are looking for solutions that support such efforts. The solutions can be products that support internal teams or external service providers. This study focuses

Definition (cont.)

on products/tools available in the market and on companies that enhance such tools through extensions and add-ons. It encompasses solutions that are being built by service providers, but it only analyzes the functional capabilities of such tools and solutions and not the service delivery capabilities of the providers.

In addition, the study analyzes the companies in the U.S. that provide system integration services for the above-mentioned combined system of records and/or systems of engagement ecosystems. For better comparison, this study focuses on system integrators (SIs) that deliver consulting and services on the two platform systems that have found high acceptance in the U.S. market: BMC software's suite of Helix® and Truesight® products, and ServiceNow's current release, New York, and forthcoming release, Orlando. ISG recognizes that there are several other, well-designed and functionally rich platforms, but for the sake of not over-burdening the study we have decided to focus on the above-mentioned two systems. Some of the SIs we have analyzed offer services for other platform systems such as Cherwell, Micro Focus, Broadcom/CA and Atlassian, but do not have any impact on the analysis in this study.



Source: ISG 2020

Definition (cont.)

ISG studies are intended to anticipate the investigation efforts and buying decisions of typical enterprise clients. These clients will benefit from a study that examines the functional capabilities while contemplating a significant strategy transformation, making infrastructure purchase-versus-rent decisions, supporting the implementation of agile practices or incorporating automation into their environments. The study comprises multiple quadrants covering a spectrum of process automation capabilities that an enterprise client would require. Our research investigates several of the tool capabilities (templatized data structures, automated process policies, integration capabilities and standardized outputs) and the support capabilities that provide consulting and managed services in addition to the tool solutions.

Scope of the Report

The scope of the report covers product functionalities and service portfolios offered by vendors in the heterogenous SIAM environment. Due to the broad scope and non-standardized SIAM definitions, this report is based on a sub-set of ISG's own SIAM reference model, where a key focus area are the automation capabilities delivered by vendors for the operational tasks inside SIAM. The more sophisticated areas covering GRC issues are excluded from this report and may be covered in another ISG Provider Lens™ study.

The six quadrants of the report focus on the processes through a plan-design-manage approach underlined with an information layer feeding the three operational process clusters. Two quadrants focus on the SI companies specialize in either ServiceNow's platform or BMC Software's offerings around the Helix® or TrueSight® product sets.

Definition (cont.)

The six quadrants that are covered are:

- Business Value and Service Management (BVSM): It covers the processes for demand analysis, catalog management, chargeback and customer satisfaction.
- IT Service Design (SD): It incorporates all service design (SD)-related processes, ranging from capacity availability management to service validation and deployment.
- IT Service Operation (SO): It covers all operational processes for event and problem management, including all reporting and improvement activities.
- Sourcing Information Management (SIM): It is the underlying process cluster that gathers, stores and provides data to the management processes; it includes data homogenization and golden record management within the configuration management database (CMDB) to support asset, configuration and access management.
- Service Integrators for BMC Software products (BMCSI): It includes companies that are dedicated to help clients design an architecture, build, customize and/or operate SIAM/ITSM solutions primarily based on the Helix® and TrueSight® offerings, and also recognizes other products such as ControlM®.
- Service Integrators for ServiceNow's products (SNSI): It includes companies that are dedicated to help clients design an architect, build, customize and/or operate SIAM/ITSM solutions based on the current release, New York, while it also recognizes the support of other recent releases.

Provider Classifications

The ISG Provider Lens™ quadrants were created using an evaluation matrix containing four segments, where the providers are positioned accordingly.

Leader

The "leaders" among the vendors/providers have a highly attractive product and service offering and a very strong market and competitive position; they fulfill all requirements for successful market cultivation. They can be regarded as opinion leaders, providing strategic impulses to the market. They also ensure innovative strength and stability.

Product Challenger

The "product challengers" offer a product and service portfolio that provides an above-average coverage of corporate requirements, but are not able to provide the same resources and strengths as the leaders regarding the individual market cultivation categories. Often, this is due to the respective vendor's size or their weak footprint within the respective target segment.

Market Challenger

"Market challengers" are also very competitive, but there is still significant portfolio potential and they clearly lag behind the "leaders." Often, the market challengers are established vendors that are somewhat slow to address new trends, due to their size and company structure, and have therefore still some potential to optimize their portfolio and increase their attractiveness.

Contender

"Contenders" are still lacking mature products and services or sufficient depth and breadth of their offering, while also showing some strengths and improvement potentials in their market cultivation efforts. These vendors are often generalists or niche players.

Provider Classifications (cont.)

Each ISG Provider Lens™ quadrant may include a service provider(s) who ISG believes has a strong potential to move into the leader's quadrant.

Rising Star

Rising stars are mostly product challengers with high future potential. When receiving the "rising stars" award, such companies have a promising portfolio, including the required roadmap and an adequate focus on key market trends and customer requirements. Also, the "rising stars" has an excellent management and understanding of the local market. This award is only given to vendors or service providers that have made extreme progress towards their goals within the last 12 months and are on a good way to reach the leader quadrant within the next 12-24 months, due to their above-average impact and innovative strength.

Not In

This service provider or vendor was not included in this quadrant as ISG could not obtain enough information to position them. This omission does not imply that the service provider or vendor does not provide this service.

SIAM/ITSM - Quadrant Provider Listing 1 of 3

	System Integrators for ServiceNow Products	System Integrators for BMC Software Products	Business Value Service Management	Service Operation & Delivery	Service Design & Transition	Sourcing Information Management
4me	Not In	Not In	Market Challenger	Contender	Contender	Contender
Accenture	Leader	Not In	Not In	Not In	Not In	Not In
Atos	Leader	Not In	Not In	Not In	Not In	Not In
BMC	Not In	Not In	Market Challenger	Leader	Market Challenger	Market Challenger
Capgemini	Rising Star	Product Challenger	Leader	Leader	Leader	Leader
Cherwell	Not In	Not In	Contender	Product Challenger	Contender	Contender
Cognizant	Leader	Not In	Product Challenger	Not In	Not In	Not In
Column Technologies	Not In	Leader	Not In	Not In	Not In	Not In
Deloitte	Leader	Not In	Not In	Not In	Not In	Not In
DXC	Not In	Not In	Market Challenger	Market Challenger	Leader	Leader

SIAM/ITSM - Quadrant Provider Listing 2 of 3

	System Integrators for ServiceNow Products	System Integrators for BMC Software Products	Business Value Service Management	Service Operation & Delivery	Service Design & Transition	Sourcing Information Management
EY	Contender	Not In	Not In	Not In	Not In	Not In
Flycast Partners	Not In	Rising Star	Not In	Not In	Not In	Not In
Fusion GBS	Not In	Leader	Not In	Not In	Not In	Not In
HCL	Leader	Not In	Leader	Leader	Leader	Leader
Highmetric	Contender	Not In	Not In	Not In	Not In	Not In
IBM	Leader	Not In	Not In	Not In	Not In	Not In
Infosys	Leader	Product Challenger	Leader	Product Challenger	Product Challenger	Product Challenger
InSource	Contender	Not In	Not In	Not In	Not In	Not In
LTI	Leader	Leader	Rising Star	Rising Star	Rising Star	Rising Star
Matrix42	Not In	Not In	Not In	Not In	Contender	Not In

SIAM/ITSM - Quadrant Provider Listing 3 of 3

	System Integrators for ServiceNow Products	System Integrators for BMC Software Products	Business Value Service Management	Service Operation & Delivery	Service Design & Transition	Sourcing Information Management
Mindtree	Market Challenger	Not In	Not In	Contender	Not In	Not In
Mphasis	Not In	Not In	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Orange Business Services	Contender	Contender	Leader	Rising Star	Leader	Leader
Plat4mation	Rising Star	Not In	Not In	Not In	Not In	Not In
RightStar Systems	Not In	Rising Star	Not In	Not In	Not In	Not In
ServiceNow	Not In	Not In	Leader	Leader	Market Challenger	Leader
Stefanini	Contender	Not In	Not In	Not In	Not In	Not In
Tech Mahindra	Contender	Not In	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Trianz	Rising Star	Not In	Not In	Not In	Not In	Not In

SIAM/ITSM Quadrants

ENTERPRISE CONTEXT

Service Operations Quadrant

This quadrant report is relevant for U.S. enterprises of all sizes and across all industries to evaluate tools that automate IT processes and execute operational, event-driven tasks and subsequently deliver value through business technology services.

The report evaluates and positions service providers in the U.S. market for their solutions in automating service operations, the process framework required to ensure a robust IT service delivery. It covers event, incident and problem management as well as service-level management and continual service improvement.

While U.S. clients have widely adopted standard process such as ITIL®, the use of available solutions that utilize emerging technologies for automation is lagging behind. These firms seek strong consultancy offerings in combination with highly functional products to be able to turn internal, long-lasting practical experiences into machine-enabled intelligence.

Solution providers in the region try to help clients to achieve operational excellence by automating repetitive tasks as much as possible. By implementing machine learning and artificial intelligence techniques, the available solutions support event handling while trying to prevent the occurrence of new incidents.

ISG sees two different approaches in the offerings available. Classical SIAM/ITSM single-platform systems utilize a broad partner network to enhance strong base functionalities. On the other hand, established IT service providers port their extensive functionality of blueprint-based, self-developed SIAM/ITSM architectures to available platform systems.

The solutions use mass event data handling and pattern recognition to enable machine-learning for managing problems automatically. Artificial intelligence is used to achieve self-healing infrastructures.

This report is relevant for:

CIOs who want to understand the approaches to self-healing infrastructures in order to deliver substantial savings while improving service quality.

IT and project leaders, who are responsible for increasing service quality while driving efficiencies in operations, to gain market insights into the different capabilities of the leading tool providers in this report.

VP of sourcing and vendor management to get insights about the use of emerging technologies to manage service levels across a broad multi-vendor ecosystem.

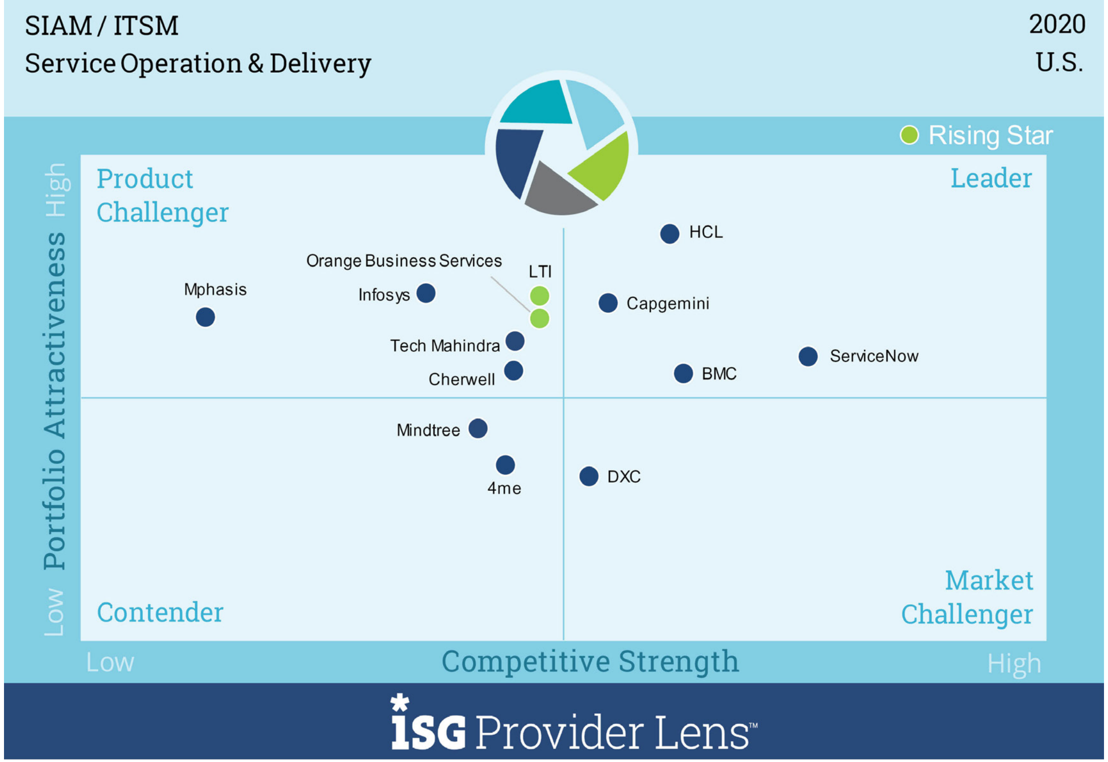
SERVICE OPERATION & DELIVERY

Definition

This quadrant addresses the area of IT service operations and the processes required to deliver them the clients. Service operations is the area of classic ITSM processes needed to deliver defined IT services to clients in a robust manner.

The processes focus on three well-known clusters:

- Event and incident management to automatically identify areas in the environment that need to be managed;
- Problem management, including user help desk, to find and fix problems and communicate with the end user;
- Post-event area that includes reporting, service level agreement (SLA) management to ensure quality in the service delivered and to continuously enhance that quality.



Source: ISG Research 2020

SERVICE OPERATION & DELIVERY

Definition (cont.)

Facility management is also a part of this process group to capture facility-related events that may impact service delivery quality. Apart from the more classic automation of process functions, this area of the solution market is currently undergoing a fundamental change due to the availability of enhanced technical capabilities. Massive and unstructured event-data, data analytics paired with AI and cognitive computing offer a wide range of enhanced functionalities that allow for higher automation in correlating and actioning. IoT and smart metering and intelligent sensors in products enable clients to establish programs that will lead to continuously availability of business services based on robust IT infrastructure delivery.

ISG's clients that are currently looking for products and solutions in this market or are already active in this space will double their investments, on an average, for new technologies like RPA, autonomics, virtual customer agents, NLP and ML.

In this market segment, we see companies with the following characteristics:

- Build the tools and provide the solution either through classic on-premise installation or through Software-as-a-Service (SaaS) delivery models;
- Build the tools and provide the solution in pure-play SaaS environments;
- Use existing solutions and provide the implementation services dedicated to this solution;
- Use existing solutions, develop specific extensions and provide implementation services for a variety of solutions;
- All the above.

SERVICE OPERATION & DELIVERY

Eligibility Criteria

- Functional breadth of product offerings
- Use of modern technologies to reduce human intervention;
- Product strategy utilizing emerging technologies such as AI, natural language processing, cognitive computing and machine learning;
- Adoption of social media and omni-channel technologies and virtual agent technology;
- Customer satisfaction;
- Use of templates and pre-defined routines, reusable use cases and other assets while installing the solution;
- Support capabilities in the U.S.

Observations

This quadrant is the most mature in this study as the activities and tasks undertaken to deliver IT to its users have the longest history and the highest maturity in IT. Software products have been developed ever since the first standardized IT management protocols were defined in 1988. The leader quadrant in this SIAM/ITSM discipline is dominated by two pure-play product vendors, of which one has its roots in those early days. Currently, several IT service providers use one or both product suites to build or supplement their own offerings.

Most of the tasks in the processes that are a part of this discipline can be heavily automated using emerging technologies that are widely used today. The use of AI, ML or cognitive computing is common across all vendors in this study. ISG anticipates an increase in customer needs, hence, vendors in the market will continue to deliver automation and integration to maintain their leading positions. Strong partner networks, especially in technology development, will be the cornerstone for success in the future. Management app stores as a part of management solutions will soon become the norm.

SERVICE OPERATION & DELIVERY

Observations (cont.)

U.S. clients benefit from strong local presence of various providers. In the recent years, vendors have been consolidating their resources; leaders in the quadrant have considerable support resources that can benefit their clients. With strong innovation plans and strategies, we expect a large number of heavily automated, autonomous and self-contained management capabilities and use cases.

Apart from leaders, some other vendors in this space to look out for would be: Atlassian with Opsgenie and Jira Service Desk, IBM with IBM ITSM, Microfocus with its ITOM platform and SolarWinds with its IT Operations Manager.

We have identified the following companies as leaders in this quadrant:

- **Capgemini** has a strong approach to DevOps paired with agile methods being used to extend its digital ecosystem transformation initiatives supporting U.S. clients to quickly capture the value of Digital SIAM. While supporting service operations and delivery, the company focuses on enabling clients report optimal business results.
- **BMC** has been a leader because of its expertise in operations management. The rich functionalities of its two product families Helix and TrueSight offer optimal operational support. The solutions utilize emerging technologies to deliver AIOps to dynamically learn client behavior, correlate, analyze, and prioritize event data, thus allowing IT operations to predict, find and fix issues faster.

SERVICE OPERATION & DELIVERY

Observations (cont.)

- **HCL** has out-of-the-box offerings on platforms such as ServiceNow, Cherwell and BMC. With DRYiCE™, HCL offers a feature rich tool set that heavily automates the SIAM Service Operations processes. This makes it a leader in SIAM, offering SIAM solutions as part of its DRYiCE® division.
- **ServiceNow** is again a leader in this year's study and uses its CMDB-centered platform to deliver capabilities for the core service operation processes, namely, problem, incident and continual Improvement. A case-management system from the grass roots, the Virtual Agent, will allow IT organizations to add more sophistication to user experience.
- **LTI** is a rising star in this quadrant. As all processes in this quadrant are used to communicate business requirements to convert them to relevant business services, LTI's NLP-driven Virtual Analyst, Lymbyc LENI, allows users to conversationally access information and insights. With this approach LTI's clients are able to "do less, faster, better, more."
- **Orange Business Services** is a rising star in this quadrant. The company utilizes the ServiceNow functionality and integrates it into its own, extended Service Management Suite. The solution is focused on improving Quality of Experience (QoE) by respective IT user, a very important measure in the days of customer centricity.

RISING STAR: ORANGE BUSINESS SERVICES

Overview

Orange Business Services is a leading provider of communication services around the globe. It has a client base of more than 273 million, which reflects high quality professional service delivery. To stay competitive, the company is making significant investments in numerous innovation centers with its extensive people resources. The company has built the expertise to serve its large number of clients with quality and efficiency; the professional services it offers has enabled it to become a major player in digital innovations and over the years has become the ideal partner for digital transformation.

Orange Business Services defines SIAM (or MSI as the company calls it) as a solution that allows an enterprise to achieve seamless governance, unification, standardization and end-to-end management of their services. To achieve this within a reasonable timeframe and with adequate investments, the company Orange has developed a classic three-phased approach, namely, discover, design and build, and run and operate.

Strengths

Strong experience in emerging technologies: As a ServiceNow Premier Service Provider Partner, the company integrates the ServiceNow functionality into its Service Management Suite.

Strong service operations: While the company focuses on end-to-end quality of experience (QoE), performance monitoring and analytics are key to the services it offers. Delivering in parlance with business KPI's ensures customer satisfaction.

Strong alliances: The numerous alliances with leading edge technology providers ensures continuous innovations in the company's solution offerings.

Caution

The solutions offered by the company are only available as managed services, hence, clients that are looking for a solution that they can use on their own will be discouraged from approaching the company.

The company does not offer its services to relatively small companies.

2020 ISG Provider Lens™ Rising Star

Orange Business Services has significant experience in managing large supplier ecosystems and delivering great value to enterprise customers.

Methodology

METHODOLOGY

The research study "ISG Provider Lens™ 2020 – SIAM/ITSM" analyzes the relevant software vendors/service providers in the US market, based on a multi-phased research and analysis process. It positions these providers based on the ISG Research methodology.

The study was divided into the following steps:

1. Definition of SIAM/ITSM market
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & use cases
4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)
5. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
6. Use of the following key evaluation criteria:
   - Strategy & vision
   - Innovation
   - Brand awareness and presence in the market
   - Sales and partner landscape
   - Breadth and depth of portfolio of services offered
   - Technology advancements

Authors and Editors

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With more than 40 years of IT industry experience, Mr. Peichert has profound knowledge, in particular, in areas such as outsourcing, IT operations, organizational design and IT/Business alignment. In his ISG role as an independent consultant, he supports customers to help them make strategic and tactical decisions and set up and optimize organizations and processes to enable them to leverage IT and service solutions.

Lutz joined ISG in 2017 when ISG acquired Experton Group. From 2014 on Lutz served as a COO at Experton Group responsible for all research and consulting activities. Until mid-2014 Lutz worked as Vice President and Principal Analyst for Forrester Research, where he was responsible for the "Sourcing and Vendor Management" practice and also published Forrester's "SVM Practice Playbook". Prior to that he worked 10 years for META Group as a Principal Director within the CIO Consulting Division.

Lutz is an experienced speaker on national and international conferences, such as the National Dutch Outsourcing Conference, the German Computerwoche Forum, the Slovak CIO Conference and other events.

Lutz started his career in the late 1970ies as a system manager at the German Navy. He has a vocational diploma and has completed training as radio and TV technician.

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Jan Erik Aase is a director and principal analyst for ISG. He has more than 35 years of collective experience as an enterprise client, services provider, ISG advisor and analyst. Jan Erik has overall accountability for the ISG Provider Lens™ reports, including both the buyer-centric Archetype reports and the Quadrant reports focused on provider strengths and portfolio attractiveness. He sets the research agenda and ensures the quality and consistency of the Provider Lens™ team.

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