

VENDOR SELECTION MATRIX™ OBSERVABILITY PLATFORMS

THE TOP GLOBAL VENDORS 2022

Research In Action

May 2022

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RESEARCH IN ACTION
independent research & consulting

FOREWORD

Every year, Research In Action surveys 10,000+ enterprise IT and business decision makers in order to gain insights on strategy, investments and ongoing challenges of technology innovation in the IT and Marketing Automation realm. These surveys give us access to a wealth of direct and unfiltered feedback from the buyers. It also helps us to understand how buying decisions are made in today's business environment. The Vendor Selection Matrix™ is a primarily survey-based methodology for vendor evaluation where 63% of the evaluation is based on a survey of enterprise IT or business decision makers and 37% on the analyst's judgement. The analyst's input is fed by a combination of intensive interviews with software or services vendors and their clients, plus their informed, independent point-of-view as an analyst. All of this combines to make Research in Action Vendor Selection Matrix™ reports so unique. This approach is one of the key differentiators of Research In Action in market research. For this report we interviewed 1,500 enterprise IT and business managers with budget responsibility in enterprises globally. We selected those vendors which achieved the best evaluations scores from the buyers but disregarded those with fewer than 15 evaluations.

While we see continuous growth and adoption of modern cloud applications, this growth has created additional complexities in the technology ecosystem. As a result, the old ways of monitoring and managing applications have become inefficient and have many visibility gaps. DevOps teams, Site Reliability Engineers and Developers have started looking for new approaches to meet the growing complexity requirements. Understanding how the highly distributed cloud applications work and predicting incidents is one area where teams look for automation tools. The other side is the data side. Telemetry required for understanding how highly distributed cloud applications behave has grown exponentially as well. That's where Observability comes into play. Observability provides insight into the performance of cloud and other environments based on analytics of a vast amount of telemetry data (metrics, traces, histograms, logs, events) collected from a diverse set of data sources, such as cloud applications and services, infrastructures, Kubernetes, etc. Additionally, Observability allows the contextual insight across development, IT operations and business issues, enabling teams to come together to uncover new insights essential for every business – digital or non-digital.

This new report is intended as a useful guide to important Observability market trends, and key top global Observability Platforms as selected by 1,500 buyer companies based upon product, company and service quality. The research should help decision makers across IT and business to determine which Observability Platforms fit requirements for an observability journey. The study should be used as a starting point before a more detailed evaluation of Observability Platforms.

You only live once (YOLO)!

Eveline Oehrlich

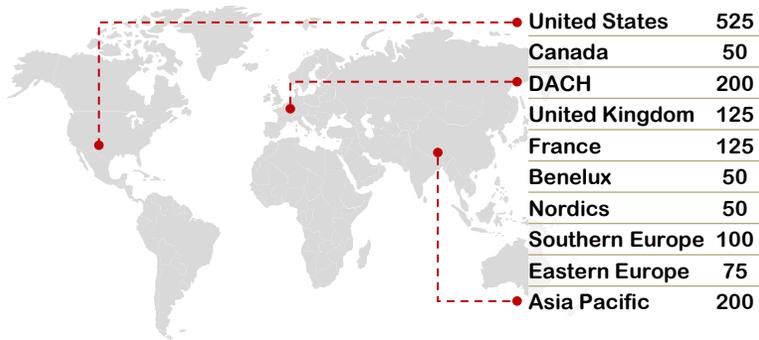
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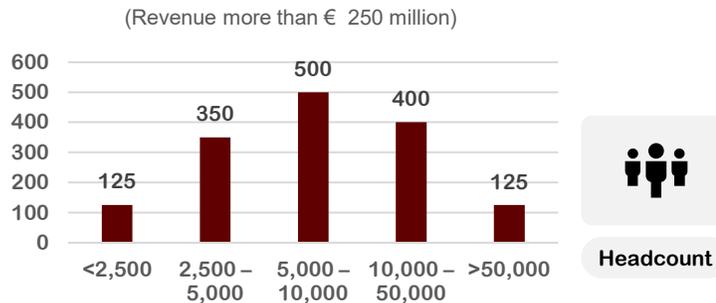


OUR SURVEY DEMOGRAPHICS: IT AUTOMATION

Country Breakdown



Company Size Breakdown



Industry Breakdown

Energy	90
Financial Services	255
Government & Non Profit	90
Life Sciences	200
Manufacturing	350
Technology, Media & Telecoms	200
Consumer Packaged Goods & Retail	105
Professional Services	110
Travel & Transportation	100
Total	1,500

Job Title Breakdown

VP IT Infrastructure	160	Chief Operations Officer	60
IT Manager	150	VP Technology	50
VP IT	140	Business Executive	40
Chief Information Officer	130	Sourcing and Vendor Management	30
IT Operations Manager	125	VP IT Financial Management	30
VP Service Desk	120	VP Enterprise Architecture	25
Chief Digital Officer	90	Project Manager	25
Chief Technology Officer	70	VP Application Development	20
Project Management Office	65	VP DevOps	20
VP IT Shared Services	65	Chief Financial Officer	15
VP Operations	60	Chief Sales Officer	10
Total	1,500		

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



100,000+
Data Points



1,500
Enterprise Managers



37%
Analyst's Opinion



63%
Survey Results

The Vendor Selection Matrix™ Evaluation Methodology:

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

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

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



OUR MARKET IMPACT OVER 12 MONTHS



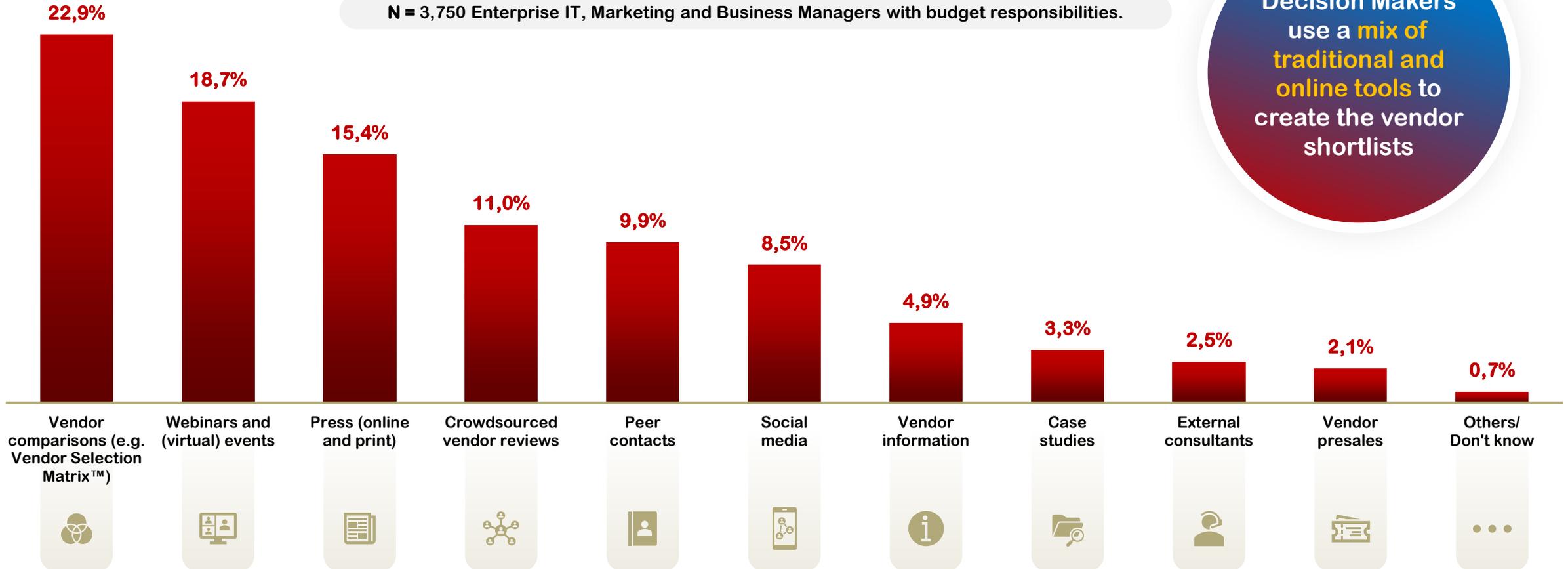
Vendor Selection Matrix™: The right mix makes all the difference
63% customer evaluations + 37% analyst's judgement = 100% success



WHAT TOOLS DO YOU USE TO CREATE THE VENDOR SHORTLIST?

N = 3,750 Enterprise IT, Marketing and Business Managers with budget responsibilities.

Decision Makers use a mix of traditional and online tools to create the vendor shortlists

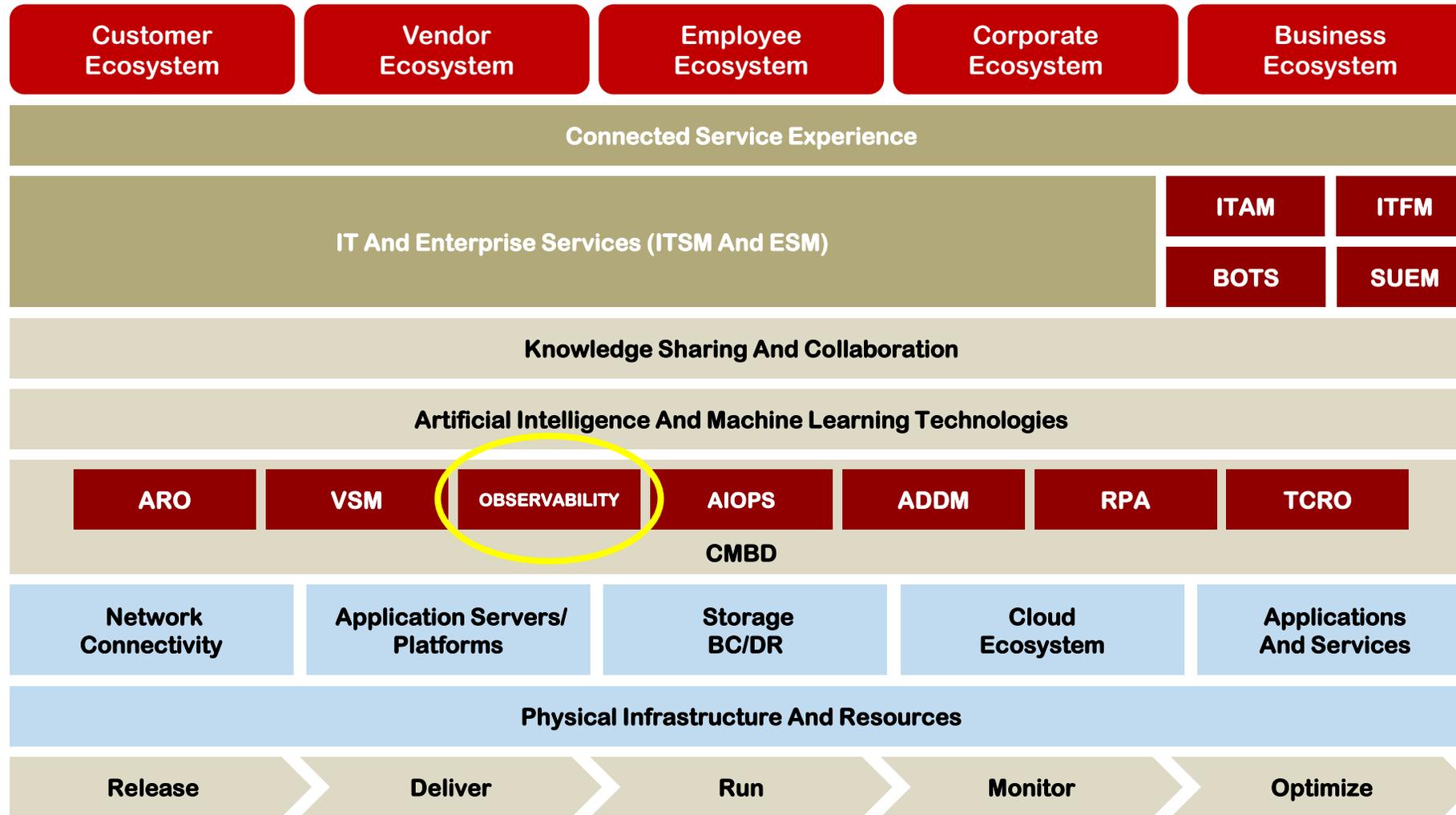


WHAT ARE OBSERVABILITY PLATFORMS?

- **Observability platforms provide visibility across a variety of details to pinpoint why there is a problem. The platforms typically leverage real and historical data from across the infrastructure and applications such as metrics, traces, histograms, logs, and events. Software solutions which fall into the observability platform category must be able to understand what is happening within a system by observing the outputs of such.**
- **The focus of observability platforms is leveraging the data across the value chain of software delivery including the macro steps of ideate, create, release and operate within modern hybrid environments.**
- **The subprocesses within software delivery, and its related personas (e.g., IT Operations, DevOps and Site Reliability Engineering) are the primary consumers of observability platforms. The platform should include the following key capabilities:**
 - **Telemetry is collected across distributed data sources as observability output**
 - **Observability output analytics through ingestion of many data points across modern hybrid and legacy environments (applications, infrastructure, security, etc.)**
 - **Integration into existing tooling or other management domain solutions already existing**
 - **Leverages synthetic and real-user monitoring**
 - **Correlates customer and business metrics to application and infrastructure performance**
 - **Leverages Machine Learning and AI to analyze volume of metrics (this is optional as much of this is part of AIOps solutions)**



THE IT AUTOMATION MARKET TEXTURE



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

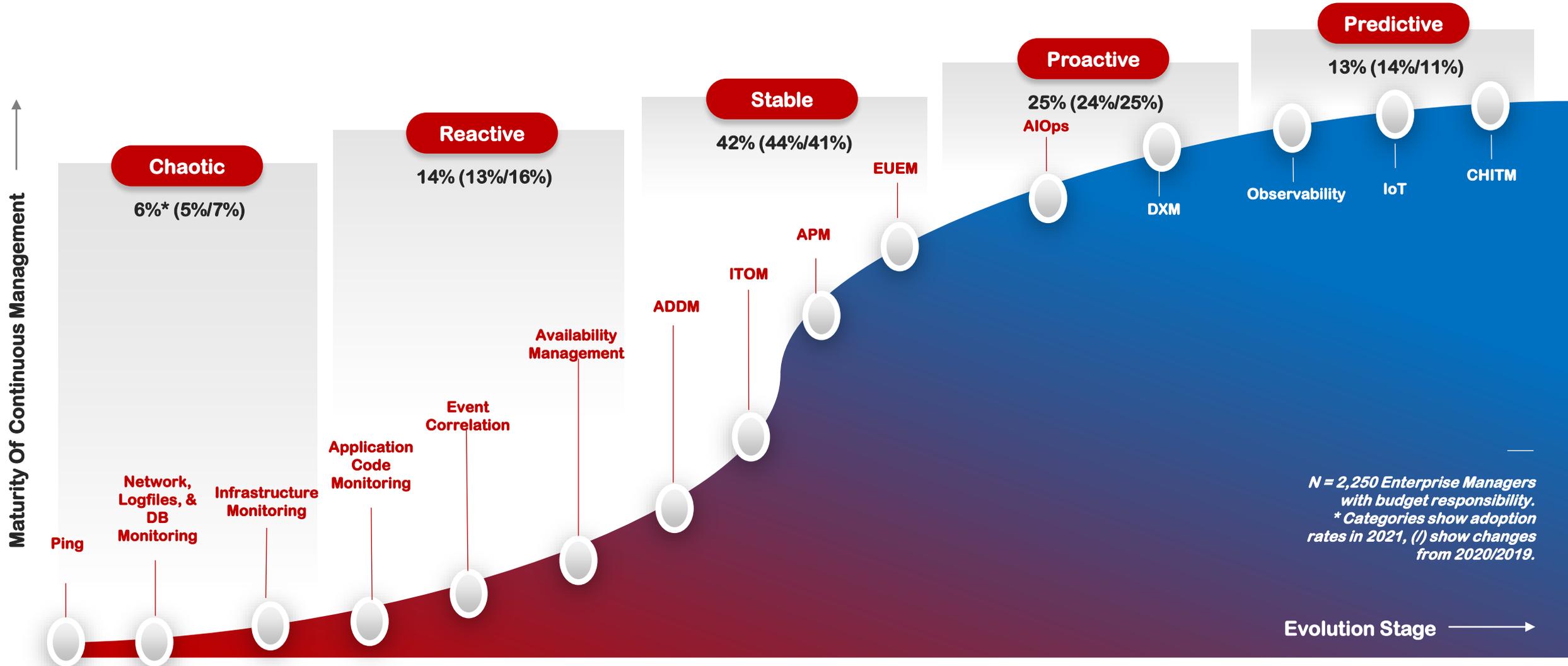
IT Automation solutions are foundational for any transformation to reduce toil and decrease manual errors.

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



CONTINUOUS MANAGEMENT (CM)

MATURITY S-CURVE 2021



N = 2,250 Enterprise Managers with budget responsibility.
* Categories show adoption rates in 2021, (/) show changes from 2020/2019.

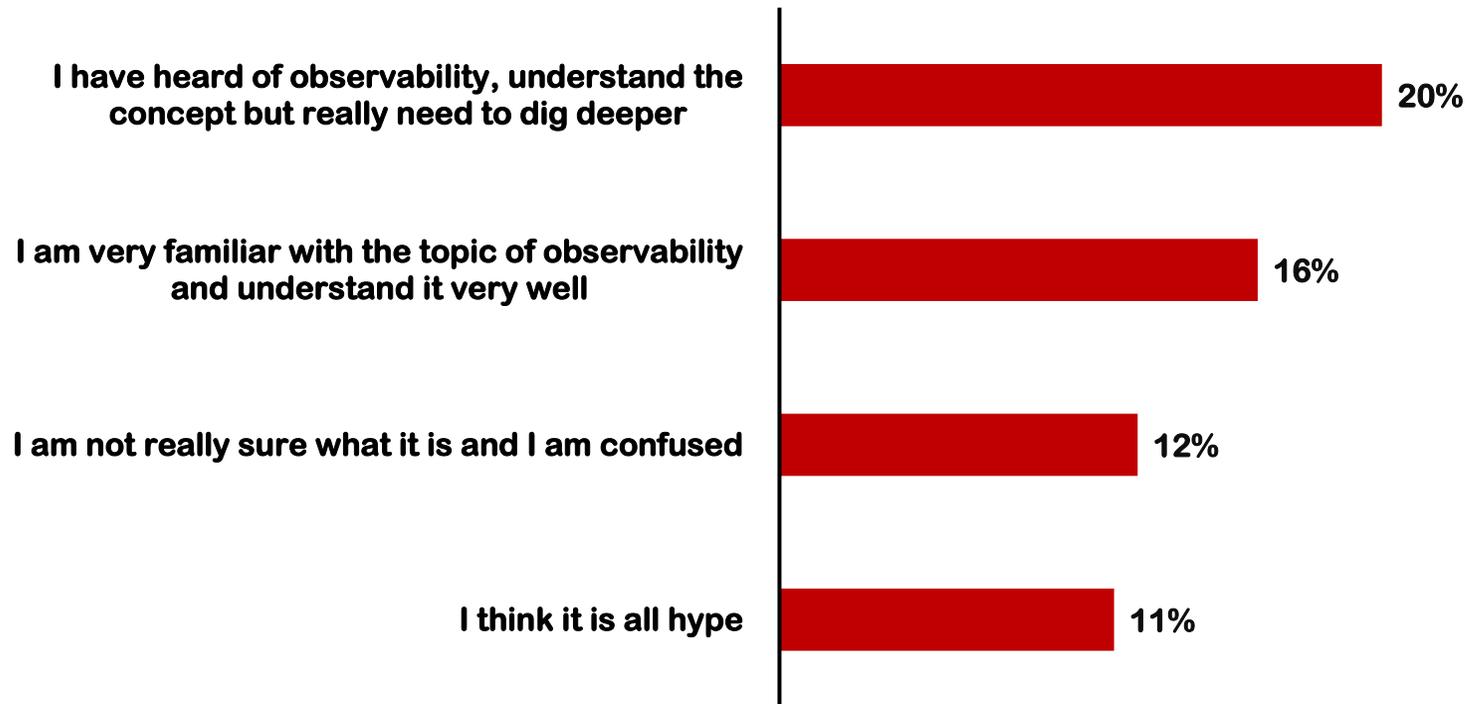
All acronyms are defined in the report Appendix



RESEARCH IN ACTION
vendor selection matrix®

RESEARCH:

GLOBAL UNDERSTANDING OF OBSERVABILITY IS NOT WHERE YOU THINK IT IS



N = 1,500 Enterprise IT and Business Managers with budget responsibilities.

Question:
What would you say about the current state of the observability software market?

There is some work to do as our survey respondents indicated the following:

20% have heard of observability but need to dig deeper to really understand it.

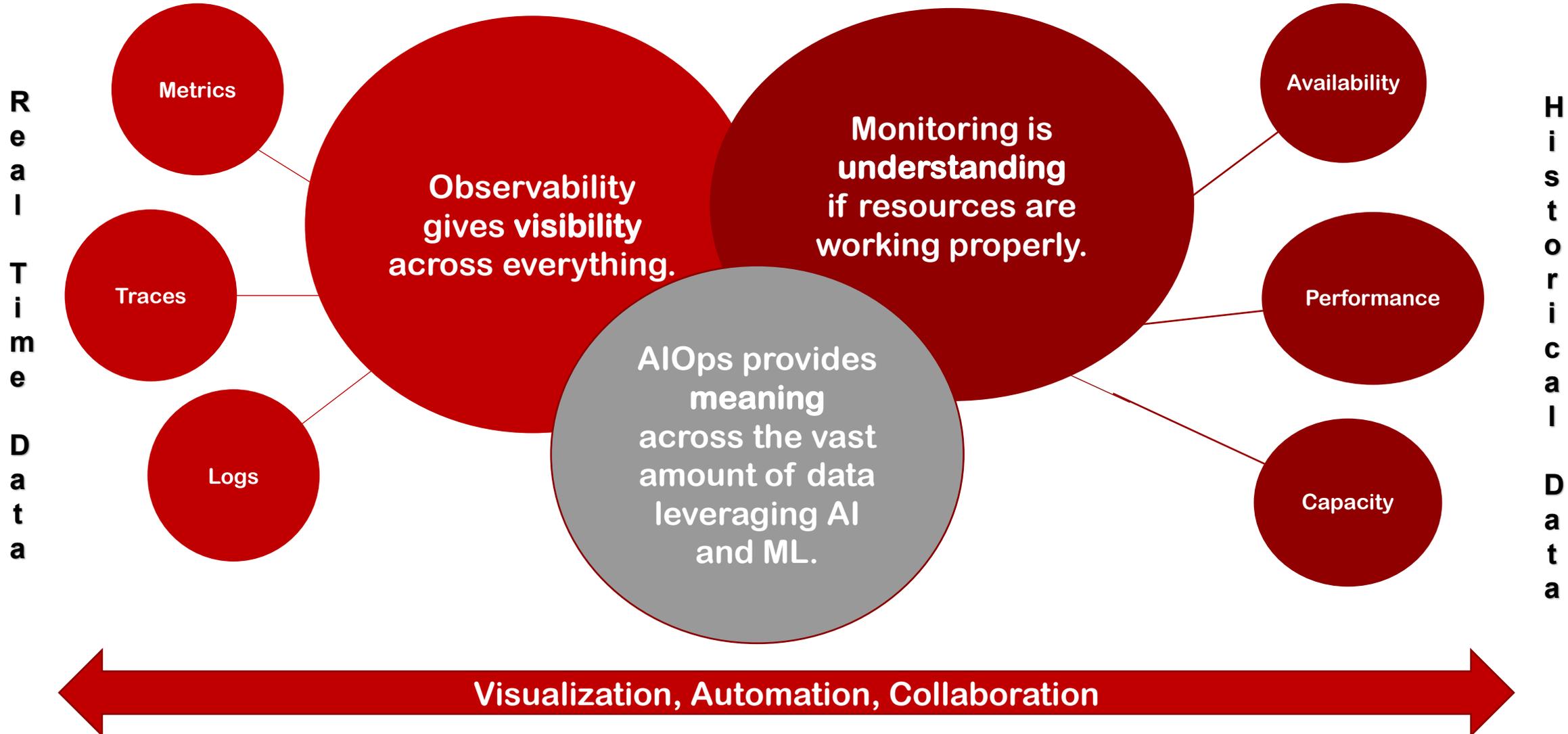
16% are familiar with the topic and understand it well.

12% of survey respondents are not sure what it is...

Some think it is hype.

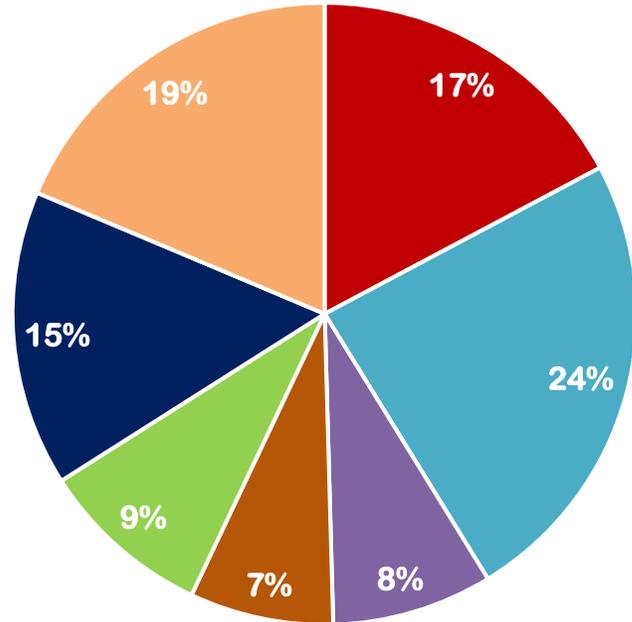


CONTINUOUS HYBRID IT MONITORING (CHITM): COMBINATION OF TRADITIONAL MONITORING, OBSERVABILITY AND AIOPS LEVERAGING REAL TIME AND HISTORICAL DATA



RESEARCH:

EXISTING OBSERVABILITY STRATEGIES ARE A MIXED BAG



- We do not currently have an observability strategy
- We are currently developing an observability strategy
- Improving the debugging
- Better input for our artificial intelligence systems/tools
- Improving on how we present the data to our users
- Improving in how we collect our data
- Improve our event data and analytics

24% of global survey respondents are currently developing their observability strategy while...

17% do not have an observability strategy as there might not be a clear understanding of its benefits.

Additionally, with the fast number of data sources around complex hybrid infrastructure, visibility into performance is a challenge.

19% state that their biggest priority in terms of observability is to improve their event and analytics data.

15% confirm that a key priority within their observability strategy is to improve how data is collected.

9% indicate that their key priority is to improve how data is presented.

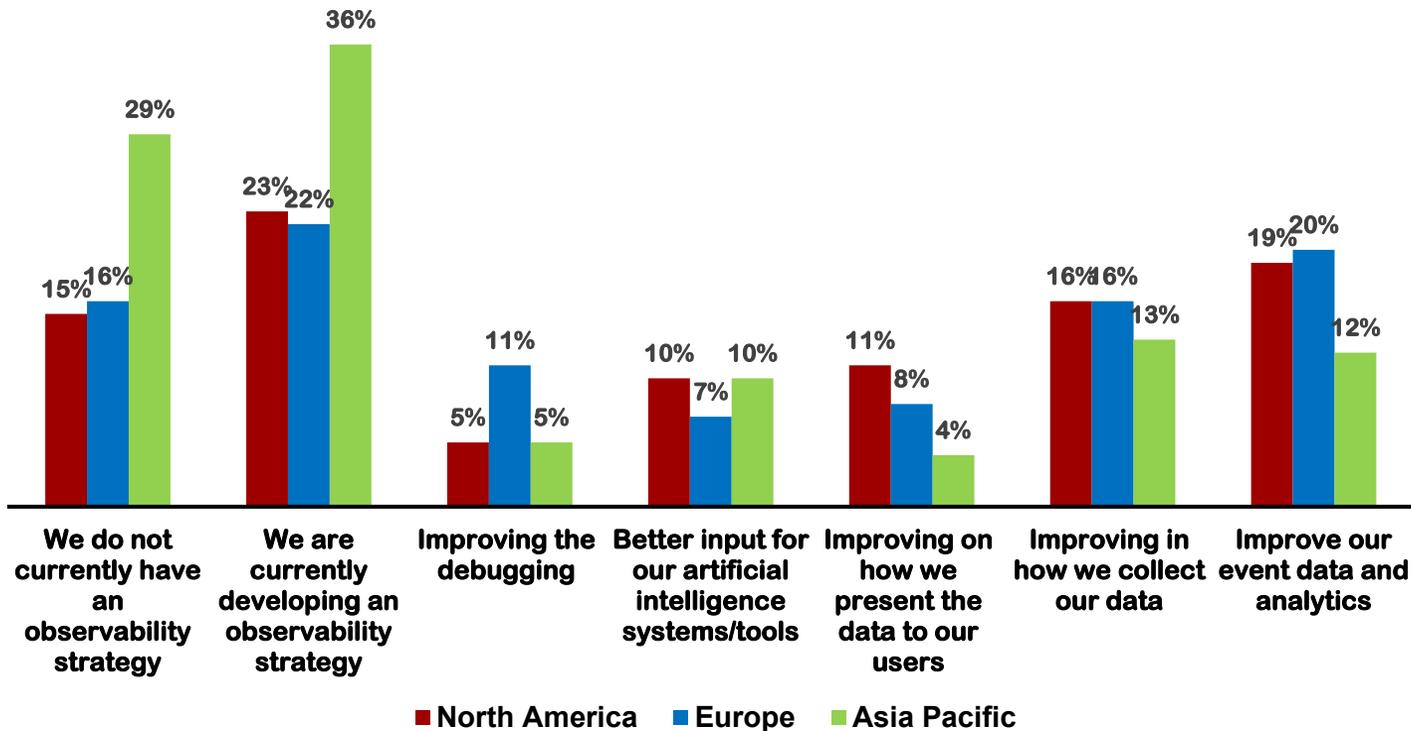
N = 1,500 Enterprise IT and Business Managers with budget responsibilities.

Question:
What is your number one priority related to your current observability strategy?



RESEARCH:

AND THERE ARE REGIONAL DIFFERENCES IN STRATEGY



Regional differences exist not only in the relative stage of enterprises observability strategy but also across the priorities.

North America enterprises are further along in terms of their observability strategy already working on key goals such as improving event data, analytics, and how they collect or present data.

European enterprises, while their strategy is like those enterprises in North America, one key difference is that improvements around debugging is a higher priority within their observability strategy.

Asia Pacific are behind the strategy development with most enterprises still developing an observability strategy.

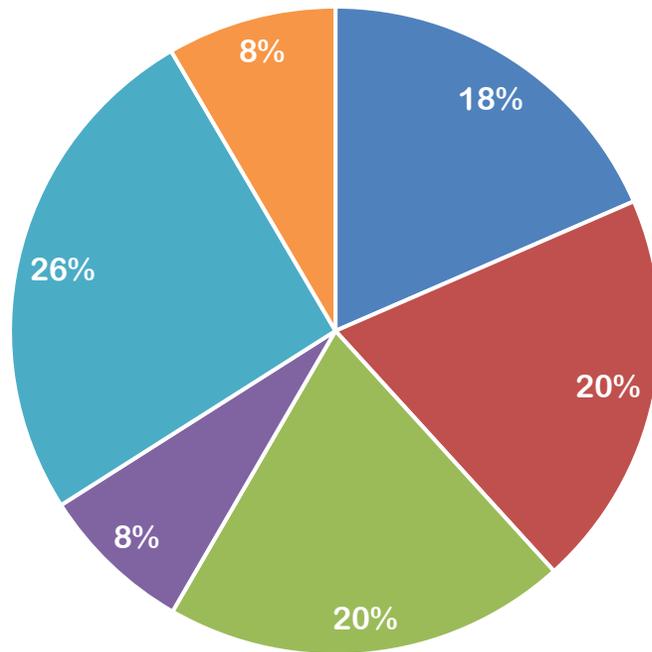
N = 1,500 Enterprise IT and Business Managers with budget responsibilities.

Question:
What is your number one priority related to your current observability strategy?



RESEARCH:

THE GLOBAL STATE OF OBSERVABILITY



- Planning to adopt observability long-term
- Planning to adopt observability within the next 18 to 24 months
- Planning to adopt observability as a practice and with it the tooling within the next 12 to 18 month
- We are practicing observability within or team and are achieving some benefits (improved troubleshooting, visibility, RCA, etc.) within our own team
- We are in the early stage of adoption (we are practicing it and have adopted some tooling)
- We are practicing observability extensively, have developed and keep modifying our tooling environment and are achieving benefits for us and other teams

Our survey respondents show optimism about Observability in the future.

8% early adopters while 18% aim for Observability in the long term and 20% are planning to adopt Observability.

N = 1,500 Enterprise IT and Business Managers with budget responsibilities.

Question:
What would you say about the current state of the observability software market?



INSIGHTS: OBSERVABILITY MARKET TREND 2022

Observability is more of an attribute than a process. Observability goes hand in hand with Application Performance Monitoring & Management (APM). APM provides visibility into the performance of system components through the collection and analysis of traditional system metrics. These metrics provide the insights that help make the system observable. Making a system observable is achieved in part through the implementation of a robust APM strategy but Observability is more of a state than a process. A system is observable when its state can be easily determined without further implementations.

What this means:

- **Don't confuse APM with Observability.** APM is part of the tooling and processes which enable the observability of systems. While APM does not need to be part of the Observability platform, its output are essential metrics for observability.

* See <https://www.cio.com/article/196371/the-biggest-enterprise-technology-ma-deals.html>



INSIGHTS: OBSERVABILITY MARKET TREND 2022

The emergence of OpenTelemetry impacts the monitoring space. OpenTelemetry was formed through the merger of OpenTracing and OpenCensus and today has broad vendor and language support, providing standardization as to what the distributed telemetry data looks like. Many IT organizations are faced with tremendous complexity in the infrastructure and applications they are collecting telemetry from. The adoption of observability hinges on processes and frameworks that make the instrumentation of applications and infrastructure easier. Observability must be more about data analysis and experience management than instrumentation, which can only be achieved if there are standards across telemetry data.

What this means:

- Developers need only instrument their code once, and can then swap and change monitoring tools, comparing competing solutions and even running multiple different monitoring solutions in production for different needs.



INSIGHTS: OBSERVABILITY MARKET TREND 2022

Complexity requires adoption of observability. The adoption of microservices, for better or worse, for many, have become the default architectural choice. For organizations with autonomous teams and loosely coupled systems, microservices can work well, but they bring the complexity inherent in working with any distributed system.

What this means:

- Today's modern systems often feature microservices-based architectures within the distributed infrastructure. This makes it difficult to pinpoint the source of a problem and steps to increase the observability of applications and its supporting infrastructure must be prioritized.



INSIGHTS: OBSERVABILITY VENDOR TRENDS 2022

Observability understanding must be improved before adoption will grow. Thirty-seven percent (37%) of our survey participants say that they are familiar or very familiar with the topic of observability. Sixteen percent (15%) are currently (May 2022) evangelising the topic in their company, eighteen percent (18%) are piloting and eight percent (8%) are leveraging observability in production. Eleven percent (11%) think the topic is all hype and twelve percent (12%) don't really understand what it is and are confused.

What this means:

- The observability topic and approach must be presented showing benefits and routes to value. While many organizations still leverage fragmented monitoring approaches across their organization, the results in limited insights into the performance of modern hybrid cloud applications and other business critical resources is challenging progress in the digital transformation. The education, best practices and case studies must be showing success and benefits for the combined team of development, IT operations and business to gain adoption and to accelerate this space.



VENDOR SELECTION MATRIX™

OBSERVABILITY PLATFORMS



These are the Top vendors as selected by 1,500 buyer companies users based upon product, company and service quality.

VENDOR NAME	SOLUTION
BMC	BMC Helix
BROADCOM	AIOps from Broadcom
CATCHPOINT	Catchpoint Platform
CISCO APPDYNAMICS	AppDynamics Platform
DATADOG	Datadog Observability Platform
DYNATRACE	Dynatrace Software Intelligence Platform
IBM	IBM Observability by Instana
MICRO FOCUS	Micro Focus Operations Bridge
MICROSOFT	Azur Monitor
MOOGSOFT	Moogsoft Cloud
NEW RELIC	New Relic One Platform
OPSRAMP	OpsRamp Platform
ORACLE	Oracle Cloud Observability and Management Platform
RIVERBED	Alluvio by Riverbed
SOLARWINDS	Appoptics Platform
SPLUNK	Splunk Observability
STACKSTATE	StackState Observability Platform
SUMO LOGIC	Sumo Logic Continuous Intelligence Platform
ZENOSS	Zenoss Cloud

This list is alphabetical and includes all relevant Observability Platforms named by the survey respondents.

For this report we interviewed 1,500 enterprise IT and business managers with budget responsibility in enterprises globally. We selected those vendors which achieved the best evaluations scores from the buyers but disregarded those with fewer than 15 evaluations.

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



VENDOR SELECTION MATRIX™

OBSERVABILITY PLATFORMS



Vendor Quick Facts

VENDOR NAME	MARKET PRESENCE	GROWTH RATE	CUSTOMER TRACTION	GOOD TO KNOW
BMC	Big	High	Strong	Provides dynamic service operations.
BROADCOM	Big	Low	Strong	Combines complete visibility into tech stack with AI, machine learning.
CATCHPOINT	Medium	High	Good	Offers insights into users' digital experience with 360-degree observability details.
CISCO APPDYNAMICS	Big	High	Good	Provides business context into the tech stack.
DATADOG	Medium	Low	Strong	Sees everything in one observability platform.
DYNATRACE	Big	Very High	Strong	Delivers answers and intelligent automation from data.
IBM (INSTANA)	Medium	Low	Good	Helps track performance and resolves incidents faster.
MICRO FOCUS	Big	High	Strong	Full-stack analytics with more than 200 data integrations.
MICROSOFT	Medium	Low	Medium	Provides full observability into applications, infrastructure, and network.
MOOGSOFT	Small	High	Strong	AI driven observability that empowers actionability.
NEW RELIC	Medium	Medium	Good	Collects and contextualizes all operational data.
OPSRAMP	Medium	Very High	Good	Controls the chaos within hybrid IT enterprises.
ORACLE	Medium	Low	Low	Enables monitoring of application deployed on OCI and across OCI compartments.
RIVERBED	Medium	Low	Medium	Combines EUEM, APM, and NPM for extensive observability.
SOLARWINDS	Big	Low	Good	Provides visibility across all layers for simple, fast, and affordable troubleshooting.
SPLUNK	Big	High	Strong	Provides complete full-stack insights.
STACKSTATE	Small	Very High	Strong	Provides topology-powered observability.
SUMO LOGIC	Medium	Very High	Strong	Turns machine data into real intelligence.
ZENOSS	Small	Very High	Low	Helps IT Ops teams understand IT service risks in real time while reducing noise.

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

NOTES:

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



VENDOR SELECTION MATRIX™:

EVALUATION CRITERIA FOR OBSERVABILITY PLATFORM

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

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

NOTES:

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



VENDOR SELECTION MATRIX™

OBSERVABILITY PLATFORMS



	STRATEGY	EXECUTION	TOTAL	
1.	DYNATRACE	4.58	4.69	9.26
2.	MICRO FOCUS	4.41	4.56	8.98
2.	SPLUNK	4.41	4.56	8.98
4.	MOOGSOFT	4.34	4.56	8.90
5.	CISCO APPDYNAMICS	4.44	4.44	8.88
6.	BMC	4.34	4.43	8.76
6.	SUMO LOGIC	4.28	4.49	8.76
8.	BROADCOM	4.34	4.41	8.75
9.	STACKSTATE	4.29	4.29	8.58
10.	OPSRAMP	4.14	4.21	8.35
11.	DATA DOG	4.05	4.26	8.31
12.	NEW RELIC	3.84	4.06	7.90
13.	RIVERBED	4.01	3.79	7.80
14.	SOLARWINDS	3.85	3.93	7.78
14.	IBM	3.93	3.85	7.78
16.	CATCHPOINT	3.70	3.93	7.63
16.	ZENOSS	3.50	3.58	7.08
18.	MICROSOFT	3.34	3.49	6.83
19.	ORACLE	3.28	3.28	6.55

Notes:

- Scale Explanation: 1 (Low) To 5 (High).
- Potential numerical deviations due to rounding.



RESEARCH IN ACTION
vendor selection matrix®

VENDOR SELECTION MATRIX™

OBSERVABILITY PLATFORMS

StackState is a market leader for Observability and topology powered observability.

STRATEGY	RESULT	EXECUTION	RESULT
Vision And Go-To-Market	4.75	Breadth And Depth Of Solution Offering	4.75
Innovation And Differentiation	4.25	Market Share And Growth	3.50
Viability And Execution Capabilities	3.50	Customer Satisfaction	4.25
Recommendation Index	4.25	Price Versus Value Ratio	4.25
	4.29		4.29

GENERAL:

StackState is a privately held company with headquarters in the Netherlands. The company was founded in 2015 with offices in Boston, MA and Hilversum, Netherlands and today has more than 60 employees. StackState launched its first observability platform in 2017. The platform core is a time-traveling topology, based on a custom-made versioned graph database.

STRATEGY:

StackStates observability strategy is centered around the 4T Data model. This model includes Topology (view all components and all their dependencies, on prem and cloud with Telemetry (metrics, events and logs per component, regardless of its source, tracing), Tracing (insights into end-to-end customer journey at code level), and Time travelling (travel back to any moment in time). All details across the 4Ts are combined in one model and one view. Additional AI capabilities enable Root Cause Analysis, Impact Analysis, Predictive Analytics, Anomaly detection, and Remediation and Automation.

EXECUTION:

StackState's growing customer list encompasses a range of industries – from finance, telecom, to managed service providers. StackState has a customer base comprising mostly large enterprises with a concentration in financial services, telecommunications, and managed service providers (e.g., Accenture, Vodafone, and Danske Bank). The company targets large and mature enterprise organizations in North America and Western Europe.

BOTTOM LINE:

StackState approach to observability via topology makes them unique in this vendor landscape. For organizations which are challenged with ever changing, highly complex environments, StackState is a great option. Its ability to enable its customer to drastically reduce Root Cause Analysis (RCA) and Mean Time To Repair (MTTR) is gaining attention from large enterprises.



RESEARCH IN ACTION
vendor selection matrix®

Notes:

- Scale Explanation: 1 (Low) To 5 (High).
- Potential numerical deviations due to rounding.
- The Research In Action Recommendation Index is collected and calculated by asking the survey participants: "Would you recommend this vendor in this market to your peers - Yes or No?".

THE RESEARCH IN ACTION GMBH VENDOR SELECTION MATRIX™ METHODOLOGY

Vendor Selection Matrix™ Disclaimer:

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

About:

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



APPENDIX: IT AUTOMATION MARKET TEXTURE DEFINITIONS

- **Application Discovery and Dependency Mapping (ADDM)** solutions automatically discover various applications running on server and network devices within the business hybrid infrastructure and maps the dependencies between them providing a holistic view of all the resources running and the relationships between them.
- **Application Performance Management (APM)** solutions manage the performance and health of applications within a IT enterprise.
- **AI Powered Chatbot Platforms** which are used to build applications that answer questions, provide advice and/or recommendations using natural language processing and other dialog related technologies.
- **Artificial Intelligence and Machine Learning (AI/ML)** are both technologies and are leveraged in automation solutions. Artificial intelligence (AI) is the ability of a computer program or machine to think and learn (AI can mimic human cognition). Within IT Automation AI is used to correctly interpret a variety of data, to learn from such data, and to use those learnings to achieve specific goals and tasks through flexible adaptation. Machine learning enables computers with the ability to learn without being programmed (explicit algorithms). It explores the study and construction of algorithms which can learn and make predictions on data. The algorithms follow programmed instructions or can make predictions or decisions based on the data. Machine learning is used when explicit algorithms cannot be done (e.g., computer vision, search engines, optical character recognition).
- **Artificial Intelligence for Operations (AIOps)** solutions equip IT enterprise teams with analysis of volumes and categories of data to improve key processes, tasks and decision making. The adoption of these tools automates the ingestion of fast volumes of data; leverage machine learning to analyze the data, present findings to either predict or alert on issues, and leverage the knowledge for automation or decision making.
- **Artificial Intelligence Predictive Analytics (AIPA)** solutions apply Artificial Intelligence across development, IT operations, service management and other functional areas to gain intelligent insights for proactive work, elimination of issues and ongoing improvements in context of the owner and function.
- **Application Release Orchestration (ARO)** solutions equip IT enterprise organizations and their teams with the automation of the software deployment cycle across hybrid technology environments.
- **Configuration Management Database (CMDB)** is a database which captures IT components referred to as configuration items (CIs), which can be software, hardware, a document, article, or any such item that is part of the information system of the organization.
- **Continuous Hybrid Management (CHM)** platforms or solutions that empower, automate and continuously manage the ongoing demands of all digital functions within an enterprise no matter if they are within IT or business teams.
- **Enterprise Service Management (ESM)** is a category of business management software - typically a suite of integrated applications that a service organization uses to capture, manage, save and analyze data critical to their service business performance. It automates service offerings across internal functional areas such as (1) Human resources, (2) Vendor management, (3) Technical services, (4) Field services, (5) Financial management and (6) Shared services organizations.
- **Digital Service Management (DSM)** solutions enable the management of resources and services which support multiple digital services leveraged by external customers. The purpose is to break down operating silos, ensure compliance and governance while enabling the business to continuously innovate new and existing digital services.
- **Digital Experience Management (DEM)** solutions manage the digital interaction of customers (end-users) with that of an enterprise.
- **End User Experience Management (EUEM)** solutions monitor and manage the impact of application and device performance from the end user's point of view and ensure quality of service as seen and experienced by the end user.



APPENDIX: IT AUTOMATION MARKETEXTURE DEFINITIONS

- **IT Asset Management (ITAM)** software manages the full lifecycle of IT assets which typically includes all software, hardware, networking, Cloud services, and client devices. In some cases, it may also include non-IT assets such as buildings or information where these have a financial value and are required to deliver an IT service. IT asset management can include operational technology (OT), including devices that are part of the Internet of Things. These are typically devices that were not traditionally thought of as IT assets, but that now include embedded computing capability and network connectivity.
- **IT Financial Management (ITFM)** software enables the accurate and cost-effective management of IT assets and resources with the aim to plan, control, recover (or overall manage) costs which are occurring while providing IT and Enterprise Services to the organization.
- **The IT Infrastructure Library (ITIL)** is the de facto standard for IT Service Management process definitions today.
- **Internet of Things Management (IoT)** solutions vary depending on the use case but typically manage a system of interrelated computing devices, mechanical and digital machines, objects, animals or people that are equipped with unique identifiers which transfer data over a network without requiring human-to-human or human-to-computer interaction.
- **IT Operations Management (ITOM)** solutions monitor and control IT services and infrastructure and enable IT to execute routine tasks necessary to support the operation of applications, services and hardware components within an organization; typically included are the provisioning of IT infrastructure, capacity management, cost-control activities, performance and security management and availability management for all IT infrastructure and assets.
- **IT Service Management (ITSM)** refers to the entirety of activities – directed by policies, organized and structured in processes and supporting procedures – that are performed by an organization to plan, design, deliver, operate and control Information Technology (IT) services offered to internal customers. It is thus concerned with the implementation of IT services that meet customers' needs, and it is performed by the IT service provider through an appropriate mix of people, process and information technology.
- **Observability** solutions enable the aggregating, correlating and analyzing of steady streams of performance data from distributed applications and the hybrid infrastructure which support the applications.
- **Robotic Process Automation (RPA)** solutions enable the automation of tasks, processes and procedures which are normally conducted by a human. RPA solutions create software robots that mimic human actions. Typically, these are tasks that a human would do. (Ro)Bots and Virtual Agents are part of RPA solutions.
- **Secure Unified Endpoint Management (SUEM)** software enables the management and securing of mobile applications, content, collaboration and provides for the management of all endpoints like smartphones, tablets, laptops, printers, ruggedized devices, Internet of Things (IoT) and wearables.
- **Technology Cost and Resource Optimization (TCRO)** software enables the planning, management and visibility of the supporting and required business and IT technology resources from a cost and capacity perspective by visualizing, planning, prioritizing and optimizing the usage and demands of technology resources (people, processes and technologies) for the enterprise.
- **Value Stream Management (VSM)** software solutions capture, visualize, and analyze the flow of work across the entire Agile software delivery project. The capabilities include end-to-end visibility, traceability and governance over the entire process and help to plan, track, and steer work at the team, program, portfolio, and enterprise levels. It includes the people working on a project, the systems which are operated and leveraged, and the flow of information and materials between teams. It enables the measurement of speed and quality for digital transformations.



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