

IT SERVICES

Tooling up for ITaaS

IT as a service (ITaaS) is an operational model where the enterprise IT department acts and operates as a distinct business entity, creating services for the other lines of business within the organization. This report is designed to provide insight into the requirements for supporting ITaaS.

CLOUDSCAPE

KEY FINDINGS

- ITaaS is a competitive business model where an IT department views the LOBs as having many options for IT services, and the internal IT organization has to compete against external providers to serve these LOBs.
- The catalyst for ITaaS within enterprises is typically mobile service delivery and the creation of the 'anytime, anywhere and any device' workplace as it introduces consumer IT trends into the enterprise.
- The IT department needs to start thinking in terms of the creation of a portfolio of services – some developed internally, some provided externally via dedicated contracts, and others sourced from public cloud providers.
- Tooling, automation, process and policy become paramount for long-term optimization and sustainability of the service portfolio. This is why service automation, integration and management are such growing requirements in the 'new style' IT services market, where ITaaS is the ultimate goal.
- These factors are combining to create a perfect opportunity for service providers to work with IT departments, enabling them to move to a business portal approach to managing IT, which sets them on the path to ITaaS.

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New York

20 West 37th Street, 6th Floor
New York, NY 10018
Phone: 212.505.3030
Fax: 212.505.2630

San Francisco

140 Geary Street, 9th Floor
San Francisco, CA 94108
Phone: 415.989.1555
Fax: 415.989.1558

London

37-41 Gower Street
London, UK WC1E 6HH
Phone: +44 (0)20.7299.7765
Fax: +44 (0)20.7299.7799

Boston

125 Broad Street, 4th Floor
Boston, MA 02109
Phone: 617.275.8818
Fax: 617.261.0688

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SECTION 1

Executive Overview

1.1 INTRODUCTION

This report is designed to give strategists within organizations' internal buy-side IT service-provider teams, as well as external supply-side IT service providers, insight into the requirements for supporting the IT-as-a-service (ITaaS) model. In this report, we address some of the most frequently asked questions posed by buyers. We also examine the different types of offerings that are coming to market, and we position and profile a selection of IT service providers that are currently active in the ITaaS space.

1.2 KEY FINDINGS

- ITaaS is a competitive business model where an IT department views the LOBs as having many options for IT services, and the internal IT organization has to compete against external providers to serve these LOBs.
- The catalyst for ITaaS within enterprises is typically mobile service delivery and the creation of the 'anytime, anywhere and any device' workplace as it introduces consumer IT trends into the enterprise.
- The IT department needs to start thinking in terms of the creation of a portfolio of services – some developed internally, some provided externally via dedicated contracts, and others sourced from public cloud providers.
- Tooling, automation, process and policy become paramount for long-term optimization and sustainability of the service portfolio. This is why service automation, integration and management are such growing requirements in the 'new style' IT services market, where ITaaS is the ultimate goal.
- These factors are combining to create a perfect opportunity for service providers to work with IT departments, enabling them to move to a business portal approach to managing IT, which sets them on the path to ITaaS.
- The main advantage for the internal IT department in adopting a service-provider offering is that it's not buying a raw technology platform, but rather a preconfigured platform that has been designed by a vendor with a core competency in IT management. The value in this is that the buyer organization is accessing some of the intellectual property of the service provider.
- For the majority of service providers, the service-delivery platform is a back-office workhorse and the cornerstone of its services, rather than being an offering in its own right. However, with the emergence of ITaaS as an aspirational model for many IT departments, it is time for service providers to rethink this.

1.3 METHODOLOGY

This report is based on countless anecdotal conversations with IT managers across multiple industries, as well as our regular research on software vendors and service providers. This research was supplemented by additional primary research among both buyers and suppliers, including attendance at a number of trade shows and industry events.

Reports such as this one represent a holistic perspective on key emerging markets in the enterprise IT space. These markets evolve quickly, though, so 451 Research offers additional services that provide critical marketplace updates. These updated reports and perspectives are presented on a daily basis via the company's core intelligence service – 451 Market Insight. Forward-looking M&A analysis and perspectives on strategic acquisitions and the liquidity environment for technology companies are also updated regularly via 451 Market Insight, which is backed by the industry-leading 451 M&A KnowledgeBase.

Emerging technologies and markets are also covered in additional 451 practices, including our CloudScape, Datacenter Technologies (DCT), Enterprise Security, Information Management, Infrastructure Computing for the Enterprise (ICE) and 451 Market Monitor services. All of these 451 services, which are accessible via the Web, provide critical and timely analysis specifically focused on the business of enterprise IT innovation.

This report was written by Dr. Katy Ring, Research Director, IT Services. Any questions about the methodology should be addressed to Katy at: katy.ring@451research.com

Katy Ring – Research Director, IT Services

Dr. Katy Ring has more than 25 years of experience in the IT industry, providing strategic advice to C-level executives at vendor and end-user organizations. She has developed strong research-based expertise and has focused on areas where the global IT service delivery model is changing, including cloud services, the evolving CIO role, innovation, sustainability and global sourcing of labor. Most recently, Katy led K2 Advisory, a research resource for CIOs, their senior colleagues, and suppliers. Before K2, she spent 12 years at Ovum Research, leading research in emerging software and services markets, and developing the company's Outsourcing Practice. Before her tenure as a Principal Analyst and Practice Leader at Ovum, Dr. Ring was a journalist with publications, including Computer Weekly and Computergram International, and was a founding editor of Software Futures.

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SECTION 2

Why ITaaS, and Why Now?

2.1 WHAT IS ITAAS?

IT as a service is an operational model where the IT department of an enterprise acts and operates as a distinct business entity, creating services for the other lines of business (LOBs) within the organization. At its core, ITaaS is a competitive business model in which an IT department views the LOBs as having many options for IT services, and the internal IT organization has to compete against external providers to win the IT business of the LOBs.

The catalyst for ITaaS within enterprises is typically mobile service delivery and the creation of the ‘anytime, anywhere and any device’ workplace as it introduces consumer IT trends into the enterprise. This means that in pursuing ITaaS as a strategy, the CIO must introduce a service-centric, cloud-enabled approach to delivery, making outsourcing, compliance and mobility easier to achieve. Once this is in place, then the future of IT will lie in managing service relationships by acting as a broker between the requesters and the providers of services.

IT will then be operating in the world of service definitions, recording and analyzing services. The argument is that service relationship management is the next big software domain and should be owned by the CIO. In this way, the CIO becomes the keeper of the frictionless service model within the organization.

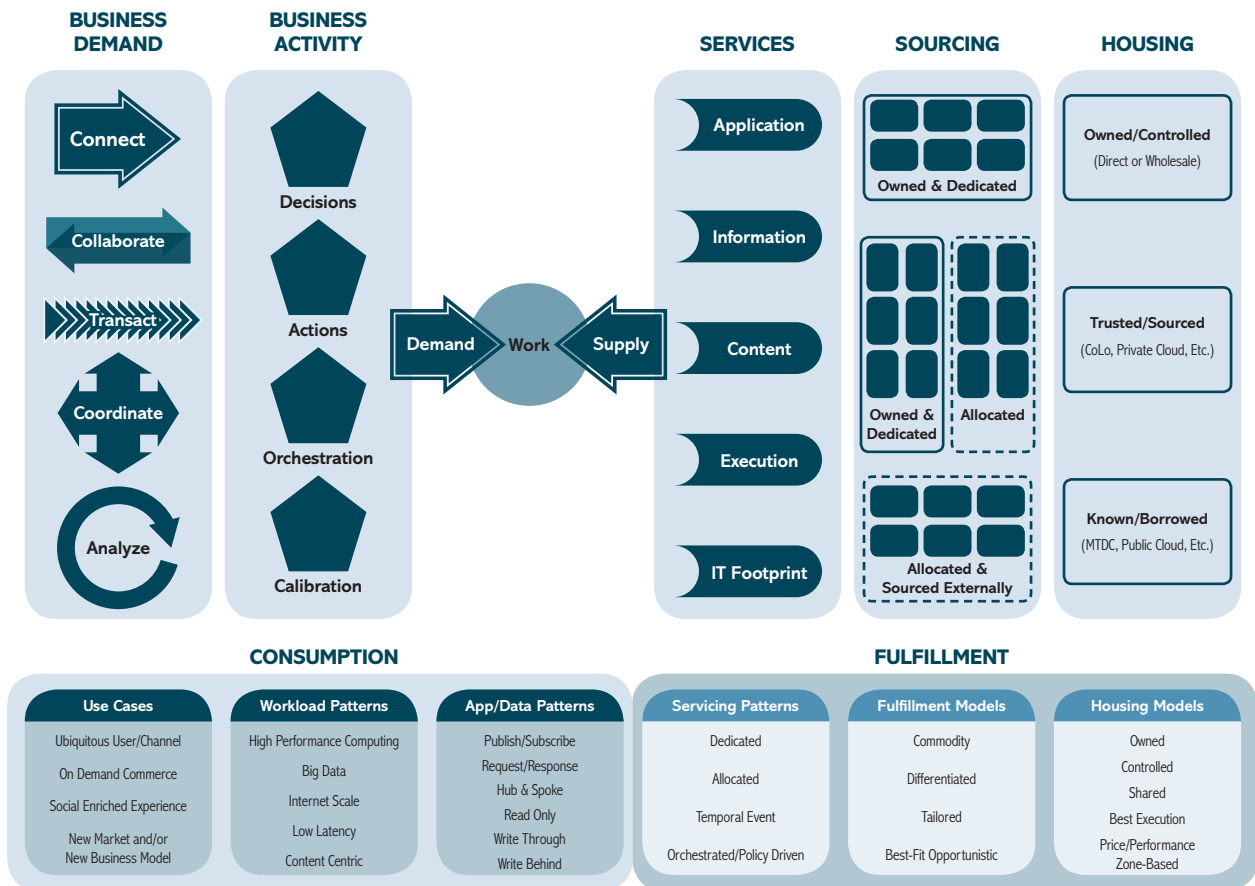
In order to realize the ITaaS strategy, the IT department must embrace new tooling and frameworks to support the broker role. The main tools to support ITaaS are ITSM platforms, cloud management platforms and the online service catalog to support end-user self-service capabilities. Depending on the complexity of the organization and its outsourcing arrangements, a service integration and management (SIAM) framework and SIAM provider may also be required.

To borrow phrasing from the IT service vendor community, the IT department needs to start thinking in terms of the creation of a portfolio of services – some developed internally, some provided externally via dedicated contracts, and others sourced from public cloud providers. Indeed, as we explain in the 451 Research Digital Enterprise Cloud Playbook, continuous, reliable and efficient delivery of business and technology services that match demand within the context of a dynamic digital economy require a portfolio management approach (see Figure 1).

In order to fulfill requirements, the IT department has to match business demands to the services available via various sourcing models that reflect infrastructure housing decisions for different workloads. To do this, all aspects of this portfolio must be visible, integrated and well managed as a collection of capabilities. Tooling, automation,

process and policy become paramount for long-term optimization and sustainability of the portfolio. This is why service automation, integration and management are such growing requirements in the 'new style' IT services market, which targets ITaaS as the ultimate goal.

FIGURE 1: CREATING A PORTFOLIO OF SERVICES FOR ITAAS



2.2 THE IT DEPARTMENT CHALLENGE

Most organizations now have leaner IT departments because of the economic downturn since 2007-08, which has meant these departments have lost both critical mass and some of their IT knowledge. This has made ITSM offerings more attractive since they offer the IT department tooling to deliver stronger performance and the ability to provide additional business value without increasing headcount.

However, the challenge is that while organizations are beginning to make multimillion-dollar investments in tooling to improve IT service delivery and management, they often struggle to integrate and maintain the tools. This is because IT departments have typically customized the tools for their environment and then cannot keep up with vendor upgrades because these break the custom code that has been developed. Additional members of staff then have to be retained to run this custom code. Moving workloads to the cloud only exacerbates the situation.

While the traditional system and service management tooling available to most IT departments includes tooling that is not very well maintained or upgraded, internal support services are also often fragmented and not well coordinated. Small wonder, then, that existing IT departments are struggling to keep up with technology trends such as cloud delivery, mobility and the consumerization of enterprise IT. While the benefits of these changes include lower costs and improved organizational agility, they also bring non-standardized IT, which is more complex to manage.

The situation is further compounded by multi-sourcing in the managed services context, which is creating multiple technology management silos and which makes it difficult for enterprise service management tooling to have a big impact in improving service delivery.

These factors are combining to create a perfect opportunity for service providers to work with IT departments, enabling them to move to a business portal approach to managing IT, which sets them on the path to ITaaS. There is an increasing buyer appetite to improve the automation of service delivery in order to improve end-user satisfaction without having to grow IT staffing levels.

The ultimate goal is for the IT department to continue to maximize its reduction in operational expenditure while minimizing business impact and developing a portfolio management approach for services.

2.3 THE CHANGING DEMANDS FOR TOOLING TO SUPPORT ITAAS

Given this context of the changing requirements for ITaaS, mainstream systems management technologies are not delivering high levels of cost reduction or improving infrastructure 'business as usual' metrics. But there are a few disruptive new entrants raising the bar for return on investment of IT service automation.

In particular, at the ITSM level two vendors are leading the change in tooling for ITaaS – ServiceNow and BMC Remedyforce. Both were developed as SaaS offerings for the cloud era.

ServiceNow

A wide range of IT outsourcing providers have migrated to ServiceNow for their own service management platform. These include Accenture, AT&T, Cognizant, Dimension Data, IBM, iGate Patni, Infosys and SunGard.

ServiceNow's premier service-provider partners are KPMG and Accenture (technology services), and globally the company also works with E&Y and Deloitte. In the US, regional partners include CompuCom, Fruition Partners and Maryville Technologies, while in the UK Devo Team and Innovise are important partners. In EMEA, ServiceNow also sells with Atos, Capita and Getronics.

Service providers can run ServiceNow in a hosted or non-hosted manner.

BMC Remedyforce

Remedyforce is 100% developed by BMC using the Force.com platform, and salesforce.com is BMC's biggest sales channel for Remedyforce. The platform was built with SaaS in mind, so users automatically get releases of new functionality and enhancements online. Users can configure without programming (you can write custom code, but you don't have to). There is easy drag-and-drop functionality using Force.com that is targeted at end users.

To the Force platform, BMC has brought its expertise in incident management, problem management, change management, CMDB and real-time analytics. All the ITIL-based best practices are accessible so that a new user can, for example, learn how to manage incidents. There are two main interfaces to the product – the self-service portal and salesforce.com's Chatter social media app. Self-service is handled via simple forms, or end users can interact with the helpdesk via Chatter, which is very free form.

The vast majority of Remedyforce implementations are performed by partners, which include service providers Column Technologies and Logicalis. BMC Remedyforce is targeted at the upper end of the midmarket through the lower end of the enterprise space. It is a purely hosted offering running on salesforce.com infrastructure. If customers want on-premises options, then BMC has other products available.

SECTION 3

ITaaS Buyer FAQs

When buyers are considering how to work with IT service providers to support a move to ITaaS, there are a few main questions that are asked repeatedly. So here we offer some quick-start answers.

3.1 WHAT IS THE OPTIMAL LEVEL OF AUTOMATION?

Not all IT services are highly appealing for service automation – those that are tend to involve many transactions, such as ‘cloudbursting’ to external providers or offering device support for internal employees. But many well-known and well-established infrastructure platforms simply don’t demand service automation because they are back-office workhorses that run without much change.

Generally, service automation brings the greatest benefits where it can dramatically reduce time spent on the phone, as well as reducing the mean time to resolve (MTTR) various issues. For example, automation can help with the issue of password reset, which can account for up to one-quarter of all calls to a helpdesk. This number can be dramatically lowered by automatic or biometric reset using voice recognition, with substantial savings for the service desk and an improvement in service quality.

Service automation also provides softer benefits. For example, customer satisfaction rates tend to improve with increased service automation, largely because service updates can be pushed out automatically, in a timely manner, which reduces the amount of time customers spend on the phone with IT support.

An element of common sense needs to be applied to IT service automation because, just as with our wider experience of customer service in our personal lives, some aspects of automation are great (online self-help guides), while others are just frustrating (having no way to contact someone if the self-help doesn’t fix the problem). One of the main benefits of working with an IT service provider is that they should not only be able to work with the buy-side organization to reduce the cost of IT management, but they should also be able to reduce organizational business effort by providing smart automation. For example, should you have to order devices through a portal for a new employee? Or can the service provider connect directly to your organization’s HR system so that when someone is hired, a process is triggered to ensure that the right devices and application access are waiting for them on day one?

3.2 WHAT KIND OF STAFFING MODELS SHOULD BE IN PLACE?

One question that many buyers have is whether IT service providers have relevant staffing models in place that reflect the move toward ‘devops,’ where implementation and automation decisions are made alongside system design and build. There is a suspicion that many IT service providers are no better prepared for this staffing change than the internal IT departments within enterprises.

Opinion within the IT service-provider community is divided on this issue: Some service providers believe that the main change with increased service automation tooling has been to make support staff more productive and proactive. This means they can take on more issues per person, and they can use their operational experience to improve the reusable scripts that are available to tackle problems. In this way, both Level 1 and Level 2 support roles become a more skilled capability. For example, training academies now exist in many IT service-provider delivery-center hubs to ensure that skills are in place to take advantage of more automated service delivery. But ultimately delivery remains distinct from design.

Indeed, finding multiskilled resources to build automation solutions is getting harder for service providers at Level 3 support. For example, an automation engineer is expected to have expertise in seven core areas: process knowledge, systems knowledge, analytical thinking, project management, collaboration, technology, and platform management. This is why providers are emphasizing the need for internal training because this is not a skills gap that can be addressed by straightforward technology certification.

A few service providers have gone further in terms of reorganizing and restructuring the way service delivery is managed. So, for example, service architects, service management teams, and quality management and delivery teams are brought together to work in a closely integrated way from the initial design of a process to its delivery.

3.3 CAN I CUSTOMIZE?

Another frequently asked question is whether, as a buyer, you can customize ITMaaS tooling. When you buy from an IT service provider, as opposed to subscribing to a SaaS provider’s offering, you nearly always can. Typically the IT service provider will have three main approaches to working with you:

- They can integrate your existing tooling with their tooling to provide you with a custom IT service management and support capability.
- They can migrate your organization to their tooling, which largely means they are then responsible for ensuring that the tooling is regularly updated, custom code is kept in sync, and so on.
- For a fee, they can help you populate a standard ITMaaS cloud platform, which you simply then subscribe to.

All of these options enable some level of customization, ranging from the first, with a repackaging of your own tooling choices behind an external service-level agreement, to the last, where you are largely limited to configuration choices.

3.4 WHO HOSTS THE PLATFORM?

In the majority of cases, the service provider will host the platform in its dedicated datacenter infrastructure or, if it does not have its own facilities, in one of its partner's datacenters. However, some service providers are simply reselling SaaS hosted by the software vendor. So, for example, salesforce.com always hosts BMC Remedyforce, while many ServiceNow systems integrators are using SaaS hosted by ServiceNow. However, a few service providers are hosting their own instances of ServiceNow within their datacenters, so this is worth investigating.

3.5 WHAT SERVICE-LEVEL METRICS AND PRICING SHOULD I EXPECT?

Within the outsourcing market, the tooling will typically form part of the broader outsourcing agreement and, consequently, will not necessarily form a separate cost item, since it is bundled into the overall value to be delivered by the contract. However, one major change to the traditional outsourcing approach is that automated tooling enables buyers and suppliers to track SLA performance in real-time. This can create better relationships between service providers and customers, as well as a closer joint alignment to buyer business outcomes.

When you are subscribing to an IT service provider's standard ITMaaS platform, agreements are typically for a subscription of one to three years, paid on a monthly basis. There is also usually an up-front fee for transition, training and setup. The monthly fee will generally be determined by the scale of IT deployment to be managed (worked out based on number of devices, users and events) and the level of managed service wrapping the customer requires from the service provider.

There are a wide range of opinions as to just how much service automation can enable service providers to reduce IT costs overall for a customer. While this will vary depending on organizational circumstance, savings of 10-20% are to be expected, and some service providers claim savings of 30% or more.

SECTION 4

The Changing Landscape for Service Offerings

The lines are increasingly blurring between consumption of IT services and business services, and this is especially true where SaaS offerings are being adopted directly by LOB buyers. These trends are increasing the IT buyer appetite for service automation that is accessible to end users, so they can use a service catalog to directly select and buy services that are approved by the organization and work within its policies. Indeed, pulling cloud-sourcing in from the shadows is one of the benefits of developing an ITaaS model.

The underlying IT systems themselves also need to be able to support a faster time to market, faster application deployment and the ability to take innovation from new technology sources (new market entrants). All of which means that the opportunity for external IT service providers to provide service integration and management (SIAM) tools and services is also growing as a requirement where the IT department is acting as a broker.

These two trends are influencing how service providers are developing their offerings for buyers.

4.1 PULLING CLOUD-SOURCING IN FROM THE SHADOWS

The mission of the IT department has always been to provide services to support the business functions of the organization. With ITaaS the discussion as to how this is done is moving on to consider the role of the service catalog, with external third-party cloud services included in the catalog like branded franchises that are competing with 'own brand' internal IT.

This may not seem like such a big deal at first, especially for organizations that have implemented ITIL and ITSM processes with associated KPIs and metrics for service improvement. However, cloud-enabled ITaaS shakes up the proposition, taking the IT department out of its comfort zone, where it was selling to a centrally managed captive market, and thrusting it into the role of a free-market retailer.

For example, the IT department is now competing with commercial technology vendors and service providers for budget. Interestingly, IT professionals often see the development of the service catalog as a tool for reestablishing some control over so-called shadow IT. However, it is quite a challenge to define a cloud service catalog because end users often don't really know what they want, while the IT department itself is not well known for its sales and marketing skills. Think about it: the ITaaS service catalog distills IT into a retail product offering for an online shopping service.

We would advise IT professionals involved in this type of project to liaise with internal marketing professionals and get their feedback on the way the internal services are presented. With published service catalogs, SLAs, pricing and chargeback, end users will ultimately become comparison shoppers. Internal IT will need to cost and price its services like a retailer, taking into consideration competitive market supply and demand issues that have rarely been considered before.

Internal IT will also need to define services in a simple and standardized way so that business users can make meaningful comparisons. This is possibly the toughest challenge of all. Indeed, many commercial technology and service providers still struggle with this themselves within their own product and service lines – and their actual business is selling IT.

Aside from the obvious consulting engagements that all these issues highlight, one of the growing opportunities for IT service providers will be to broker and integrate public cloud services into the enterprise ITaaS service catalog, positioning them appropriately against internally provided services in terms of security and governance requirements.

4.2 OUTSOURCING, MULTI-SOURCING AND INNOVATION

Cloud delivery is really just part of the IT outsourcing spectrum of services. However, the challenge for the IT industry is that the existing ITIL-framed service catalogs, management tooling and service-desk support were not designed for the modern world of large-scale, self-service IT provisioning. This fact, along with the rise of new cloud-driven disciplines such as IT financial management and multi-vendor management, are creating opportunities for IT service providers to offer new and enhanced services.

The largest opportunity for service providers requires an understanding of ITaaS that spans both cloud-centric storefronts and application marketplaces, as well as an understanding of existing virtualized and dedicated environments. In other words, for enterprise buyers ITaaS is about more than cloud; it also has to embrace ‘legacy’ services. This has led to a rush to embrace the phrase ‘hybrid cloud’ within sales and marketing initiatives. In fact the emphasis of most providers rushing to market with such offerings is to provide the ability to ‘burst’ out to public cloud infrastructure, with the emphasis much more on traditional ITIL service management capabilities. Very few providers so far really have a well-blended proposition that can support the internal IT department in aiding its various end-user communities in choosing the best execution venue for a given workload.

Meanwhile, we are already operating in an outsourcing market where large, monolithic outsourcing contracts are now a rarity, as second- and third-generation buyers in the US and Europe pursue ‘blended’ multi-sourcing strategies where service providers bid for separate technology towers. However, in the ITaaS context, where the emphasis should be on selecting the best execution venue for each workload, the multi-sourcing approach will soon reach a crisis point. This is because technology change is creating the requirement for a unified service management and delivery structure to make that selection. As infrastructure becomes virtualized, the separation of workplace services from datacenter services, from network services, and from application services is becoming increasingly anachronistic. One service-provider response to this has been the development of SIAM offerings to try to ensure that end-to-end service delivery is managed against targeted business outcomes.

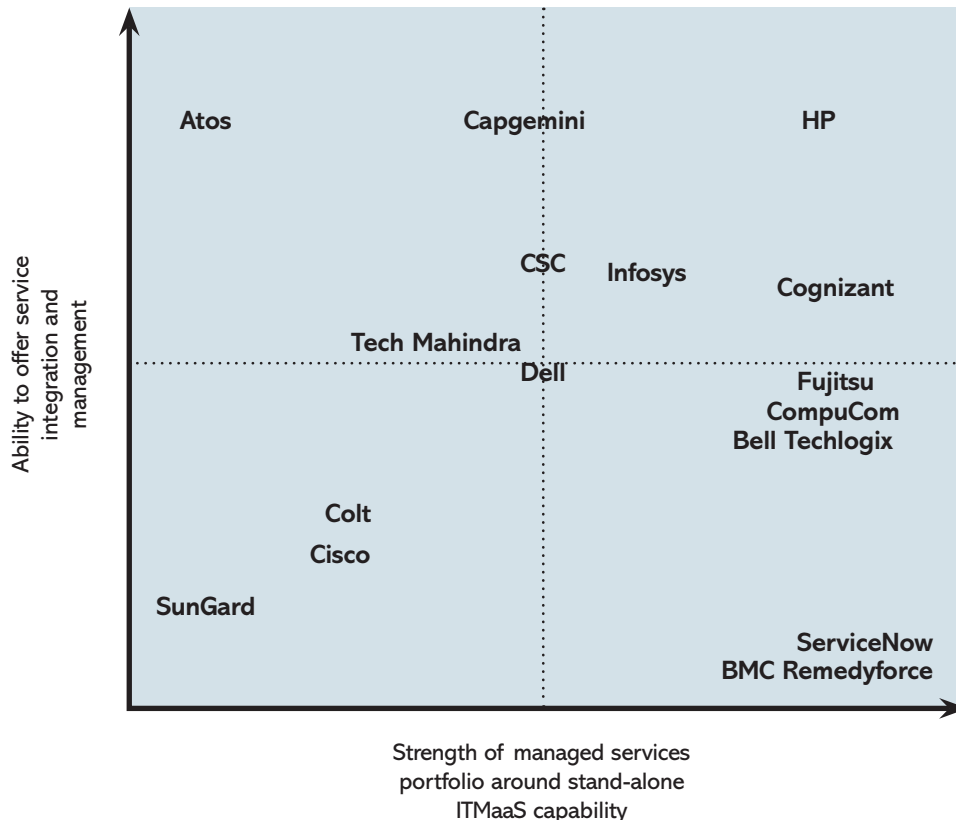
4.3 POSITIONING THE VENDORS

There are two main approaches for a managed service provider to take in supporting buy-side organizations looking to move to an ITaaS capability. Either the service provider can take on the total SIAM capability on behalf of the customer by managing multiple suppliers and SLAs, and/or it can offer stand-alone, hosted ITMaaS tooling and associated consulting and integration services.

Figure 2 offers a view of how some of the service providers fit into this ITaaS service-provider landscape. The vertical axis positions vendors in terms of being able to offer SIAM capabilities for managing multiple vendors and associated SLAs for clients. The horizontal axis positions vendors in terms of being able to offer stand-alone ITMaaS capabilities within their managed services portfolio.

Based on these criteria, vendors in the top right quadrant are able to offer both SIAM and ITMaaS capabilities in support of enterprise buyers moving to an ITaaS model. Those vendors positioned in the top left quadrant are stronger in developing their SIAM capabilities, while those in the bottom right are stronger in offering ITMaaS (unsurprisingly, this is where key SaaS providers are positioned). In the bottom left quadrant sit service providers that are focused on modernizing their service-automation back-office platform for ‘new style’ managed IT services but do not yet offer stand-alone ITMaaS.

FIGURE 2: ITAAS SERVICE PROVIDER LANDSCAPE



SECTION 5

Vendor Profiles

What follows is not intended to be an exhaustive list of all service providers. Rather, it should be considered a brief directory of some of the service providers we currently cover and an outline of their ITaaS capabilities – a snapshot of an emerging market in early 2014.

5.1 ATOS

Technology Approach

The Atos service management tooling is called the Atos Technology Framework, and it has four layers:

- A presentation layer for the customer and the customer's end users. This is a portal application for standard request management and order fulfillment that is based on the CA service catalog and provides ticketing and self-help functionality. It hooks to an internal service-integration dashboard, which can, for example, chart past storage use and forecast likely future use. This layer also has reporting applications that feed into SLA metrics, commercial reporting and chargeback reporting.
- A process-integration layer for alerting and process orchestration that makes use of CA IT process management.
- The data layer is built around HP technology for CMDB and discovery audits
- Above this, there is a tower-specific reference architecture layer designed by Atos, where different toolsets are required for workplace, servers, storage, apps and networks.

Atos uses the TIBCO BusinessWorks enterprise service bus to integrate all the layers, as well as to integrate with customer and third-party systems. For example, Atos can use it to integrate with client HR systems so that when the client hires a new employee, a new PC is ordered, and the appropriate access rights to SAP, etc., are provided. It also connects with on-site support services, say, for technical call-outs.

Within its framework, Atos uses automation tools from many technology vendors in the tower-specific layer, but these tools are not exposed to the customer – the customer simply uses the service catalog to access services.

The roadmap for Atos includes optimizing the user-centric model for the desktop and further reducing the provisioning time for the datacenter service itself. Atos is also adding social networking functionality, such as instant messaging to the service desk, and will integrate additional market standards in several layers of the framework.

SWOT Analysis

STRENGTHS Atos is primarily using its investment in service-delivery automation to enable it to offer customers more innovation within their managed services contracts, which is a thoroughly sensible use of technology in the company's biggest revenue-earning business line.	WEAKNESSES There seems to be a slight disjointedness in the go-to-market strategies of Atos and the Atos company Canopy. The latter is coming to market with the 'as a service' portfolio, while Atos itself is providing the managed services behind the Canopy offerings. If the two are not as closely aligned in front of the customer as they are in delivering the services, then Atos' portfolio will begin to look a little old-fashioned. For example, Atos is nearly the only service provider of its size that doesn't have a stand-alone ITMaaS offering.
OPPORTUNITIES The clear opportunity for Atos lies with its ability to come to market with a SIAM offering based on its service-automation and integration-technology framework. This provides a way for the company to capitalize on the current market trend for multi-sourcing.	THREATS One of the main threats for Atos is that the SIAM opportunity could turn out to largely be an on-premises play for retained IT teams, rather than something that many organizations will contract with a service provider to provide.

5.2 BELL TECHLOGIX

BEAM as a Service (BaaS)

BEAM is a service-delivery management platform made available as a number of functional modules. These modules span helpdesk operations, knowledge management, network and system management, mobility management, analytics, and reporting. The platform includes automated call management based on VoIP and IP services management, the monitoring and managing of incidents using ITIL and ITSM, and IT asset management using a CMDB. Knowledge management and a self-service portal are also provided.

The BEAM services run on a private cloud, and while the commercial packaging is new, the company has taken its proven systems management implementation and made it client-facing, providing complete support for the environment, including management of the third-party vendors and licensing. On top of this, Bell Techlogix can add customized services for each customer.

Business intelligence is provided via the company's Data Cube, which was launched more than a year ago. This creates the IT intelligence from the operations side, generating analytics around continual service improvement and problem root causes. In this way, Bell Techlogix can provide generic operative KPI information around service improvement and ticket management. In other words, BaaS can offer a living repository of best practices. This is a really interesting development for midmarket customers because they typically have not had access to this kind of data before – these pooled metrics and KPIs add real, ongoing value to the proposition.

An offering such as BaaS enables Bell Techlogix, a US domestic player, to better compete with labor-arbitrage players because it means that the company can offer more cost-effective management services, providing consistent delivery that is location-independent. The approach also helps the company build a multi-skilled workforce – it helps accelerate internal career paths, moving tier one support workers up to tier two and tier three. It is then easier to develop the workforce by, say, taking a tier two service desk agent and adding tier two mobility skills to the knowledge base. What is more, the exposure to more BI and CIO analytics means that the business acumen of the company’s internal IT professionals is growing.

The company is targeting the US midmarket, a customer base that typically has no single system of record. The go-to-market approach is one of collaborative governance – and does not require holistic outsourcing. Rather, Bell Techlogix is extending its platform to help customers deliver the service themselves to their end users.

SWOT Analysis

<p>STRENGTHS</p> <p>Bell Techlogix is coming to market with a clearly differentiated approach to delivering services as an MSP in the cloud era. It is offering capabilities to its target companies that they do not currently have access to – best-practice key performance indicators (KPIs) – in a way that is palatable to the way they operate (i.e., not fully outsourced), but that also offers opportunities for the company to add value via its staff, as well as its tooling.</p>	<p>WEAKNESSES</p> <p>Selection of the right commercial models with technology vendor partners will prove crucial in enabling Bell Techlogix to continue to develop this mode of operation for its customers. Because the company is ahead of most of its peers, this could continue to prove challenging in the near-to-midterm.</p>
<p>OPPORTUNITIES</p> <p>The growth opportunities look good once the company has some anchor client references ready for market consumption. In particular, this approach opens up the opportunity for Bell Techlogix to develop more segmented offerings for customers based on the knowledge it is accumulating via the Data Cube.</p>	<p>THREATS</p> <p>Ultimately, the business model that Bell Techlogix is developing will become mainstream for many MSPs, so it needs to continue to innovate to stay one step ahead. In the shorter term, the main threat will be from buyers seeking to go directly to a subscription model with the ITSM technology vendors themselves. In particular, if BMC Remedy were to be sold to a service provider, that could threaten the Bell Techlogix model.</p>

5.3 CAPGEMINI

Supporting ITaaS is changing the way Capgemini contracts, especially as it develops its SIAM capabilities. For example, in the deal with UK-headquartered engineering company Rolls-Royce signed in March 2012, Capgemini was appointed service integrator to ensure that the specialized IT outsourcing services provided by a number of vendors would operate together effectively to deliver the best possible support to Rolls-Royce operations in 50 countries worldwide. This was a brand new type of contract for SIAM, and difficult to draw up because it was a first-mover contract, with both Capgemini and Rolls-Royce cutting new ground.

In terms of ITMaaS, Capgemini is planning to take its Project Delivery Service to market. One of the options within this portfolio is an ITMaaS capability providing tooling along with runbooks and embedded process knowledge. The main tools within the offering are Remedy on Demand and Atrium, packaged with Capgemini consulting expertise and provided with either a modified or a standard service desk. A billing dashboard will also be added to the tooling.

SWOT Analysis

<p>STRENGTHS Capgemini is one of the first service providers to come to market with a SIAM capability, so it has early-mover experience in this type of contract.</p>	<p>WEAKNESSES The tooling for the ITMaaS offering may be perceived as old-fashioned by some buyers keen to move to new-style ITSM technology.</p>
<p>OPPORTUNITIES As a service provider keen to identify with SIAM requirements, Capgemini is in a good position to capitalize on buyer interest in developing ITaaS propositions.</p>	<p>THREATS The challenge for all service providers offering SIAM is whether the opportunity is large enough to compensate for lost revenue in providing managed technology towers.</p>

5.4 CISCO

Within its operate-and-manage business, Cisco Services uses BMC Remedy along with Oracle applications for the technical support center. The tooling choice is driven by the need for integration with client investments and the ability to support the exchange of bidirectional information. This is also what fueled the acquisition of SolveDirect with its ServiceGrid product.

Internally, Cisco IT uses tooling that it calls Suite Integration for cloud management, which takes advantage of the self-service portal, service catalog and lifecycle management software acquired from newScale, along with the Intersperse software acquired with Tidal Software for application management, business-process tracing and runtime monitoring. The tool enables Cisco teams to order new software and devices for themselves. This is done using access credentials from Active Directory, and then services can be provisioned automatically. Suite Integration is being continuously improved by tooling for ITaaS and PaaS to expand the automation suite and offer employees more services from the Enterprise Store, so, for example, they can set up their own virtual offices. Users can provision additional storage and order database schemas. In the old days, the engineering and application development teams would open a ticket and wait eight weeks to get what they needed; now they log in to Active Directory, push a button, and they are typically provisioned in six minutes.

Within Cisco, IT offers standardized bundles of services. This same set of tools is made available to service providers and can then be customized for use by their customers. The service catalog has access to department codes (using Active Directory) so that, internally at Cisco, chargeback can be used for, say, a virtual office setup or for a virtual machine. Charges are then made to the individual's cost center.

For external service provisioning, Cisco’s philosophy is to interface with what the customer already has, which is why SolveDirect is such an important acquisition – it does a good job of integrating multiple systems, each with its own DBMS and CRM systems for inputting data and for extracting information. Mike Flannagan, senior director and GM at Cisco Systems, says that Cisco’s aim is to become more agnostic about alerts regardless of the tools that customers use.

Although ServiceGrid has an ITSM front-end application, it is not intended to compete with, say, BMC Remedy or ServiceNow. Rather, the idea is to integrate systems using the 300 or so interconnections offered. An organization can subscribe to ServiceGrid while maintaining its own ITSM system, with the platform facilitating the connection and mapping of ITSM processes to each other. ServiceGrid is a cloud-based systems-integration capability for ITSM and CRM but is not actually being positioned by Cisco as an ITSM interface; rather, the main use case is connecting disparate systems.

For ServiceGrid, Cisco is currently providing some systems-integration capabilities because it is a recent acquisition and because, being cloud-based, the integration work is done remotely rather than on-site. As channel support for the platform increases, Cisco will be less involved in systems integration. Advanced Services also provides some planning, design and implementation services for large, high-touch customers.

SWOT Analysis

<p>STRENGTHS</p> <p>In the network management space, Cisco is in the pole position to drive the adoption of service automation and more intelligent or ‘smart’ services. Despite some initial concerns about whether customers would welcome the collection of network data into Cisco’s automated tool known as The Collector, it is being deployed, and partner sentiment is becoming more positive.</p>	<p>WEAKNESSES</p> <p>For most organizations, the real value of ITSM lies with providing a better understanding of how well aligned IT is with business outcomes. Typically, this comes down to workload and business process management rather than network or datacenter management <i>per se</i>. This is still a weakness for Cisco, although acquisitions such as Composite suggest it is one that is being addressed.</p>
<p>OPPORTUNITIES</p> <p>With the emergence of the ‘Internet of Everything,’ support services become more complex, and the requirement for product manufacturers to integrate with service providers only increases the number of service connections that will need to be created and managed. As we have said before, Cisco is well positioned to grow in this space.</p>	<p>THREATS</p> <p>Senior management has to manage the decline in networking margins with the ramp-up of new business opportunities in areas such as Advanced Services. In particular, the shift that will need to happen in Cisco’s culture as services becomes a more important part of the business mix should not be underestimated.</p>

5.5 COGNIZANT

The OnTarget approach

The foundation of the OnTarget management platform was part of the AimNet acquisition, and Cognizant has added tools, homegrown products and its cloud management platform, Cloud360, on top of it.

With this approach, Cognizant claims three key differentiators:

- Integrated delivery support between the application and integration services, which clients find especially helpful for non-production application areas.
- The Operation Maturity Model, which was introduced in 2007 and has an ITSM framework, methods, continuous service improvement and governance layers. Cognizant has developed its Delivery Maturity Index as part of this model, and automation is key because the index goes beyond compliance and is based on more than 240 engagements to date.
- The OnTarget framework, which is the customer-facing standardized capability, takes best-of-breed components to which Cognizant integrates workflows between the application layer and the infrastructure using its intellectual property. In this way, it can provide application awareness for holistic management of environments where the business needs drive application sizing on the fly.

Cognizant provides transformation in delivery via its automation platform. While Cloud360 is the preferred model for Cognizant, it recognizes that as a service company, it must also be able to work with customer tooling, so its use is optional rather than mandatory for managed services customers.

The platform underpinning OnTarget is 12-13 years old and has evolved from its origins as a network and server management platform. The monitoring layers have all been replaced, and components have been changed as the platform has evolved. There are 723 end customers and 50 partners using it, and every new Cognizant customer is on-boarded to make use of the existing best practices offered via templates for middleware, databases, etc. This covers alerting as well as standard reports and provides customers with a jump start in improving their service delivery. The knowledge management component is integrated into the platform and is also becoming richer over time.

Cloud360 is a homegrown product that includes the cloud platform along with several other integration platforms. It was built in 2009; Cognizant started selling it in 2010, and the company had the first customer in 2011. Cognizant developed Cloud360, and Microsoft SCOM, HP NNMi and BMC BPPM are the tools that provide additional services. For integration, Cognizant uses 'manager of manager' industry-standard tools and a custom tool for case exchange.

In this way, the company can integrate cloud into the main management stack so that it can monitor services in a non-linear way. With Cloud360, Cognizant can manage the existing customer estate, as well as the virtualized layers. It is a good fit for customers looking to experiment with cloud in public, private and on-premises scenarios because it keeps processes consistent. The platform uses BMC event management for enabling customers to use their own tools while the company integrates alerts. The alerting is then converted to the ITSM ServiceNow layer that was added a couple of years ago.

Cognizant is positioning Cloud360 as an accelerator product that can be used for one VM or 10,000 VMs. It is available as a product to compete with vendors such as BMC, and Cognizant sells perpetual and subscription licenses on a SaaS model. Cloud360 is installed and available in Cognizant datacenters managing 5,000 VMs internally.

SWOT Analysis

<p>STRENGTHS</p> <p>Cognizant has come to market more quickly with an ITMaaS offering – in the form of OnTarget and Cloud360 – than many of the tier one Western-headquartered service providers and is managing to grow a respectable installed base for the offering among its customers.</p>	<p>WEAKNESSES</p> <p>One of the main weaknesses Cognizant faces is that it not well known in the market as an infrastructure services provider, and yet, the entry point for many of these IT management services is with an IT infrastructure management requirement.</p>
<p>OPPORTUNITIES</p> <p>As the market matures for ITMaaS, Cognizant has a strong opportunity to further develop its blended brokering and managed support services for applications and infrastructure because this does provide a point of differentiation for the company.</p>	<p>THREATS</p> <p>One of the biggest threats to service providers offering infrastructure management from a 'single pane of glass' is that buyers must feel confident that they are not simply moving from multiple cloud providers to multiple cloud platform integration providers. In other words, they must feel that lock-in is not simply happening at a higher level of abstraction because if they do, market acceptance will slow down.</p>

5.6 COLT

The Information Delivery Platform

Colt began building the common information-delivery platform 18 months ago as it began to build out its IT portfolio, moving on from its telco heritage. It quickly identified that it is not possible to use telco systems to deliver transactional services for complex IT. Colt needed to move from a system based on send and receive to service-request management. So the company developed an architecture to enable it to move to delivery of the new IT services. The resulting framework has been live since the beginning of 2013 and continues to evolve.

Functionally, there are two main parts to the platform:

- Service catalog and service-request system using ServiceNow.
- Orchestration tooling to manage service requests ranging from restarting a virtual machine to managing the failover of an IT site. These processes are decomposed and pushed through to fulfillment. This part of the platform Colt built itself using open source tools because there was nothing that the company could buy off the shelf to fulfill its requirements. With the Colt orchestration platform, the company can decompose service requests and ensure it can fulfill them as agreed in the SLA.

The platform is designed to provision a number of products and services, including Colt's virtual datacenter, hybrid/private cloud, compute and storage. Customers can buy directly from VMware or via Colt's portal to provision machines and network on a pay-as-you-go model or as a monthly service.

Colt uses the existing telco billing capability, which already supports a usage model. It is now developing specific rate cards for runtime viewing using the Kenan platform, while chargeback modeling is done in vCloud along with a set of supported use cases.

Colt also offers consulting services to help customers understand the service-delivery model, and it has developed a solutions architect toolset to do a quick build for SLA documents. The toolset provides the building blocks required for SLAs in multiple languages via a rapid-design process. ServiceNow and customers' existing change management systems can be integrated with the portal via APIs.

In 2014, the plan is that the platform will evolve as Colt builds out the self-service offerings so that, say, colocation can be procured online under the network portfolio. The intention is that Colt will present the portal as one item to all its customers; this is a challenge because, for example, self-service needs limited performance reporting, while managed services need much more complex performance reporting. The portal will also become more transactional so that you can click on a firewall and generate a service request.

Billing will be moved to an IT-focused billing engine, and the company has already locked down what the services are via the standard service building blocks. The challenge that Colt is working on now is to build the matrix models necessary to support customers with different pricing models for each service block. All the logic is in ServiceNow and kept separate from the presentation layer. The abstraction is beneficial because as the portal gets more complex, Colt does not want an escalating development cost.

SWOT Analysis

<p>STRENGTHS</p> <p>Colt has taken its networking legacy to create a new type of business model suited to cloud delivery and consumption. So far, it has managed to do this without destabilizing its existing business.</p>	<p>WEAKNESSES</p> <p>The company is several years ahead of the market in what it can deliver, so it may have to be more patient than shareholders would like in building up its IT services revenue. The recent departure of Simon Walsh, EVP of Enterprise Services, may signal problems in this regard.</p>
<p>OPPORTUNITIES</p> <p>As cloud delivery becomes more important, Colt will be in a stronger position than many competitors because of the attention it has given to service automation around its new IT offerings. This will help increase partnering opportunities with service integrators, as well as with direct sales.</p>	<p>THREATS</p> <p>The challenge for a mid-tier player developing a market-leading capability is to stand its ground and build market share before larger competitors catch up. The gamble is whether market demand will outpace those large players' capabilities so that Colt benefits.</p>

5.7 COMPUCOM

CompuCom developed a custom multi-tenant version of ServiceNow that was launched as part of the company's ITIL-based IT service delivery and management framework known as IIM. The delivery system is aligned with ServiceNow releases, and adoption has grown to about 40% penetration of the company's managed services base, where it is delivered as a SaaS offering. The constraint to wider adoption is that many within the company's installed customer base have invested in their own systems management tooling.

From a managed service and cloud standpoint, clients can use the IIM environment as they need to and can add more CPUs, etc., using CompuCom's service catalog to make resources available for their end users. This way, customers can utilize the workloads that CompuCom makes available, and the company then manages the environments for those virtual machines and workloads, providing services such as root-cause analysis in the customer environment. Because of IIM's multi-tenant architecture, CompuCom can also watch the cloud infrastructure from an operations perspective. This means that customers can request workloads from their own environments and from the public cloud as well. The same monitoring toolset applies across hybrid, public and private clouds, and customer requests are diagnosed in the toolset for back-end incident management.

Although CompuCom makes use of ServiceNow's multi-tenant architecture, in IIM, the configuration model is not integrated with the engine, so releases can be blocked and staggered to work with the customers' business requirements. CompuCom does offer a chargeback mechanism; costs are definable based on output from the CMDB and then can be charged back so that budgets can be sized accordingly. Typically, this is best done by the internal IT department, running quarterly reviews with card users.

When it comes to using IIM, CompuCom is flexible in the way it brings the offering to market. For example, it can provide a comprehensive IT management offering across the board, or a monitoring-only offering for root-cause analysis, correlation and incident management. This means that when the tickets are created, there is an incident of record, and then the customer's IT department can close out the incident on its own. Sometimes CompuCom integrates root-cause-analysis tooling with other service-provider tooling for customers; indeed, the company assists ServiceNow with systems-integration skills for customers that want to integrate ServiceNow into their existing service-delivery processes.

IIM uses RightAnswers as its knowledge base for sharing common problems and issues among customers. For example, FAQs can be created to help new employees navigate their IT choices.

Aside from the managed services, CompuCom also has a professional services arm that works with customers and prospects, providing discussion workshops on IT service management. CompuCom remains vendor-independent from a technology and services perspective. However, where participants are considering moving away from dated BMC or HP Service Manager systems, the company will introduce cost-effective approaches to IT management, including its IIM and ServiceNow capabilities.

SWOT Analysis

<p>STRENGTHS</p> <p>CompuCom has established a market-leading position in providing ITMaaS for the US midmarket that is built on a close relationship with ServiceNow. Its commitment to retaining this leadership is commendable but will become more challenging as other players catch up.</p>	<p>WEAKNESSES</p> <p>Despite its early entry into this market, less than half of its installed base has migrated to its tooling, which suggests that growth in the midmarket for ITMaaS may be seriously constrained by buyer sentiment.</p>
<p>OPPORTUNITIES</p> <p>It is interesting that anecdotal evidence suggests that larger organizations may prove to be more receptive to the ITMaaS concept than the midmarket, so CompuCom's investment in IIM has already enabled it to expand its managed services offerings to larger organizations.</p>	<p>THREATS</p> <p>In the next two years, having an ITMaaS capability will be standard across service providers, so CompuCom will need to decide to what extent IIM continues to be a differentiator for the midmarket buyer.</p>

5.8 CSC

CSC is developing a new service management portfolio to be launched this year that will make use of its ServiceMesh acquisition made late in 2013. Prior to acquisition, ServiceMesh had built a reputation for its application-centric Agility Platform, which was engineered to use the Puppet configuration engine and VMware-based workloads. The platform can take an application running in a VMware virtual machine and prepare it for deployment to VMware's Cloud Foundry PaaS, to CSC, to Microsoft Azure or to Rackspace's Xen-based OpenStack cloud.

Acquiring ServiceMesh was a game-changer for CSC because it makes CSC a less heavily VMware-oriented IaaS provider that is based on Vblocks and more a hybrid cloud service broker. That is, it can import and export workloads from a variety of enterprise environments and serve as the public cloud provider for them. For example, this would enable it to more credibly come to market with a SIAM offering.

CSC uses BMC Remedy for core ITSM, which has been enhanced with CSC expertise around client-retained and third-party tools. The company also uses Blazent asset management to create golden asset records from multiple sources, while Flexera software is used to provide more flexibility around complex licensing arrangements in the customer base than BMC Remedy can support. Orchestration and automation services are managed via BMC Atrium, while for monitoring, CSC uses the EMC Ionix platform, as well as CA Nimsoft.

CSC is finalizing key strategic tool decisions as it formalizes its service management offerings. It has been using Remedy for a number of years, but due to a lack of governance, CSC has hundreds of customizations of the tool. In 2012, it developed a plan to rationalize and reengineer the Remedy toolset back to a standardized set. Having done this, the company is at the final stage of product selection for its ITSM tooling going forward.

SWOT Analysis

<p>STRENGTHS</p> <p>There is integrity in CSC’s strategy to become the service provider that really understands both the new and the old IT service markets and can act as an independent arbiter between the two. Within this context, its plan to become a technology-neutral hybrid cloud broker has potential.</p>	<p>WEAKNESSES</p> <p>It is taking CSC some time to set out its stall of next-generation services, which is understandable given the internal changes being undertaken to support them, but if it takes too long, investors and buyers will get bored and move on.</p>
<p>OPPORTUNITIES</p> <p>As CSC launches its next-generation services, it should be in a much stronger position to sell more standardized, productized services to smaller enterprises and midmarket customers.</p>	<p>THREATS</p> <p>The main threat is whether CSC’s new business model will enable it to continue to both retain its existing customer base and attract new customers. The main issue is market credibility – can it be perceived differently, or will it always be seen as a traditional services player?</p>

5.9 DELL

Dell is taking a pragmatic approach to service automation, including moving IT operations to the cloud following key acquisitions such as Boomi and Enstratus. At the moment, the platform is a back-office workhorse that provides a robust ITSM capability and is the foundation of Dell’s services, but it is implied in the company’s offerings rather than being one in its own right.

Dell's ITSM platform is built on the BMC stack, and the company operates two versions. Both versions are modified to Dell's processes – one is highly customized for large outsourcing customers, and a more standardized version is used for other customers. The Quest monitoring suite is integrated into the ITSM platform, and Dell uses Boomi to integrate to customer tool-sets so that data can be leveraged from the customer ITSM system to Dell's ITSM system using business rules.

Dell Enstratus offers single cloud and multi-cloud management, hybrid cloud, and on-premises infrastructure management. However, a level of sophistication at the IT department level is required to make best use of the platform, which is offered on-premises and as SaaS. Dell can create an ITMaaS capability for a customer, but this is not yet a productized offering for the company. ITSM expertise is provided via Dell's Global Infrastructure Consulting arm.

SWOT Analysis

<p>STRENGTHS</p> <p>Dell has, via shrewd acquisitions, gotten many of the components in place to enable it to develop a productized ITMaaS capability should it choose to do so.</p>	<p>WEAKNESSES</p> <p>Given the development of Dell Services as a disruptive entrant targeting the midmarket, it is surprising that there does not appear to be plans to offer a productized ITMaaS capability.</p>
<p>OPPORTUNITIES</p> <p>Dell is already working closely with key partners BMC and salesforce.com to become a stronger channel for BMC Remedyforce as part of its ITMaaS positioning. This offers good opportunities for Dell's midmarket approach.</p>	<p>THREATS</p> <p>If Dell does not get out in the market soon with a plan, the opportunity will begin to slip away.</p>

5.10 FUJITSU

Services

Fujitsu has three systems management capabilities:

- Triole for Service is Fujitsu's historical service management approach. It underpins all of Fujitsu's managed services contracts and sits one level back from the customer. It is tied back to the resolver groups within the organization.
- Fujitsu's ITMaaS is a suite of SaaS-based applications providing the infrastructure, application-monitoring and service-desk capabilities needed to deliver a more efficient and cost-effective IT operation. The tooling is underpinned by CA Nimsoft technology to implement and drive monitoring and service-desk functionality in support of Fujitsu's clients' business needs. ITMaaS is offered as a packaged stand-alone service, hosted by Fujitsu. Customers pay for it on a subscription basis to monitor an agreed number of devices per user per month. Customers then take the toolset and implement their own processes in it.
- As part of its recently announced Cloud Integration Platform, monitoring services and performance across numerous cloud providers is a function delivered by the Nimsoft Monitor SaaS toolset, which also forms part of the Fujitsu ITMaaS offering. The Cloud

Integration Platform, however, is a broader offering than ITMaaS and is combined with other technologies such as Run My Process, cloud service catalog management, backup as a service and single sign-on.

Fujitsu does offer consultancy engagements around its SaaS offerings; however, its own professional service arm is stronger in certain regions than others. Therefore, in the UK, US and Australia, buyers use Fujitsu Professional Services, while in other regions (such as Singapore), the company partners with local players.

ITMaaS Approach

In the ITMaaS space, Fujitsu has spent a long time building up its tools and mechanisms for its in-house method known as Triole for Service, which uses CA technology. In the last 18 months or so, it has supplemented this with an 'as a service' approach using CA Nimsoft for managing infrastructure and applications.

Both tools are integrated via Unified Manager for the company's service-desk capability. Fujitsu's intellectual property is based on the delivery of services rather than on the tooling itself. The CA toolsets are run on Fujitsu infrastructure in Fujitsu datacenters using Fujitsu staff and capabilities, including the company's processes and procedures for IT management, which it developed as part of its on-premises toolset heritage.

An important part of Fujitsu's ITMaaS approach was added in April when Fujitsu acquired Run My Process (RMP) to provide process and data integration. This has given the company the ability to integrate environments for customers and support other handoffs. However, although the company is integrating the tools and using RMP for some customer scenarios, it is not yet a standard part of Fujitsu's service management deployment.

The company's Cloud Integration Platform uses RMP to pull together its integrations. Fujitsu is making use of the tool to build global service management capabilities by providing service-desk management instances in multiple regions. Also, for customers that have ITMaaS running along with on-premises tooling, RMP integrates the two.

Internally, Fujitsu uses Triole for Service at the back end for second- and third-line support technicians of managed service contracts, while first-line support makes use of ITMaaS. RMP is then used to join them so that tickets can be passed between support teams.

While many service providers are opting to move to ServiceNow for ITSM, Fujitsu has decided to stick with CA and use Nimsoft. Fujitsu says this is because CA provides stronger self-service capabilities for end users. The service provider likes the Facebook-like interface and social-media-type community that Nimsoft offers. Fujitsu also believes that its existing relationship with CA and the way that the product is architected enable it to implement a cloud service more easily from Fujitsu infrastructure. Furthermore, about half of Fujitsu's installed managed services base is using its implementation of CA tooling.

Going forward, Fujitsu will keep the ITMaaS offering up to date with new Nimsoft releases, and it will push the social-delivery aspect of the service. The offering will also reach a larger audience as part of the Cloud Integration Platform where a broader set of capabilities may be introduced, such as integrating catalog service consumption into the core service management capabilities so that, say, a VM is automatically deployed with monitoring agents, enabling automated alerts to drive tickets.

SWOT Analysis

<p>STRENGTHS</p> <p>Fujitsu is bringing management offerings to market in the form of ITMaaS and the Cloud Integration Platform, which are well positioned for the ‘additive’ service management requirements of its enterprise buyers.</p>	<p>WEAKNESSES</p> <p>For a company that was early to market with Triole for Service underpinning its managed services capabilities, it is somewhat surprising that Fujitsu does not have publicly available metrics to anchor its service management capabilities in real-world customer benefits.</p>
<p>OPPORTUNITIES</p> <p>The main strategic opportunity for Fujitsu lies with larger, cross-border contracts. However, both ITMaaS and the Cloud Integration Platform play more obviously to smaller tactical contracts in the US and parts of Europe and will probably help Fujitsu grow in countries such as the US where it currently describes its penetration as ‘suboptimal.’</p>	<p>THREATS</p> <p>Fujitsu is in an interesting position: it’s not yet at the scale of global service delivery as IBM or HP, but it is too large and well established to operate as a service disruptor. This means that unless Fujitsu can strongly articulate its position, it may be squeezed out of ITMaaS and hybrid cloud management opportunities by both larger players and new entrants.</p>

5.11 HP

HP has a suite of automation software spanning the orchestration and provisioning of servers, databases, middleware and networks. When it comes to cloud delivery, there are two main requirements that HP uses its software to fulfill. First, the management and automation of cloud-delivery platforms and second, providing an integration and management framework for supplier-delivered services, including cloud services.

HP addresses the first requirement by extending the capabilities of existing tools such as Business Service Management for monitoring, Configuration Management System for configuration management, and Service Manager for ITSM processes. It also offers an integrated end-to-end service lifecycle management capability with HP Cloud Service Automation, and provides support for OpenStack as part of its converged infrastructure offering.

The company addresses the second requirement via its HP SIAM framework, which is designed to integrate externally delivered services, providing integration points, supplier management control and governance processes. SIAM is built on top of existing HP automation software and is offered as a set of predefined policies, configurations, processes, metrics and indicators. The company launched SIAM in February 2012, and version 2.0 is now available. HP has successfully lowered customer management costs to 4% of IT budget using the framework.

ITMaaS

HP has several approaches to ITMaaS – some are SaaS-only offerings, and some are a combination of on-premises and off-premises managed services.

- SaaS: a pure SaaS offering is available for most of the HP Software IT management portfolio, including specific tools that are only available on SaaS, such as HP Service Anywhere or HP Agile Manager.
- Solution Management services: these are managed services that can use either on-premises or ‘as a service’ products to deliver an end-to-end IT management service to the customer. Some examples are Managed Enterprise Monitoring, Testing as a Service and Software Asset Management.
- Managed/outsourced services: these are a broad portfolio of services – from IT operations to business process outsourcing – that address different customer needs. These services use a predefined IT management framework, based on HP Software tools, to deliver standard services and processes to multiple customers efficiently, but can also be extended to offer customization or provide additional flexibility.

Most of the products and services above can be provided in a consumption-based model. HP Software uses the same set of tools for all the offerings. They are supported by Cloud Service Automation, Server Automation, Operations Orchestration, uCMDB, Database and Middleware Automation, Service Manager, Asset Manager, Executive Scorecard – and optional third-party products like Adaptive Computing’s Moab for high-performance computing or Cloud Cruiser financial management software.

The HP Professional Services team has created intellectual property that allows HP’s delivery teams to accelerate the implementation of HP Software tools and supports Internet address provisioning management, flexing and bursting, showback and chargeback, and financial management.

In order to accommodate customers that want to manage IT from a ‘single pane of glass,’ as well as customers that want tools with extra functionality that come with their own consoles, HP provides an integrated view via the Executive Scorecard, which provides information on all products from on-premises to those that are remotely managed, spanning both testing and production systems.

SWOT Analysis

<p>STRENGTHS</p> <p>HP has a good reputation in the service-automation software market, and a large installed software base to sell newer SaaS offerings to, as well as the ability to innovate in the outsourcing market by offering HP SIAM.</p>	<p>WEAKNESSES</p> <p>One of HP's challenges is that it has to choose which areas to focus sales and marketing activity on. It is in danger of being out-marketed in the ITMaaS software space by pure plays, such as ServiceNow and BMC Remedy Force, which are gaining momentum among buyers.</p>
<p>OPPORTUNITIES</p> <p>HP automation software is so widely deployed that the main opportunity might be characterized as a defensive one in retaining customers via the addition of SaaS offerings. In the outsourcing market, SIAM offers new opportunities as the multi-sourcing trend continues for buyers in second- and third-generation contracts.</p>	<p>THREATS</p> <p>HP's largest threat probably lies with the ability to defend its customer base while transitioning to the new style of IT via its cloud offerings. This is a threat shared with other players, including direct rival IBM.</p>

5.12 INFOSYS

In honing its operating model, Infosys has adhered to some basic requirements, such as the need for tooling to be plug-and-play because most clients are not open to changing their platforms. Infosys also has ready-to-deploy use cases for workload automation, data-transfer automation, runbook automation and virtualization automation, all of which can be customized as necessary. Service automation is provided via a centralized console with a GUI-type model (because a script-based model is cumbersome and requires more skills), and of particular interest for customers in regulated industries, automated auditing is also provided. The goal is to provide end-to-end orchestration without manual intervention.

To address these requirements, the Infosys service-automation operating model uses best-of-breed tooling from vendors including Microsoft, CA, ServiceNow, Automic, IPsoft, BMC, HP, Puppet Labs and Splunk. Some of the tooling choices have to do with leveraging assets that customers already own, and others have to do with current market traction for offerings from IPsoft, Puppet Labs and ServiceNow.

However, Infosys brings its own intellectual property to the model based on its experience managing IT for customers. It starts by taking the client's existing automation architecture into consideration. To create the operating model for each client, Infosys integrates with client tooling using LogLogic analytic feeds, for example, to help work out what can be automated and what tooling can be offered. In each contract, Infosys is looking for clear outcomes that can bring down resource numbers by 20%.

The majority of Infosys tooling is script-based and will continue to be so, but to this the company has added SaaS IT process automation for incident management because this is becoming well established in the market through ServiceNow. Infosys is also investing in BMC and HP tooling for ERP automation. It sees level one support activities

as a good area for automation because they are often repetitive and can be predicted, while level two support still needs human expertise. In particular, Infosys is finding that private cloud deployment is creating a consolidation context where you can manage the services but shrink the management footprint. It uses Splunk reporting and analytics capabilities to trend and analyze IT key performance indicators for customers to help align service management with business outcomes.

SWOT Analysis

<p>STRENGTHS</p> <p>It is difficult to elevate automation into a service differentiator, but with its technology-agnostic approach to tooling, the development of its automation lab and automation library, and recent customer wins, Infosys appears to be doing just that.</p>	<p>WEAKNESSES</p> <p>The weakness for most service providers using service automation to reduce costs over the term of an outsourcing contract is that industrialization may not yield the planned efficiencies, thus creating lower margins than expected.</p>
<p>OPPORTUNITIES</p> <p>Having proved itself as a strong competitor with its labor-arbitrage capability for Western buyers, Infosys now has the opportunity to renew contracts and offer to take another chunk out of the cost of IT operations for customers.</p>	<p>THREATS</p> <p>Service automation plays best on integrated technology stacks; consequently, the continuing trend for multi-sourcing is working against the outcome-oriented contracting that Infosys is aiming for.</p>

5.13 SUNGARD

The infrastructure sitting behind SunGard’s Viewpoint and Spotlight portals uses the ServiceNow ticketing platform and Service Center Asset Management, and Zenoss monitoring and reporting tools. The technology operations automation tooling is from HP, with, for example, SunGard using Opsware for patch management for network, storage and compute.

SunGard is using this tooling infrastructure globally with slightly different instances running in Europe. The global deployment means that SunGard service-delivery management teams in different geographical locations (some offshore) are all using the same ‘pane of glass’ for managed services, with the exception of cloud services. Once the outsourcing contract is agreed upon, SunGard transitions customers to its toolset by developing an integration layer between its toolset and the customer toolset – the e-bonding of tickets is the first phase of this development.

At present, the SunGard cloud services portal is separate from Viewpoint and Spotlight, and it links into private, secure, third-party (CloudStack and AWS) and recovery services. The plan is for all the portals to be combined into one SunGard customer interface in 2015. From a customer perspective, the rollout of this unified interface will be done on a per-account basis.

The key roadmap development for the service management tooling is the integration of the portals into one customer service portal and the way that the service-delivery managers function and work with the interface.

SunGard will enhance the cloud services at the back end to include billing engines on certain cloud offerings, tying this capability back to the monitoring and orchestration tools. The company will also launch an IL3 cloud infrastructure in the UK market in the first half of 2014.

SWOT Analysis

<p>STRENGTHS</p> <p>SunGard is making timely adjustments in its service-delivery operations to better support the requirements of the outsourcing market in an era when buyers want more transparency and consistency in the management of their contracts.</p>	<p>WEAKNESSES</p> <p>SunGard is slightly behind some of its competitors in being able to provide the ability to manage both cloud services and the rest of the infrastructure estate from a single pane of glass for its customers.</p>
<p>OPPORTUNITIES</p> <p>As selective outsourcing increases in the market and SIAM emerges more firmly as a buyer requirement, SunGard is in a strong position with its tooling and staffing investments to respond both as a service provider in its own right and as part of a wider provider ecosystem.</p>	<p>THREATS</p> <p>The key question for SunGard is whether it can grow its managed and cloud services quickly enough to compensate for customer attrition in the traditional disaster-recovery services. In the UK, the Serco contract has gone some way to answering that question.</p>

5.14 TECH MAHINDRA

Tech Mahindra has several offerings within its automation program, with the main ones being infrastructure services, application management services and testing services.

Infrastructure Services

Tech Mahindra’s infrastructure services are built on a portfolio of offerings spanning the ‘plan-build-run-monitor’ lifecycle that includes consulting, datacenter services, end-user computing, enterprise networking, enterprise security, IT infrastructure operation management and transformation services. Each of these can be offered as a stand-alone service or as part of a total outsourcing contract, underpinned by service-automation platforms.

Some of the key features of the automation offering include:

- Rule engines created per customer specification or sector-specific SLAs.
- Operations such as identity access management are customized and automated based on the business rules of the customer.
- End-to-end automation of the ticketing process to ensure improvement in SLAs and capture the knowledge in the tools.
- Currency of the process documentation that ensures that the team is ready for an audit anytime with documents to back it up.

Tech Mahindra has set up a tools practice to support these additional automation capabilities, developing alliances and partnerships with software vendors including BMC Software, CA Technologies, HP and Microsoft. Most of these partnerships are aligned toward working together to integrate and orchestrate multiple IT operations management tools.

Tech Mahindra also provides consulting and managed services for ITSM tools from BMC, ServiceNow and HP.

Application Management Services (AMS)

Tech Mahindra has developed its AMS framework to integrate people, processes and technology for delivering its application management services. Within this framework, the company has a set of service offerings that are underpinned by its CUBES platform, which is a modular tool supporting the ITIL process. It supports business, application and infrastructure layers from an application viewpoint – automating, tracking and monitoring transactions in each layer to help manage SLAs.

The CUBES platform has common elements with USOP, the infrastructure management platform, so where there are clients outsourcing both infrastructure and applications to Tech Mahindra, it can leverage these components to create a set of tools to structure the migration process. It also integrates with tools such as the BMC Suite and Clarify.

Elements within the CUBES platform, such as SLA Manager and Technology Agnostic Application Monitoring, are offered as stand-alone products. Work is currently under way to design CUBES so that it can be hosted as an AMS PaaS offering.

Testing Services

As part of its testing services, Tech Mahindra has created integrated reusable service blocks built as a platform that can be consumed individually or collectively, and it has introduced two tools to automate the testing process.

One of these tools is a consolidated and integrated test management and reporting tool called 'eConvergence,' which extracts test details from multiple projects by integrating with commercially available test tools such as HPQC, RQM, HPALM and bespoke test management tools. EConvergence maps all the testing data into a single database for reporting, monitoring and future extraction. It uses either published API or database connection for source data from the existing test management tool.

Tech Mahindra has also introduced the test automation tool eConvergence Cloud Automation Framework (eCAF), which provides an end-to-end test automation framework that builds a pool of tools, each used to develop one part of the framework. The combination of tools helps to automate end-to-end test cases with little or no manual intervention. Customers can license tools or use bespoke tools with a management 'tool of tools' approach combining best-of-breed toolsets. EConvergence and eCAF are productized through Tech Mahindra's Test Factory ordering portal, where customers can choose one or more services or products. Several European telcos are already using these services.

In addition to eCAF, Tech Mahindra is planning to roll out Zero Touch Testing within the next 18 months for requirements gathering, test planning and so on, using multiple reusable service blocks to provide static testing or point-of-execution testing.

SWOT Analysis

<p>STRENGTHS</p> <p>On an account-by-account basis, Tech Mahindra is managing to become a larger, more strategic partner for customers, and its investment in additional automated service delivery is clearly helping with this. As for new wins and renewals, the ability to potentially reduce IT costs by up to 50% is a strong calling card to have.</p>	<p>WEAKNESSES</p> <p>The next step should probably be a decision about how far down the ‘productized’ as-a-service approach Tech Mahindra wants to go, and then it can address the sales and marketing adjustments that need to be made to support more stand-alone services.</p>
<p>OPPORTUNITIES</p> <p>Tech Mahindra’s immediate opportunity is to continue to cross-sell services (service automation should help with this) into the different account bases that it and its merged Satyam acquisition have, especially now that it can go to market behind a unified brand.</p>	<p>THREATS</p> <p>In the quickly growing ITMaaS space, Tech Mahindra cannot take too long in getting its message out to market or it will be drowned out by a multitude of noisier competitors.</p>

SECTION 6

Conclusions and Recommendations

6.1 IMPLICATIONS FOR BUYERS

It may seem counterintuitive for buyers to opt for using the service provider's platform to deliver ITaaS. After all, surely it is less risky to own the tooling yourself and have the service provider help you set it up and use it. The main difference here is that with a service-provider offering you are not buying a raw technology platform, but a preconfigured platform that has been designed by a company that has a core competency in IT management. The value of this is that you are accessing some of the intellectual property of the service provider.

One of the advantages of the 'stand-alone ITaaS' offering from service providers is that it offers an alternative to the traditional IT outsourcing market. As an IT professional, you do not have to hand over the management of the delivery of ITaaS to an external vendor. But you can take advantage of the service provider's platform, from which you can provide your own tier of service delivery to your end users.

There is scope within this model to develop collaborative governance so that operational processes and policies can be promulgated via the service catalogs that you and the service provider develop.

If you decide to work with a service provider in this way, there are some emerging areas of functionality to consider when negotiating. These include:

- **ITSM systems integration:** At the moment, information sharing between enterprise customers and external IT service providers is undertaken on a 1:1 basis. In order to escalate a problem, enterprises need to take data from an internal system and re-key it into another system via, say, email. But typically an IT enterprise interacts with more than 20 external IT service providers, and managing each of these on a 1:1 basis creates operational inefficiencies. If you can, it is preferable to use many:many connections managed from the cloud. An example of this capability is found in the ServiceGrid cloud-based platform now owned by Cisco. It enables buyers, partners and suppliers to integrate with anyone else on ServiceGrid without having to develop 1:1 connectors.
- **Brokering mechanism:** Can your service provider act as a broker as well as a service manager? For example, Cognizant has several customers using its integrated framework, and it offers a single set of operational processes. This means Cognizant can offer one set of processes and operations across multiple providers, so that customers can help Cognizant publish service catalogs for their end-user customers. The buyer organizations can select infrastructure from multiple providers, and then Cognizant exposes the pricing, including the managed services pricing. In this way, Cognizant's Cloud360 is a cloud broker and cloud management platform all in one.

- **Data integration:** If you are working for an organization where the IT department has to quickly support new customer communities as the result of acquisition activity, for example, then being able to use a data integration tool to pull together a view of the customer from different data silos can be a useful service to provide.
- **Process integration:** Most organizations have analyzed fragments of their processes, and then people in between these fragments apply knowledge to create the automated process. However, if you simply base your approach on what has been captured, you will create a rigid system. A rigid system requires skilled management, intense change management and excessive manual intervention, which is often one of the traditional causes of automation failure. More viable systems are flexible; this is where the business process modeling, execution and monitoring part of the service-provider offering comes into play. It enables processes to be captured using rapid prototyping and agile methods.
- **Adaptive automation:** To some extent, traditional configuration management databases already provide this capability, and can be shown to provide an 8-12% cost savings by increasing the velocity and quality of some processes. But these tools are constrained by the availability of skilled individuals to manage the tools and intervene in the manual parts of the process, and ultimately they often show a man-hours savings, but not a headcount reduction. With a process orchestration layer, it is possible to add situational awareness and expose operational intelligence against policies and procedures within the processes. For example, the adaptive automation that Cortex from Innovise creates means that it can be used by clients without greenfield sites who can retrofit the platform to help them get to a more automated state.
- **Knowledgebase and analytics:** Being able to aggregate learning from beyond your own organization can be very helpful in supporting end-user self-service. For example, Bell Techlogix launched its Data Cube over a year ago as part of its service management platform, BaaS, which creates the IT intelligence from the operations side, generating analytics around continual service improvement and problem root causes. In this way, Bell Techlogix can provide generic operative KPI information around service improvement and ticket management via a living repository of best practices.
- **Delivery teams:** It is definitely worth asking how the service provider's delivery teams are being brought together for end-to-end automated delivery. This is because service architects, service and quality management teams, and delivery teams have to work very closely together from the design of the process to the delivery, including automation and tooling. An emerging approach is to assign a service-delivery manager for each customer, who is then responsible for *all* of the service elements.

6.3 IMPLICATIONS FOR SERVICE PROVIDERS

For the majority of service providers, the service-delivery platform is a back-office workhorse and the cornerstone of its services, rather than being an offering in its own right. However, with the emergence of ITaaS as an aspirational model for IT departments, it is time for service providers to rethink this.

The challenge is that many service providers have baked-in technologies that are not optimal for 'new style' IT services, while at the same time the outsourcing market is becoming more competitive, with lower margins. However, service providers do need to have a roadmap to address the requirement for a Web portal interface, service management integration, a multi-tenanted option and a usage-based subscription model.

All service providers need to invest in automation technology for quality and speed of delivery of IT services. Many are in the process of introducing new tooling to support their managed services. This is being driven by multiple factors:

- Adoption of virtualized infrastructure by customers, especially in the financial services and retail sectors.
- The trend for selective outsourcing, which means that service providers need to be able to work efficiently and effectively together to deliver services to buyers. It is increasingly difficult for a service provider to deal with only the technology tower that it has been contracted to manage.
- Technology refreshes among buyers are bringing in new SaaS offerings that must also be managed as part of a services contract.
- A requirement to provide lower fixed costs to set prices for consumption-based pricing models.
- Ongoing M&A activity means that there is a demand for service management capabilities that can simplify the IT department's job.
- To provide service management intelligence for continuous service improvement, service providers need a standardized technology approach in order to generate data that is comparable between accounts.
- ITSM tooling is driving demand for a 'single pane of glass' view that goes beyond an ITIL definition to create a system view of the data that is running the business.

Service automation enables more standardized service delivery, which enables more accurate costing. So the service-delivery platform needs to be revamped in order to ensure that the service provider is preparing for the cloud era, where many services will be commoditized and standard pricing will be important. The customer-facing front end or portal also needs to be ready for the mobile and social media age. All of which means that service providers need to be reassessing and reevaluating the technology they currently use as their back-office service-delivery workhorses.

It is not just a question of creating a rejuvenated technology approach to IT management, however, as service providers also need to rethink the way they work with multiple third-party vendors, especially where they are creating a commercially viable stand-alone service management offering. What will the terms of use be for the technology? Will the tool be accessed via SaaS or via a dedicated license? And so on. For many service providers, this may be the first foray into establishing new legal and contracting vehicles to support a subscription service that looks like a product. The vendor management agreements are the financial engineering layer of abstraction between the client and the service, and this layer forms part of the value that the service provider is offering.

The other big implication has to do with ensuring that service-delivery teams have the right skills in place for a new way of working. With a virtualized infrastructure service, management is driven by analytics, so the service provider needs people that can understand both process and technology in order to deliver services. Essentially, a broader skill set is now required for service delivery that must include greater technical expertise, as well as more commercial awareness than teams needed in the past. Service-delivery professionals need to be able to challenge technical teams as well as being able to talk to customers about the impact of service issues on their business.

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