

# Vendor Selection Matrix – Capacity Management SaaS And Software: The Top 20 Global Vendors 2018

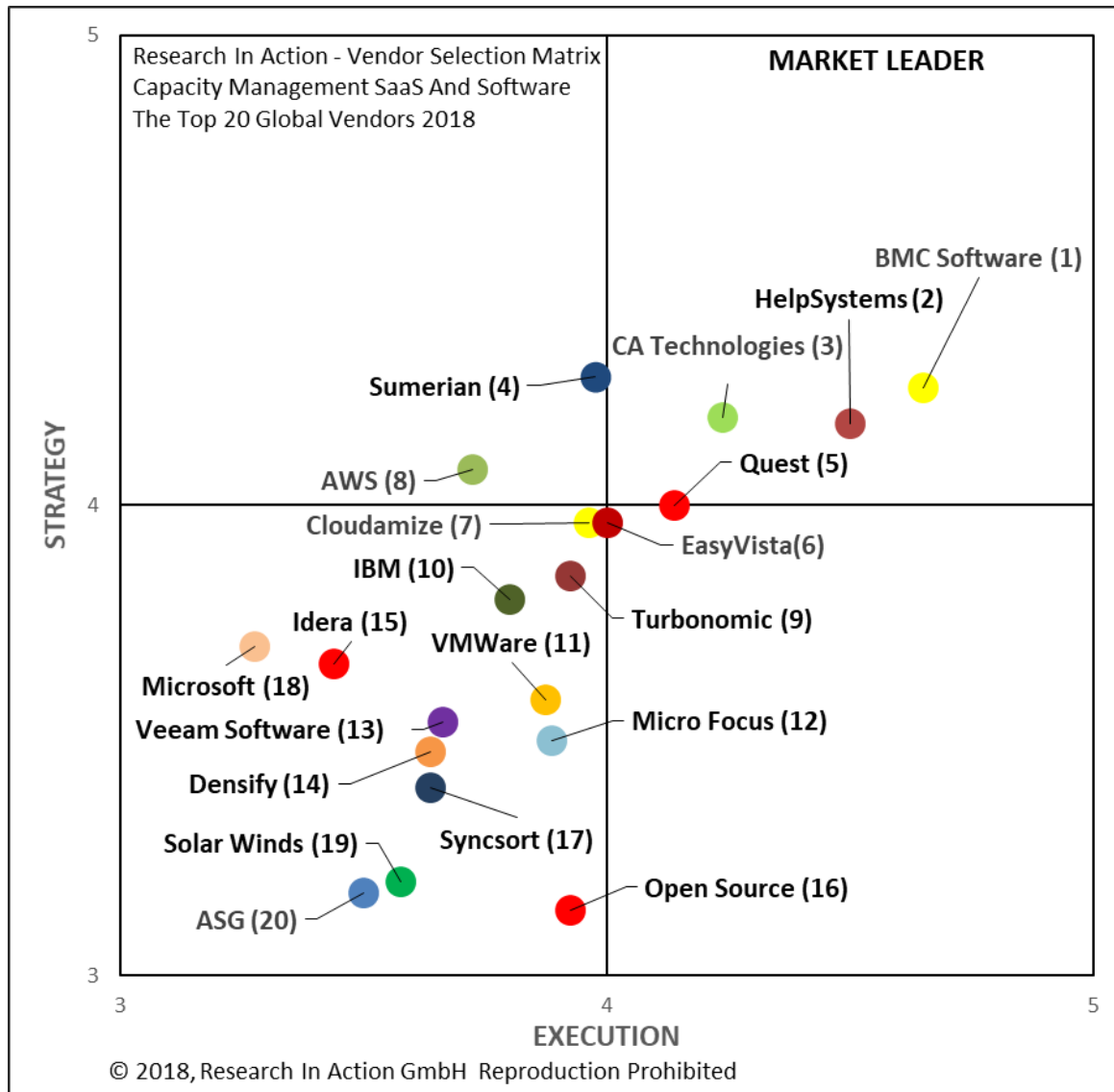
Dr. Thomas Mendel Ph.D.

Managing Director

March 2018



# Vendor Selection Matrix – Capacity Management SaaS And Software: The Top 20 Global Vendors



	Strategy	Execution	Total	
1	BMC Software	4,25	4,65	8,90
2	HelpSystems	4,18	4,50	8,68
3	CA Technologies	4,19	4,24	8,43
4	Sumerian	4,28	3,98	8,25
5	Quest	4,00	4,14	8,14
6	EasyVista	3,96	4,00	7,96
7	Cloudamize	3,96	3,96	7,93
8	AWS	4,08	3,73	7,80
9	Turbonomic	3,85	3,93	7,78
10	IBM	3,80	3,80	7,60
11	VMWare	3,59	3,88	7,46
12	Micro Focus	3,50	3,89	7,39
13	Veeam Software	3,54	3,66	7,20
14	Densify	3,48	3,64	7,11
15	Idera	3,66	3,44	7,10
16	Open Source	3,14	3,93	7,06
17	Syncsort	3,40	3,64	7,04
18	Microsoft	3,70	3,28	6,98
19	Solar Winds	3,20	3,58	6,78
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## Vendor Selection Matrix Methodology

### Data Summary:

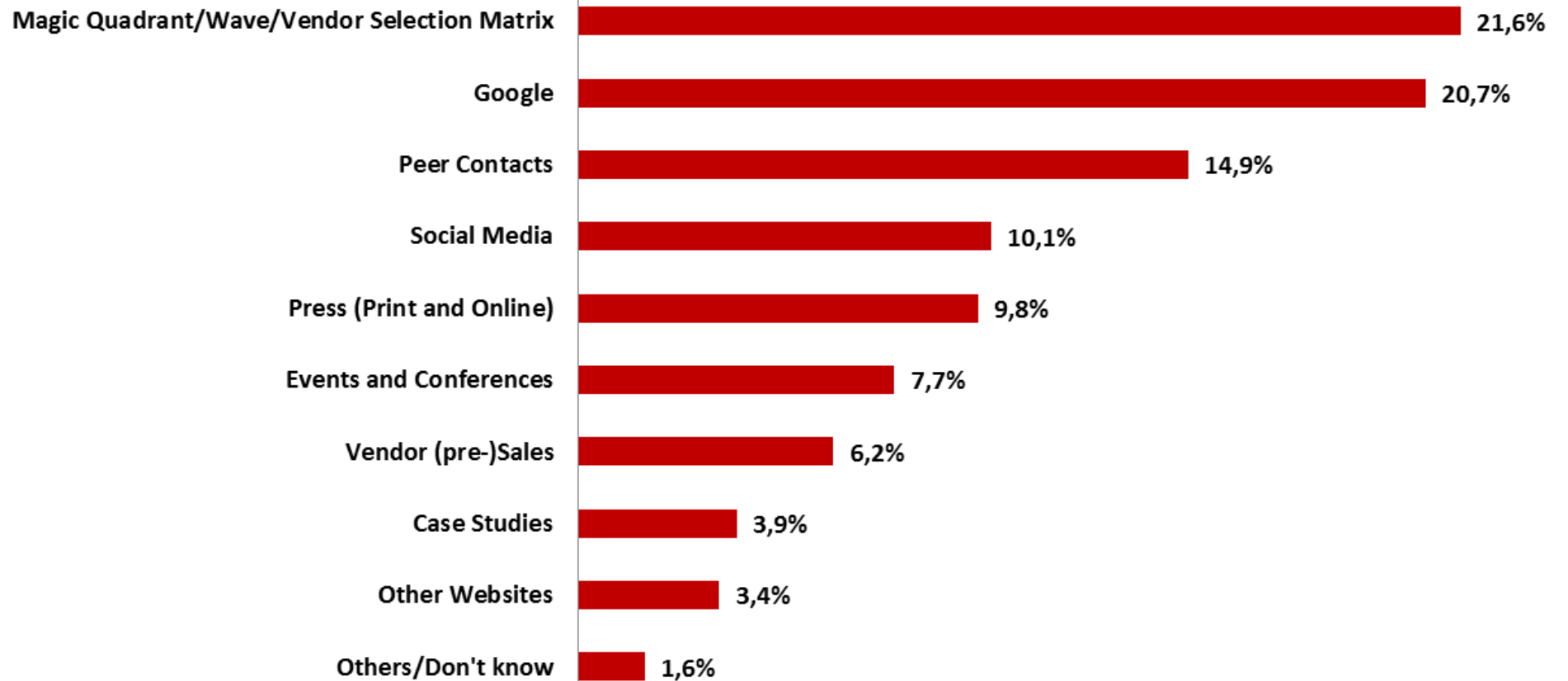
- Unique, primarily survey-based methodology for comparative vendor evaluation.
- At a minimum, 60% of the evaluation results are based on enterprise buyers' survey results.
- Analyst's opinion accounts for a maximum of 40% of the evaluation results (not close to 100% as in most other vendor evaluations).
- More than 45,000 data points were collected.
- Data was collected in Q4 of 2017 and Q1 of 2018, covering 1,500 IT buyers in a combined telephone and online survey.
- The Top 20 vendors of Capacity Management SaaS and Software (selected by the buyers in the survey) were evaluated.
- The evaluation results and forecasts are based on customer and vendor feedback, publicly available information, triangulation, as well as the analyst's opinion.



# What Tools Do You Use To Create The Vendor Longlist?

**MQ/VSM  
Google  
Peers  
Social Media  
Press**

**Decision Makers use  
a mix of traditional  
and online tools**



N=931 IT and Business Managers in Enterprises (Companies with more than 10,000 employees only)



# Market Overview: Market Definition

- IT Service Management (ITSM)<sup>1</sup> refers to the entirety of activities – directed by policies, organized and structured in processes and supporting procedures – that are performed by an organization to plan, design, deliver, operate and control Information Technology (IT) services offered to customers. It is thus concerned with the implementation of IT services that meet customers' needs, and it is performed by the IT service provider through an appropriate mix of people, process and information technology
- The IT Infrastructure Library (ITIL)<sup>2</sup> is the de facto standard for IT Capacity Management process definitions today.
- The goal of Capacity Management<sup>3</sup> is the right-sizing of IT resources to meet current and future IT and business requirements in a cost-effective manner. Over time, Capacity Management has evolved from being largely reactive to being mostly proactive, as has the overall IT Service Management practice.

<sup>1</sup> IT Service Management, see [https://en.wikipedia.org/wiki/IT\\_service\\_management](https://en.wikipedia.org/wiki/IT_service_management).

<sup>2</sup> IT Infrastructure Library, see [http://en.wikipedia.org/wiki/IT\\_Infrastructure\\_Library](http://en.wikipedia.org/wiki/IT_Infrastructure_Library). ITIL is a trade mark of AXELOS Limited.

<sup>3</sup> Capacity Management, see [https://en.wikipedia.org/wiki/Capacity\\_management](https://en.wikipedia.org/wiki/Capacity_management).



# Market Overview: Evaluation Scope

## Coverage:

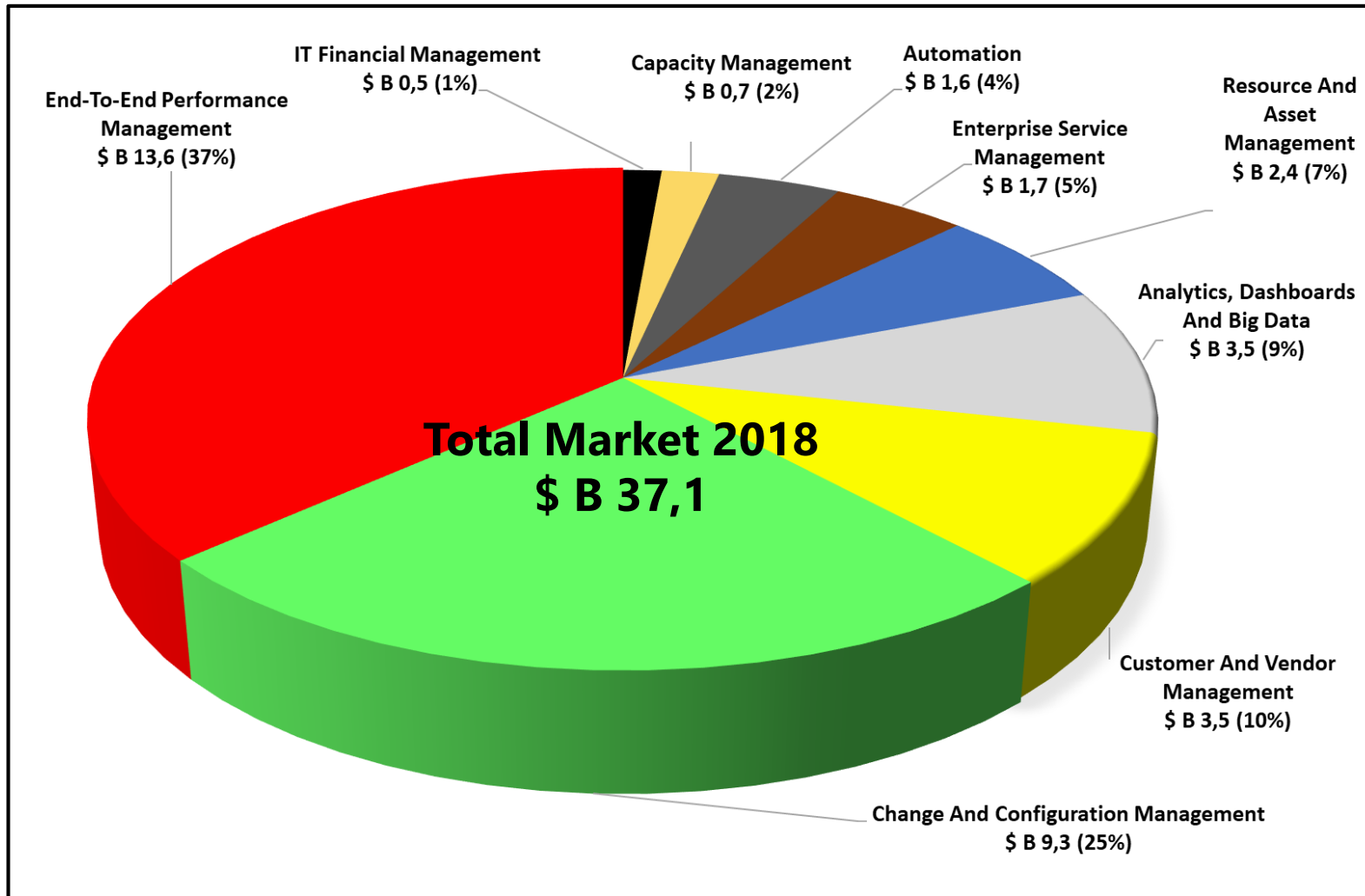
INFRASTRUCTURE	CLOUD	APPS	SLAs
Clients Server Mainframe Network Middleware...	Private Public Hybrid	ERP CRM SCM PPS...	Business Services IT Services Infrastructure Services Outsourced Services

## Value Chain:

PLAN	ANALYZE	RUN	OPTIMIZE
Determine Capacity Requirements	Measure Current Capacity Usage	Gather Usage Data In An Ongoing Fashion	Predict Future Capacity Needs Accurately



# IT And Enterprise Service Management SaaS And Software: Global Market Sizing 2017 And Market Forecast 2018



\$ Billion*	2018	Growth	2017
End-To-End Performance Management	13,60	5,3%	12,91
Change And Configuration Management	9,38	0,9%	9,30
Customer And Vendor Management	3,58	8,5%	3,30
Analytics, Dashboards And Big Data	3,50	11,8%	3,13
Resource And Asset Management	2,40	3,9%	2,31
Enterprise Service Management	1,79	35,6%	1,32
Automation	1,63	25,4%	1,30
Capacity Management	0,76	5,6%	0,72
IT Financial Management	0,51	13,3%	0,45
<b>Total Market</b>	<b>37,15</b>	<b>6,9%</b>	<b>34,74</b>

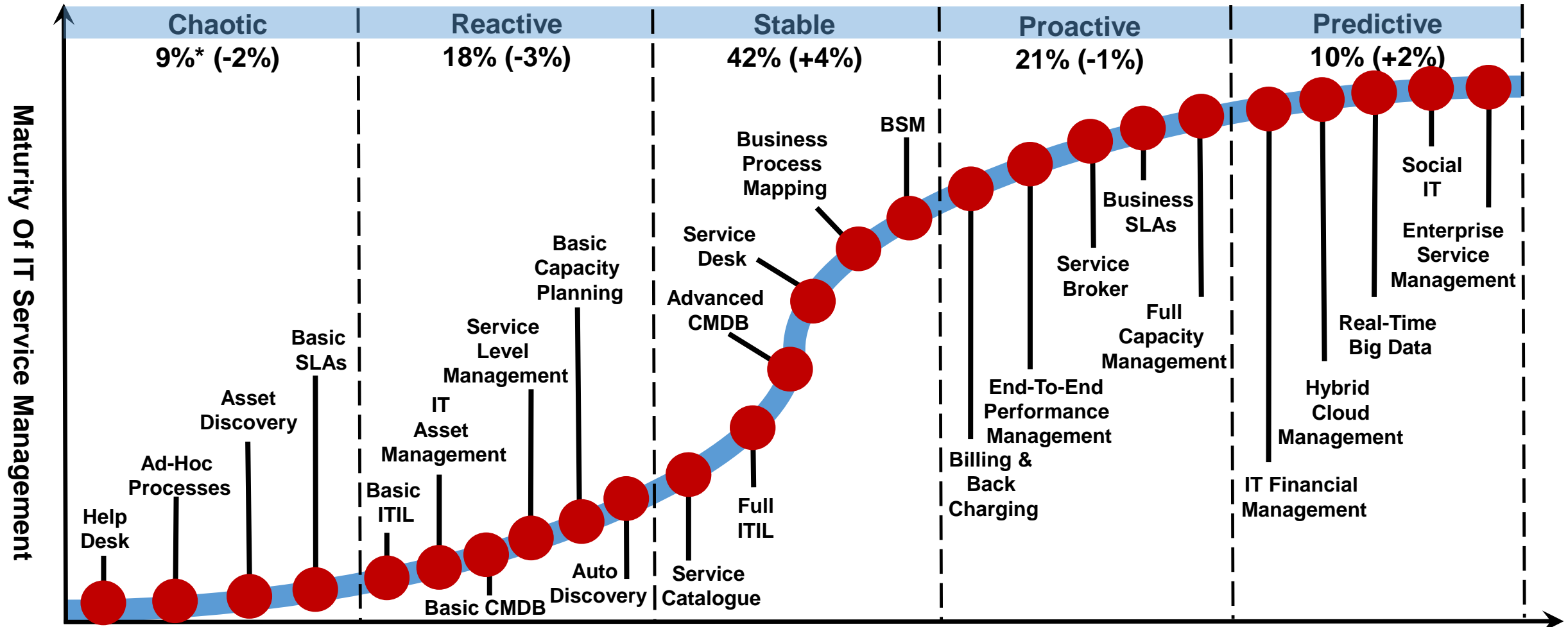
\* Numbers include software licenses, maintenance and SaaS revenue.

Enterprise buyers in the Research In Action survey predict continuing robust market growth in 2018.



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# IT Service Management Maturity S-Curve 2018



N=2,250 IT Managers in Enterprises

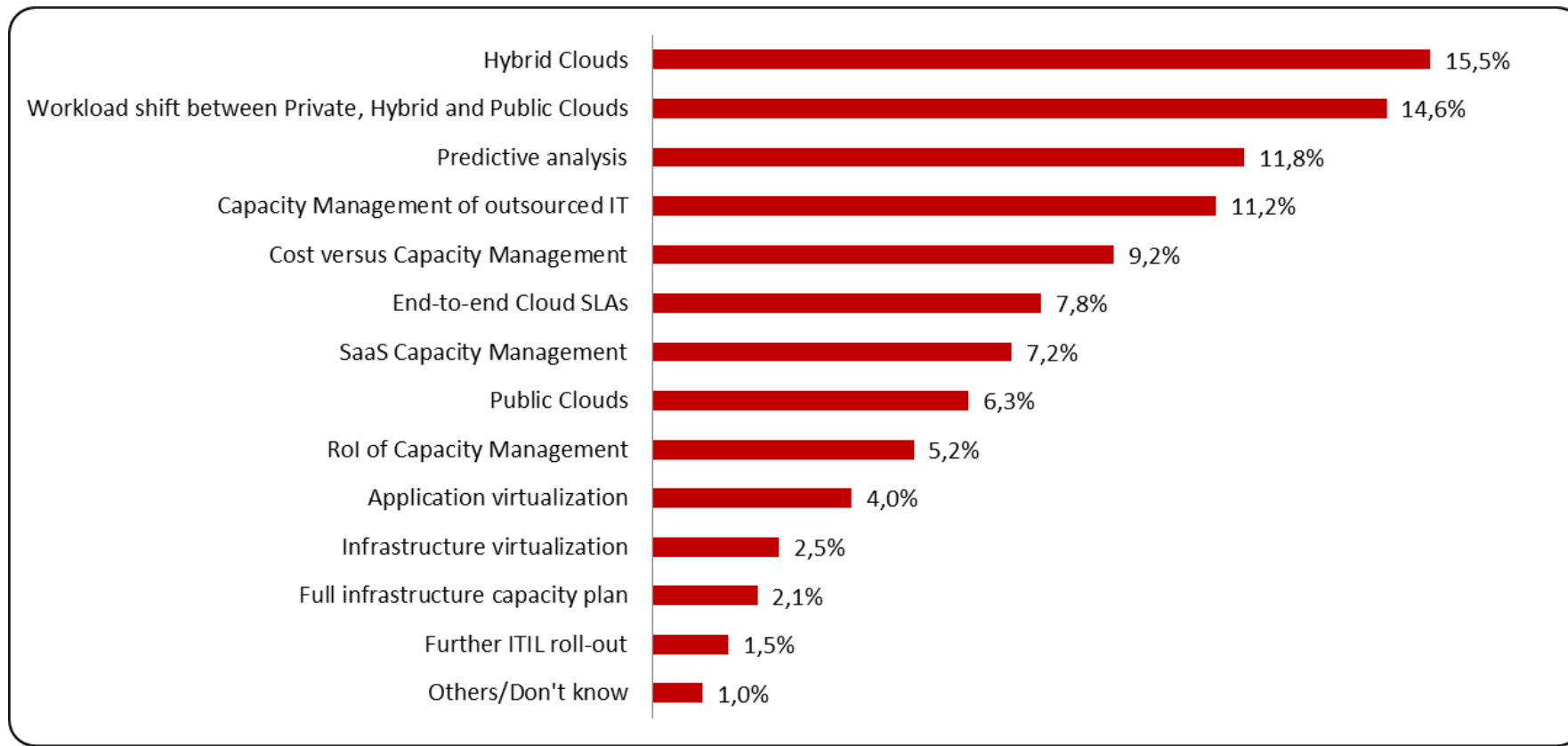
\* Categories show adoption rates, ( ) show changes from 2017





# Market Overview: Market Trends 2018

What is your number one investment area in the Capacity Management space for 2018?



N=1,500 IT Managers in Enterprises



# Market Overview: Market Trends 2018

- **Across-the-board ITIL adoption is increasing the demand for Capacity Management.** Today, 85% of enterprises globally are using ITIL in some way. This high penetration of ITIL standards has led to a significantly higher IT process maturity for IT Service Management. Enterprises are now able to adopt new IT service innovations at a much faster pace than ever before. This is having a significant effect on Capacity Management as well.
- **The continuing rise of the Hybrid Cloud.** The Cloud phenomenon has been adopted by enterprises at a breathtaking pace. However, most companies today are choosing Hybrid Cloud options. Consequently, in 2018 Hybrid Cloud Capacity Management is the number one investment trend.
- **A busy market with many vendors.** Research In Action believes that as of today, the broader Capacity Management market has more than 500 active competitors globally. Many of these competitors offer Capacity Management as add-on functionality. The current market size of the core Capacity Management market is roughly \$ 760 million, with a high growth potential. Very few vendors, however, cover the full spectrum of the market and the whole value chain. The vast majority of vendors specialize in one or two market segments.
- **Capacity Management will become the next frontier.** The vast majority of enterprises have already bought into the ITIL philosophy. Over the next few years, most enterprises will adopt either a lighter approach to ITIL or will move up to adopt full Enterprise Service Management. Both will result in companies moving up the IT Service Management Maturity S-Curve. Consequently, the adoption of Capacity Management will increase at the same rate.



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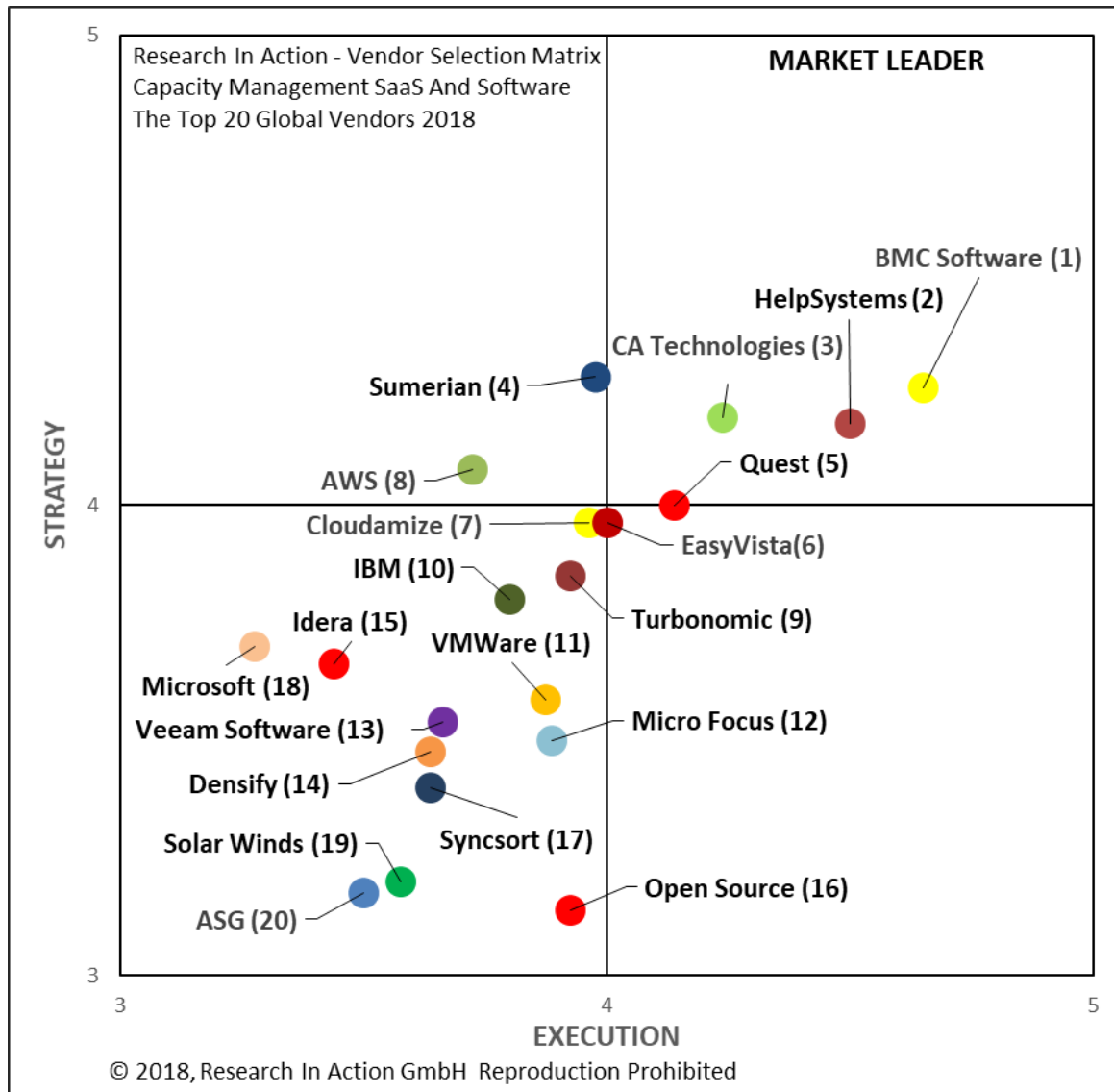
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# Vendor Selection Matrix – Capacity Management SaaS And Software: Evaluation Criteria

<b>Strategy</b>		
Vision & Go-To-Market	30%	Does the company have a coherent vision in line with the most probable future market scenarios? Does the go-to-market and sales strategy fit the target markets and customers?
Innovation & Partner Ecosystem	20%	How innovative is the company? How is the partner ecosystem organized and how effective is the partner management?
Company Viability & Execution Capabilities	15%	How likely in the long-term survival of the company? Does the company have the necessary resources to execute the strategy?
Differentiation & USP	35%	Does the solution have a Unique Selling Proposition (USP) and clear differentiators?
<b>Execution</b>		
Breadth & Depth Of Solution Offering	30%	Does the solution cover all necessary capabilities expected by the customers?
Market Share & Growth	15%	How big is the market share and is it growing above market rate?
Customer Satisfaction	25%	How satisfied are customers with the solution and the vendor?
Price/Value Ratio	30%	How do customers rate the relationship between the price and perceived value of the solution?



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# Vendor Selection Matrix – Capacity Management SaaS And Software: Results – The Winner



## BMC Software: A well-rounded portfolio fully embracing Capacity Management for the Cloud

- **General:** BMC is still well known for bringing Business Service Management to IT. Even Business leaders recognize the BMC brand as one of very few in the IT Service Management market. BMC today is a well-established private company with market-leading products in all areas of the IT and Enterprise Service Management space.
- **Strategy:** BMC is highly differentiated. The vision of helping customers to establish high performing end-to-end digital services, while optimizing the cost and utilization of IT resources, remains strong. Further simplification, better analytics and full Cloud coverage are BMC's focus areas going forward, in-line with customer's expectations.
- **Execution:** BMC is one of the two market share leaders in Capacity Management. BMC's product portfolio is second to none. It covers the complete value chain of market requirements including all aspects of Cloud Capacity Management. Clients are very satisfied with BMC's delivery capabilities. In fact, BMC has the highest scores for customer satisfaction in the industry.
- **Customer Quote:** "Over the years, BMC has become even more than a trusted partner for us. Moving into the Cloud era, we will rely on BMC even more." CIO Global financial services company.
- **Bottom Line:** BMC is the market leader for Capacity Management and should remain in the pole position for the foreseeable future.



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# Vendor Selection Matrix – Capacity Management: Results – Detailed Results (I)

	<u>Weighting</u>	ASG		AWS		BMC Software		CA Technologies		Cloudamize	
		Score	Result	Score	Result	Score	Result	Score	Result	Score	Result
<b>Strategy</b>											
Vision & Go-To-Market	30%	3	0,90	3,75	1,13	4	1,20	4	1,20	4	1,20
Innovation & Partner Ecosystem	20%	3	0,60	4	0,80	4	0,80	3,5	0,70	4	0,80
Company Viability & Execution Capabilities	15%	3	0,45	5	0,75	4,5	0,68	4,75	0,71	3,75	0,56
Differentiation & USP	35%	3,5	1,23	4	1,40	4,5	1,58	4,5	1,58	4	1,40
	<b>100%</b>		<b>3,18</b>		<b>4,08</b>		<b>4,25</b>		<b>4,19</b>		<b>3,96</b>
<b>Execution</b>											
Breadth & Depth Of Solution Offering	30%	4	1,20	3,75	1,13	5	1,50	5	1,50	3,75	1,13
Market Share & Growth	15%	3	0,45	4	0,60	5	0,75	5	0,75	3,75	0,56
Customer Satisfaction	25%	3,5	0,88	3,5	0,88	4,5	1,13	3,75	0,94	4	1,00
Price/Value Ratio	30%	3,25	0,98	3,75	1,13	4,25	1,28	3,5	1,05	4,25	1,28
	<b>100%</b>		<b>3,50</b>		<b>3,73</b>		<b>4,65</b>		<b>4,24</b>		<b>3,96</b>
Scale Explanation: 1 (Low) To 5 (High)											



# Vendor Selection Matrix – Capacity Management: Results – Detailed Results (II)

	<u>Weighting</u>	Densify		EasyVista		HelpSystems		IBM		Idera	
		Score	Result	Score	Result	Score	Result	Score	Result	Score	Result
<b>Strategy</b>											
Vision & Go-To-Market	30%	4	1,20	4	1,20	4	1,20	3,5	1,05	3,75	1,13
Innovation & Partner Ecosystem	20%	3	0,60	3,75	0,75	4	0,80	3	0,60	3,5	0,70
Company Viability & Execution Capabilities	15%	3	0,45	3,5	0,53	4	0,60	5	0,75	3,5	0,53
Differentiation & USP	35%	3,5	1,23	4,25	1,49	4,5	1,58	4	1,40	3,75	1,31
	<b>100%</b>		<b>3,48</b>		<b>3,96</b>		<b>4,18</b>		<b>3,80</b>		<b>3,66</b>
<b>Execution</b>											
Breadth & Depth Of Solution Offering	30%	3,5	1,05	4	1,20	4,5	1,35	4,5	1,35	3,5	1,05
Market Share & Growth	15%	3	0,45	3,5	0,53	4,5	0,68	4,5	0,68	3	0,45
Customer Satisfaction	25%	3,75	0,94	4	1,00	4,5	1,13	3,5	0,88	3,25	0,81
Price/Value Ratio	30%	4	1,20	4,25	1,28	4,5	1,35	3	0,90	3,75	1,13
	<b>100%</b>		<b>3,64</b>		<b>4,00</b>		<b>4,50</b>		<b>3,80</b>		<b>3,44</b>
Scale Explanation: 1 (Low) To 5 (High)											



# Vendor Selection Matrix – Capacity Management: Results – Detailed Results (III)

	<u>Weighting</u>	Micro Focus		Microsoft		Open Source		Quest		Solar Winds	
		Score	Result	Score	Result	Score	Result	Score	Result	Score	Result
<b>Strategy</b>											
Vision & Go-To-Market	30%	3	0,90	3	0,90	2	0,60	4	1,20	3,5	1,05
Innovation & Partner Ecosystem	20%	3,5	0,70	5	1,00	3	0,60	4	0,80	2,5	0,50
Company Viability & Execution Capabilities	15%	4,5	0,68	5	0,75	3	0,45	4	0,60	4	0,60
Differentiation & USP	35%	3,5	1,23	3	1,05	4,25	1,49	4	1,40	3	1,05
	<b>100%</b>		<b>3,50</b>		<b>3,70</b>		<b>3,14</b>		<b>4,00</b>		<b>3,20</b>
<b>Execution</b>											
Breadth & Depth Of Solution Offering	30%	3,5	1,05	3	0,90	3	0,90	4	1,20	3	0,90
Market Share & Growth	15%	3,75	0,56	3	0,45	4	0,60	4	0,60	3	0,45
Customer Satisfaction	25%	4	1,00	3,5	0,88	4	1,00	4,25	1,06	3,5	0,88
Price/Value Ratio	30%	4,25	1,28	3,5	1,05	4,75	1,43	4,25	1,28	4,25	1,28
	<b>100%</b>		<b>3,89</b>		<b>3,28</b>		<b>3,93</b>		<b>4,14</b>		<b>3,50</b>
Scale Explanation: 1 (Low) To 5 (High)											





# Vendor Selection Matrix – Capacity Management: Results – Detailed Results (IV)

	<u>Weighting</u>	Sumerian		Syncsort		Veeam Software		Turbonomic		VMWare	
		Score	Result	Score	Result	Score	Result	Score	Result	Score	Result
<b>Strategy</b>											
Vision & Go-To-Market	30%	4,5	1,35	3,5	1,05	3	0,90	4	1,20	3,5	1,05
Innovation & Partner Ecosystem	20%	4,5	0,90	3	0,60	3	0,60	4	0,80	3	0,60
Company Viability & Execution Capabilities	15%	3	0,45	3,5	0,53	4,25	0,64	3	0,45	4,75	0,71
Differentiation & USP	35%	4,5	1,58	3,5	1,23	4	1,40	4	1,40	3,5	1,23
	<b>100%</b>		<b>4,28</b>		<b>3,40</b>		<b>3,54</b>		<b>3,85</b>		<b>3,59</b>
<b>Execution</b>											
Breadth & Depth Of Solution Offering	30%	3,5	1,05	3,5	1,05	3	0,90	4	1,20	3,5	1,05
Market Share & Growth	15%	3	0,45	3	0,45	3,75	0,56	3,5	0,53	4	0,60
Customer Satisfaction	25%	4,5	1,13	3,75	0,94	4	1,00	4	1,00	3,5	0,88
Price/Value Ratio	30%	4,5	1,35	4	1,20	4	1,20	4	1,20	4,5	1,35
	<b>100%</b>		<b>3,98</b>		<b>3,64</b>		<b>3,66</b>		<b>3,93</b>		<b>3,88</b>
Scale Explanation: 1 (Low) To 5 (High)											



# The Research In Action GmbH

## Vendor Selection Matrix Methodology

### **Vendor Selection Matrix Disclaimer:**

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