Guide du marché des plateformes de gestion des services informatiques

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Les plateformes ITSM jouent un rôle essentiel en fournissant aux responsables des infrastructures et des opérations un système d'information centralisé pour la prestation de services informatiques intégrés, grâce à la collecte des événements et activités ITSM. Ce guide du marché vous permettra de vous orienter dans l'évolution du marché des plateformes ITSM et d'identifier ses principaux fournisseurs.

Aperçu

Principales conclusions

- De nombreux fournisseurs de plateformes ITSM axent leurs feuilles de route produit sur les fonctionnalités émergentes, notamment l'IA et les flux de travail de cas non informatiques, plutôt que sur le développement de fonctionnalités de base plus robustes telles que le reporting, l'automatisation, l'intégration et la convivialité du produit.
- Bien que les prix soient restés stables sur le marché des services informatiques, le coût total de possession peut varier considérablement en fonction des approches de regroupement des produits, des coûts de mise en œuvre et des exigences d'administration continue.
- Les responsables des infrastructures et des opérations délaissent un produit ITSM unique au profit de l'intégration de plusieurs solutions afin d'offrir flexibilité et autonomie aux équipes produit.

Recommandations

- Identifiez vos besoins opérationnels les plus critiques en vous concentrant d'abord sur les pratiques ITSM de base et les exigences d'intégration, tout en tenant compte des objectifs stratégiques à court terme en matière d'automatisation, d'extensibilité des métiers et d'IA.
- Comparez le coût total de possession de vos solutions sur une période de trois ans. Pour ce faire, tenez compte des implications financières non seulement pour les besoins initiaux, mais aussi pour les éléments clés de la feuille de route, tels que l'IA, la gestion des actifs, l'intégration et l'orchestration. Collaborez avec les fournisseurs afin de connaître le prix des mises à jour majeures et des fonctionnalités supplémentaires, ainsi que les coûts ultérieurs de mise en œuvre, de migration et d'administration.
- Développer un écosystème stratégique de plateformes ITSM en recensant les outils existants et en définissant des protocoles clairs de capture de données entre les plateformes afin de permettre une production de rapports et une analyse de données unifiées de bout en bout.

Définition du marché

Gartner définit les plateformes de gestion des services informatiques (ITSM) comme des logiciels offrant une gestion et une automatisation cohérentes des flux de travail, permettant aux organisations de planifier, fournir, prendre en charge et améliorer leurs services informatiques intégrés. Ces plateformes constituent un système d'information centralisé pour les pratiques ITSM, notamment la gestion des demandes, des incidents, des problèmes, des changements, des connaissances, des niveaux de service et de la configuration. Généralement proposées en mode SaaS, les plateformes ITSM sont également disponibles pour des déploiements sur site, selon les besoins de chaque organisation.

ITSM platforms are key tools used to manage IT support issues and aid employee productivity. IT leaders require robust ITSM platforms to drive business value in the services they provide, and are increasingly looking for these products to support digital business transformation outside IT. By capturing, tracking and reporting on service-related activities across the estate, the platform acts as a coherent system of record for ITSM-related actions.

ITSM platforms boost infrastructure and operations (I&O) teams' efficiency through automating processes, streamlining decision making and providing seamless integration with third-party applications. As organizational needs grow, advanced multichannel support features enhance the end-user experience, helping IT services remain agile and aligned with business goals.

Mandatory Features

The mandatory features for this market include:

Support for the following ITSM practices with out-of-the-box forms, workflows and reports:

- Incident management
- Problem management
- Request management
- Change enablement
- Knowledge management

These practices are augmented by:

- An integrated configuration management system
- The ability to define and monitor service levels

Common Features

Common features for this market include:

- Multichannel engagement of users — e.g., self-service portal, mobile, virtual support agent, live chat, walk-up and collaborative support hub
- Service configuration management
- Service reporting and resource management
- Service catalog management
- Workflow, automation and integration among IT operations management (ITOM) tools, development tool chain and service providers
- Integrated AI for automated and assisted insight

- Case management to facilitate simple ticketing and workflow for business units adjacent to IT
- A graphical process designer to visually create and manage workflows
- Native discovery and dependency mapping for creating a service asset inventory and service configuration baseline
- Integrated IT operations observability and event management
- Connectors and APIs for third-party products, systems and platforms
- ITSM practice performance monitoring and reporting

Market Description

ITSM platforms support IT organizations in delivering digital services by offering a broad set of streamlined workflows, engagement channels, integrations and supporting insights to enable more effective decision making. Common capabilities for ITSM platforms include:

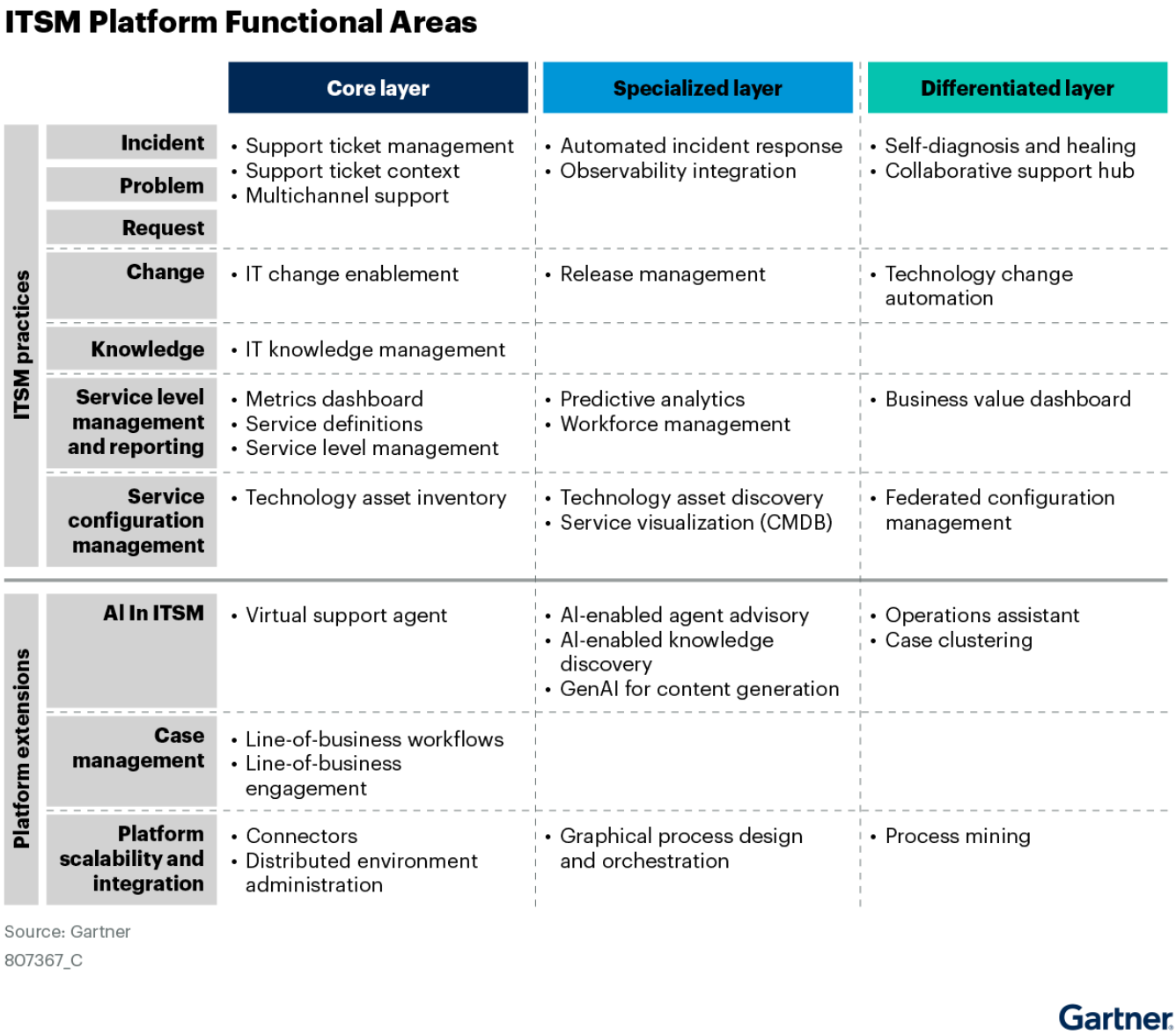
- **IT incident, problem and request management** through a set of process workflows, decision-enabling context and automation, enabling IT's support functions.
- **Change and release management** capabilities that help automate and manage changes, assisting in identifying and reducing the risk of disruptions in the production environment.
- **IT knowledge management** with one or more native knowledge bases, life cycle management for the knowledge articles and integration to other ITSM processes.
- **Service-level management and reporting** to support data-driven decision making by visualizing and analyzing ITSM platform and integrated data for service quality management, costing, improvement and resource utilization (related to the supported ITSM practices).
- **Service configuration management,** which provides I&O leaders with a federated system of record detailing the relationships and operational status of IT service components.
- **Integrated AI** features to augment ITSM practices with natural language processing and AI-driven insights.

- **Platform scalability and integration** for complex IT environments through a set of platform features that enable integration with adjacent tools, strong data controls and highly customizable workflows.

- **Case management** to manage IT-adjacent tickets and business workflows, eliminating the need for separate business process automation tools or low-code application platforms.

While at their most basic, ITSM platforms are workflow tools for IT, these products have evolved. They now provide a broad range of functional capabilities to support more complex environments and user requirements (see Figure 1).

Figure 1: ITSM Platform Functional Areas



ITSM Platform Functional Areas

		Core layer	Specialized layer	Differentiated layer
ITSM practices	Incident	• Support ticket management • Support ticket context • Multichannel support	• Automated incident response • Observability integration	• Self-diagnosis and healing • Collaborative support hub
	Problem			
	Request			
	Change	• IT change enablement	• Release management	• Technology change automation
	Knowledge	• IT knowledge management		
	Service level management and reporting	• Metrics dashboard • Service definitions • Service level management	• Predictive analytics • Workforce management	• Business value dashboard
	Service configuration management	• Technology asset inventory	• Technology asset discovery • Service visualization (CMDB)	• Federated configuration management
Platform extensions	AI In ITSM	• Virtual support agent	• AI-enabled agent advisory • AI-enabled knowledge discovery • GenAI for content generation	• Operations assistant • Case clustering
	Case management	• Line-of-business workflows • Line-of-business engagement		
	Platform scalability and integration	• Connectors • Distributed environment administration	• Graphical process design and orchestration	• Process mining

Source: Gartner
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Gartner

The core functional areas above are largely commoditized in this market and generally represent the minimum viable capabilities to sustain an ITSM practice or line-of-business

platform extension. Specialized features are less common across the market. Many of these extend workflows, enabling I&O leaders to scale their practices through deeper collaboration and automation. Differentiated functional areas typically support advanced needs and often align with a vendor's unique positioning. Further details on each functional area can be found in **Key Functional Considerations to Identify Your Next ITSM Platform**.

Market Direction

Incident management (also known as ticketing) products to track the work IT does have been around for decades, yet ITSM platforms remain a staple for most I&O teams. In fact, despite the overall maturity of this market, it is forecast to grow by 15.1% (constant currency) in 2025 and will reach $14.9 billion by 2028. [1] Evolving challenges for I&O leaders present further opportunities for ITSM platform development in areas such as AI, collaborative and federated support models, and automation.

Gartner sees the following forces shaping the future of the ITSM platforms market:

- **ITSM platforms as a digital hub:** Organizations need to break down their digital silos to provide more insights and a faster response to operational challenges. Being the common system of record for operational workflows, ITSM platforms leverage an increasing breadth of integrations across different adjacent markets such as digital employee experience management (DEX), event intelligence (formerly AIOps) and DevOps tools.

- **Enterprise service management:** Many I&O leaders are looking at service management strategies that span both IT and different lines of business, such as HR and finance. This is driven by market hype and the promise of a single platform across service delivery that can deliver greater efficiencies and a consistent user experience.

- **Access to generative AI:** The proliferation of public large language models has reduced the barriers of entry for vendors to integrate GenAI into their offerings. Gartner has not observed AI commonly triggering platform replacement decisions by I&O leaders (in-part due to many third party applications that can meet this need). However, it is increasingly becoming a must-have requirement for a new solution.

- **Need for greater asset visibility:** Recent years have seen large-scale outages, increasing emphasis on alignment between ops and security teams, and accelerated cost

management initiatives. These are driving the need for deeper asset visibility in the CMDB through robust discovery, dependency mapping, data normalization and ITAM integrations.

- **Depreciation of traditional ITSM frameworks:** As organizations look for their ITSM practices to become more agile and better support digital services, traditional ITSM approaches are being replaced by new agile, site reliability engineering (SRE) and DevOps-oriented approaches. This challenges the status quo and requires new operating models.

- **Product-centric operating models:** The increased demand for autonomy among product teams is driving more distributed and collaborative support structures. This shift challenges traditional centralized IT models, requiring central IT to transition from a controlling role to a governance and facilitation role, and foster and maintain a consistent experience across the organization. This also drives further emphasis to “shift left” and enable self-service for service management practices.

- **Cloud and hybrid environments:** They drive the coordination of complex SLAs across internal and external service providers. To meet these challenges, I&O teams must ensure detailed component data is accurately shared and synchronized across specialized tools. These include SaaS management platforms and observability solutions, which are better equipped to handle the variety, volume, and velocity of incoming data. This approach requires a highly federated CMDB model that supports evolving operational requirements while enabling seamless integration and efficient data management across multiple ecosystems.

- **Budgetary pressures:** Economic uncertainty and budget pressures are challenging I&O leaders to look at reducing administrative overhead. Providers responsive to this trend will look to simplify the way their customers develop, upgrade and enhance their deployments. This may include a combination of automated health checks, simplified product configuration utilities, graphical design features, AI augmentation and other technologies.

ITSM platforms play a vital role in supporting the organization’s digital strategy. Their features, while largely commoditized, contribute substantially to IT value delivery through their standardized practices, automation, and by supporting data to drive effective decision making. As organizations look to address the above forces, Gartner expects to see a

divergence in how I&O leaders strategically position ITSM platforms in their organization, as follows.

IT Operations Management (ITOM) Consolidation

I&O leaders seeking to accelerate how they monitor, detect and resolve incidents are approaching ITSM as part of a connected ITOM tooling strategy. For more, see **Innovation Insight: Create a Service Response Capability to Reduce the Volume and Impact of Incidents**. To address this buyer need, some ITSM platform vendors are investing in observability (e.g., log monitoring, employee experience), event correlation and automation (e.g., SaaS management, self-healing) offerings as part of a larger platform or portfolio strategy. This provides these I&O organizations with deeper insights into system performance and allows for automating responses to reduce manual effort.

Lightweight ITSM

I&O leaders who are driven by Agile and DevOps alignment often shy away from heavy investments in traditional ITSM tooling. Alternatively, they will build a minimalistic approach to ITSM, in which they deploy a toolchain-like solution with a low-cost ITSM product to act as a hub for select workflows (e.g., changes, problems). They will surround this hub with point solutions to fill needs in areas such as incident management and AI. While many ITSM platforms can align with that “good enough” strategy, this also presents opportunity for disruption by adjacent markets, such as automated incident response, conversational AI, and observability products, as they invest in workflow features.

Decentralized ITSM

In many larger enterprises, product teams and other business units are seeking more autonomy and agility, leading ITSM to become decentralized across multiple toolsets. This scenario acts as a hybrid between ITOM consolidation and lightweight ITSM.

In decentralized ITSM, a primary ITSM platform remains the system of record for global ITSM practices. However, smaller ITSM platform deployments are stood up, often independently, by adjacent teams for a limited scope of ITSM requirements (such as request fulfillment and incident management). Without proper governance and integration between the tools, this will lead to data silo challenges, such as not being able to determine if a change resulted in an outage during a major incident because the change wasn’t discoverable by the MI team. The small, independent deployments can also lead to end-to-end reporting gaps and a disjointed end-user experience when contacting IT.

I&O leaders looking at maintaining end-to-end visibility in a decentralized environment must consider whether they can offer simple decentralized administration for their primary ITSM product to enable these product teams to have more control. Otherwise, they must build a charter to govern data residency rules between ITSM platforms and a strategy for how they will be integrated.

Market Analysis

The vendor landscape for ITSM platforms market is stable. While there has been some consolidation over the past several years, more recent market acquisitions within the ITSM platforms space have focused on adding integrated functionality such as AI, monitoring and observability. There is a dominance at the top end of the market, where in 2023 the leading three vendors had an estimated 70% of overall market share and the top vendor by revenue had around 48% of market share. [2]

This market is highly commoditized in core functionality and is composed of hundreds of products that, at minimum, claim to provide IT organizations with the ability to track and resolve issues affecting the IT production environment. While this market is widely homogeneous in nature without many specialized segments, vendors typically fall into one of two categories based on the typical ITSM maturity of their buyers:

- **Basic-to-intermediate ITSM solutions:** Outside of the enterprise-class providers, differentiation is more difficult as buyer needs typically map to the highly commoditized functionality in this market. This functionality is illustrated in the core layer of Figure 1. When asked about their unique selling proposition, many vendors in this category highlight quick time-to-value and low cost of ownership via inclusive pricing models and low-code, no-code administration.
- **Advanced ITSM solutions:** The number of large-enterprise-focused vendors offering advanced functionality remains low. These providers offer highly configurable products with deep ITSM practice support, robust federated CMDB functionality and broad out-of-the-box integration libraries. They are also investing more heavily in innovative applications of AI, as their customers can leverage their scale and data quality to achieve better results than less mature organizations. This functionality is illustrated in the specialized and differentiated layers of Figure 1.

Differentiation Through Product Synergies

The market commoditization does not mean vendors cannot further differentiate. Often, however, this differentiation comes as part of a broader platform or portfolio strategy, where ITSM is integrated into other business applications. In many cases, this represents a convergence of historically separate and distinct technologies and tools. Examples include:

- **IT service response (observability integration):** Some ITSM platform providers are investing in native monitoring and event intelligence to accelerate I&O's response to potential service outages and enable more informed decisions around its environment. This may include native event management for automated incident creation, event-intelligence-based root cause detection embedded in a problem workflow, or observability insights visualized within a CMDB.

- **Enterprise service management (business workflow support):** IT organizations partner with the business to support the extension of service management outside the I&O environment. This would typically be to address digital transformation needs within one or more lines of business, such as HR, finance or workplace management.

- **SecOps support:** Some ITSM platforms are closely integrated into security solutions as I&O partners with security to form an interoperable cybersecurity mesh architecture, driving more streamlined practices and aligning their sources of truth. For more, see **How to Integrate Cybersecurity in Your ITSM Practice**.

- **DevOps support:** I&O partners with development teams to drive more agile ITSM practices. The ITSM platform is closely integrated into the DevOps toolchain (e.g., allowing developers to create change records from within their native tooling or linking incidents to bugs). Process flexibility, AI and automation are prioritized to drive more agile practice support, thus allowing greater velocity to be achieved.

- **Digital employee experience management and automation (DEX integration):** ITSM platforms offer native DEX features to capture end-user telemetry and expose integrated device telemetry insights. This enables service desk agents or self-healing when coupled with the ITSM's virtual support agent.

- **IT asset management support:** I&O buyers often overlap requirements between ITAM and CMDB (see **How to Avoid the Top Mistakes With ITAM and CMDB Programs**) initiatives. While these are two separate disciplines, several ITSM providers offer and market functionality across both domains with the ability to link configuration item (CI) and asset data.

Software Support Impacts Tool Selection

I&O leaders are commonly identifying resource limitations as a challenge in enabling their ITSM platform aspirations. In surveying the ITSM vendors in this research, implementation time and administrative resources vary widely, which will impact the associated overhead of an investment. Table 1 shows three deployment scenarios and the ranges recommended by the ITSM platform providers profiled in this research for implementation time and administrative resources.

Table 1: Example Administrative and Implementation Ranges for ITSM Platforms

Scenario	*Range of administrative headcount for ongoing platform support reported by representative ITSM vendors in this research (responsibilities include system architecture, system administration, integration, custom development, project management)*	*Range of typical implementation times reported by representative ITSM vendors in this research*
Scenario 1 (basic): A 1,000 employee organization using the solution primarily for asset inventory, incident management, change management, knowledge management, request portal, reporting dashboard. No custom apps developed.	*0.5 to 3 FTEs (median is 1)*	*2-12 weeks*
Scenario 2 (intermediate): A 5,000 employee organization using the tool for incident, change, knowledge, request		

Source: Gartner (February 2025)

As illustrated above, there is a wide range of recommended administrative and implementation overhead. Given the increases in capability and complexity, enterprise-class ITSM platforms will often be more costly and require more resources for deployment than a

basic-to-intermediate product. I&O organizations intent on and capable of achieving high levels of maturity within 18 months should consider more advanced ITSM platforms. Doing so will enable them to gain value from solutions focused on a broader, end-to-end context of IT service support and delivery.

Note that a tool alone will not improve ITSM maturity and can even slow down the process if I&O's limited resources are spent configuring the tool rather than improving people and process issues. Those intent on improving maturity should not underestimate the work and time required to achieve results. I&O organizations with more basic functional requirements should consider the overhead of the tool. They should also consider the overheads of supporting features such as multichannel engagement, integration, automation and reporting. This will enable a good fit and avoid overspending on license and deployment costs. It will also help avoid increased demand on resources to successfully manage these tools.

Product Roadmaps Focus Outside of Core ITSM

While most organizations already have an ITSM platform, this market continues to see growth through upselling AI and broader extensions into lines of business outside of IT. Gartner continues to observe buyer demand for functionality that extends the scope of ITSM tools beyond traditional IT service management practice support. This has led however, to a large focus by providers on developing these adjacent areas rather than enhancing their core ITSM support. As a result, while many solution providers are introducing new GenAI virtual agents, for some this is coming at the expense of foundational practice components, such as more detailed reporting and service level tracking. We discuss these two extended areas of focus below:

Extending the ITSM Platform Into Adjacent Lines of Business

All vendors surveyed for this Market Guide noted that they provide out-of-the-box workflows outside of IT to support several different business requirements. In addition, many provide low-code and no-code workflow design capabilities, which enable citizen developers to build process-centric applications with minimal involvement from IT or non-IT development staff. Most supported were the extension into service delivery for HR and facilities (100%), followed by support for some project and contract management features (95%).

It is critical to note, however, that just because a vendor claims to support a business use case does not mean they provide deep support for that line-of-business requirement. In

many cases, Gartner customer feedback indicates functional support outside of IT for the business extensions in many ITSM platforms is limited to a subset of form templates, workflows and reports that adapt service management practices to that need. I&O leaders looking to develop a strategic approach to enterprise service management should review **3 Keys to Enterprise Service Management Success**.

The Growing Role of AI in ITSM Platforms

Gartner continues to see broad investments into AI and machine learning (ML) from ITSM platform vendors. I&O organizations are looking to leverage AI to drive more speed and scale for their services (see **Use-Case Prism: Artificial Intelligence for IT Service Desk**). Meanwhile, platform vendors are looking to this as an opportunity to upsell and differentiate. GenAI technology is further accelerating investments into AI/ML, with more immersive conversational AI experiences, knowledge generation and case summarization use cases. These promise to transform legacy ITSM practices by stripping out manual activities and exposing new insights using the large amount of data amassed on the ITSM platform.

Given the growing need of I&O groups to optimize IT support and service management processes, in 2024 Gartner introduced the new **Magic Quadrant for Artificial Intelligence Applications in IT Service Management**. This research focuses on the tools, including both stand-alone products and a subset of ITSM platforms, for analyzing ITSM information and metadata to provide intelligent advice and actions on ITSM practices and workflows.

Representative Vendors

The vendors listed in this Market Guide do not imply an exhaustive list. This section is intended to provide more understanding of the market and its offerings.

Vendor Selection

There are hundreds of ITSM vendors in the market. This research identifies a range of representative vendors that have met Gartner's market definition and mandatory features for ITSM platforms. The mandatory features include:

Support for the following ITSM practices with out-of-the-box forms, workflows and reports:

- Incident management

- Problem management
- Request management
- Change enablement
- Knowledge management

Support for the following to augment these practices:

- An integrated configuration management system
- The ability to define and monitor service levels

Vendors included in this Market Guide also represent a broad geographic range based on headquarter locations and areas of focus, and are visible to Gartner clients, as evidenced by client conversations, Gartner.com searches and Gartner Peer Insights. Note that a vendor's headquarters (HQ) region does not necessarily indicate where all its customers are located; global penetration varies widely.

A vendor's exclusion from this research does not mean that it and its products lack viability. Gartner regularly advises clients to explore the broader market to select a fit-for-purpose solution.

Representative Vendors of ITSM Platforms (alphabetically listed)

Vendor	*Product Name*	*Headquarters*
Atlassian	Jira Service Management	Sydney, Australia
BMC	BMC Helix ITSM	Houston, Texas, U.S.
EasyVista	EV Service Manager	Paris, France
Espiral MS Group	Proactivanet	Gijón, Asturias, Spain

Vendor	Product Name	Headquarters
Freshworks	Freshservice	San Mateo, California, U.S.
Halo Service	HaloITSM	Stowmarket, U.K.

Source: Gartner (February 2025)

Vendor Profiles

Atlassian

Atlassian, founded in 2002, is a public company headquartered in Sydney, Australia. Its operations are global, and it targets organizations of all sizes and ITSM maturities for its offering.

Atlassian's strategy aims to provide a single platform that connects development, I&O ar business teams across the entire life cycle of digital products and services. It provides a connected ecosystem of solutions across the broader Atlassian platform. Its solution off over 200 prebuilt form and project templates for business teams and a CMDB that can b configured to support a broad range of IT and non-IT asset types. Recent product enhancements include adding virtual support agents, data reconciliation for asset data ingested into the CMDB, and GenAI agent assist features.

Hosting options: On-premises, SaaS, cloud-hosted

Multitenancy support: Yes (multi-instance supported on select licensing plans only)

Licensing options: Atlassian Jira Service Management is licensed by named users and it also offers an enterprise licensing agreement (ELA) option.

Supported non-IT workflow extensions: HR, facilities, project management, legal management, contract management, finance management, customer service management and others

IT asset discovery and management: Available native automated IT asset discovery and hardware asset management (HAM)

BMC

BMC, founded in 1980, is a privately held company headquartered in Houston, Texas, U.S. Its operations are global, and it targets midsize and larger customers with intermediate-to-high ITSM maturities for its ITSM offering.

BMC's strategy is aimed at unifying operations and service management with a common underlying data platform, integrated interfaces, GenAI and cross-functional ChatOps to better support DevOps teams and connect the lines of business. It supports the needs of highly mature I&O organizations with its ITSM process support, observability and event intelligence integration, robust configuration management, and AI-driven features such as case clustering. Recent product enhancements include adding predefined templates to simplify CMDB administration, AI-based risk assessment for changes and enhanced incident clustering for problem management.

In October 2024 BMC announced it will split into two companies in early 2025, separating its BMC Helix business (including ITSM) from its mainframe and orchestration business. [3]

Hosting options: On-premises, SaaS, cloud-hosted

Multitenancy support: Yes

Licensing options: BMC Helix ITSM is licensed by named and concurrent users and also offers an ELA option.

Supported non-IT workflow extensions: HR, facilities, project management, security operations, contract management, finance, customer service management, field service management

IT asset discovery and management: Available native automated IT asset discovery and dependency mapping, software asset management (SAM), HAM

EasyVista

EasyVista, founded in 1988, is a privately held company headquartered in Paris, France. Its operations are in North America and Europe and it targets midsize and larger customers with low-to-intermediate ITSM maturity for its ITSM offering.

EasyVista's strategy is aimed at providing a cost-effective and simple-to-set-up ITSM platform with a feature set that suits customers at various stages of their IT maturity journey. It offers integrated IT operations management products that complement the ITSM platform with digital experience monitoring, infrastructure monitoring and endpoint management support. EasyVista also provides its customers with a Green IT dashboard for tracking the environmental impact of devices. Recent product enhancements include adding native IT asset discovery and data normalization, enhanced IT orchestration and AI agent assist features.

In November 2024, EasyVista entered into an agreement to acquire a majority stake in Germany-based ITSM platform provider, OTRS.

Hosting options: On-premises, SaaS, cloud-hosted

Multitenancy support: Yes

Licensing options: EasyVista is licensed by concurrent users and it also offers an ELA option.

Supported non-IT workflow extensions: HR, facilities, project management, security operations, legal management, contract management, finance management, customer service management, field service management

IT asset discovery and management: Available native automated IT asset discovery, SAM, HAM

Espiral MS Group

Espiral MS Group, founded in 1998, is a privately held company headquartered in Gijón, Asturias, Spain. Its operations are mostly in Europe as well as Latin America, and it targets medium-to-large size enterprises with intermediate-to-high ITSM maturity for its ITSM offering.

Espiral MS Group's strategy is aimed at providing an easy-to-implement ITSM and IT asset management (ITAM) tool for improving management practices with a fast return on investment. It focuses primarily on ITSM, ITAM, and cybersecurity solutions, and directly manages customer support needs with a focus on Spanish language support. Recent product enhancements include adding configurable Kanban boards, additional API connectors, and QR code support for expedited incident and request submission.

Hosting options: On-premises, SaaS, cloud-hosted

Multitenancy support: Yes

Licensing options: Proactivanet is licensed by named and concurrent users and also offers an ELA option.

Supported non-IT workflow extensions: HR, facilities, project management, security operations, legal service management, contract management, finance, customer service management, field service management, and others

IT asset discovery and management: Available native automated IT asset discovery and dependency mapping, SAM, HAM

Freshworks

Freshworks, founded in 2010, is a public company headquartered in San Mateo, California, U.S. Its operations are global, and it targets organizations between 500 and 10,000 from all ITSM maturities for its ITSM offering.

Freshworks' strategy is aimed at quick configuration and ease of use in its AI-enabled ITSM platform. It provides features such as no-code single-click "scenario automations" to simplify the support process. In addition, it integrates its ITSM platform into its CRM customer engagement center product, Freshdesk, to bridge external support needs with internal fulfillment. Recent product enhancements include adding an operations assistant, connector apps into common DevOps tools, and enhanced discovery and dependency-mapping capabilities through the acquisition of Device42.

Hosting options: SaaS

Multitenancy support: Yes

Licensing options: Freshservice is licensed by named users.

Supported non-IT workflow extensions: HR, facilities, project management, legal management, contract management, finance management, customer service management

IT asset discovery and management: Available native automated IT asset discovery and dependency mapping, SAM, HAM

Halo Service Solutions

Halo Service Solutions, founded in 1994, is a privately held company headquartered in Stowmarket, U.K. Its operations are in the U.S., Australia, the UAE and the U.K., and it targets organizations of all sizes and ITSM maturities with its ITSM offering.

Halo's ITSM strategy is aimed at providing a scalable platform to modernize service management needs, along with providing a partnership-style relationship with its customers. Rather than offering multiple pricing tiers and add-ons, Halo has an all-inclusive licensing model that includes extended features such as AI and iPaaS. Halo's ITSM product forms part of a wider Halo platform which includes professional services automation and customer success management capabilities, included in the same solution. Recent product enhancements include adding an operations assistant, event management support and a dedicated document management interface.

Hosting options: On-premises, SaaS, cloud-hosted

Multitenancy support: Yes

Licensing options: HaloITSM is licensed by named and concurrent users.

Supported non-IT workflow extensions: HR, facilities, project management, security operations, legal management, contract management, finance management, customer service management, field service management

IT asset discovery and management: Automated IT asset discovery and dependency mapping, SAM, and HAM are all available via a white-label relationship.

IFS

IFS, founded in 1983, is a privately held company headquartered in Linköping, Sweden. Its operations are global, and it targets organizations of over 500 employees and from all ITSM maturities for its ITSM offering.

IFS' strategy is aimed at extending ITSM across multiple engagement channels, augmented by a broader set of ITOM and line-of-business extensions. Its all-inclusive approach to product bundling includes various discovery, asset management, endpoint management and line-of-business extensions in a single ITSM license tier. In addition, IFS offers a portfolio of adjacent products including field service management, enterprise asset management

(EAM) and ERP. Recent product enhancements include adding AI agent assist features, UI modernization, and discovery for Microsoft 365 environments.

Hosting options: On-premises, SaaS, cloud-hosted

Multitenancy support: Yes

Licensing options: IFS assist is licensed by named and concurrent users and it also supports an ELA.

Supported non-IT workflow extensions: HR, facilities, project management, security operations, legal management, contract management, finance management, customer service management, field service management, and others

IT asset discovery and management: Available native automated IT asset discovery and dependency mapping, SAM, HAM

InvGate

InvGate, founded in 2008, is a privately held company headquartered in Buenos Aires, Argentina. Its operations are in Latin America, the U.S. and Europe, and it targets midsize and small enterprise organizations with intermediate ITSM maturity for its ITSM offering.

InvGate's strategy is aimed at creating easy-to-implement solutions that help companies modernize their operations quickly and efficiently. It provides a card-style UI to navigate work, as well as agent productivity features, including time tracking and gamification. Recent product enhancements include adding a graphical workflow designer, GenAI features for IT teams, and additional workflow templates.

Hosting options: On-premises, SaaS, cloud-hosted

Multitenancy support: No

Licensing options: InvGate is licensed by named and concurrent users.

Supported non-IT workflow extensions: HR, facilities, security operations, legal management, contract management, finance management, customer service management, field service management

IT asset discovery and management: Available native automated IT asset discovery, SAM, and HAM

Ivanti

Ivanti, formed in 2017, is a private company headquartered in South Jordan, Utah, U.S. Its operations are global, and it targets midsize and enterprise organizations of between 1,000 and 40,000 employees of all ITSM maturities for its ITSM offering.

Ivanti's strategy is aimed at providing a no-code/low-code platform that enables comprehensive digital employee experiences and unites its wider portfolio of security, endpoint management and digital employee experience management (DEX) solutions. It provides ITAM, digital employee experience management (DEX) and self-healing features bundled with ITSM, as well as integration with its unified endpoint management, vulnerability and patch management products. Recent product enhancements include adding GenAI for incident summarization and knowledge creation, a Microsoft Teams-based virtual support agent, and updated UI for self-service.

Hosting options: On-premises, SaaS, cloud-hosted

Multitenancy support: Yes

Licensing options: Ivanti is licensed by named and concurrent users.

Supported non-IT workflow extensions: HR, facilities, project management, security operations, contract management, and others

IT asset discovery and management: Available native automated IT asset discovery, SAM, and HAM. Customers can also purchase dependency mapping via a white-label relationship.

ManageEngine

ManageEngine, a division of Zoho Corporation, was founded in 2002 and is a privately held company headquartered in Del Valle, Texas, U.S. Its operations are global and it targets organizations of all size and ITSM maturities for its ITSM offering.

ManageEngine's strategy is aimed at providing highly customizable, value-oriented ITSM as part of a portfolio of integrated IT and business management products. It offers a portfolio of complementary products, including endpoint management, privileged access management,

network monitoring, application monitoring and active directory management solutions. ManageEngine also bundles AI features in all ITSM licensing tiers without any additional licensing costs. Recent enhancements include adding sentiment analysis, Microsoft 365 Copilot integration, and support for text-to-code through integration with OpenAI (ChatGPT).

Hosting options: On-premises, SaaS, cloud-hosted

Multitenancy support: Yes (only for MSPs)

Licensing options: ServiceDesk Plus is licensed by named users and also offers an ELA option.

Supported non-IT workflow extensions: HR, facilities, project management, security operations, legal, contract management, finance, customer service management and field service management

IT asset discovery and management: Available native automated IT asset discovery and dependency mapping, SAM, and HAM

Matrix42

Matrix42, founded in 1992, is a privately held company headquartered in Frankfurt, Hessen, Germany. Its operations are primarily in Europe and it targets prebuilt and small enterprise organizations of all ITSM maturities for its ITSM offering.

Matrix42's strategy is aimed at providing a broad suite of integrated ITSM, IT operations management and security products as part of an easy-to-configure and customizable low-code platform. It offers a portfolio of complementary products, including endpoint management, endpoint data protection, remote desktop support, IT asset management, and identity governance and administration software with out-of-the-box integration to automate actions and drive user productivity. Recent enhancements include adding AI agent assist features and an updated UI. In April 2024, Matrix42 acquired Nordic ITSM platform provider Efecte.

Hosting options: On-premises, SaaS, cloud-hosted

Multitenancy support: Yes

Licensing options: Matrix42 is licensed by named users and also offers ELA options.

Supported non-IT workflow extensions: HR, facilities, project management, security operations, legal, contract management, finance, customer service management and field service management

IT asset discovery and management: Available native automated IT asset discovery and dependency mapping, SAM, and HAM

OpenText

OpenText, founded in 1992, is a public company headquartered in Waterloo, Canada. Its operations are global and it targets midsize to large enterprises with intermediate to high ITSM maturity for its ITSM offering.

OpenText's strategy is aimed at ease of use and quick implementation by providing an extensible no code/low code service management platform connected into its broader ITOM, automation and line of business solutions. It has designed its product to enable codeless configuration and integration capabilities. It offers a single pricing tier that allows customers to switch between named and concurrent licensing at any time during the contract, and bundles features including AI/ML, orchestration and discovery. Recent enhancements include adding a GenAI-based virtual agent, improved network discovery features, and more extensive Kubernetes support.

Hosting options: On-premises, SaaS, cloud-hosted

Multitenancy support: Yes

Licensing options: OpenText Service Management (SMAX) is licensed by named and concurrent users and also offers an ELA option.

Supported non-IT workflow extensions: HR, facilities, project management, security operations, contract management and others

IT asset discovery and management: Available native automated IT asset discovery and dependency mapping, SAM, and HAM.

ServiceNow

ServiceNow, founded in 2004, is a public company headquartered in Santa Clara, California, U.S. Its operations are global and it targets companies with more than 1,000 employees of all ITSM maturities for its ITSM offering.

ServiceNow's strategy is aimed at providing a single AI-enabled platform with a broad portfolio of IT and line-of-business applications to help customers manage workflows across their organizations and departments. Its ITSM supports highly mature I&O organizations, with product features including a pretrained large language model (LLM), process mining and workforce optimization. Recent product enhancements include adding digital employee experience management (DEX) capabilities, simplified configuration and service catalog integration for the virtual support agent, and more extensive support for release management.

Hosting options: SaaS and cloud-hosted; on-premises on an exception basis

Multitenancy support: Yes (multi-instance via domain separation)

Licensing options: ServiceNow is licensed by named users and offers an ELA option.

Supported non-IT workflow extensions: HR, facilities, project management, security operations, legal management, contract management, finance management, customer service management, field service management and others

IT asset discovery and management: Available native automated IT asset discovery and dependency mapping, HAM and SAM

SolarWinds

SolarWinds, founded in 1999, is a public company headquartered in Austin, Texas, U.S. Its operations are global and it targets midmarket and small enterprise organizations of all ITSM maturities for its ITSM offering.

SolarWinds' strategy is aimed at ease of use through no-code configuration and enabling service operations with integration into its broader software portfolio of monitoring and observability solutions. Its integration into its SolarWinds Observability product automates converting alerts to incidents, updating alerts from incidents, mapping CI dependencies and connecting CI data into tickets. Recent product enhancements include added GenAI agent

assist features, the ability for agents to build and send templated responses, and data masking for text and attachments.

Hosting options: SaaS (SolarWinds Service Desk), on-premises (SolarWinds Web Help Desk)

Multitenancy support: Yes (via MSP option)

Licensing options: SolarWinds Service Desk is licensed by named users.

Supported non-IT workflow extensions: HR, facilities, legal management, contract management, finance management

IT asset discovery and management: Available native automated IT asset discovery and dependency mapping, HAM and SAM

SymphonyAI

SymphonyAI, founded in 2017, is a privately held company headquartered in Palo Alto, California, U.S. Its operations are global, and it targets midsize and enterprise organizations between 2,000 and 40,000 employees of all ITSM maturities for its ITSM offering.

SymphonyAI's strategy is aimed at providing AI-powered IT and enterprise workflows on a no-code/low-code platform. It focuses on providing service management and automation to address the needs of IT and adjacent lines of business with limited administrative requirements. Recent product enhancements include a virtual support agent, operations assistant and an API configuration utility.

Hosting options: On-premises, SaaS, cloud-hosted

Multitenancy support: Yes

Licensing options: SymphonyAI IT Service Management is licensed by named users.

Supported non-IT workflow extensions: HR, facilities, project management, contract management, customer service management

IT asset discovery and management: Available native automated IT asset discovery, HAM and SAM. Dependency mapping is available via reseller agreement.

SysAid

SysAid, founded in 2002, is a privately held company headquartered in Tel Aviv, Israel. Its operations are global and it targets midsize and small enterprise organizations of all ITSM maturities for their ITSM offering.

SysAid's strategy is aimed at providing core ITSM capabilities on a low-code/no-code, AI-enabled platform. In addition, it provides some native ITAM and client support capabilities for endpoint diagnostics and remedial actions, including inventory and patching features. Recent product enhancements include adding image recognition for their virtual support agent, an operations assistant, and AI agent assist features including intelligent categorization.

Hosting options: On-premises, SaaS

Multitenancy support: Yes

Licensing options: SysAid is licensed by named users and also offers an ELA option.

Supported non-IT workflow extensions: HR, facilities, project management, security operations, legal, finance, customer service management

IT asset discovery and management: Available native automated IT asset discovery, HAM and SAM. Dependency mapping is available via reseller agreement.

TeamDynamix

TeamDynamix, founded in 2001, is a privately held company headquartered in Columbus, Ohio, U.S. Its operations are in the U.S. and Canada, and it targets organizations of 500 to 10,000 employees with intermediate to high ITSM maturities for its ITSM offering.

TeamDynamix's strategy is aimed at providing a low-code ITSM tool that is integrated into its project portfolio management (PPM) and iPaaS products. Its solution allows for multiple private and public-facing self-service portals with data controls to limit what information is accessible. This can be useful for organizations that provide support to end users who are not internal employees and require different levels of access to IT services. Recent product enhancements include RAG support for its conversational AI, AI-enabled case summarization, and Microsoft Intune integration.

Hosting options: SaaS and cloud-hosted

Multitenancy support: Yes

Licensing options: TeamDynamix is licensed by named users and also offers an ELA option.

Supported non-IT workflow extensions: HR, facilities, project management, security operations, legal management, contract management, finance management, customer service management, field service management

IT asset discovery and management: Available native automated IT asset discovery and HAM. SAM is available via reseller agreement.

TOPdesk

TOPdesk, founded in 1997, is a privately held company headquartered in Delft, Netherlands. Its operations are global and it targets midsize enterprises of 250 to 10,000 employees with low to intermediate ITSM maturity for its ITSM offering.

TOPdesk's strategy is aimed at ease of use and quick implementation for its ITSM platform, while offering support for other non-IT workflows. It provides a number of out-of-the-box templates and automated actions to expedite customer implementations without coding. Recent product enhancements include adding a native mobile app for agents, an updated knowledge management interface, and integration of operations activities into its Kanban boards.

Hosting options: Self-hosted, partner-hosted, SaaS

Multitenancy support: No

Licensing options: TOPdesk is licensed by named users and also offers an ELA option.

Supported non-IT workflow extensions: HR, facilities, project management, security operations, legal management, contract management, finance management, customer service management, field service management

IT asset discovery and management: Available native HAM and SAM. Automated IT asset discovery is available via reseller agreement.

USU

USU, founded in 1977, is a privately held company headquartered in Möglingen, Germany. Its operations are in Europe and North America and it targets midsize to large enterprises with

intermediate to high ITSM maturity for its ITSM offering.

USU's strategy is focused on providing a flexible platform for digitizing all service processes. USU's product supports the service owner and manager roles with configurable service models that document and track the performance of IT services in the organization. They also offer a broad portfolio of integrated ITOM and business workflow solutions including observability, asset management, FinOps and customer service management. Recent product enhancements include UI enhancements, VSA integration into the self-service portal, and AI for change management.

Hosting options: On-premises, SaaS, cloud-hosted

Multitenancy support: Yes (primarily for MSPs)

Licensing options: USU is licensed by total employees (all-user named licensing).

Supported non-IT workflow extensions: HR, facilities, project management, security operations, contract management, finance management, customer service management, field service management

IT asset discovery and management: Available native HAM and SAM. Automated IT asset discovery is available via reseller agreement

Xurrent

Xurrent (formerly 4ME), founded in 2010, is a privately held company headquartered in Santa Barbara, California, U.S. Its operations are in ANZ, North America and Europe, and it targets midsize to small enterprise organizations with low to intermediate ITSM maturity.

Xurrent's strategy is aimed at reducing administrative overhead and supporting rapid implementation with graphical designers and other low-code capabilities, which can be extended across the enterprise to address enterprise service management (ESM) use cases. Due to Xurrent's multitenant cloud architecture, deployments can connect with other Xurrent deployments (whether internal departments or third-party providers) without custom integration work. It also has an all-inclusive licensing model with no extra charge for AI features. Recent product enhancements include agent UI enhancements, a new UI design tool, and the acquisition of StatusCast, which provides visualized status pages for service availability, incidents and planned downtime.

Hosting options: SaaS

Multitenancy support: Yes

Licensing options: Xurrent is licensed by named users.

Supported non-IT workflow extensions: HR, facilities, project management, security operations, legal management, contract management, finance management, customer service management, field service management.

IT asset discovery and management: Available native HAM and SAM. Automated IT asset discovery and dependency mapping is available via reseller agreement.

Market Recommendations

- Ensure ITSM platform selection is aligned with current and planned service desk and service operations capabilities by defining an 18-month ITSM practice roadmap and giving little weight to functionality that will not directly enable those service improvement objectives.
- Justify the TCO against a defensible ROI by going beyond ticket deflection aspirations to focus on how the ITSM platform will help support the overall maturity goals of the I&O function. These goals should be aligned with an achievable business value metric (e.g., improving business agility and productivity, customer experience, risk reduction) and balanced against the true TCO of the solution.
- Transform your ITSM platform's role from a stand-alone system of record to part of a federated toolchain by prioritizing the quality, ease, cost and support of the ITSM platform's integration capabilities. Evaluate these in any tool selection exercise.

⊕ Evidence