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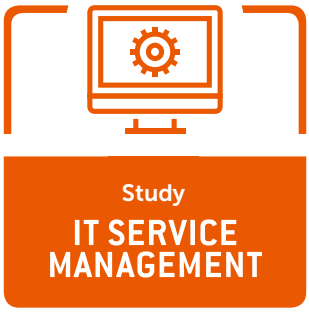

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Yearning for a plan

Simon Hülsbömer,
Senior Project Manager
Research

The desire for predictability – never has it been as strong as it is today. We long to be able to make plans again that extend beyond the next day. We want to see an end to this pandemic that has turned everything on its head and asked of us a disproportionate degree of flexibility in our work and private lives – most of all mentally – for a year now. This lack of planning security, even in the short-term, is causing a real headache in Germany, a country famed the world over for its organization, rules and punctuality.

Maybe that's why it's so comforting and reassuring to deal with the topic of IT service management (ITSM) – an area where there are often such clearly defined rules and processes but, above all, an area which contributes to better organizing and accelerating company and IT processes and optimizing workflows on the whole: a little order-restoring ray of light amid all the coronavirus chaos. Added to this is the increasing (coronavirus-related) shifting of the world of work from largely central company IT structures to decentralized home and mobile office set-ups. To keep enterprises up and running, employees need to be offered more self-service options and IT processes have to be more straightforward and easier to understand. That's what ITSM is all about. So it's little wonder that, when questioned for our study, IT decision-makers selected ITSM as the most strategically important IT issue of the moment.

If we were, so to speak, to transfer the principles of ITSM to other company divisions outside of IT with a view to creating more order, efficiency and speed there, this would be referred to as enterprise service management (ESM). This is an area which, according to the study participants, is still vastly underrepresented and will not catch on in a big way for some time. But if coronavirus has taught us anything, it's that what is accepted as a more or less valid perception today can be obsolete tomorrow, especially given that companies are already using ESM tools for service purposes across departments.

With this in mind, it's equally difficult to make any reliable long-term conclusions about ESM – another wish that – unfortunately – remains unfulfilled. That said, the study results are of course still worth a look – serving as a comprehensive ITSM stocktaking exercise with after ten months of the coronavirus pandemic.

I hope you enjoy reading and find the results informative.

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Management Summary

An overview of the key findings

New requirements

Covid-19 has forced ITSM to adapt IT service hours, to provide more self-service options, to optimize processes and to invest in IT-infrastructure and IT equipment for those working from home.

Coronavirus is shifting priorities

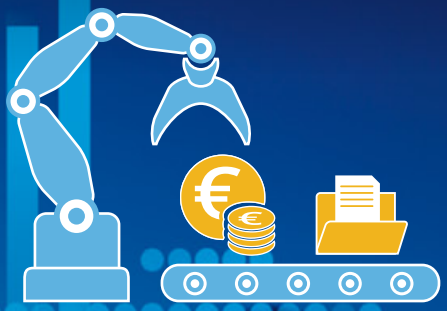
IT service management is fast overtaking cybersecurity to become the most important strategic IT issue.

Improved results

More than half of companies are (very) satisfied with their IT service management.

Coronavirus the cash cow

During the coronavirus pandemic, almost half of companies increased their ITSM and ESM budget quite significantly.



Consensus

Most companies are of the opinion that the standardized, automated operation of IT services lends itself to other business processes like finance or administration too.

IT sets the tone

In most companies it's the IT department that drives innovation in service processes and makes the decisions when choosing ITSM or ESM tools.

On the up

More than six in ten companies have now launched an ESM tool, with three in ten having done so some time ago. This has seen the numbers rise in comparison to the previous year.

Primary objectives

IT process optimization was/is the most important objective in the launch of ITSM solutions. Increased employee and customer satisfaction is the focus of ESM solutions.

Key findings

IT Service Management 2021

1. Covid-19 throws up new challenges for IT service management

Adapted IT service hours, more self-service options, process optimization, investment in IT infrastructure and IT equipment for those working at home – coronavirus has changed IT service management (ITSM).

The shifting of the workplace from the office to home acted like a stress test and shone a light on company ITSM set-ups. This forced them to ask questions like: Is our IT support efficient enough? Are our IT processes flexible and resilient enough to handle crises?

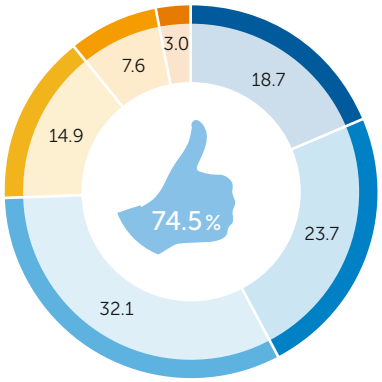
"Covid-19 showed us that we as a company needed to first concentrate on optimizing our processes." Three quarters of the companies agreed with this statement (75 percent).

Another challenge came in the form of changed working hours. When employees are sitting at their desk working from home at 10 p.m., the service desk is often vacant. Some solutions to this include adapting IT service hours or introducing better self-service options. More than three quarters of those surveyed (78 percent) agreed with this, 20 percent strongly agreed, 31 percent agreed and 26 percent more or less agreed.

In 75 percent of companies Covid-19 required investment in IT infrastructure and IT equipment for employees working from home. The latter of these posed a completely new IT challenge for many companies.

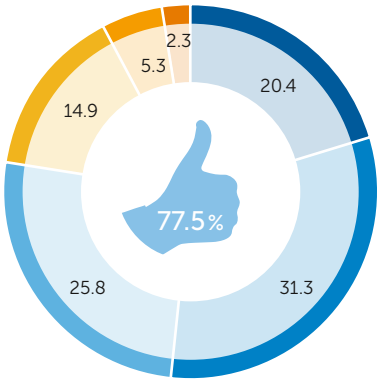
To what extent to do you agree with the following statements?

"Covid-19 showed us that we as a company needed to first concentrate on optimizing our processes."



Date in percent. Basis: n = 498

"Covid-19 has seen a trend towards changing working hours. This has given rise to a need to adapt IT service hours or offer better self-service options."



Data in percent. Basis: n = 511

2. Coronavirus has seen ITSM become the most important strategic IT issue

The coronavirus pandemic has led to a surge in digitalization in most companies. This has seen ITSM take a front seat too. It is becoming the single most important issue in IT.

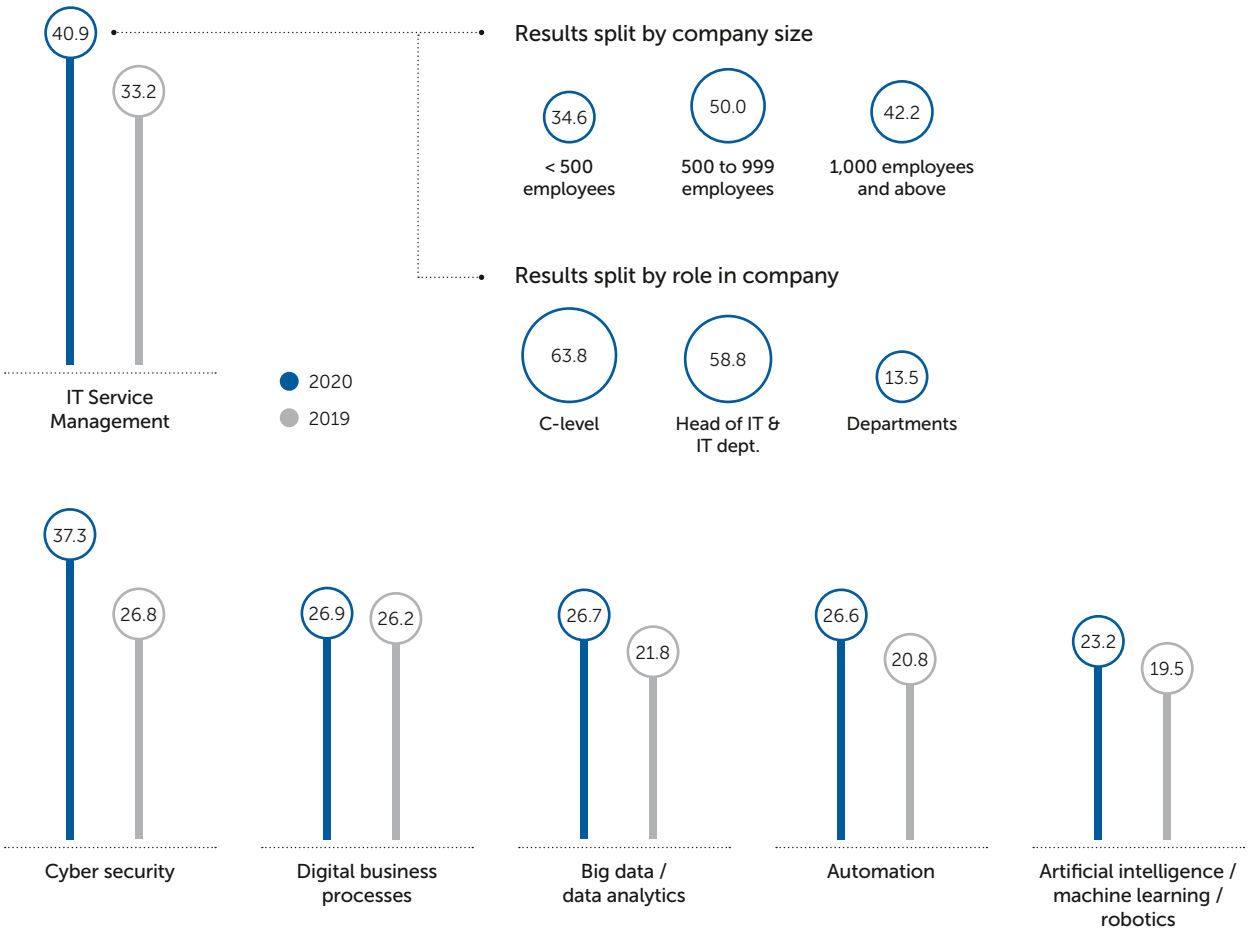
During the coronavirus pandemic many companies implemented digitalization projects within the space of a few months that would otherwise have taken them years to complete.

IT service management needs to follow suit and accelerate its processes and improve the efficiency of these.

That is why, at 41 percent (previous year: 33 percent and second place), ITSM is fast becoming the most strategically important issue faced by company IT departments over the coming two years. The figures here are particularly high among medium-sized companies with between 500 and 999 employees (50 percent), C-level management (64 percent) and the heads of IT departments (59 percent).

What do you see as the most important strategic IT issues of the coming 12 to 24 months?

Data in percent. Multiple answers possible. Basis: n = 531 (2019: n = 385)

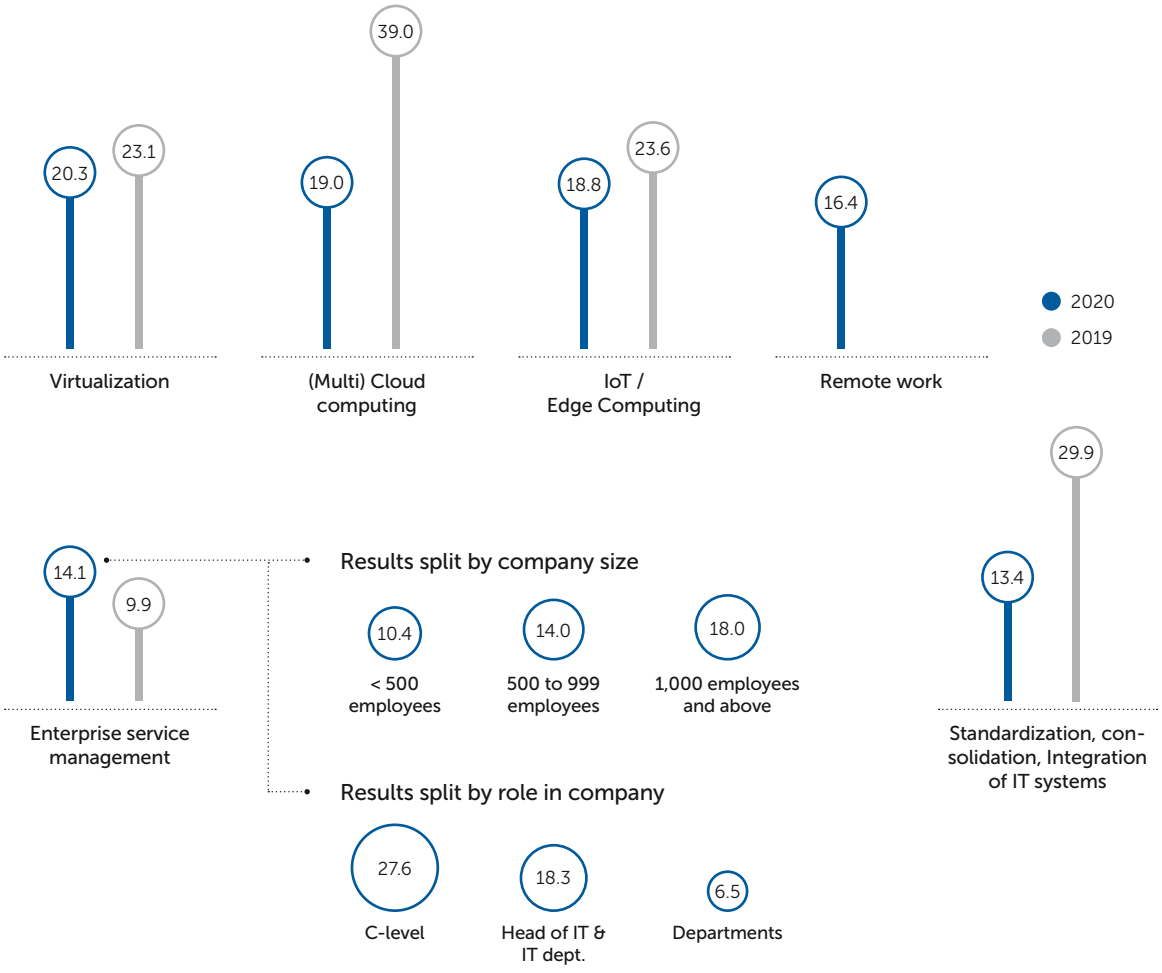


Cyber security comes in second at 37 percent (previous year: 27 percent and fourth place). Coronavirus is playing a key role here too since the increasing shift of work from the office to home has seen an increase in security challenges.

At 27 percent each, the issues digital business processes (previous year: 26 percent), big data / data analytics (previous year: 22 percent) and automation (previous year: 21 percent) took third place in front of artificial intelligence (KI) / machine learning / robotics at 23 percent and virtualization at 20 percent.

One thing that is surprising is how last year's frontrunner, (multi-) Cloud computing, dropped from 39 to 19 percent. This may be due to the fact that many companies had already transferred the majority of their applications to the Cloud the previous year. Cloud is now becoming a commodity.

Two other results were striking: enterprise service management (ESM) regained some significance at 14 percent, while standardization, consolidation and IT systems integration brought up the rear at 13 percent. Last year this issue made third place at 30 percent.



3. Satisfaction with IT service management is on the up

56 percent of companies are very satisfied or satisfied with their IT service management. These values represent a slight improvement compared with 2019.

56 percent of companies are very satisfied or satisfied with their IT service management. This is an increase on the figure from last year (54 percent).

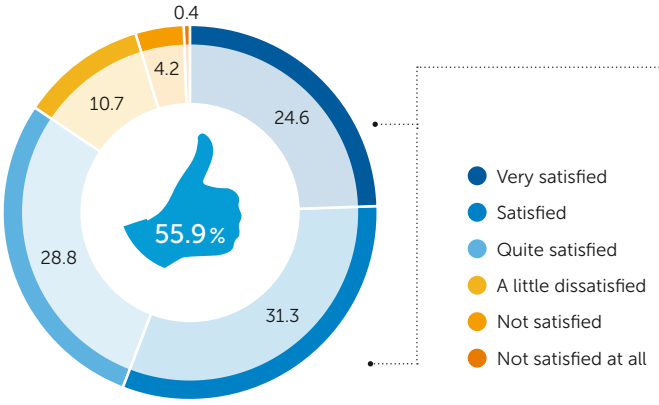
On a scale of 1 to 6, satisfaction scored an average of 2.4. Last year the average was 2.5.

As was the case last year: the larger the company and/or the larger the IT budget, the greater the satisfaction with ITSM. While just 47 percent of small companies of up to 500 employees were "very satisfied" or "satisfied", the figure among medium-sized companies of between 500 and 999 employees is 63 percent and the figure in large companies with more than 1,000 employees was 60 percent.

Where the IT budget is concerned, the figure rises from 50 percent in companies with a budget of less than ten million euros to 71 percent in large companies with an IT budget of more than ten million euros.

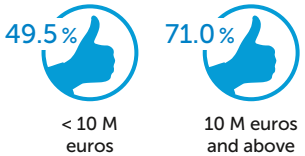
On the whole, how satisfied are you with your company's IT service management?

Data in percent. Basis: n = 521



"(Very) satisfied" results split by company size

"(Very) satisfied" results split by IT budget

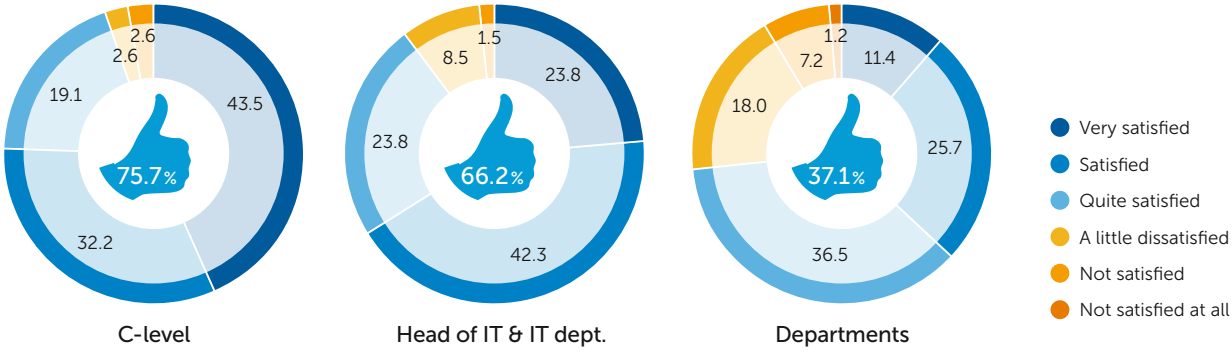


There are also major differences with regard to the roles within the companies. While 76 percent of C-level executives are either "very satisfied" or "satisfied" with their ITSM, the figure is 66 percent among IT managers and the IT department, and just 37 percent in the other departments.

29 percent of companies indicated being "quite satisfied" (previous year: 30 percent) while, like last year, 15 percent reported being "quite dissatisfied" or "not satisfied".

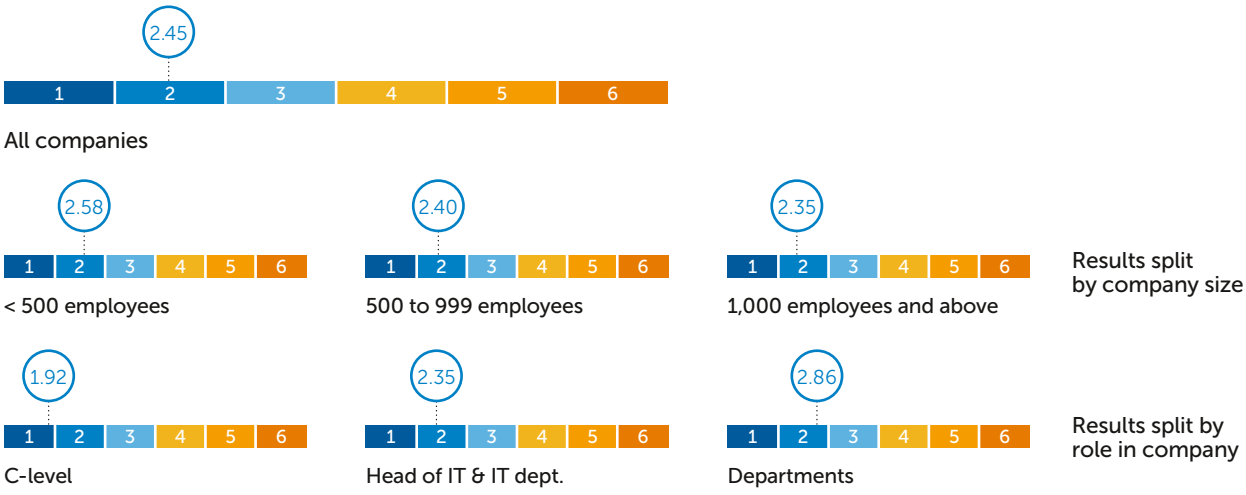
The answers to the question "How would you rate your current ITSM/ESM solution?" confirm these results. This resulted in an average of 2.45 with better scores among medium-sized and large companies as well as C-level management.

Results split by role in company



How would you rate your current ITSM/ESM solution?

Data in percent. Basis: n = 508



4. Consensus: ITSM principles can be transferred to other business processes

The majority of companies are of the opinion that the standardized, automated operation of IT services lends itself to other business processes like finance or administration too.

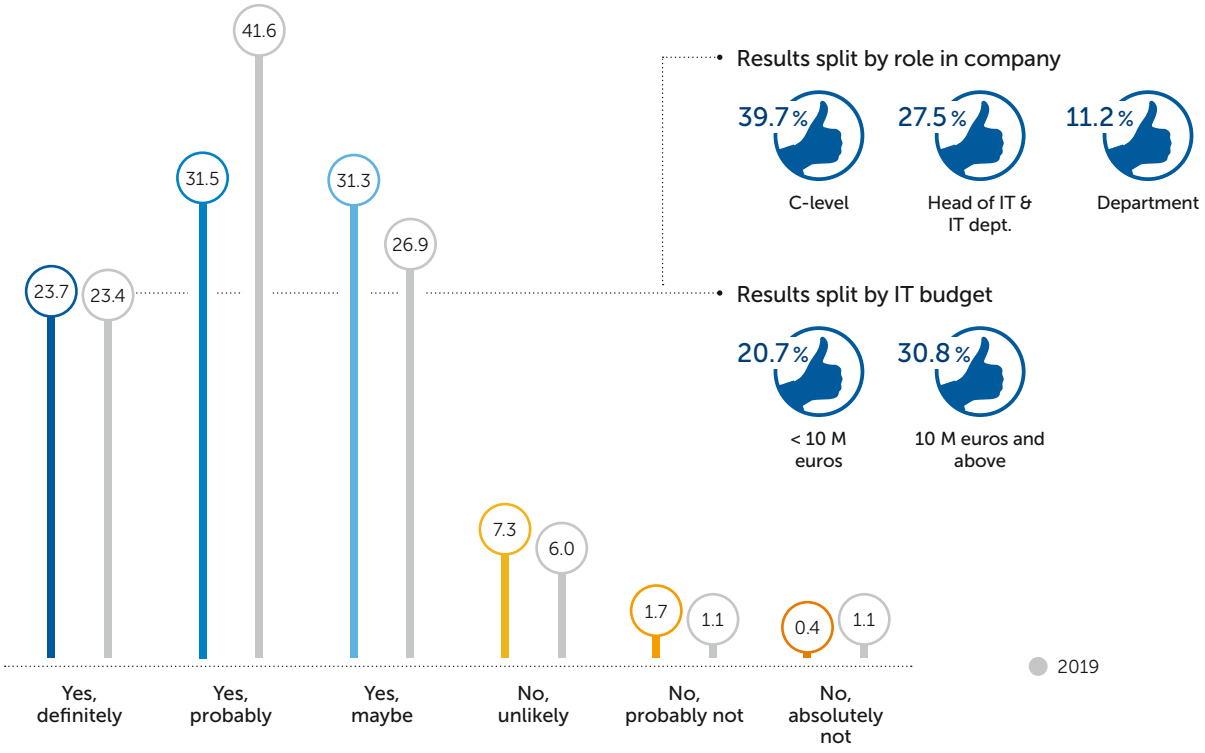
87 percent of companies (previous year: 92 percent) are of the opinion that the principle of IT service management, i.e. standardized, automated IT services, can be applied to other business processes. This would see ITSM become enterprise service management (ESM). Just nine percent disagreed with this.

A breakdown of the figures: 24 percent of companies responded "Yes, definitely" (like the year before). The numbers in C-level management are above average here (40 percent) and among companies with an IT budget of more than ten million euros (31 percent).

32 percent of companies (previous year: 42 percent) are of the opinion that ITSM principles could probably be transferred to other business processes; 31 percent said "Yes, maybe" (previous year: 27 percent).

What do you think? Does it make sense to "transfer" the standardized, automated operation of IT services (= IT service management, ITSM) to other business processes and/or apply the basic concept of ITSM there too?

Data in percent. Basis: n = 531 (2019: n = 385)



The order remains the same when it comes to the preferred areas of ESM use. The respondents deemed the use of ITSM principles in the field of IT security the most practical (30 percent, previous year: 29 percent). What is interesting is the discrepancy between IT managers (43 percent) and the departments (eleven percent).

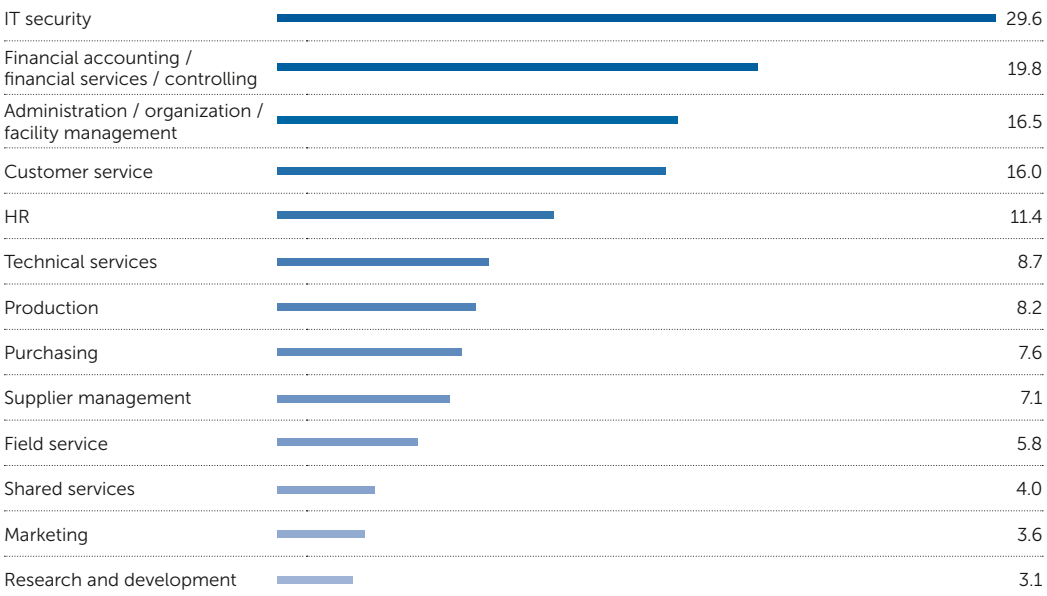
Other key areas include financial accounting / financial services / controlling (20 percent, previous year: 22 percent) and administration / organization / facility management (17 percent, previous year: 21 percent).

The companies also saw greater potential for standardized and automated business processes in customer service (16 percent) and the HR department (nine percent).

Even if companies are convinced of the advantages of enterprise service management, the issue plays only a secondary role in IT. After all, when it comes to strategic IT issues, ESM lags behind at 14 percent *(see Key finding 2 on page 10/11)*. This discrepancy is surprising and leads us to conclude that a rigorous implementation of ESM is likely still a way off yet.

In which of the following areas does it make most sense to apply the basic concept of ITSM?

Data in percent. Multiple answers possible. Filter: Companies that feel transferring ITSM to other business processes makes sense too. Basis: n = 459



5. More ESM tools in use

Almost two thirds of companies now use one ESM software for several service areas. This has seen a decline in the significance of specific sector solutions for the digitalization of workflows in non-IT areas.

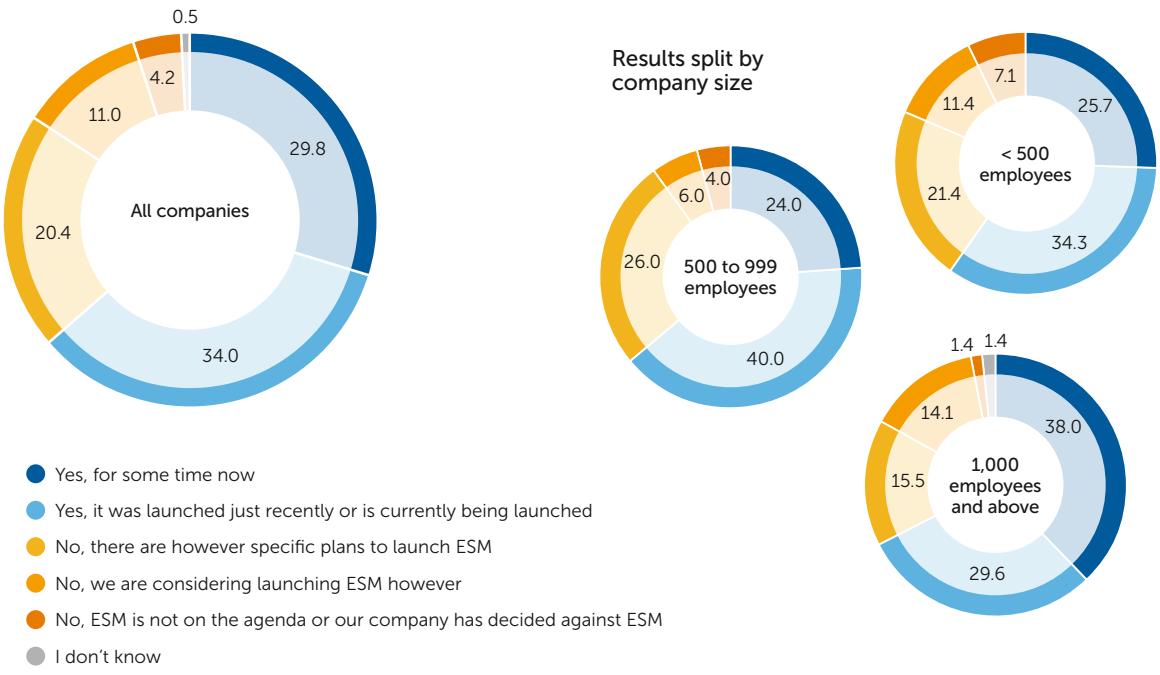
ESM software is on the up: A total of 64 percent of companies (previous year: 58 percent) have already launched an ESM tool. 30 percent (previous year: 23 percent) have been using one for some time; 34 percent have recently started using one or are currently in the middle of launching one.

While 60 percent of small companies with up to 500 employees use an ESM solution (just 45 percent the previous year), this figure is 64 percent for medium-sized companies, and 78 percent in large companies with more than 1,000 employees (previous year: 61 percent).

A total of 36 percent of companies (previous year: 43 percent) haven't yet implemented an ESM solution, however 20 percent are already planning to launch ESM (previous year: 19 percent); eleven percent are considering launching ESM, and four percent either haven't given ESM a thought or have decided against it.

Do you use an enterprise service management (ESM) tool for several service areas in your company (e.g. IT, HR, finance, customer service, facility management...)?

Data in percent. Filter: Respondents from IT and technology departments (generally in a managing role). Basis: n = 191

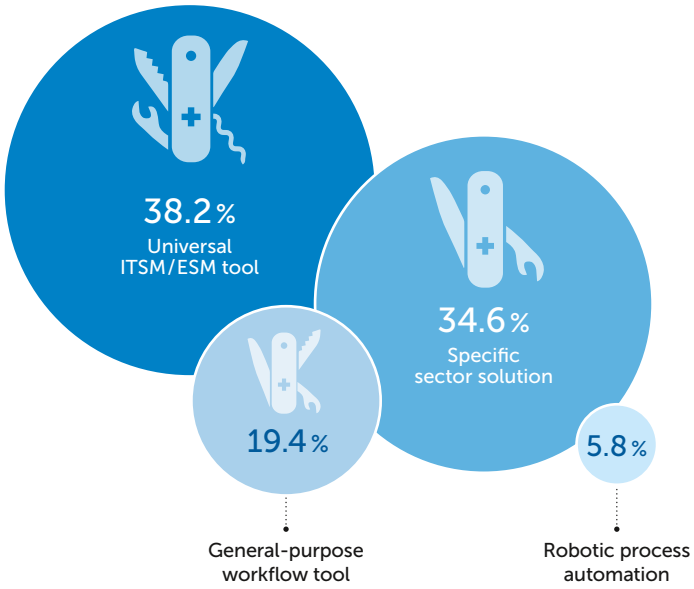


It's worth noting that universal ITSM/ESM tools might play a greater role in the future. After all, 38 percent of respondents from the areas of IT and technology indicated that the digitalization of workflows in non-IT areas would be best accomplished with an ITSM/ESM tool.

35 percent see specific sector solutions as the best tool; 19 percent of companies back universal workflow tools for the digitalization of workflows; six percent see robotic process automation as the answer, i.e. software robots that perform continually recurring monotonous routine tasks.

What kind of tool do you think would be best suited to facilitating the digitalization of workflows in non-IT areas of the company in future?

Data in percent. Multiple answers possible.
Filter: Respondents from IT and technology departments (generally in a managing role). Basis: n = 191



6. IT department drives innovation and decides on tool selection

In most companies it's the head of IT and the CIO that are responsible for selecting ITSM or ESM tools. The IT department is also largely responsible for service process innovation.

The IT department is the driving force behind innovation in service processes in two thirds of companies (69 percent). This applies particularly to medium-sized (72 percent) and large companies (75 percent).

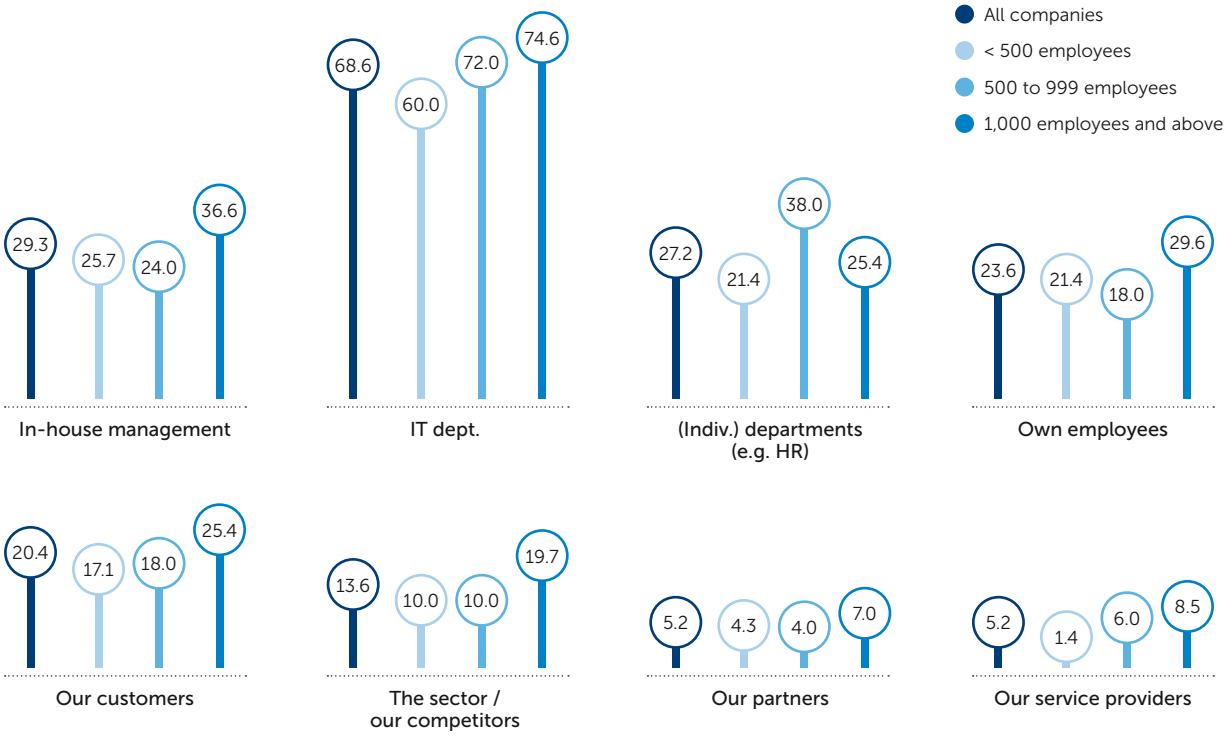
The key role of IT on the subject of ESM is obvious. Only the IT department has the experience and the knowledge as to how software-based systems might be transferred to other areas. The IT department has developed an edge in expertise with ITSM and ITIL standards that the other departments can use for their (new) digital services.

Management takes the lead in transformation in ITSM and ESM in just 29 percent of companies; in about a quarter it's the individual departments (27 percent) or in-house staff (24 percent).

A fifth of companies take inspiration from their customers' service processes. The external influence of competitors, partners or service providers plays a role primarily in large companies with more than 1,000 employees.

Who drives the service processes of your company? Who is in charge of change and innovation?

Data in percent. Filter: Respondents from IT and technology departments (generally in a managing role). Basis: n = 191



More and more these days the IT department has the say when it comes to the decision-making process for selecting ITSM and ESM tools.

Taking CIOs/IT directors (59 percent) and heads of IT (49 percent) together, in many companies the IT department is the first point of contact when it comes to making decisions with regard to software for service management (multiple answers possible).

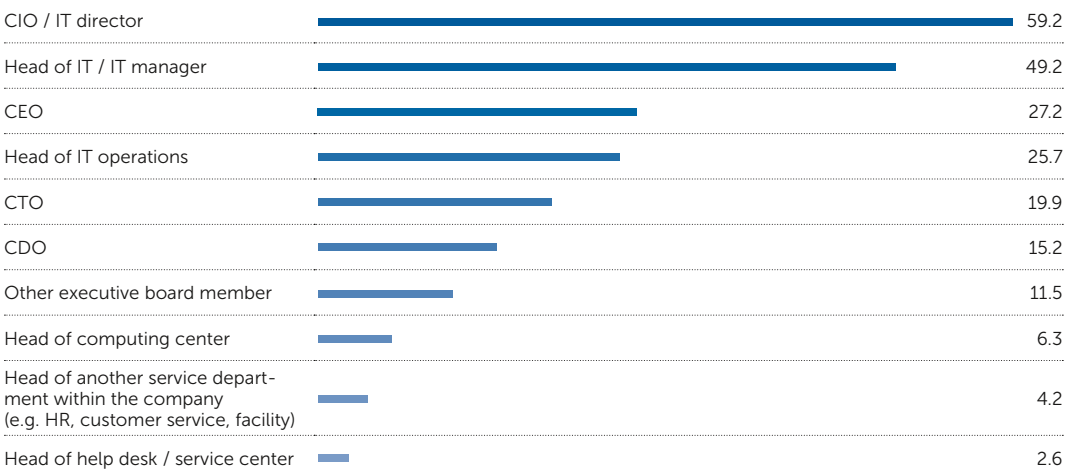
What is interesting is the diminished importance of the CEO on this issue. They were only responsible for selecting ITSM and ESM tools in 27 percent of the companies. Two years ago* the CEO was joint top with the CIO at 43 percent.

Again this year decision-making authority lay with heads of IT operations at 26 percent (last year only 16 percent).

* It is important to note however that this year the questions covered here were only addressed to decision-makers and employees from IT and technology – the previous two years saw all roles within the company asked. Due to the partially different respondent groups, a year-on-year comparison of values is only possible to a limited extent.

Who within your company is involved in the decision-making processes in relation to ITSM/ESM tools?

Data in percent. Filter: Respondents from IT and technology departments (generally in a managing role). Basis: n = 191



7. Investment in ITSM and ESM is on the up – both despite and because of coronavirus

Most companies think their ITSM/ESM budget is sufficient to help them achieve their objectives. The coronavirus pandemic has seen half of companies increase their investment. ITIL (IT Infrastructure Library) remains the most important field for ITSM investment.

80 percent of companies say that their ITSM budget is sufficient (33 percent) or more or less sufficient. There were no significant differences here between the small, medium, and large companies. Striking here are the high figures among C-level management (91 percent) and the above-average figures (75 percent) in the IT department.

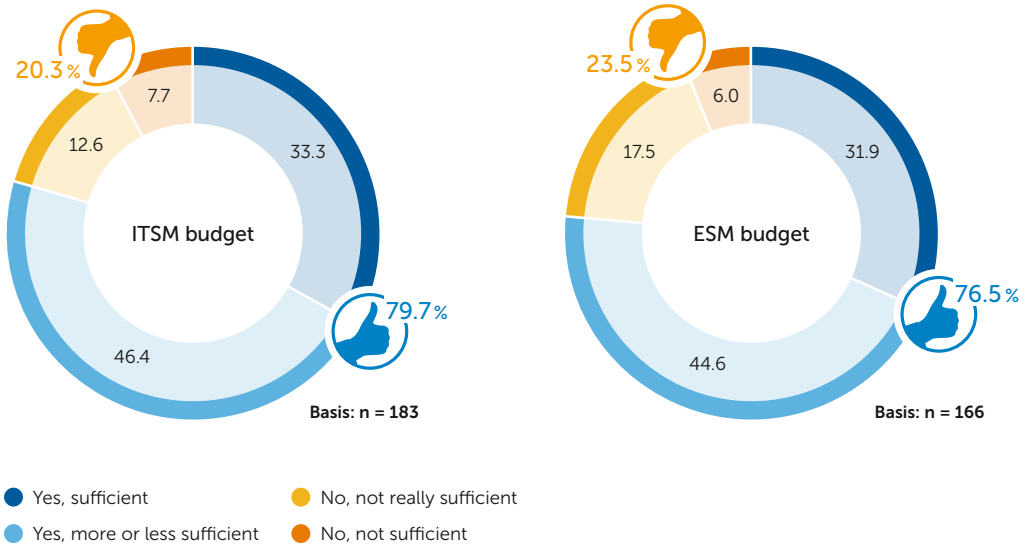
The ESM budget paints a similar picture. Here, 77 percent of companies said they had at their disposal sufficient (32 percent; large companies just 23 percent) or more or less sufficient funds for the standardization and automation of non-IT processes.

The good news: during the coronavirus pandemic around half of companies increased both their ITSM budget (51 percent) and their ESM budget (48 percent) quite significantly.

In a third of companies the ITSM budget (34 percent) and the ESM budget (36 percent) stayed roughly the same, and just twelve percent of companies reduced their ITSM and ESM budget. Three percent of companies didn't have a budget for ITSM or ESM.

Is your budget for ITSM or ESM sufficient to achieve the goals you have set?

Data in percent. Filter: Respondents from IT and technology departments (generally in a managing role).



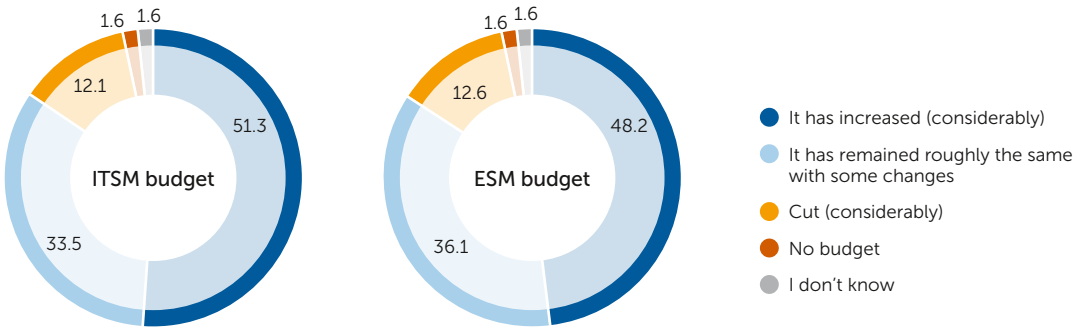
At 28 percent each, ITIL and Cloud service management account for the bulk of ITSM expenditure. A quarter of companies invest in substitutes for ITIL.

Areas like service automation, expansion of service range, bring your own device (BYOD) and Cloud service brokers still account for more than 20 percent.

15 percent of companies reported spending money on extending ITSM to enterprise service management.

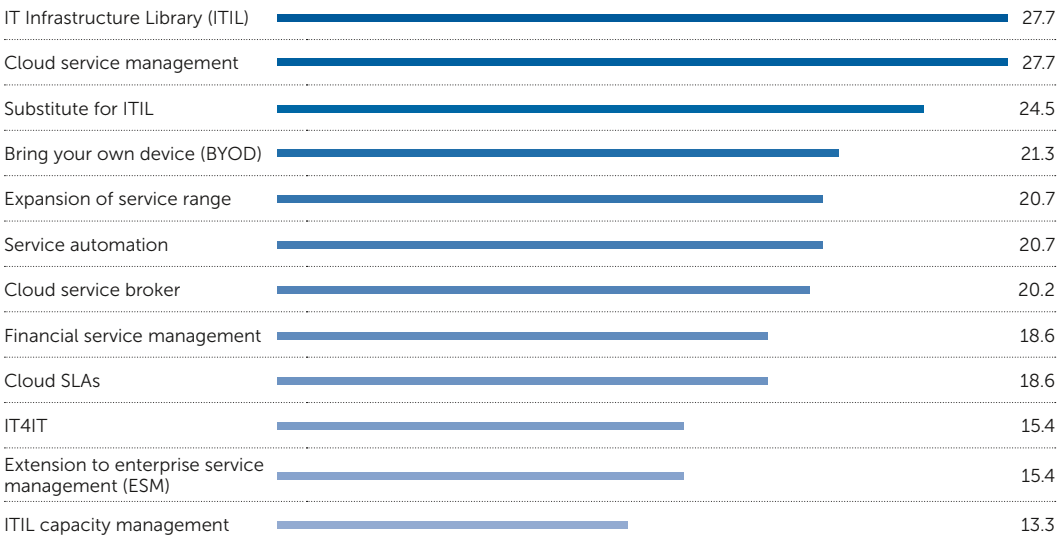
What impact is the coronavirus pandemic having on your ITSM or ESM budget?

Data in percent. Filter: Respondents from IT and technology departments (generally in a managing role). Basis: n = 191



In which of the following areas of IT service management will your company (primarily) invest in the next few months?

Data in percent. Multiple answers possible. The top 12 answers are shown. Filter: Respondents from IT and technology departments (generally in managerial roles) whose companies have budgets for ITSM. Basis: n = 188



8. ITSM for optimized processes, ESM for more satisfaction

IT process optimization was/is the most important objective in the launch of ITSM solutions. With ESM solutions the focus is on increased employee and customer satisfaction.

As was the case the previous year, the optimization IT processes is by far and away the most important goal when introducing an ITSM tool. This was the response of 67 percent of companies (previous year: 56 percent).

The figures for medium-sized companies with between 500 and 999 employees and IT departments were strikingly high here at 72 percent each.

45 percent of companies want to use the ITSM tool to increase customer and employee satisfaction, 29 percent to set up a service catalog and another 29 percent to fulfill service level agreements, and another 29 percent to create a basis for more IT automation and to create the conditions for digital transformation within the company.

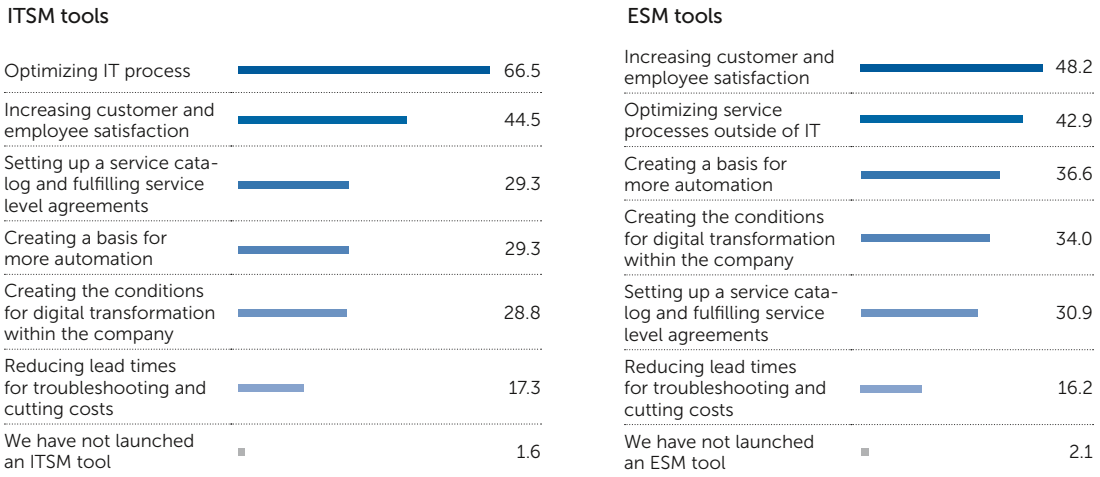
Two percent of companies have neither an ITSM tool nor ESM tool.

48 percent of companies primarily want to use ESM solutions to increase customer and employee satisfaction or to optimize service processes outside of IT (43 percent).

Other important goals included creating a basis for more automation within the company (34 percent). 31 percent of companies want to use an ESM tool to set up a service catalog and fulfill service level agreements.

What are (were) your company's primary reasons for launching your current ITSM and/or ESM tools?

Data in percent. Multiple answers possible. Filter: Respondents from IT and technology departments (generally in a managing role). Basis: n = 191



Other Study Results

IT Service Management 2021

1. IT is ready for digitalization

The majority of companies see their IT set-up as well positioned to address the major challenges of digitalization: speed and flexibility.

The coronavirus pandemic has rapidly accelerated the pace of digitalization, while also acting as a sort of stress test, revealing digital shortcomings and IT vulnerabilities.

An agile IT set-up is a prerequisite for offering digital services faster and adapting to new market and customer situations.

Most companies see their IT set-up as being well equipped for these challenges. On a degree of maturity scale of 1 to 7, the average improved from 3.0 to 2.81.

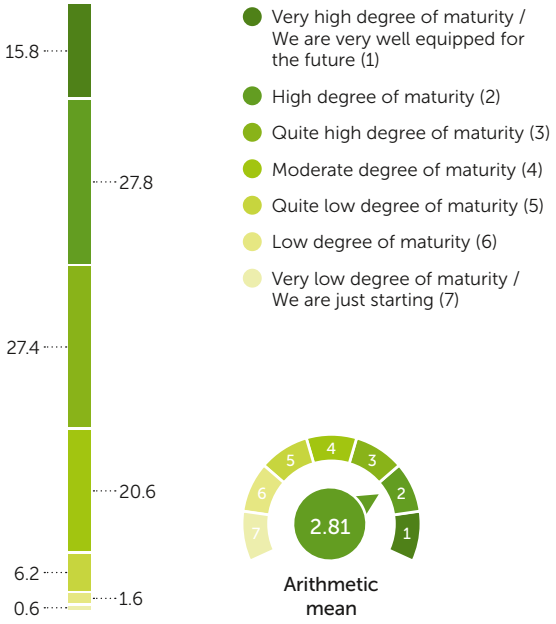
The best average figures were those for C-level management (2.05) and companies with an IT budget of more than ten million euros (2.41).
The most skeptical were the departments, with an average of 3.42.

16 percent of the respondents assigned their IT set-up a very high degree of maturity, an improvement on twelve percent on the previous year. 55 percent of companies awarded their IT set-up a high or quite a high degree of maturity. Just eight percent (previous year: eleven percent) thought their IT systems were barely prepared for the new challenges.

The figures for the degree of maturity for automation of (business/IT) processes are similar across the company divisions. The arithmetic mean here was 2.95.

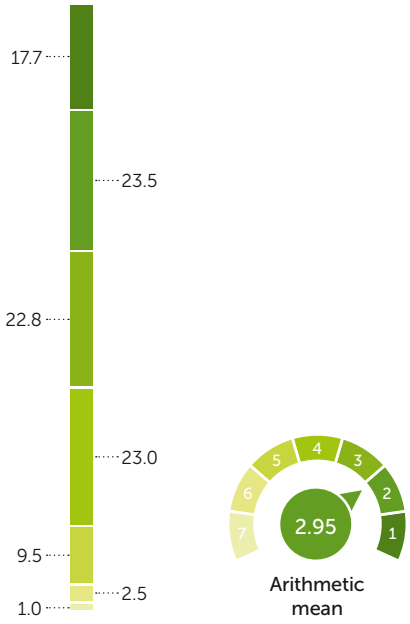
How would you rate your company's IT degree of maturity to handle the challenges of digital transformation?

Data in percent. Basis: n = 514



How do you rate the degree of maturity with regard to the automation of (business/IT) processes within your departments?

Data in percent. Basis: n = 514



2. ITSM: Cloud solutions are in demand

Just over half of companies are currently using an ITSM solution from the Cloud, followed by a hybrid model. The percentage of those using on-premises may rise in future, however.

51 percent of companies currently use a software as a service solution from the Cloud for IT service management. This applies in particular to medium-sized companies of between 500 and 999 employees (59 percent).

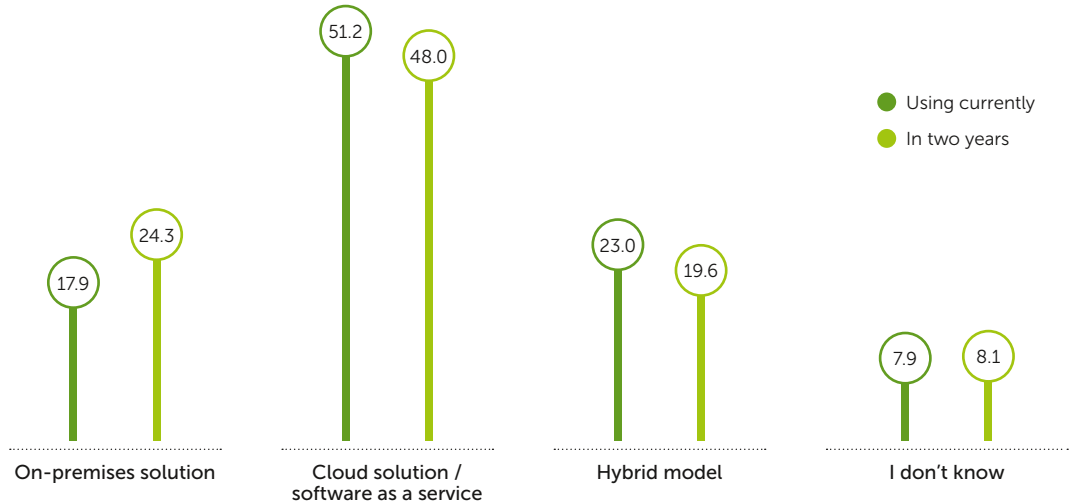
Roughly a quarter of companies (23 percent) use a hybrid model comprising Cloud and locally installed software (on-premises).

18 percent of companies use an on-premises solution for IT service management. There were distinct differences between small (17 percent), medium (13 percent) and large companies (21 percent) here.

There were some surprising answers to the question: "If you could see into the future: What supply model will you likely be using for IT service management two years from now?" Here, the figures for a Cloud solution and the hybrid model each fell by three percent, while the percentage for locally installed ITSM software rose by six percent to 24 percent. Given the current trend towards Cloud solutions (Cloud is becoming a commodity), we would expect the opposite.

What supply model do you use for IT service management, and what supply model will you likely use two years from now?

Data in percent. Basis: n = 531



3. Standards and best practices improve service management

ISO 9000/9001 is replacing ITIL as the most important standard for service management in the company. More and more companies are now using a centrally defined service catalog.

ISO 9000/9001 is replacing ITIL as the most relevant standard for service management in the company. The standard for quality management (QM) and setting up a QM system has now reached 47 percent (previous year: 46 percent).

The IT Infrastructure Library (ITIL) with best practices for process optimization in companies is rapidly losing its significance. The figure has dropped from 54 percent to 37 percent. One explanation for the decline could be due to increasing investment in ITIL alternatives (see Key finding 7 on page 20/21).

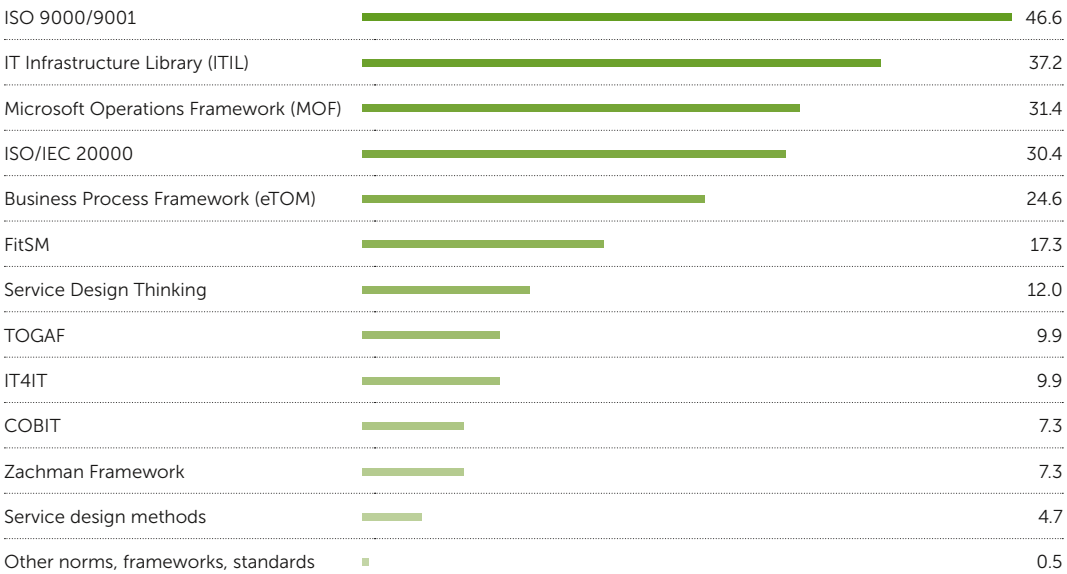
31 percent of companies (previous year: 29 percent) use the Microsoft Operations Framework (MOF), followed by 30 percent (previous year: 21 percent) which use ISO/IEC 20000 with a focus on IT service management.

When it comes to service design companies primarily use the IT4IT (35 percent), Service Design Thinking (34 percent) and bluEDGE (22 percent) systems.

A total of 91 percent of companies (previous year: 79 percent) now have a centrally defined service catalog for IT, customer service, HR etc.: some company-wide (26 percent), and some for some or individual departments like IT, customer service, HR, or facility management (42 and 24 percent respectively).

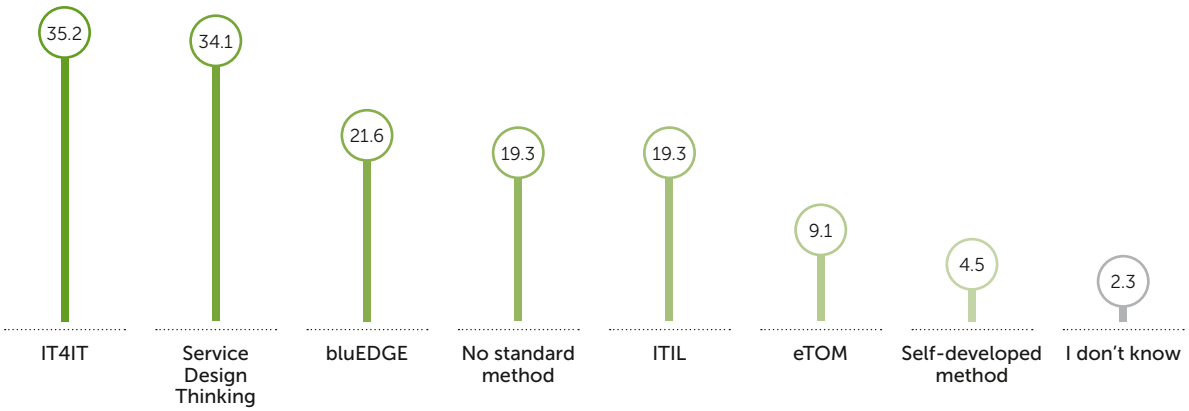
Which of the following norms, frameworks and standards are relevant to your company's service management?

Data in percent. Multiple answers possible.
Filter: Respondents from IT and technology departments (generally in a managing role). Basis: n = 191



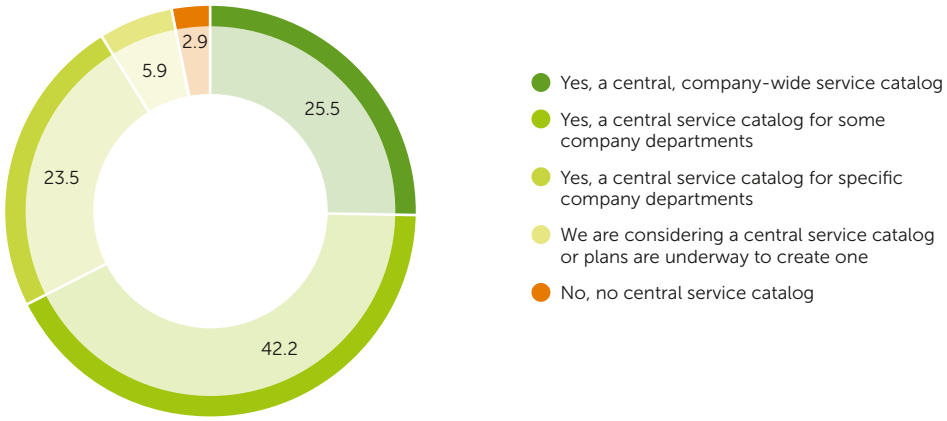
Does your company use a standardized method for service design or the description and definition of services?

Data in percent. Multiple answers possible. Filter: Respondents from IT and technology departments (generally in a managing role) within companies which use an ITSM tool. Basis: n = 88



Does your company have a centrally defined service catalog (for IT, customer service, HR, facility management...)?

Data in percent. Filter: Respondents from IT and technology departments (generally in a managing role). Basis: n = 102



4. Competent employees guarantee high service quality

The majority of companies see the expertise of their service employees as the key pillars of satisfactory service quality. There is still some catching up to do with regard to transparency surrounding the cost of services.

In many companies, the key priority when it comes to the optimization or automation of IT-based workflows is service quality.

For 41 percent of companies the most important criterion for satisfactory service quality is standardized and reliable knowledge among its service staff. That's no surprise given how much employees working from home depended and still depend on competent assistance from the service desk.

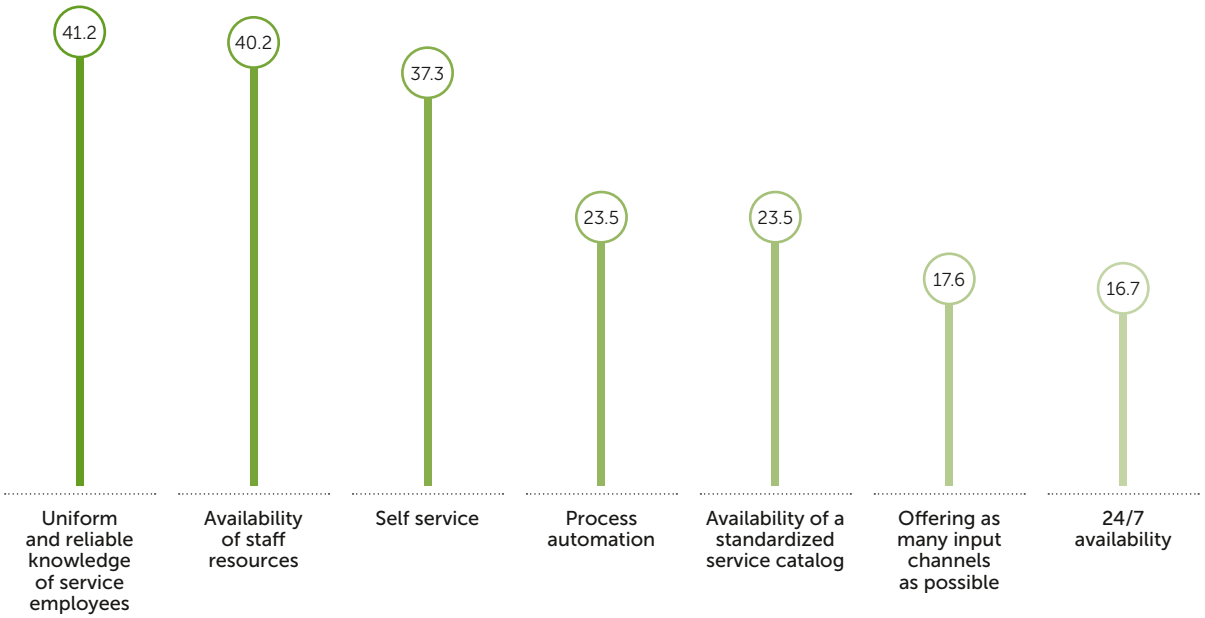
This was followed by the criterion "availability of staff resources" at 40 percent, then self-service at 37 percent. The strong significance of self-service portals stems from the coronavirus pandemic too *(see Key finding 1 on page 9)*.

Other criteria for satisfactory service quality include process automation, a standardized service catalog and 24/7 availability.

The profitability of services is becoming more important too. Here, 85 percent of companies said that service profitability is becoming important, 27 percent very important, 41 percent important and 18 percent quite important. Twelve percent of companies felt its significance had not changed.

What, in your opinion, are the key guarantees (no more than three) of satisfactory service quality?

Data in percent. Filter: Respondents from IT and technology departments (generally in a managing role). Basis: n = 102

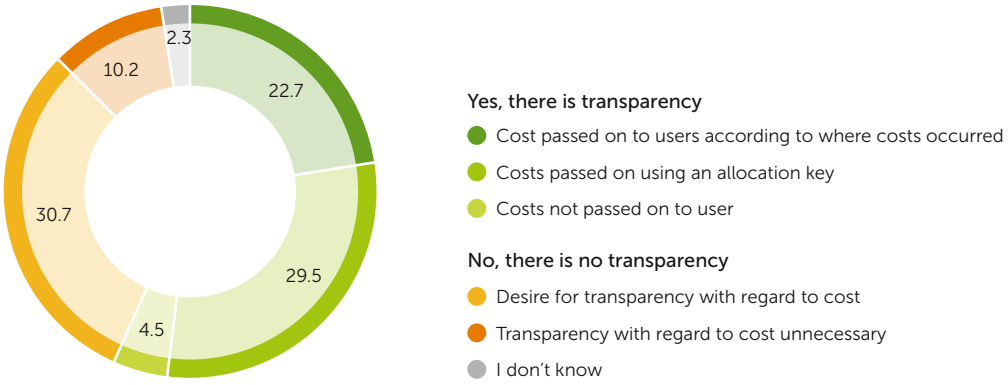


One key pre-requisite for service profitability is transparency with regard to the costs of individual services. Just 57 percent of companies know – at least according to the IT and technology decision-makers we asked – how much their services cost and pass them on to the users according to where the costs occurred or using an allocation key.

One possible explanation for this is that Covid-19 has led to a huge change in IT service management. Some companies may have lost sight of the costs amid this challenge.

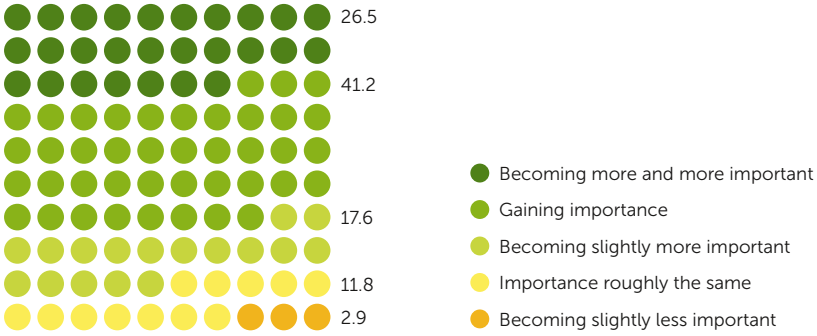
Is there transparency within your company regarding the costs of individual services, and do you pass these costs on?

Data in percent. Filter: Respondents from IT and technology departments (generally in a managing role) within companies which use an ITSM tool. Basis: n = 88



In many companies, the key priority when it comes to the optimization or automation of IT-based workflow processes is service quality. But how about service profitability. Is this becoming more important?

Data in percent. Filter: Respondents from IT and technology departments (generally in a managing role). Basis: n = 102



5. A gloomier outlook for the new version: ITIL 4

The euphoria surrounding the new version (ITIL 4) for the future of ITSM and ESM has somewhat dissipated. Above all, ITIL 4 was supposed to bring increased flexibility and agility.

The new version, referred to as ITIL 4, describes how agile approaches can be combined with ITIL.

At the heart of this is the service value system with added value for customers.

The idea is that, adopting a holistic approach, the service provider uses a customer requirement or a new idea on the market as a basis for developing services that generate value for the customer.

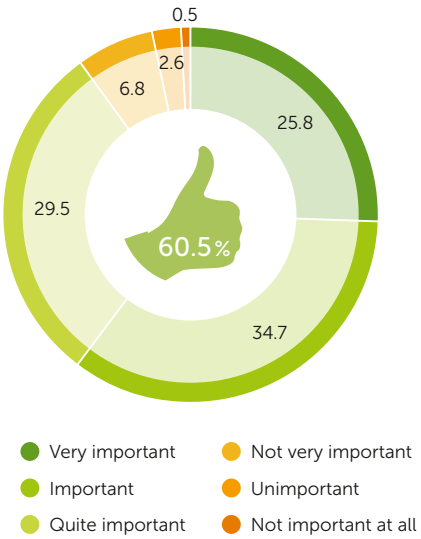
This year, just 61 percent (previous year: 76 percent) of companies said that ITIL 4 will be important for the future of ITSM and ESM; 26 percent regarded it as very important and 35 percent as important. ITIL 4 was deemed quite important too 30 percent.

The main anticipated advantages were flexibility and agility. 47 percent (previous year: 43 percent) of companies expect ITIL 4 to help them achieve more flexibility in offering services.

41 percent (previous year: 43 percent) expect a more flexible service lifecycle, whereas a little more than a third of companies expect a more holistic consideration of business processes and value chains and another third expect more straightforward and agile use.

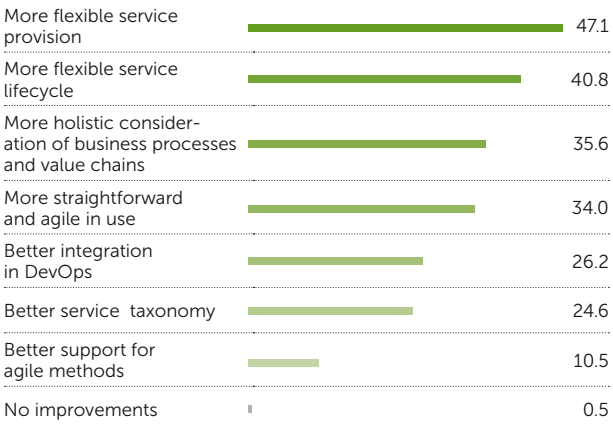
What do you think: How important is ITIL 4 for IT service management and enterprise service management?

Data in percent. Filter: Respondents from IT and technology departments (generally in a managing role). Basis: n = 190



What improvements do you hope to gain from ITIL 4?

**Data in percent. Multiple answers possible.
Filter: Respondents from IT and technology departments (generally in a managing role). Basis: n = 191**



6. A standardized approach as a basis for increased service automation

The degree of automation in core processes within companies is increasing. This is due, in part, to an increasingly standardized approach to service automation.

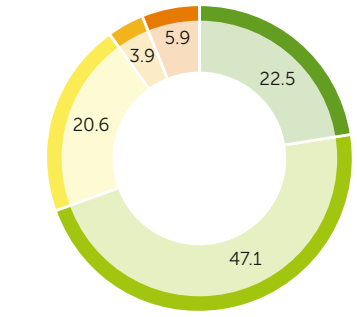
In order to successfully implement service automation in hybrid IT environments (Cloud, internal IT, outsourcing), 47 percent of companies use a standardized approach with individually implemented processes for each service.

23 percent of companies have likewise taken a uniform approach to service automation but with standardized processes based on standardized service definitions and/or service blueprints. In other words, 70 percent of companies are now pursuing a standardized approach to service automation.

That's another reason the degree of automation in core processes within companies is rising. One percent of companies have already automated 80 to 100 percent of core processes. 14 percent have automated 60 to 79 percent and 35 percent 40 to 59 percent of processes. 14 percent of companies have only just started the process. If we look at last year's survey results (where questions were asked outside of IT and technology departments too), we can see quite a significant increase across the board. Companies look set to further intensify the automation process in the coming years.

How is your company pursuing service automation in increasingly hybrid IT environments (Cloud, outsourced IT, internal IT) and the organizational silos popular in IT departments?

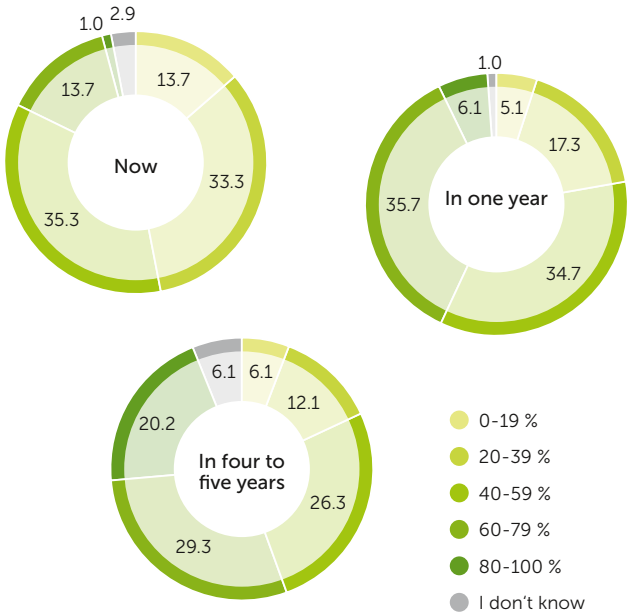
Data in percent. Filter: Respondents from IT and technology departments (generally in a managing role). Basis: n = 102



- Using a uniform approach with standardized processes based on standardized service definitions and/or service blueprints
- Using a uniform approach with individually implemented processes for each service
- Using a varying approach in individual silos
- No standardized approach to service automation
- No approach to service automation

How much of the business processes in your company are already automated?
How much of your business processes are likely to be automated in future?

Data in percent. Filter: Respondents from IT and technology departments (generally in a managing role). Basis: n = 98-102 (depending on answer)



7. Technological know-how now the most important selection criterion

Companies primarily value technological know-how when selecting an ITSM/ESM software solutions provider. Value for money has now slipped into second position.

After two years there's now a new frontrunner in the race for the top criterion for selecting ITSM/ESM software solution providers.

At 35 percent (previous year: 33 percent), technological know-how has replaced value for money (32 percent; previous year: 37 percent) as the most important criterion.

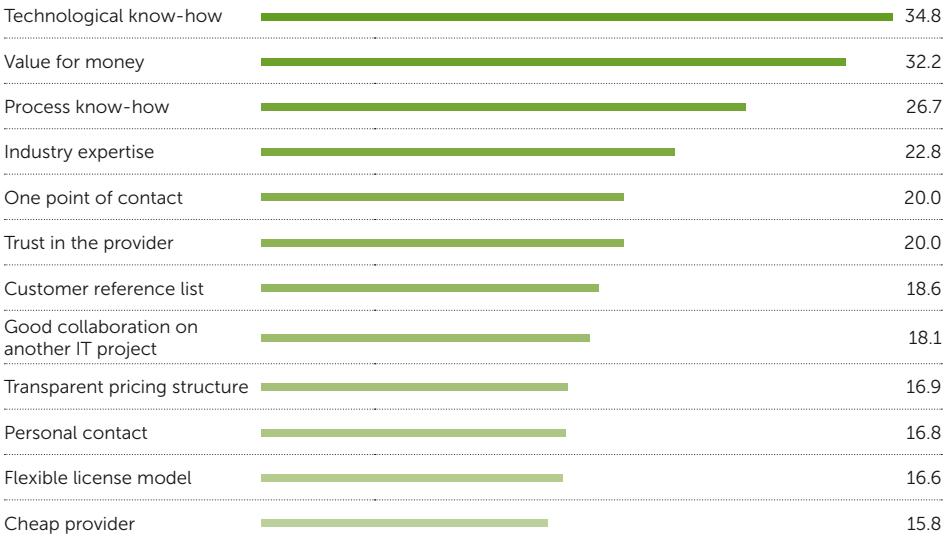
It was primarily large companies with more than 1,000 employees (41 percent) and IT departments (45 percent) that attached the most importance to the technological expertise of the provider.

27 percent of companies valued process know-how (previous year: 34 percent) when selecting a provider, 23 percent industry expertise.

One in five companies attached importance to trust in the provider, another fifth valued having a fixed point of contact and another fifth rated a customer reference list (up five percent on the previous year).

What are your company's key criteria for selecting a suitable ITSM/ESM software solution provider?

Data in percent. Multiple answers possible. The top 12 answers are shown. Basis: n = 531



8. It's important to companies to be able to adapt the tool themselves

The most important criteria when selecting a suitable ITSM/ESM solution are integration capability and the possibility of making adjustments without the assistance of the manufacturer.

As was the case last year, high integration capability is high up on the list of features and attributes companies look for in an ITSM/ESM tool. 35 percent of companies thought so (previous year: 36 percent). High integration capability was most important to large companies with more than 1,000 employees (41 percent).

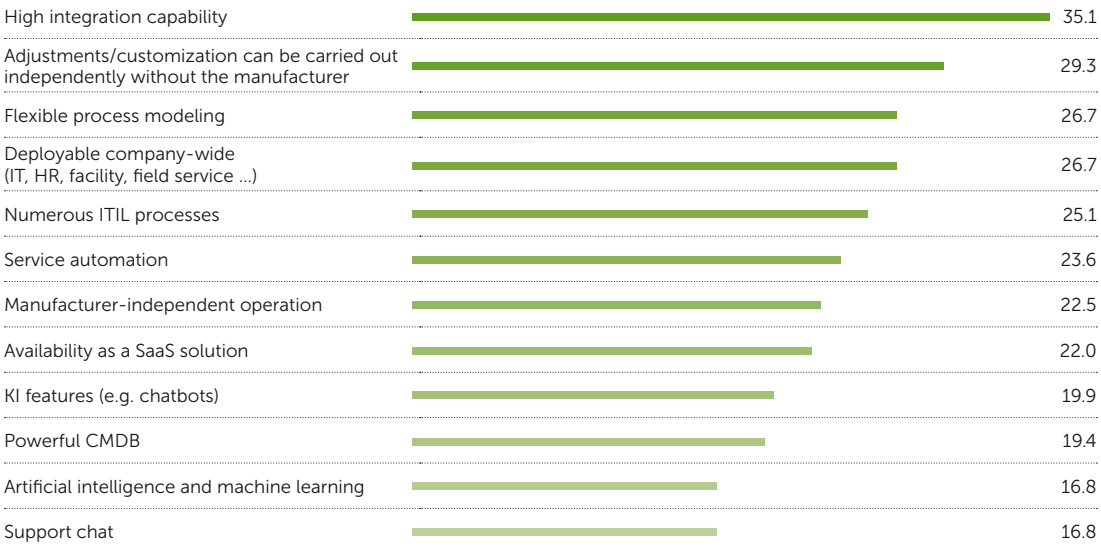
29 percent of companies thought it was important when selecting an ITSM/ESM solution to be able to adapt/customize the tool themselves without the help of the manufacturer. Last year this point came in fourth at 24 percent. In particular, large companies (34 percent) and companies with an annual IT budget of more than ten million euros (47 percent) regarded independence from the manufacturer as important.

Flexible process modeling dropped a place at 27 percent (previous year: 31 percent) . Respondents also suggested that the ITSM/ESM solution should be deployable in all departments company-wide (27 percent), support numerous ITIL processes (25 percent) and enable service automation (24 percent).

Manufacturer-independent operation, availability as a SaaS solution, chatbots, a powerful CMDB as well as artificial intelligence and machine learning also play a role when selecting an ITSM/ESM tool.

What are your company's key criteria for selecting a suitable ITSM/ESM tool?

Data in percent. Multiple answers possible. The top 12 answers are shown.
Filter: Respondents from IT and technology departments (generally in a managing role). Basis: n = 191



9. GDPR compliance: the greatest risk to AI use in ITSM/ESM

The handling of employee and security-relevant data as well as compliance with GDPR are regarded as the greatest risks in the use of AI technologies in ITSM and ESM.

As expected, issues surrounding data security and privacy featured first and foremost among the obstacles to using artificial intelligence and machine learning in IT and enterprise service management.

45 percent of companies see handling employee data and the necessary co-determination as the greatest risk. Here, the figures were disproportionately high among large companies with more than 1,000 employees (59 percent).

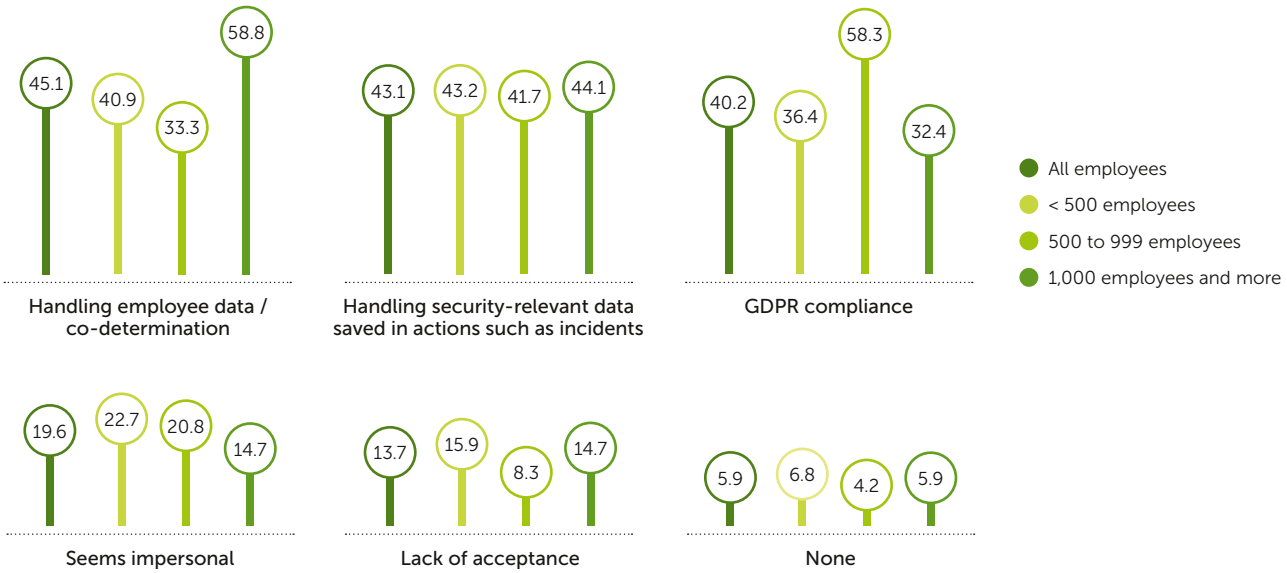
At 43 percent, the handling of security-relevant data saved in actions such as incidents came second top.

This applies in particular to companies with a higher IT budget in excess of ten million euros (58 percent).

Next up at 40 percent was another data-relevant risk: compliance with GDPR. The GDPR requires transparency with regard to where the personal data of employees and customers are stored, the purpose for which it is used, and who processes and uses it when and where and with which rights. 58 percent of medium-sized companies with between 500 and 999 employees are concerned by this. Obstacles like "seems impersonal" (20 percent) and a lack of acceptance (14 percent) were more marginal.

What risks do artificial intelligence and machine learning in IT and enterprise service management pose to your company?

Data in percent. Multiple answers possible. Filter: Respondents from IT and technology departments (generally in a managing role). Basis: n = 102



10. Coronavirus is impacting communication channels in ITSM

Email remains the most important channel of communication in IT and enterprise service management, but coronavirus has seen a revival of the phone and the increased use of self-service portals, chats, chatbots and, of course, collaboration tools like Teams or Zoom.

At 41 percent, email is and remains (previous year: 34 percent) the most important communication channel in companies' (IT) service management.

The phone is becoming more and more important as a channel for reporting problems or ordering new (IT) services (33 percent; previous year just 15 percent). The explanation: employees working from home have been looking for a direct line to service desk employees when confronted with urgent IT problems.

In 26 percent of companies, (previous year: 19 percent) reporting currently happens primarily via self-service portals.

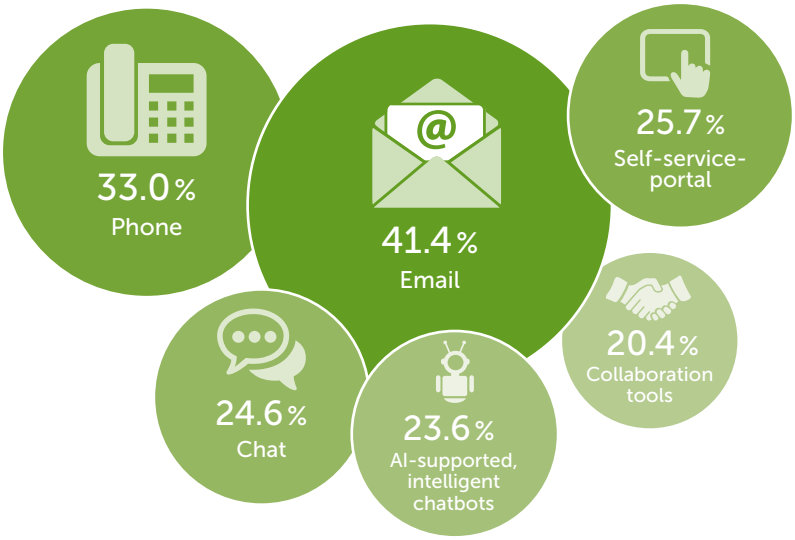
Other communication channels that have seen strong growth are chats and AI-based chatbots. The percentage of chats as a main channel of communication rose from 14 to 25 percent, and the share of AI-based chatbots has more than doubled from eleven to 24 percent.

Obviously as a result of coronavirus, the primary use of collaboration tools like Teams, Zoom or Slack in service management communications has more than tripled (20 percent; six percent the previous year).

Virtual voice assistants like Alexa and virtual/augmented reality continue to eke out a niche existence (three percent).

What, in your opinion, is the most important channel of communicationin (IT) service management?

Data in percent. Multiple answers possible. Filter: Respondents from IT and technology departments (generally in a managing role). Basis: n = 191



A look towards the future

IT Service Management 2021

Coronavirus is changing IT service management

The coronavirus pandemic has led to a surge in digitalization in most companies. This has also seen IT service management (ITSM) become the most strategically important IT theme. Optimized ITSM processes, adapted IT service hours and more self-service were and continue to be necessary, and there is some catching up to do with regard to enterprise service management (ESM).

By Jürgen Mauerer

Coronavirus has sped up digitalization significantly. Many companies implemented digitalization projects within the space of a few months that would otherwise have taken them years to complete. This has seen IT service management (ITSM) take a front seat too. The shifting of the workplace from the office to home acted like a stress test and shone a light on the ITSM set-up at companies. This forced them to ask questions like: Is our IT support efficient enough? Are our IT processes flexible and resilient enough to handle crises like this?

As a result of coronavirus, IT service management has become the most strategically important issue facing IT departments in the coming two years at 41 percent (previous year: 33 percent and second place). Of course, in many companies, a lot of IT services are now standardized, automated and operate cost efficiently at a consistently high level. As such, the satisfaction of companies with their ITSM is high again this year. The figures have even risen slightly compared with the previous year. On a scale of 1 to 6, satisfaction scored an average of 2.4, in other words: "good". Last year the average was 2.5.

But even if many companies are satisfied with their IT service management –coronavirus has brought with it some new challenges. With lockdown, social distancing and increased working from home, IT departments have had to make their service management processes more efficient. This is reflected in the present study too. Roughly three quarters of companies agreed with the following statement: "Covid-19 showed us that we as a company needed to first concentrate on optimizing our processes."

Coronavirus poses new challenges

Coronavirus has changed ITSM in other ways too. Self-service portals and communication with the service desk became a key focus for customers too. For instance, when employees are sitting at their desk working from home at 10 p.m., the service desk is usually vacant. Some solutions to this include adapting IT service times or introducing better self-service options. These might for instance come in from of solution databases with tips and tricks for everyday IT questions to help employees working from home. Roughly three thirds of the respondents agreed with this. In these cases AI-based chatbots are often used too to improve the service desk quality.

Covid-19 has also given rise to a need for investment in IT infrastructure and IT equipment for employees working from home. This has posed a completely new IT challenge for many companies. The availability of funds is not an issue. 80 percent of companies say that their ITSM budget is sufficient (33 percent) or more or less sufficient. The good news: during the coronavirus pandemic roughly half of companies (51 percent) have increased or even significantly increased their ITSM budget – thereby creating a basis for further IT service management. optimization.

A need to catch up on the ESM front

The pandemic has seen around half of companies increase their ESM budget (48 percent) quite significantly. But for some reason the topic of enterprise service management has not really gained any momentum. 87 percent of companies (previous year: 92 percent) are of the opinion that the principle of IT service management, i.e. standardized, automated IT services, can be applied to other business processes in departments like HR, marketing, or sales, but just 15 percent of companies are spending money on extending ITSM to ESM (previous year: ten percent).

And, at 14 percent, enterprise service management is not seen as a particularly relevant strategic issue for IT either. This suggests that consistent implementation of ESM is still some way off as of yet. Companies would be wise to avoid any further delay and start transferring ITSM principles to services in other departments.

After all, ESM does offer one major advantage: it offers an overview of a company's most important service business processes because it facilitates the flow of data and information between the internal departments and external resources involved in a business process.

CIO Agenda 2021

Data for a general estimation of the market situation

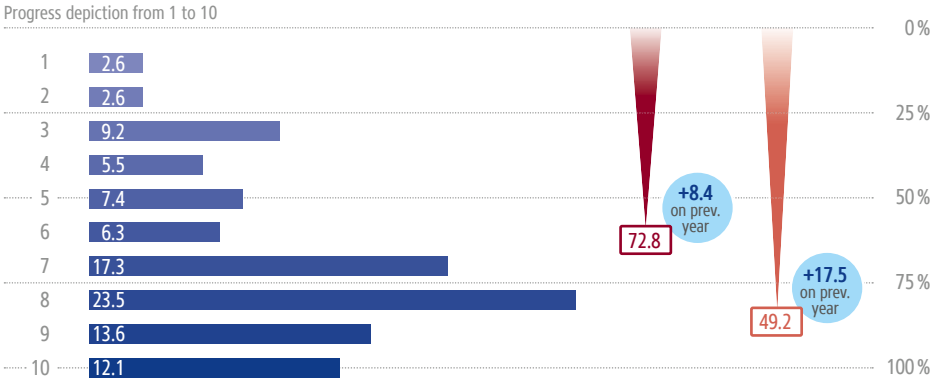
Exclusive insights:
How IT decision-makers are shaping business:
both the present and the future

IT Service Management 2021

CIO Agenda 2021

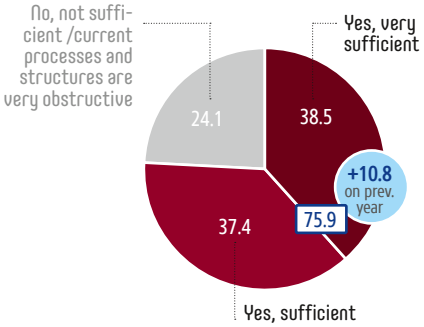
Making great strides on the path towards digital transformation

Almost 73 percent of CIOs questioned feel that they and their companies have already passed the halfway mark, while **almost half of the respondents (49 percent)** think they have reached the last quarter. That is quite considerably more than the previous year (+8 and +18 percentage points respectively).



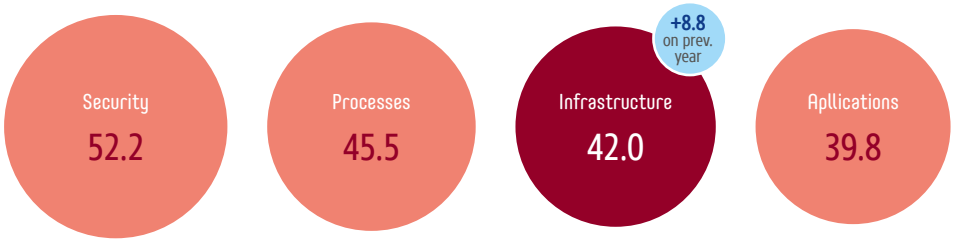
Development of new digital business models

76 percent of companies have at their disposal the fundamental **processes and structures** for this – 11 percentage points more than the previous year. In companies with an annual IT budget of more than 10 million euros this figure has actually reached 92 percent (+13).



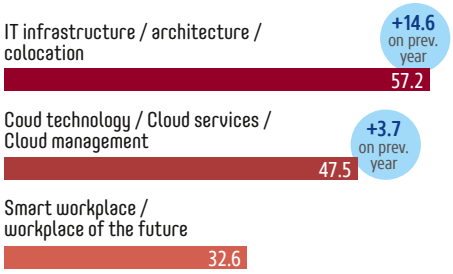
Strong core areas

CIOs plan to pour **substantial investment** into the areas of security, processes, infrastructure, and applications in the coming three years. **Infrastructure issues** in particular have been the subject of renewed attention (+9 percentage points in comparison to the previous year).



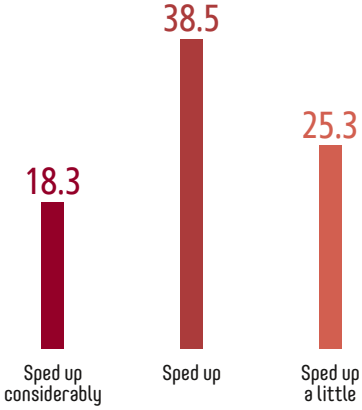
Cloud no longer number one

Almost 57 percent of companies want to **invest** initially in infrastructure issues in the medium term (+15 percentage points in comparison to the previous year). This has seen Cloud investments fall considerably short of the top spot despite an increase on the previous year (+4).



Covid is accelerating the process

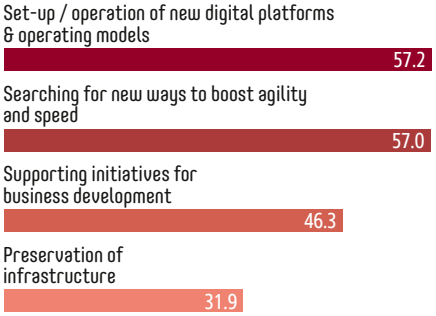
82 percent of companies think the medium- to long-term impact of the **pandemic** is accelerating digital transformation within companies.



Innovators, not preservationists

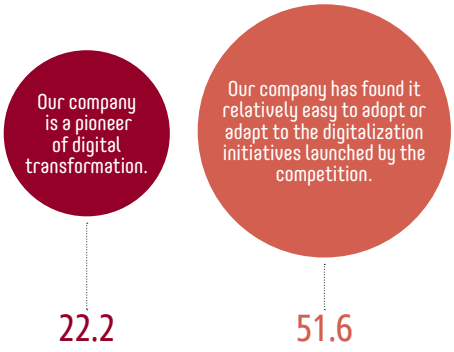
Most CIOs/IT directors see their long-term role as that of creators and operators of new digital platforms and operating models, and pioneers of more agility and speed within their companies.

Focus of CIOs / IT directors in 5 years:



Pioneers and fast followers

Almost three quarters of CIOs see themselves as **pioneers** (22 percent) or **fast followers** (52 percent) of digitalization initiatives.

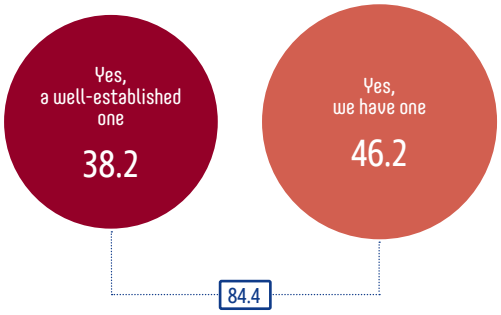


Aresearch project by IDG Research Services
in cooperation with the WHU – Otto Beisheim
School of Management.

All data in percent

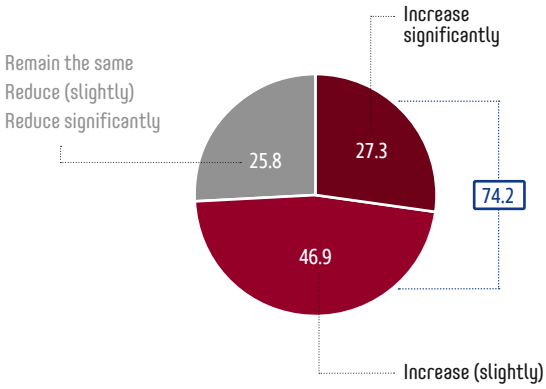
Digitalization strategy

Almost 85 percent of German companies now have one; so do 90 percent of large companies with more than 100 employees, as do 95 percent of those with annual turnover of more than 1 bn euros.



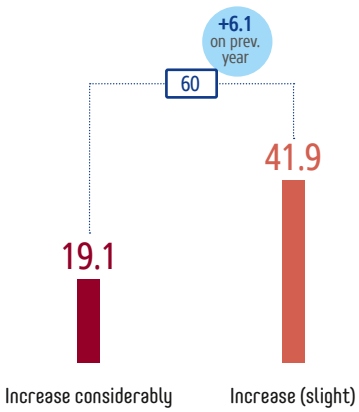
Ever-increasing investment in the digital future

74 percent of the respondents expect to see their **overall IT budget** rise (significantly). This figure stood at barely 66 percent last year.



Success with more IT employees

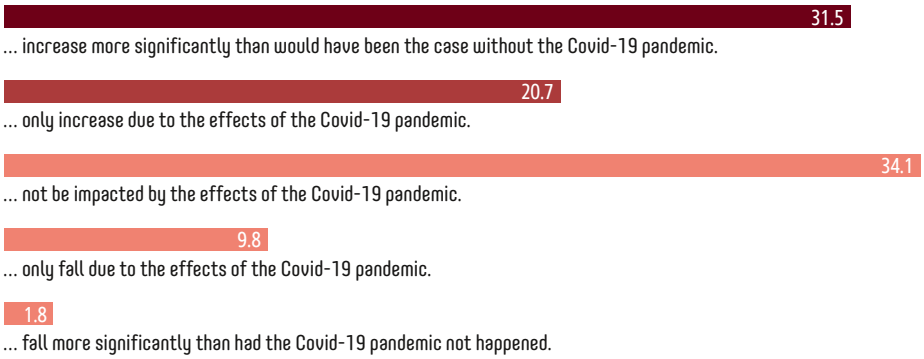
The **number of IT employees** is set to increaseconsiderably in more than **60 percent** of companies. That is 6 percentage points more than the previous year



Bigger budgets amid coronavirus

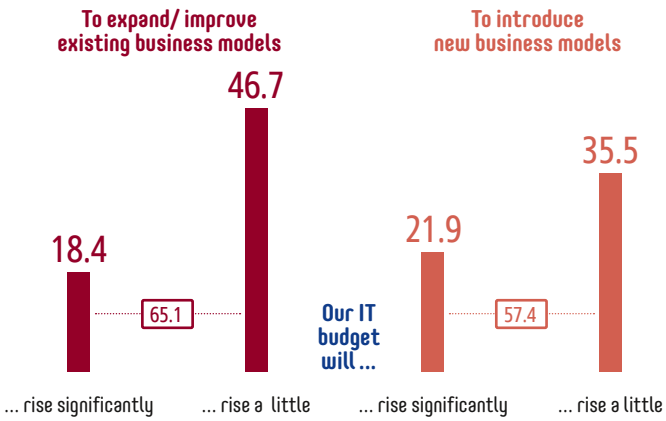
In more than a fifth of the companies asked, IT budgets will only increase due to the effects of the coronavirus pandemic; in **almost another third of cases** the pandemic has contributed to an even greater budget increase.

Our IT budget will ...



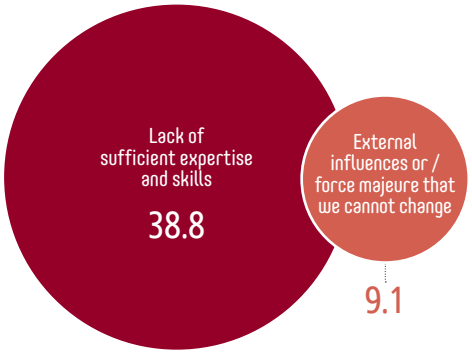
IT investment for business

Two thirds of companies will increase **investment in IT** in order to expand or improve existing business models and significantly **more than half** of the respondents want to launch entire new business models using IT funds.



A lack of know-how

When asked about the **resistance and obstacles** that obstruct the digital ambitions of their companies, 39 percent of CIOs' first answer is the **lack of sufficient expertise and skills** but **external influences or force majeure** (such as a pandemic) are hardly regarded as an obstacle.



Study population:
IT directors of companies in non-German-speaking region: strategic (IT) decision-makers on C-level and in the departments (LoBs), IT decision-makers & IT specialist from IT dept.

Overall sample:
276 completed and qualified interviews

Investigation period:
November 17 to December 10, 2020

Method:
Online survey (CAWI)

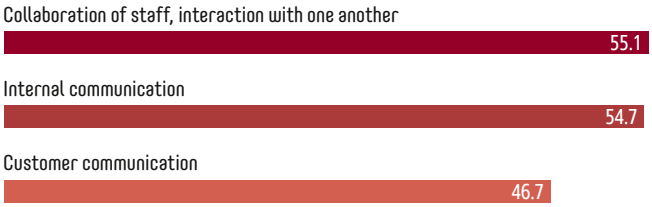
CIO Agenda 2021

All data in percent

Interaction and communication are changing

The pandemic is having a greater influence on people than it is on company processes.

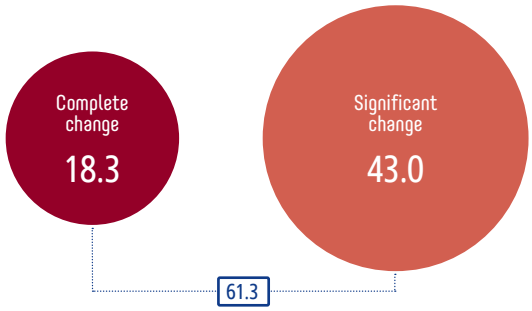
What the pandemic has impacted most in the company:



Data analytics is the future

More than six in ten companies estimate that data analytics / big data will change their business models in the long term – within five to ten years' time.

Impact of change by data analytics / big data within the coming three years:



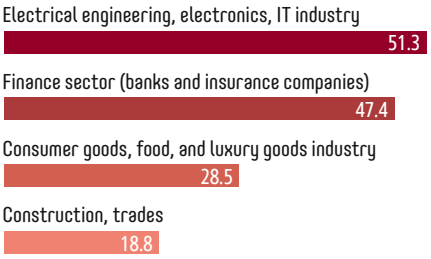
Limited cooperation with startups

When working on digitalization projects companies works primarily with their **own customers** or industry partners. Even competitors are often preferable to startups.

Existing partnership ...

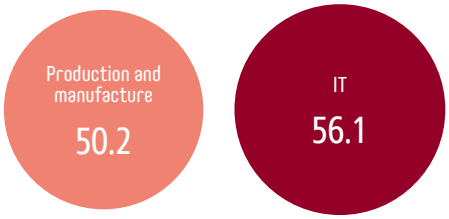
IT industry and banks / insurance companies experiencing the biggest changes

CIOs estimate that the sectors of electronics / IT and banks / insurance companies are most **heavily affected** by digital change.



Production, IT, and service are undergoing significant change

When asked which of the individual **departments** are most **affected and undergoing most change due to the digital transformation**, the CIOs questioned said their own department: **IT**.



CIO Agenda 2021 – Executive Summary

The results of the CIO Agenda 2021 are of course partly shaded by the coronavirus pandemic. For instance, many companies are switching their budgets that they would have liked to put into Cloud projects before the end of the year over to infrastructure projects in order to make their existing systems more stable and secure. All in all, the pandemic has seen the pace of digital transformation move considerably faster and the IT budgets of companies significantly increased in many cases. These increases in budget are also prompted by companies planning or even forced to develop new business models. The field of data analytics in particular seems to be a promising long-term candidate – collaboration with start-ups less so. There has been little change from the previous year with regard to the resistance and obstacles to the digital ambitions of companies – here the impact of the shortage of skilled personnel in particular continues to be felt.

When asked about the fundamental influences of the pandemic within companies, it is primarily employees' interaction with one another as well as internal and external communication that CIOs and IT directors feel have changed – much more so than "technocratic" issues like (sales) processes or finances. The respondents see their own long-term tasks chiefly in the field of innovation – e.g. creating and running new digital platforms and operating models as well as creating more agility and speed in the company. While the preservation of existing infrastructures counted among the core duties of the IT team last year in particular, the unanimous consensus is that this will be a short-lived preoccupation and the innovative sleeves will be rolled up again by the time the pandemic has been overcome.

The digital gap is widening

2020 saw companies invest extensively in digital architectures, tools, and processes to face the enormous challenges presented by the Covid-19 crisis. This wave of digitalization does not however seem to be leading to a convergence of the digital landscape. Instead, this study, CIO Agenda 2021, by IDG Research Services / CIO Magazine and the WHU – Otto Beisheim School of Management, shows an increasing divergence with regard to their willingness to invest in the digital future.

Prof. Dr. Dries Faems
is holder of the chair for Entrepreneurship, Innovation und Technological Transformation at WHU – Otto Beisheim School of Management

By Prof. Dr. Dries Faems

The results of the survey of 276 (IT) decision-makers from companies in the German-speaking region show that those who see themselves as "digital leaders" are planning significantly more IT investment than those classed as "digital followers" and "digital laggards". Instead of catching up, today's digital followers and digital laggards run the risk of being left in the dust by the digital competition.

Pioneers, followers, and laggards

More than a fifth of the respondents (22 percent) stated that their company could be regarded as a pioneer of digital transformation. In contrast to these digital pioneers, a little more than half of the respondents (52 percent) classed their companies as digital followers. These companies aren't initiating any new digital trends but are capable of responding adequately to the digital initiatives of competitors.
26 percent of the respondents indicated that their company had difficulty reacting to new digital initiatives launched by their competitors, that it was not capable of mounting a digital response or that it denied the relevance of digitalization for its own sector. This last group of companies is referred to as digital laggards.

What distinguishes digital leaders from digital followers and digital laggards? The results point to three key attributes. Firstly, while the majority of digital leaders (74 percent) have a well-established digital strategy or roadmap, this sort of clear digital vision was quite rare among digital followers (37 percent) and digital laggards (11 percent). Secondly, we see significant differences in the use of structures and processes for the development of digital business models.

Examples of such structures and processes include the presence of an in-house digital innovation unit, the adoption of agile development principles and the use of lean startup principles.

The majority of the digital leaders (89 percent) stressed that they relied largely on these kinds of structures and processes, whereas only a minority of the digital followers (32 percent) and digital laggards (six percent) used these structures and processes intensively. While the majority of the digital leaders pursue an open innovation strategy for digital projects, collaboration with external partners for digitalization played a considerably smaller role among the digital followers and laggards. For instance, while the majority of the digital leaders (69 percent) collaborated with customers on digital projects, this type of collaboration was only reported by a small minority of the digital followers (48 percent) and digital laggards (40 percent). A similar pattern emerges with regard to collaboration with competitors. While 62 percent of the digital leaders collaborate with competitors on digital projects, this type of collaboration is quite unusual among the digital followers (35 percent) and digital laggards (30 percent).

Limiting factors

We also asked respondents to reflect on the key factors that obstructed their ability to realize their digital objectives. A lack of expertise was the top limiting factor. But there were significant differences between digital leaders, followers, and laggards:

37 percent of the digital followers and 53 percent of the digital laggards reported a lack of expertise as a key limiting factor. Just 27 percent of the digital pioneers saw a lack of expertise as a limiting factor.

A second key limiting factor is the existence of outdated technology (legacy technology). This problem is most pronounced in the digital follower group, where one third of the respondents highlighted the existence of existing technological investment as a key limiting factor. This figure was 26 percent among the digital leaders, and 28 percent among the digital laggards.

The third major obstacle is a lack of willingness to change within the company – something which was particularly pronounced among the digital laggards, 39 percent of which stated this issue. Only 20 percent of digital followers stated this, and just 16 percent of digital pioneers.

Falling behind instead of catching up

The Covid19 crisis has prompted companies to start or accelerate the digital transformation process. Following through on a digital transformation strategy like this requires establishing a robust IT infrastructure. With this in mind we are likely to see a significant increase in IT investment in the coming years. But if we differentiate between digital pioneers, followers, and laggards, we see some significant differences. For instance, 59 percent of the digital pioneers we questioned had plans to significantly increase their IT budget over the coming three years but only 17 percent of digital followers had plans to do this, and only 19 percent of digital laggards. In other words: it is primarily the current group of "digital leaders" that are planning significant investment in their IT set-ups.

Conclusion

Last year companies were forced to (further) digitalize their infrastructure and business models. In this sense, the Covid19 crisis might be described as a sort of "wake-up call" for digital followers and laggards to catch up with the digital pioneers in their respective sectors. This might lead us to hope that non-pioneers might be motivated to make the extra effort to catch up with the pioneers in this issue. But what we are actually seeing is that it is digital pioneers who are the most ambitious with regard to their future IT investment plans, so instead of a digital convergence we might actually see an increasing digital disparity between companies, whereby the gap between digital leaders and other companies continues to grow. This worrying trend requires the attention of managers, scientists, and political decision-makers in equal measure. We want to avoid a situation where one select group of digital leaders fully exploits the advantages of digital transformation while others end up in a kind of digital death zone.

Background on the study

The CIO Agenda 2021 study was run between November 17 and December 10, 2020 by IDG Research Services (COMPUTERWOCHE/CIO) in collaboration with the WHU.
276 CIOs, CEOs, executive board members, C-level managers and heads of departments from various divisions from all industries in Germany, Austria and Switzerland took part in the online survey.

Study profile

Publisher	COMPUTERWOCHE, CIO, TecChannel und ChannelPartner
Study partners	**Platinum partner:** ServiceNow **Gold partners:** Ivanti Germany GmbH Micro Focus Deutschland GmbH **Silver partner:** Efecte Germany GmbH
Population	(IT) directors of companies in German-speaking region: strategic (IT) decision-makers from C-level and the departments (LoBs), IT decision-makers & IT specialists from the IT dept.
Participant generation	Random sampling from the IT decision-maker database of IDG Business Media; personal email invitations to take part in survey
Overall sample	531 completed and qualified interviews
Research period	December 14 to December 21, 2020
Method	Online survey (CAWI)
Questionnaire development	IDG Research Services in coordination with the study partners
Conducted by	IDG Research Services
Survey software	EFS Survey

Sample statistics

Sector distribution*	Agriculture and forestry, fishing, mining	4.7 %
	Energy and water supply	4.5 %
	Chemical / pharmaceutical industry, life sciences	10.2 %
	Medical and lab technology	10.7 %
	Metal manufacturing and processing industry	9.0 %
	Mechanical and plant engineering	11.5 %
	Automotive industry and suppliers	9.2 %
	Manufacture of electrical goods, IT industry	12.2 %
	Consumer goods, food and luxury goods industry	3.8 %
	Media, paper, and print industry	4.5 %
	Construction, trade	5.6 %
	Wholesale and retail (incl. e-commerce)	9.8 %
	Banks and insurance companies	13.4 %
	Haulage, logistics and transport	9.6 %
	Services for companies	11.9 %
	Hotel and hospitality, tourism	7.2 %
	Public administration, regional authorities, social security	6.6 %
	SSchools, universities, colleges	2.6 %
	Healthcare and social care	4.3 %
	Other industry group	5.3 %
Company size Germany-wide	Less than 10 employees	2.6 %
	10 to 99 employees	7.5 %
	100 to 499 employees	29.6 %
	500 to 999 employees	21.5 %
	1,000 to 9,999 employees	26.6 %
	10,000 employees and above	12.2 %
Turnover band Germany-wide	Less than 100 million euros	24.1 %
	100 to 999 million euros	28.8 %
	1 to 2 billion euros	22.8 %
	2 to 5 billion euros	14.9 %
	5 billion euros and more	9.4 %
Annual IT systems expenditure	Less than 1 million euros	25.2 %
	1 to 10 million euros	44.8 %
	10 to 100 million euros	24.5 %
	100 million euros and more	5.5 %

* Multiple answers possible

The study concept

Multi-client studies by IDG Research Services are more than just surveys of C-level decision-makers and IT specialists. Behind the market research projects is a sustainable study concept designed for a period of at least six months.

The start of every study project is always preceded by initial (partly virtual) editorial round tables, moderated by senior editors of COMPUTERWOCHE.

The proceedings of these round tables are reported on extensively, and the issues deemed most pressing by industry experts are taken into consideration when developing the survey questionnaire. Companies involved in the project as partners can propose their own ideas and questions.

Around three months after the methodological and content design of the study have been completed, the central results are made available in the form of a high-quality survey report.

The study results are presented at trade fairs and events like the Hannover Messe, SPS or it-sa, sometimes in the form of podium discussions, where the study partners can present to an audience of interested specialists. Alternatively, a results round table is held at the IDG Conference Center.

The entire study project receives ongoing coverage in reports by COMPUTERWOCHE and CIO, both with regard to the subject generally and the study specifically. The specialist knowledge and expertise of our authors and editors play a key role in ensuring that the results of multi-client studies by IDG Research Services are correctly placed. Comment and reporting take place on all modern media channels; infographics, image galleries and video interviews ensure that IDG studies generate great interest.

The editorial team

Heinrich Vaske:
Editor in Chief

Heinrich Vaske is the Editorial Director of COMPUTERWOCHE and CIO. His most important duty is the content alignment of both media brands. Vaske is also responsible for the content of special publications, social and web engagement, and mobile products, and he also moderates events.

Wolfgang Herrmann:
Editorial Manager CIO Magazine

Wolfgang Herrmann is the Editorial Manager of CIO Magazine. His core areas include Cloud computing, big data / analytics, and digital transformation.

Manfred Bremmer:
Senior Editor IoT and Mobile

Manfred Bremmer's focus area is mobile computing and communications. He puts mobile solutions, operating systems, apps, and devices under the microscope and rates their business compatibility.

Alexandra Mesmer:
Editor

Careers in IT has been her pet subject since she was 18. Mesmer is also jointly responsible for IDG Career Services, which offers services in employer branding and recruiting.

Martin Bayer:
Editorial Manager COMPUTERWOCHE

Specialist area: business software: business intelligence, big data, CRM, ECM, and ERP; responsible for news and cover stories in the print edition of COMPUTERWOCHE.

Jürgen Hill:
Editor in Chief Future Technologies

The graduate of journalism and IT covers all aspects of digitalization, AI / ML, IoT and Industry 4.0.

Hans Königes:
Head of Department

Hans Königes is the Head of Department for Jobs & Career and therefore responsible for all things associated with the employment market, jobs, professions, salaries, HR management, recruiting and social media in the world of work

Jens Dose:
Editor

Jens Dose is the editor of CIO Magazine. In addition to core issues for CIOs and their projects he also focuses on the role of the CISO and their areas of remit.

The author of this study

Jürgen Mauerer
Jürgen Mauerer has been working as a freelance IT journalist in Munich since October 2002. He writes primarily about the latest issues and trends in IT and the economy for publications like COMPUTERWOCHE, com! professional or ZD.NET. He also advises and supports PR agencies andIT companies on the publication of user reports, white papers, specialist articles and microsites and moderates podium discussions and events.

Our team of authors

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Alexander Jake Freimark left the editorial team at COMPUTERWOCHE to go freelance in 2009. He writes for the media and companies, with most of his work is in corporate publishing. His key focus is technological innovation,but also the transformation of organizations, markets, and people.

Gerhard Holzwart
Gerhard Holzwart started out in 1990 as editor of the leading weekly IT newspaper COMPUTERWOCHE and, from 1996 headed up the Companies & Markets department. In 2005 he took charge of the Congresses and Industry Events divisionof IDG Business Media GmbH and expanded IDG Events with roughly 80 conferences a year into one of the leading providers of ITC industry events in Germany. In 2010, Gerhard Holzwart became managing partner of h&g Editors GmbH, a role which sees him act as an event producer, direct marketing specialist and ITC editor.

Bernd Reder
Bernd Reder has worked as a specialized journalist for media, PR agencies and companies for 30 years. His areas of specialization include IT and network technology, Cloud computing, IT security and mobility. Before going freelance, Reder worked on the editorial teams of leading Specialist publication such as Elektronik, Network World, Digital World and Network Computing.

Andreas Schaffry
Dr. Andreas Schaffry has been working as a freelance IT journalist for IT service providers, media like CIO and COMPUTERWOCHE as well as PR agencies since 2003. His key areas are ERP, finance, customer experience, supply chain, manufacturing execution, business analytics, digitalization, Industry 4.0, AI and Cloud, and he specializes in SAP. He also writes about other providers like Microsoft.

Oliver Schonschek
Oliver Schonschek is a freelance analyst and journalist writing for leading specialist media about IT, security, and privacy: e.g. COMPUTERWOCHE and CIO. He has published and authored serval specialist books and has received a number of awards in the USA as an influencer und media leader for technologies like blockchain, AI, VR, and mobile computing.

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