Vendor Selection Matrix™ – SAP-Centric Application Lifecycle Management
SaaS And Software:
The Top 15 Global Vendors 2019

Dr. Thomas Mendel Ph.D.
Managing Director
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Vendor Selection Matrix™ – SAP-Centric Application Lifecycle Management SaaS And Software: The Top 15 Global Vendors 2019

Top Five (alphabetical order)
- Atlassian
- Broadcom (CA)
- Microsoft
- Realtech
- SAP

Top Six to Ten (alphabetical order)
- BMC
- Galileo
- IBM
- Micro Focus
- ServiceNow

Top 11 to 15 (alphabetical order)
- ASG
- ManageEngine
- microTOOL
- Open Source
- Solar Winds
The Research In Action GmbH – Vendor Selection Matrix™ Methodology

Data Summary:

➢ Unique, primarily survey-based methodology for comparative vendor evaluation.
➢ At a minimum, 60% of the evaluation results are based on enterprise buyers’ survey results.
➢ Analyst’s opinion accounts for a maximum of 40% of the evaluation results (not close to 100% as in most other vendor evaluations).
➢ More than 32,000 data points were collected.
➢ Data was collected in Q4 of 2018 and Q1 of 2019, covering 1,066 enterprise IT managers (with budget responsibilities) in companies using SAP, in a combined telephone and online survey.
➢ The Top 15 vendors of SAP-Centric Application Lifecycle Management SaaS and Software solutions (selected by the buyers in the survey) were evaluated.
➢ The evaluation results and forecasts are based on customer and vendor feedback, publicly available information, triangulation, as well as the analyst’s opinion.
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Survey Instrument:

Country breakdown
- DACH: 187
- United Kingdom: 107
- France: 109
- Benelux: 42
- Europe (Rest): 105
- North America: 324
- The Americas (Rest): 24
- Australia and New Zealand: 23
- Asia Pacific (Rest): 145
- Total: 1,066

Company size breakdown (Revenue more than € 250 million)
- Headcount below 2,500: 84
- Headcount 2,500 to 5,000: 167
- Headcount 5,000 to 10,000: 362
- Headcount 10,000 to 50,000: 349
- Headcount over 50,000: 104
- Total: 1,066

Job title breakdown
- VP IT: 99
- CIO: 94
- IT Manager: 84
- VP Operations: 82
- IT Operations Manager: 80
- VP Infrastructure: 73
- Project Manager: 70
- IT Service Manager: 69
- Manager DevOps: 65
- IT Supply Manager: 61
- VP DevOps: 59
- Change Manager: 55
- Test Manager: 45
- Capacity Manager: 36
- Manager Testing: 33
- General Manager: 27
- CFO: 21
- Others: 13
- Total: 1,066

Industry breakdown
- Energy: 72
- Financial Services: 178
- Government & Non Profit: 65
- Healthcare & Chemicals: 125
- Manufacturing: 267
- Media & Telecoms: 94
- Consumer Packaged Goods & Retail: 73
- Technology & Professional Services: 109
- Travel & Transportation: 83
- Total: 1,066

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What Tools Do You Use To Create The Vendor Longlist?

MQ/VSM
Press
Peers
Vendors
Social Media

Decision Makers use a mix of traditional and online tools

N = 3,000 business and IT managers with budget responsibilities
Market Overview: SAP-Centric Application Lifecycle Management SaaS And Software

➢ **Application Lifecycle Management** (ALM)\(^1\) is the product lifecycle management (governance, development, and maintenance) of computer programs. It encompasses requirements management, software architecture, computer programming, software testing, software maintenance, change management, continuous integration, project management, and release management.

➢ **IT Service Management** (ITSM)\(^2\) refers to the entirety of activities – directed by policies, organized and structured in processes and supporting procedures – that are performed by an organization to plan, design, deliver, operate and control Information Technology (IT) services offered to customers. It is thus concerned with the implementation of IT services that meet customers' needs, and it is performed by the IT service provider through an appropriate mix of people, process and technology.

➢ The **IT Infrastructure Library** (ITIL)\(^3\) is the de facto standard for IT Service Management process definitions today, used by roughly 85% of enterprises worldwide.

➢ **SAP**\(^4\), founded 1972 in Mannheim, Germany, produces enterprise software to manage business operations and customer relations. It is the world's largest inter-enterprise software company and the world's fourth-largest independent software supplier.

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1 Application Lifecycle Management, see https://en.wikipedia.org/wiki/ApplicationLifecycleManagement.
3 IT Infrastructure Library, see http://en.wikipedia.org/wiki/ITInfrastructureLibrary. ITIL is a trademark of AXELOS Limited.
4 SAP, see en.wikipedia.org/wiki/SAP_SE.
## Market Overview: SAP-Centric Application Lifecycle Management SaaS And Software

### SAP-Centric Application Lifecycle Management – Process Components

<table>
<thead>
<tr>
<th>Implementation</th>
<th>Operations</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Portfolio &amp; Project Management</td>
<td>• Data Volume Management</td>
</tr>
<tr>
<td>• Process Management</td>
<td>• Performance Management &amp; User Monitoring</td>
</tr>
<tr>
<td>• Requirements Management</td>
<td>• Integration Monitoring &amp; Application Monitoring</td>
</tr>
<tr>
<td>• Test Management</td>
<td>• Alert Management &amp; Operation Automation</td>
</tr>
<tr>
<td>• Change Control Management</td>
<td>• Business Process Monitoring &amp; Improvement</td>
</tr>
<tr>
<td>• Release Management</td>
<td></td>
</tr>
<tr>
<td>• Custom Code Management</td>
<td></td>
</tr>
</tbody>
</table>

**Major customer concerns:**
- Cloud or on-premise deployment
- Customizing or modifications
- DevOps integration
- Budget and time planning

**Major customer concerns:**
- System performance
- End-User experience/SLAs
- Downtime & fast incident resolution
- Capacity versus costs
What is your number one investment area in the SAP-Centric Application Lifecycle Management space for 2019?

New, innovative topics like AI, Bots, SAP Cloud ALM, Cloud integration, Agile and Kanban are high on the investment priorities list for 2019.

N = 1.066 enterprise IT managers with budget responsibilities in companies using SAP
Market Overview: Market Trends 2019

Are you planning to implement or replace your SAP-Centric Application Lifecycle Management solution in the next one to three years?

More than 50% of companies are going implement a new SAP-Centric Application Lifecycle Management solution over the next three years.

N = 1,066 enterprise IT managers with budget responsibilities in companies using SAP
## Vendor Selection Matrix™ – SAP-Centric Application Lifecycle Management SaaS And Software: Evaluation Criteria

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Weight (%)</th>
<th>Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vision &amp; Go-To-Market</td>
<td>30%</td>
<td>Does the company have a coherent vision in line with the most probable future market scenarios?</td>
</tr>
<tr>
<td>Innovation &amp; Partner Ecosystem</td>
<td>20%</td>
<td>How innovative is the company?</td>
</tr>
<tr>
<td></td>
<td></td>
<td>How is the partner ecosystem organized and how effective is the partner management?</td>
</tr>
<tr>
<td>Company Viability &amp; Execution Capabilities</td>
<td>15%</td>
<td>How likely in the long-term survival of the company?</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Does the company have the necessary resources to execute the strategy?</td>
</tr>
<tr>
<td>Differentiation &amp; USP</td>
<td>35%</td>
<td>Does the solution have a Unique Selling Proposition (USP) and clear differentiators?</td>
</tr>
</tbody>
</table>

### Execution

<table>
<thead>
<tr>
<th></th>
<th>Weight (%)</th>
<th>Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>Breadth &amp; Depth Of Solution Offering</td>
<td>30%</td>
<td>Does the solution cover all necessary capabilities expected by the customers?</td>
</tr>
<tr>
<td>Market Share &amp; Growth</td>
<td>15%</td>
<td>How big is the market share and is it growing above market rate?</td>
</tr>
<tr>
<td>Customer Satisfaction</td>
<td>25%</td>
<td>How satisfied are customers with the solution and the vendor?</td>
</tr>
<tr>
<td>Price/Value Ratio</td>
<td>30%</td>
<td>How do customers rate the relationship between the price and perceived value of the solution?</td>
</tr>
</tbody>
</table>
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Vendor Selection Matrix™ – SAP-Centric Application Lifecycle Management SaaS And Software: The Top Ten

Galileo: One of the most important point-players in the SAP-Centric Application Lifecycle Management market

**General:** Founded in Germany in 1998, Galileo has a long history of successful projects and standard software implementations for SAP-Centric Application Lifecycle Management.

**Strategy:** Galileo’s goal is to reinvent the manner in which SAP software changes are carried out - swift, secure, transparent and the company is already delivering on that promise. With this, Galileo is a highly differentiated vendor. Galileo achieved the third highest rating for differentiation from all vendors in our survey, no surprise here.

**Execution:** Galileo is a very focused player in the SAP-Centric Application Lifecycle Management market. The company today is the leading provider of Change, Release and Transport Management solutions for SAP software. As a next-generation solution, the Conigma Suite not only focuses on replacing SAP Change, Release and Transport Management legacy tools, but also offers a high degree of industrialization and automation of the SAP Change and Maintenance processes, lowering TCO and reducing time-to-market significantly. This resonates well with customers. Galileo achieved very high scores in the price versus value category. For customer satisfaction, Galileo even achieved the highest score from all competitors.

**Customer Quote:** “We know the competition well. We are impressed by the Galileo Conigma product capabilities as well as the company’s service quality and flexibility”. Manager DevOps European manufacturing company.

**Bottom Line:** The positioning of Galileo in the SAP-Centric Application Lifecycle Management market is unique and long-term sustainable. This should set the company up for continuing profitable growth in the years to come.
## Vendor Selection Matrix™ – SAP-Centric Application Lifecycle Management SaaS And Software: Detailed Results

<table>
<thead>
<tr>
<th>Weighting</th>
<th>Galileo</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Strategy</strong></td>
<td>Score</td>
</tr>
<tr>
<td>Vision &amp; Go-To-Market</td>
<td>30%</td>
</tr>
<tr>
<td>Innovation &amp; Partner Ecosystem</td>
<td>20%</td>
</tr>
<tr>
<td>Company Viability &amp; Execution Capabilities</td>
<td>15%</td>
</tr>
<tr>
<td>Differentiation &amp; USP</td>
<td>35%</td>
</tr>
<tr>
<td><strong>100%</strong></td>
<td><strong>4,29</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Execution</strong></th>
<th>Score</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Breadth &amp; Depth Of Solution Offering</td>
<td>30%</td>
<td>3,50</td>
</tr>
<tr>
<td>Market Share &amp; Growth</td>
<td>15%</td>
<td>3,00</td>
</tr>
<tr>
<td>Customer Satisfaction</td>
<td>25%</td>
<td>4,75</td>
</tr>
<tr>
<td>Price/Value Ratio</td>
<td>30%</td>
<td>4,50</td>
</tr>
<tr>
<td><strong>100%</strong></td>
<td><strong>4,04</strong></td>
<td></td>
</tr>
</tbody>
</table>

Scale Explanation: 1 (Low) To 5 (High)
Vendor Selection Matrix™ Disclaimer:

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About:

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

Dr. Thomas Mendel Ph.D.
+49 160 99492223
tmendel@researchinaction.de