

THE IMPORTANCE OF ITIL®

A Global View – 2014 and Beyond



Agenda

- Demographics and demographic preferences
- ITIL adoption as it stands today
- Technology and environmental impacts
- How and where is ITIL valued today?
- Recommendations for improving ITIL
- Summary and conclusions





Purpose of the Research Survey

- AXELOS are establishing an innovative and high-quality, continuous learning and development destination that is co-designed by and cocreated for those who use it. This 'Global Best Practice' portfolio includes ITIL®.
- AXELOS have the objective of driving the full market potential of ITIL as the leading global source of service management best practice for multiple organization verticals, as well as for individual practitioners embarking or improving their career credentials and capabilities.
- ITIL's benefits have more recently come into contention as new technologies such as cloud computing, more advanced forms of automation and analytics have impacted strategic ITIL initiatives and have captured media and industry attention.
- The results of the following piece of research, undertaken by Enterprise Management Associates (EMA), a well-respected research and consultancy company, largely reaffirms ITIL's value. The results do so in the face of those very forces, such as Cloud and Agile, that some industry experts are claiming render ITIL less relevant.
- This research also suggests clear priorities for how organizations, executives and professionals can better optimize their use of ITIL resources.





Executive Introduction

The results of the following research largely reaffirm ITIL's value, and do so in the face of those very forces, such as Cloud and Agile, that some industry experts claim render ITIL less relevant.

The research also suggests clear priorities for how IT organizations, IT executives and professionals can better optimize their use of ITIL resources, as well as how ITIL might, itself, evolve to support the continued evolution of IT Service Management (ITSM) in the face of both cultural and technological change.

Next, some highlights.





Some Highlights

Some of the highlights from the research include:

- ITIL was positively viewed as growing in importance, or at least holding its own, in the face of trends like Cloud and Agile – 46% viewed ITIL as increased in importance; 49% viewed ITIL as staying the same in importance; and only 5% viewed ITIL as declining in importance.
- When it came to valuing ITIL resources, 68% found ITIL 'very valuable' or 'exceedingly valuable', only 4% found ITIL 'not at all valuable'.
- When asked about reasons for value, 'ITIL helps me work with others in unified processes' came in first, followed by 'ITIL helps me do my job with added context and insight'.
- Latin America and APAC (Asia Pacific) showed a yet stronger faith in ITIL's growing importance than did EMEA (Europe, Middle East and Africa) and North America. This suggests a promising opportunity for growing ITIL's value globally.





Some Highlights

Some of the highlights from the research include:

- The trend to unify processes for managing IT and enterprise services together is a clear opportunity for growth for ITIL best practices – where a mature and consistent approach to service management can bring new levels of effectiveness across the broader business or organization.
- The impact of Cloud on ITSM initiatives shows that respondents view Cloud first and foremost as a means for expanding ITSM capabilities, in part through the growth of SaaS-delivered applications. Only 10% saw no impact from Cloud.
- Those with established BSM teams uniting business and IT stakeholders were more than twice as likely to view ITIL as growing in importance.
- When asked about how they would like to see ITIL evolve, 55% preferred modular changes surrounding ITIL's core to minimize disruptions, but still bring added levels of currency – versus 45% who believed that changing ITIL's core was preferred.





Methodology

EMA interviewed 380 respondents globally, with statistically meaningful quotas in each key geography over a period of six weeks during Q4 2013. These included:

- **EMEA 96**
- North America –119
- Asia Pacific (APAC) 61
- Central & South America 100

More specifically, the countries interviewed were:

- EMEA France, Germany, Netherlands, Spain, Sweden
- North America United States and Canada
- APAC Australia, China, India, Japan
- Central & South America Argentina, Brazil, Mexico





Methodology

In order to focus the research optimally, EMA worked with AXELOS to set additional (non-geographic) quotas on the levels of ITIL involvement and awareness:

- Aware but not studied or read 10%
- Aware and studied and read but no plans for certification, and/or plan to get Foundation level within the next 12 months – 30%, Foundation level certified – 30%, Intermediate level certified, Managing across the Lifecycle, Expert or Master – 30%
- In addition, 36 respondents were ITIL certified trainers.
- In order to ensure currency, a quota of 75% was placed on obtaining respondents using the ITIL 2011 edition, versus ITIL 2007 or ITIL v2 based on a total respondent base of 300. Significantly, this guota of 235 respondents, did not prove to be a problem to fill, underscoring ITIL 2011's current popularity.

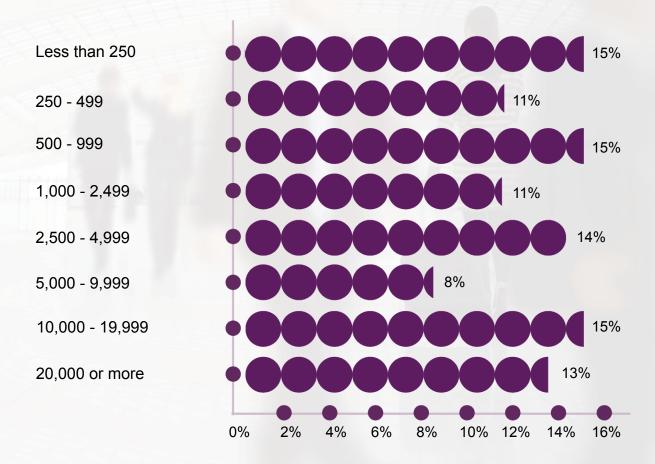




Company size was evenly spread, with 26% fewer than 500 employees, and 28% more than 10,000

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How many employees are in your company worldwide?



Average revenue was about \$100 million



What is your organization's annual sales revenue?

Less than \$1 million

\$1 million to under \$5 million

\$5 million to under \$20 million

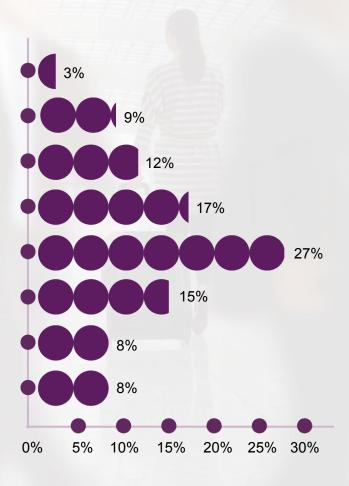
\$20 million to under \$100 million

\$100 million to under \$1 billion

\$1 billion or more

Not applicable, I work for a government or non-profit agency

Don't know





OITIL[®]

What is your organization's annual IT budget?

Less than \$1 million

\$1 million to less than \$5 million

\$5 million to less than \$10 million

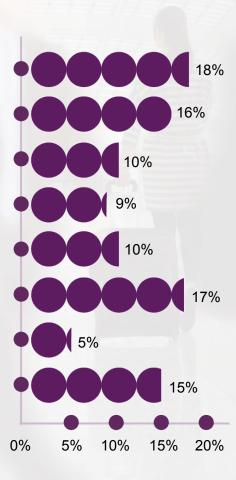
\$10 million to less than \$25 million

\$25 million to less than \$50 million

\$50 million to less than \$100 million

\$100 million or more

Don't know





Only 12% of IT budgets are decreasing, and 45% are increasing 10% or more

What was the percentage increase or decrease of your organization's annual IT budget from last year to this year?

Increased more than 75%

Increased between 50% and 75%

Increased 25% and 50%

Increased between 10% and 25%

Increased less than 10%

Stayed the same

Decreased less than 10%

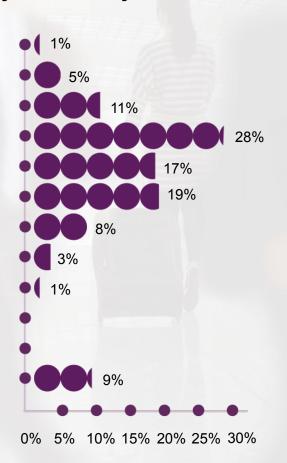
Decreased between 10% and 25%

Decreased between 25% and 50%

Decreased between 50% and 75%

Decreased more than 75%

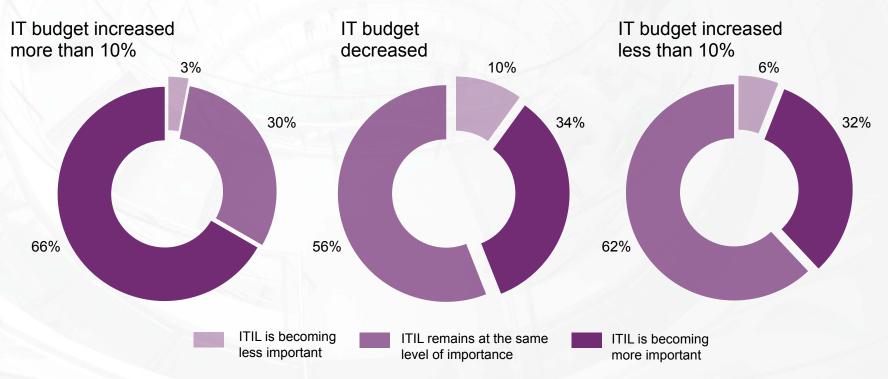
Don't know



Those who view ITIL as growing in importance are more likely to see growth in IT budget

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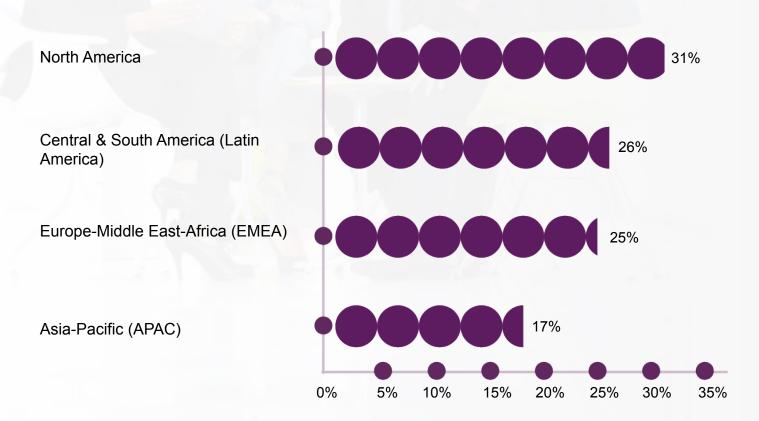
- What was the percentage increase or decrease of your organization's annual IT budget from last year to this year?
- How has the importance of ITIL changed in the past year due to trends like Cloud and Agile?





Geographical spread favoured NA, with APAC least at 64 respondents

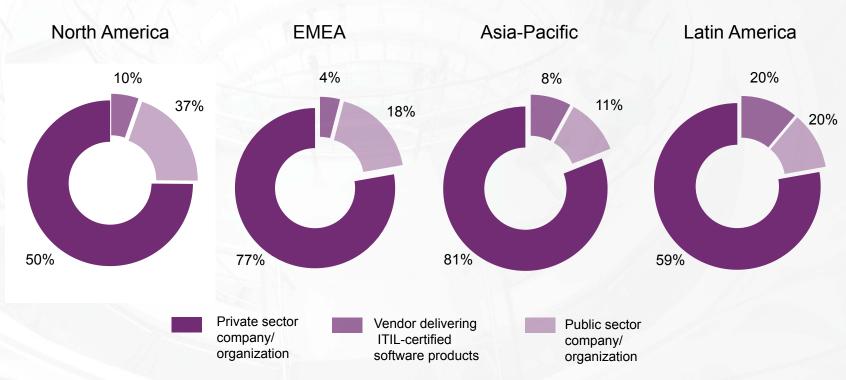
In which region are you located?



The private sector was most strongly present in EMEA and APAC, least in North America

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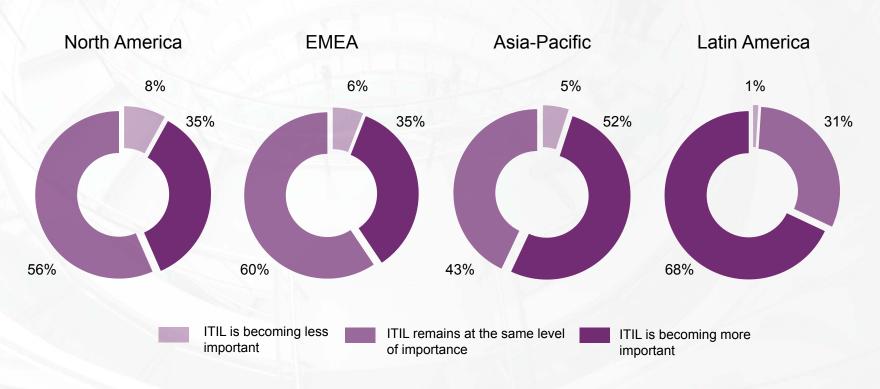
- What type of company/organization do you work for?
- In which region are you located?



A geographical view of ITIL valuation highlights Latin American and APAC enthusiasm

QITIL!

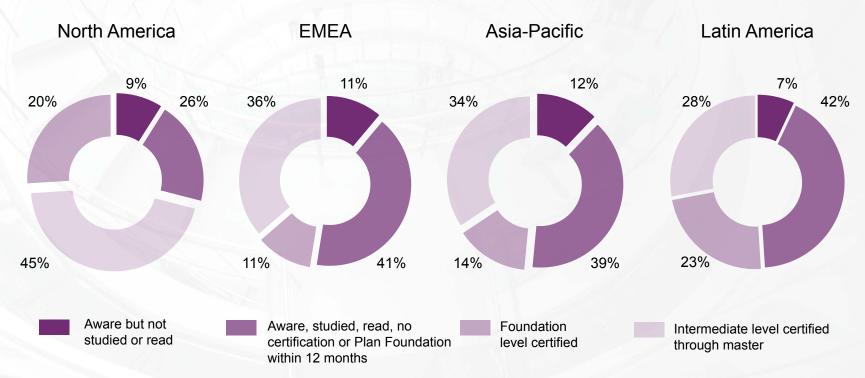
- In which region is your corporate headquarters located?
- How has the importance of ITIL changed in the past year due to trends like Cloud and Agile?



North America had the highest % of ITIL certification, EMEA/APAC the highest levels

OITIL

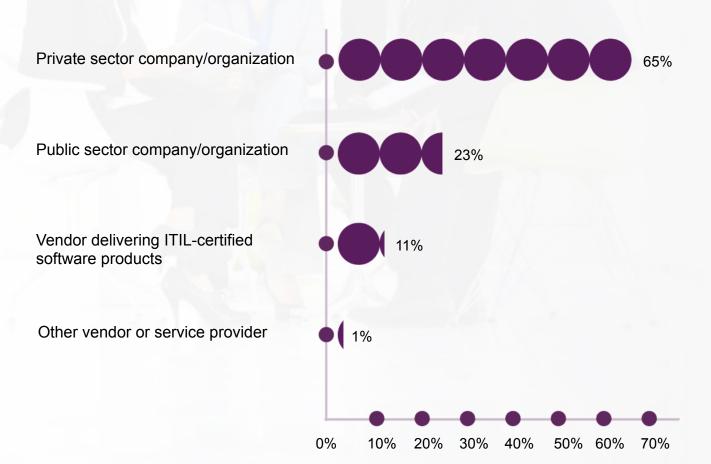
- To date, what has been your involvement with ITIL within your company/organization?
- In which region are you located?



The private sector dominated at nearly 2/3 of respondents, the public sector at nearly 1/4



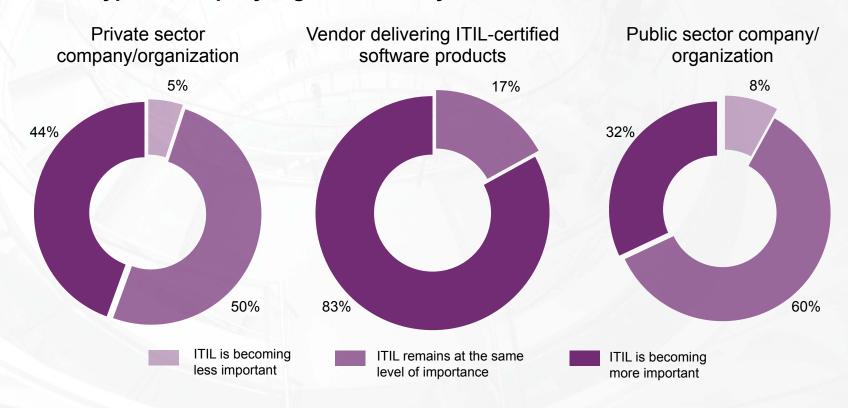
What type of company/organization do you work for?



Vendors and private sector are more positive about ITIL's relevance than the public sector



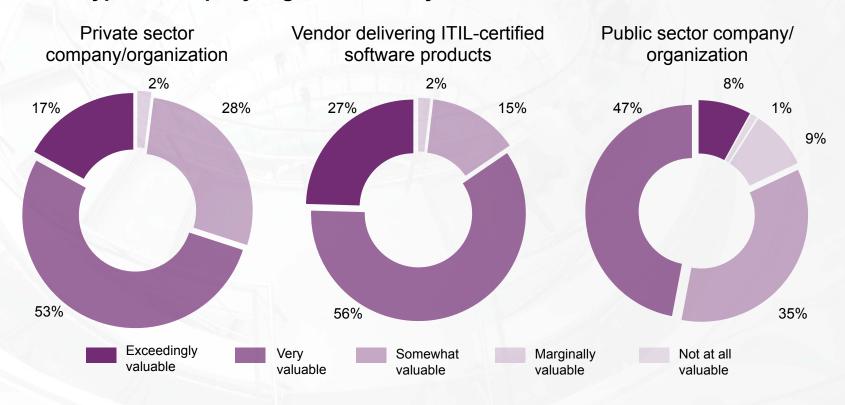
- How has the importance of ITIL changed in the past year due to trends like Cloud and Agile?
- What type of company/organization do you work for?





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- Overall, how valuable do you find ITIL resources such as: print, Internet, training, accreditation, events, etc?
- What type of company/organization do you work for?



Manufacturing, government, high tech, and finance-led in verticals represented



Which of the following best describes your company's primary industry?

Manufacturing – All Other (Not Computer or Networking-related)

Government

High Technology - Software

Manufacturing – Computer Hardware or Networking-related

Finance/Banking/Insurance

Education

Healthcare/Medical/Pharmaceutical

Retail/Wholesale/Distribution

Consulting – Computer or Networking Related

Professional Services - Computer or Networking-related

Professional Services – All Other (Not Computer or Networking Related)

Telecommunications

Consulting – All Other (Not Computer or Networking-related)

High Technology - Application/Internet/Managed/Network Service Provider

High Technology - Reseller/VAR/Systems Integrator

Hospitality/Entertainment/Recreation/Travel

Oil/Gas/Chemicals

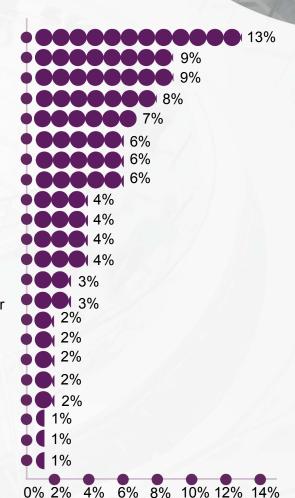
Transportation/Airlines/Trucking/Rail

Utilities/Energy

Aerospace/Defence

Legal

Non-Profit/Not for Profit



Respondents showed a strong mix of executive and non-executive roles — and 13% were non-IT



Which of the following best describes your role in the organization?

CIO/CTO (IT Executive Management)

IT-related Administrator

IT-related Manager/Supervisor (or Equivalent)

IT-related Director (or Equivalent)

Corporate/Line of Business Manager/Supervisor (or Equivalent)

IT-related Systems Analyst/Programmer/Engineer

IT-related Business Analyst

IT-related Project/Program Manager

IT-related Software Engineer/Developer

Infrastructure Engineer (Network/Systems)

IT-related Consultant/Integrator

IT-related Architect

CEO/COO/CFO (Business Executive Management)

Corporate/Line of Business Director (or Equivalent)

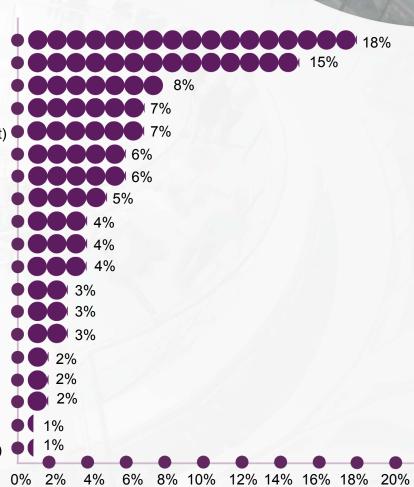
IT-security Operations Staff

IT-security Manager

IT-related Vice President (or Equivalent)

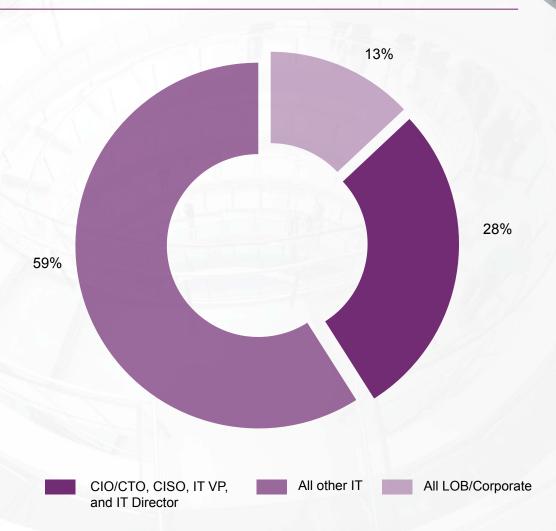
CISO/CSO/Chief Risk or Compliance Officer

Corporate/Line of Business Vice President (VP/AVP/SVP/EVP)



28% were 'Executive' - Director or above - a group with distinctive ITIL adoption traits

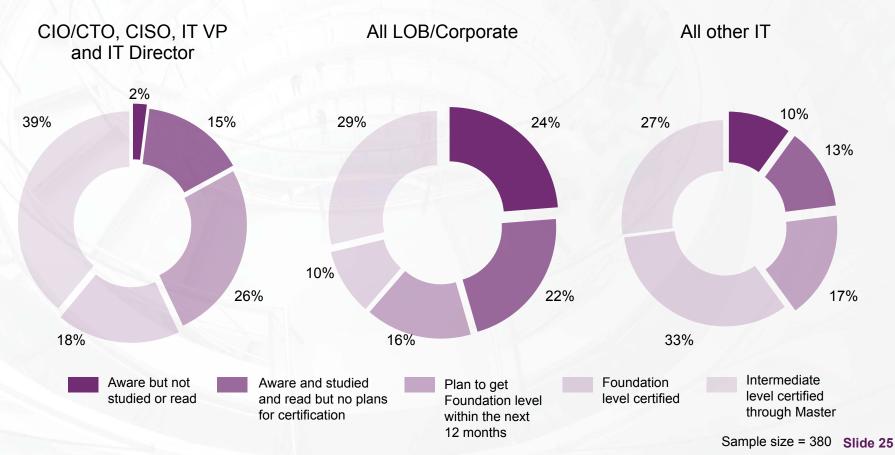




Executives had highest ITIL 'levels', but overall IT had highest certification at 60%

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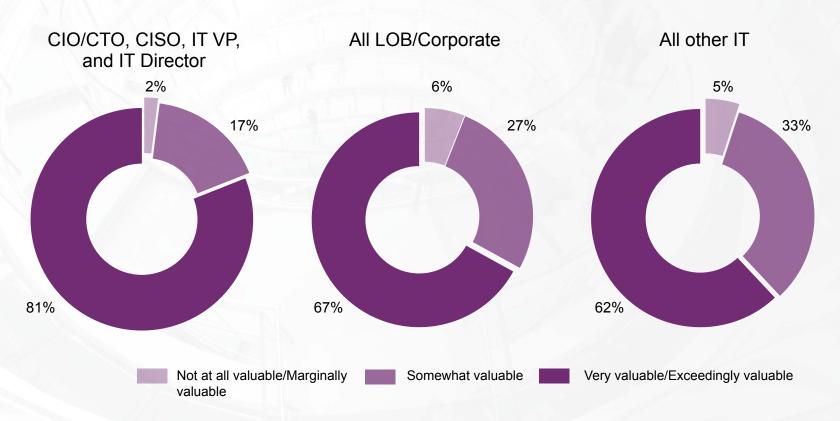
- To date, what has been your involvement with ITIL within your company/organization?
- Which of the following best describes your role in the organization?



Executives were also more likely to view ITIL resources as very or extremely valuable

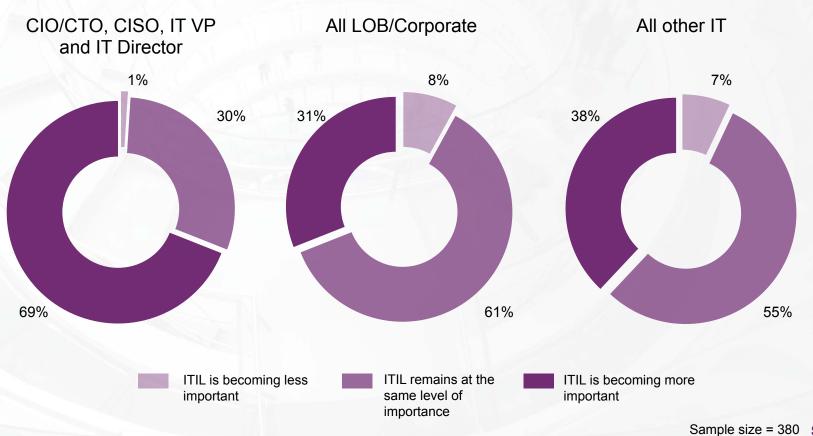


- Overall, how valuable do you find ITIL resources such as print, Internet, training, accreditation, events, etc?
- Which of the following best describes your role in the organization?



...And view ITIL as growing in importance re. trends like Cloud and Agile

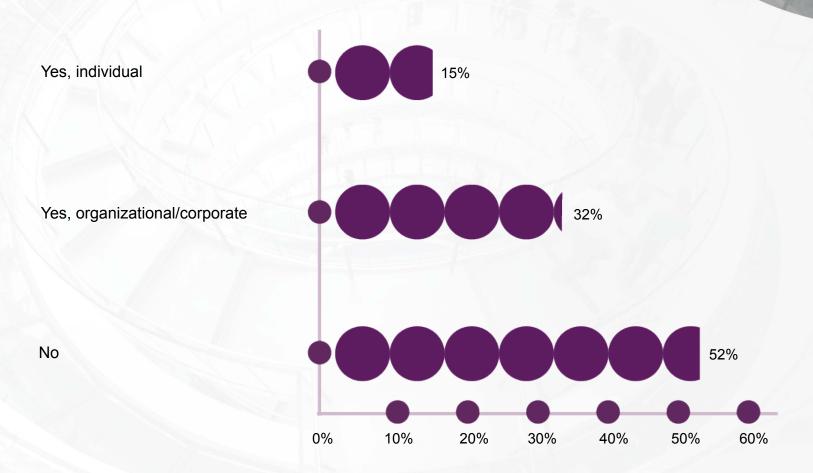
- How has the importance of ITIL changed in the past year due to trends like Cloud and Agile?
- Which of the following best describes your role in the organization?





Nearly half enjoy itSMF participation

Are you an itSMF member?





ITIL Adoption as it Stands Today

44% were not yet certified, 31% Intermediate or above



To date, what has been your involvement with ITIL within your company/organization?

Aware but not studied or read

Aware and studied and read but no plans for certification

Plan to get Foundation level within the next 12 months

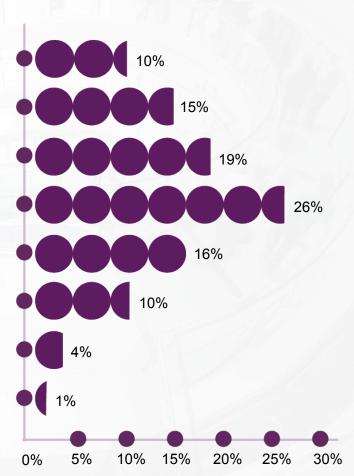
Foundation level certified

Intermediate level certified

Managing Across the Lifecycle

Expert

Master



Management directive, media and peers lead in initial ITIL awareness

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How did you first become aware of ITIL?

Management directive

Media – Internet

Word of mouth - peers

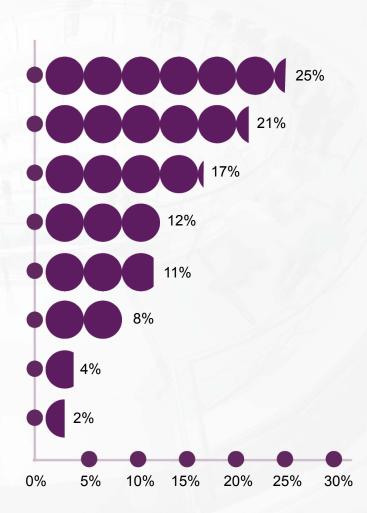
Academia

Trade shows or industry events

Analysts

Media - other

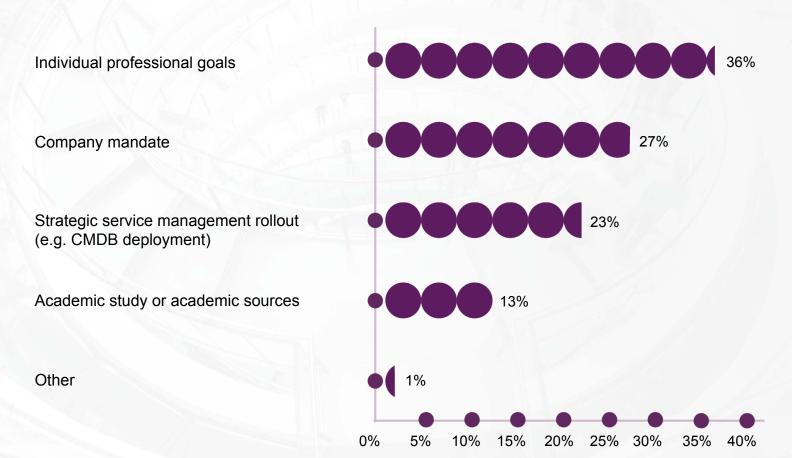
Other



Most pursue ITIL from either individual professional goals or company mandate

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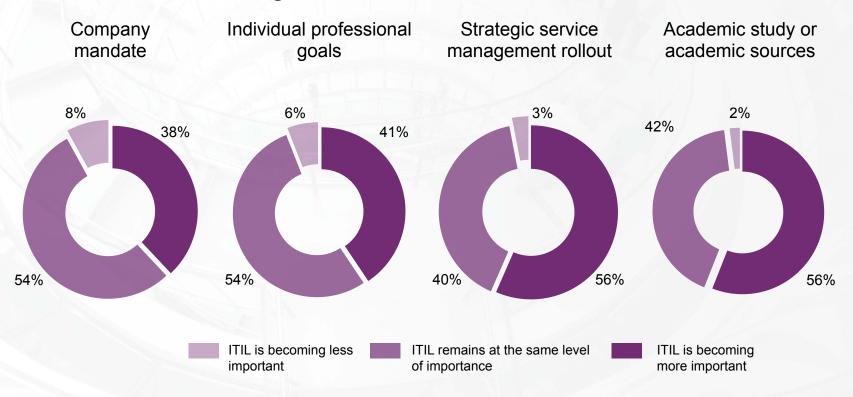
Why did you begin to pursue or study ITIL?



Those pursuing ITIL via strategic initiatives or academia tend to be more bullish re. future value

CITIL

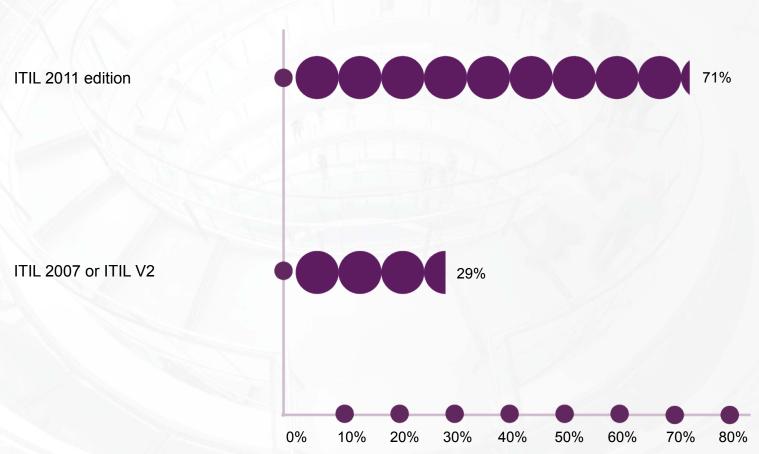
- Why did you begin to pursue or study ITIL?
- How has the importance of ITIL changed in the past year due to trends like Cloud and Agile?



ITIL 2011 led by more than 2 to 1 over v2 or 2007

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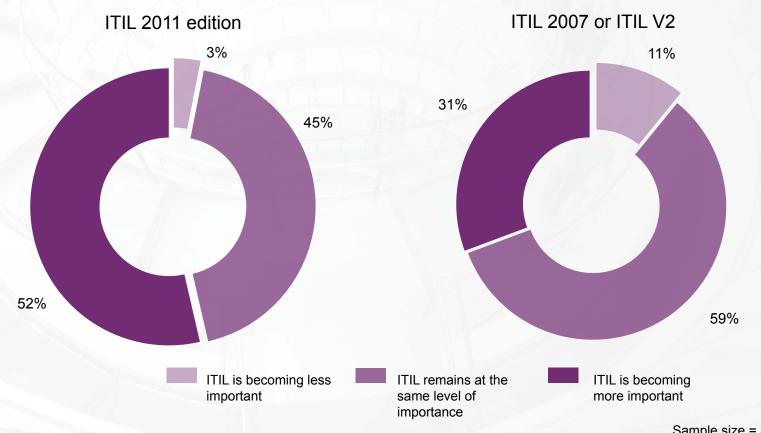
Which edition is your company/organization currently using?



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ITIL 2011 adopters are more likely to see ITIL as growing in importance

- Which edition is your company/organization currently using?
- How has the importance of ITIL changed in the past year due to trends like Cloud and Agile?



For non-2011, 40% plan to move to 2011 soon. 24% are comfortable with 2007, 15% with v2

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Why hasn't your organization moved to the ITIL 2011 edition?

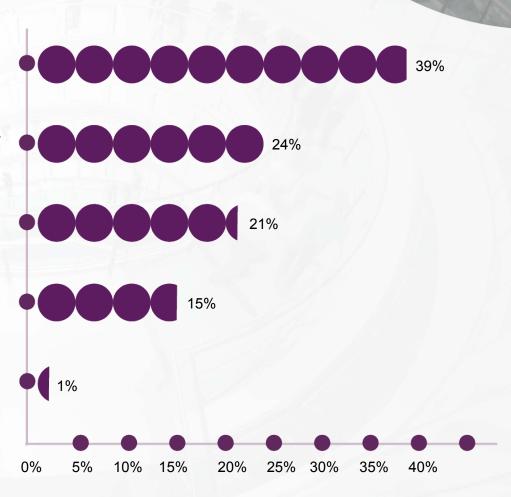
We plan to move soon

We are comfortable with the 2007 edition – don't want to move

No time – too busy with other things

We are comfortable with the ITIL V2 edition – don't want to move

We no longer feel invested in ITIL



IT Operations and IT Service Continuity Management lead in personal process investment



What ITIL processes are you personally most invested in?

IT operations management

IT service continuity management Information security management

Service desk

Application management

Problem management

Incident management

Service-level management

Change management

Continual service improvement

Technical management

Financial management for IT services

Availability management

Capacity management

Release and deployment management

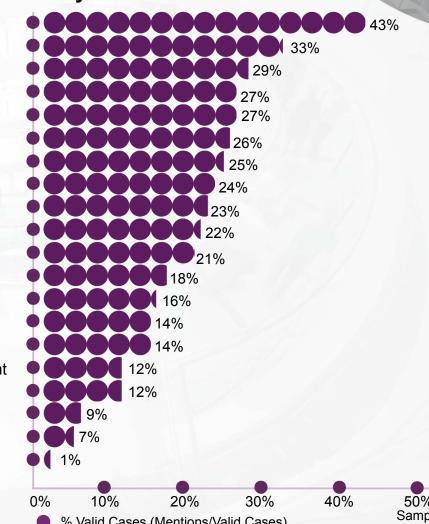
Service and asset configuration management

Event management

Identity management

Broad cross-process ownership

Other (please specify)



% Valid Cases (Mentions/Valid Cases)

Sample size = 380 Slide 37

ITIL v3 and v2, and Balanced Scorecard lead in best practice adoption

What best practices are your organization currently pursuing?

ITIL_{v3}

ITIL v2

IT Balanced Scorecard

Six Sigma

COBIT - Control Objectives for Information

PMI (PMBOK)

CMMI – Capability Maturity Model Integration

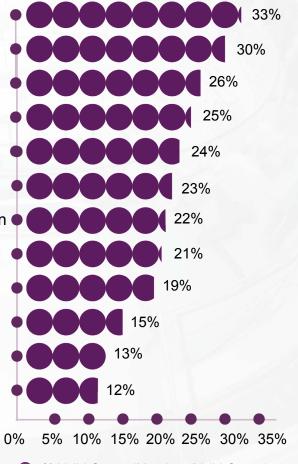
PRINCE2 (For Project Management)

MSP (For Program Management)

MoP (Management of Portfolio)

TOGAF – The Open Group Architecture

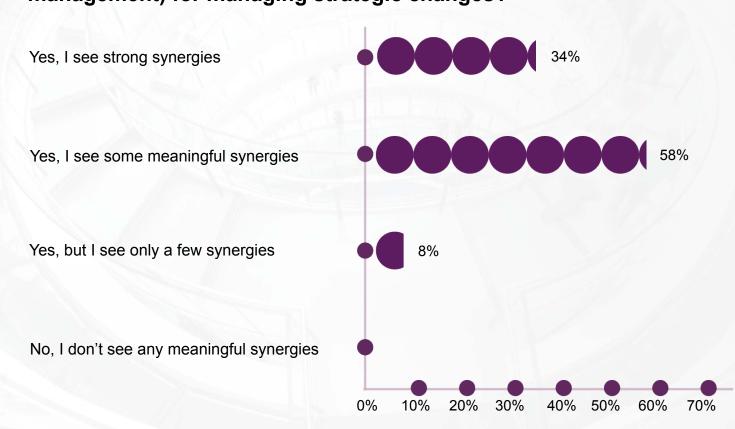
IPMA



Sample size = 380 Slide 38

But those who are see strong or meaningful synergies

Do you see synergies between ITIL and the Best Management Practice Portfolio such as PRINCE2 for project management and MoP (Management of Portfolio) and MSP (for programme management) for managing strategic changes?



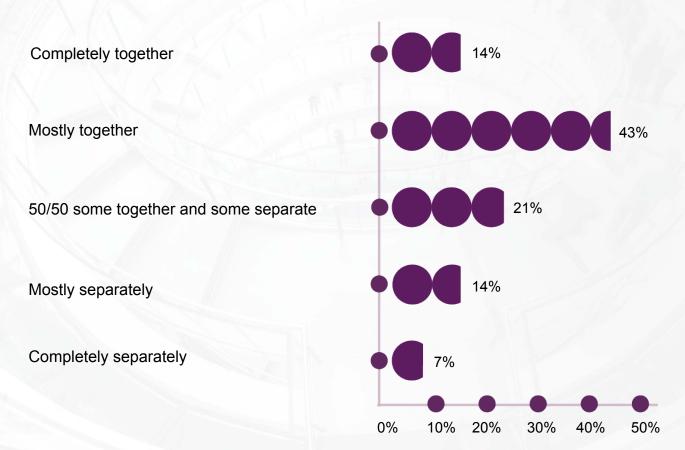


Technology and Environmental Impacts

57% mostly or completely combine enterprise and IT services, only 7% are all separate



Are IT services and enterprise services (e.g. HR, payroll, facilities, etc.) supported together or separately in your organization from an incident and request management (e.g. call centre) perspective?

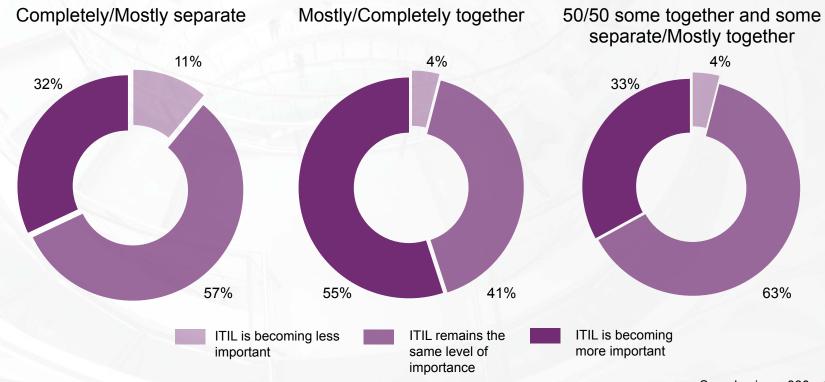


Growth in support for enterprise services leads to a stronger appreciation of ITIL's value



The correlation between:

- Are IT services and enterprise services (e.g. HR, payroll, facilities, etc.) supported together or separately in your organization from an incident and request management (e.g. call centre) perspective?
- How has the importance of ITIL changed in the past year due to trends like Cloud and Agile?



Service desk, project management, SLM and asset management lead in deployed technologies



In your organization's IT Service Management environment, which of the following service management technologies are deployed?

Service desk

Project management system

Service Level Management

Asset management

Performance and availability management

IT financial planning system

Workflow/process automation

End-user self-service portal

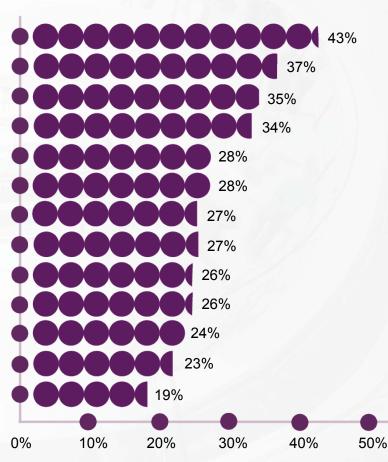
Service management dashboard

IT business intelligence/data warehouse

Service catalog

Application lifecycle management solution

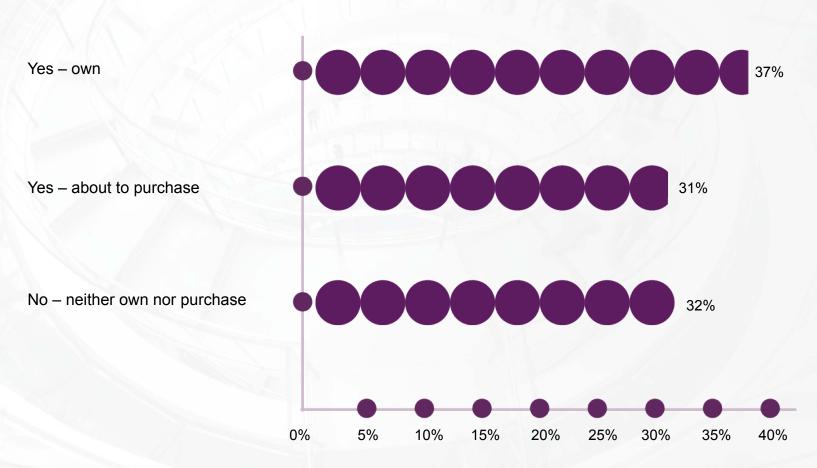
Integration with non-IT Call Centres or Customer Support



68% either own or are about to purchase a CMDB

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Does your organization own, or is your organization about to purchase, a CMDB/CMS-related solution?

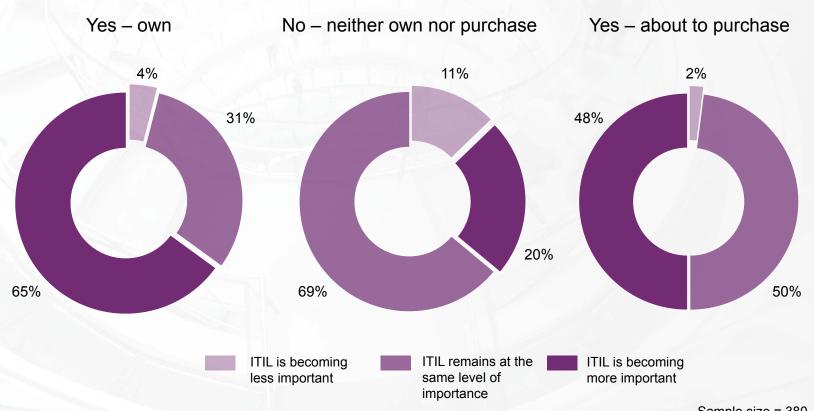


CMDB commitment strongly reflects an appreciation of ITIL's growing values



The correlation between:

- Does your organization own, or is your organization about to purchase, a CMDB/CMS-related solution?
- How has the importance of ITIL changed in the past year due to trends like Cloud and Agile?



Performance/service impact, security/compliance, asset and change lead CMDB uses



What is/are the use-case(s) that your organization is targeting currently for its CMDB/CMS?

Performance-related service impact

Security and/or compliance audits

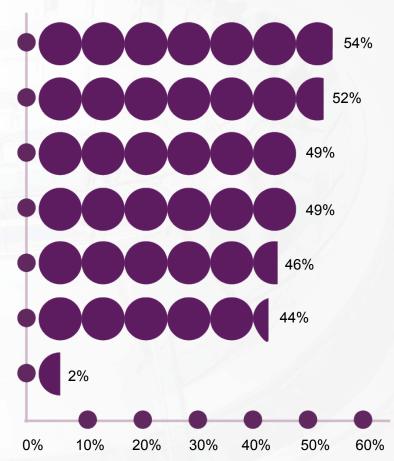
Asset management

Change management

Financial optimization

Change impact analysis

Other



But change management ties with security for the 'most dominant' CMDB use-case



What is/are the use-case(s) that your organization is targeting currently for its CMDB/CMS? Single most dominant case

Change management

Security and/or compliance audits

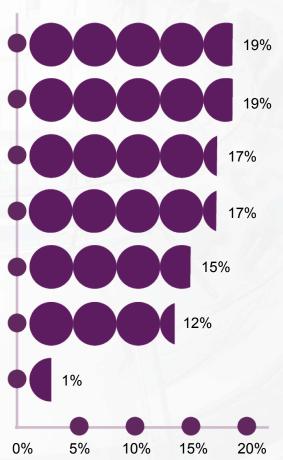
Financial optimization

Performance-related service impact

Asset management

Change impact analysis

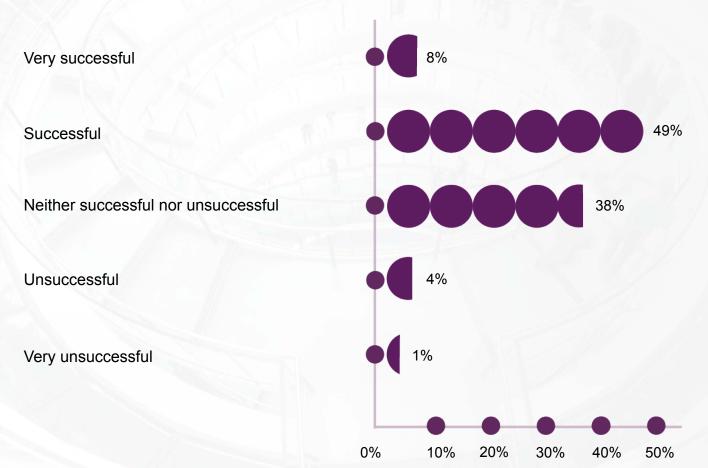
Other



57% see CMDB as successful, versus 5% as unsuccessful

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How successful would you say your organization has been to date with its CMDB/CMS initiative?



Expanding ITSM capabilities, automation and asset management lead in the impacts of Cloud



How would you describe the impact of Cloud vis-à-vis the IT Service Management in your organization?

We see Cloud as a resource for expanding our ITSM capabilities

Cloud is requiring higher levels of automation in provisioning services

Cloud and virtualization have made asset management challenging

Cloud is shortening review cycles for managing change

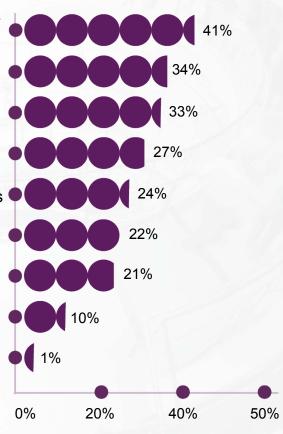
Cloud is putting pressures on us to justify costs

Cloud is pushing us to pay more attention to DevOps

SaaS options have changed the game in applications management

We see no impact from Cloud

Other



IT operations, security, capacity and service continuity are processes most impacted by Cloud



What ITIL processes do you believe are most impacted due to Cloud and associated trends like DevOps?

IT operations management Information security management

Capacity management

IT service continuity management

Availability management

Application management

Financial management for IT services

Service-level management

Change management

Release and deployment management

Service desk

Technical management

Incident management

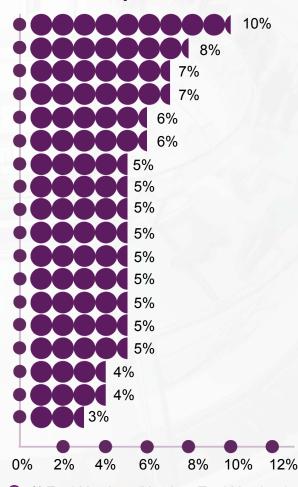
Problem management

Continual service improvement

Service and asset configuration management

Identity management

Event management



Whereas service desk and financial management are least impacted by Cloud



In your opinion, what ITIL processes are least impacted due to Cloud and associated trends like DevOps?

Service desk

Financial management for IT services

Service-level management

Change management

Service and asset configuration management

Technical management

Event management

Problem management

Identity management

Availability management

Capacity management

Release and deployment management

Incident management

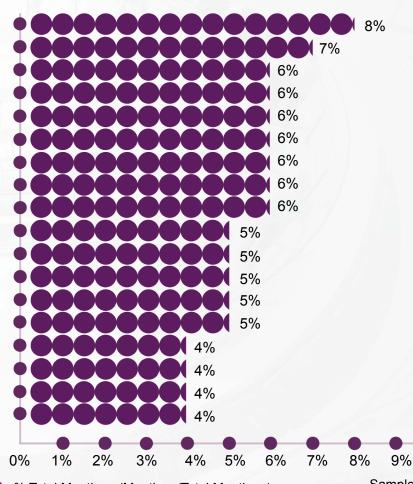
Continual service improvement

IT service continuity management

Information security management

Application management

IT operations management



67% have an integrated BSM team at some level, while only 7% see no IT/business dialogue at all

QITIL

Do you have an integrated team devoted to supporting Business Service Management requirements including both IT and business stakeholders for optimizing IT services to business needs and values?

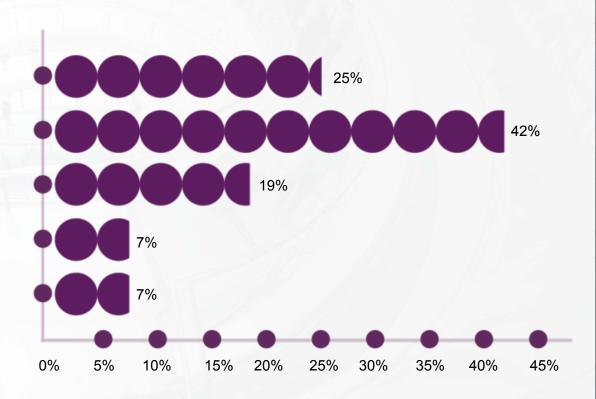
Yes, currently

Yes, but it's in the early stages

No, but we have informal discussions

No, but there is dialogue between business analysts and development

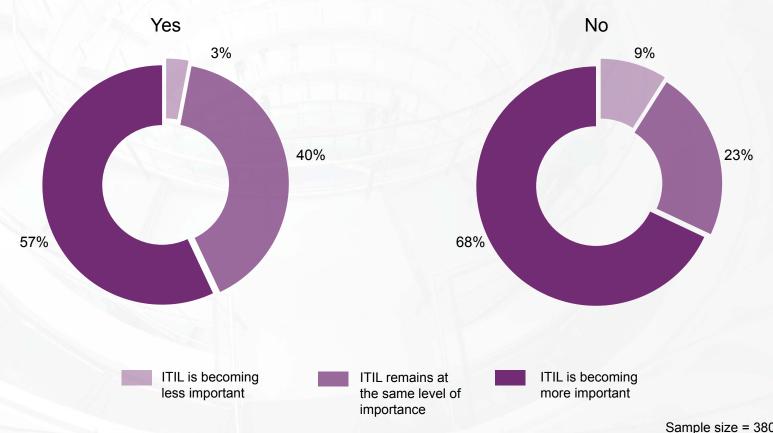
No, not at all



And those with a BSM initiative in place are more likely to view ITIL as growing in importance



Do you have an integrated team devoted to supporting Business Service Management requirements including both IT and business stakeholders for optimizing IT services to business needs and values?



74% see ITIL as very important or critical for their BSM-related discussions



How important is ITIL in those discussions?

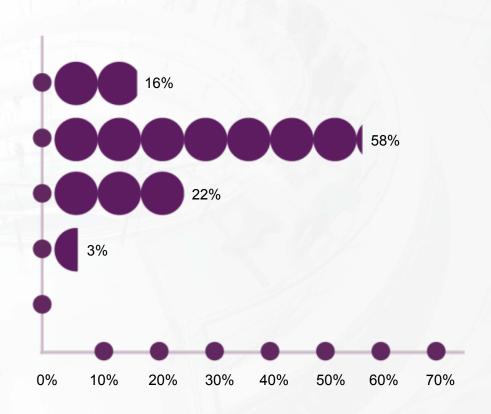
Critically important, ITIL is key

Very important, ITIL is a big part

Somewhat important, ITIL is in the mix

Marginally important, ITIL is mentioned infrequently

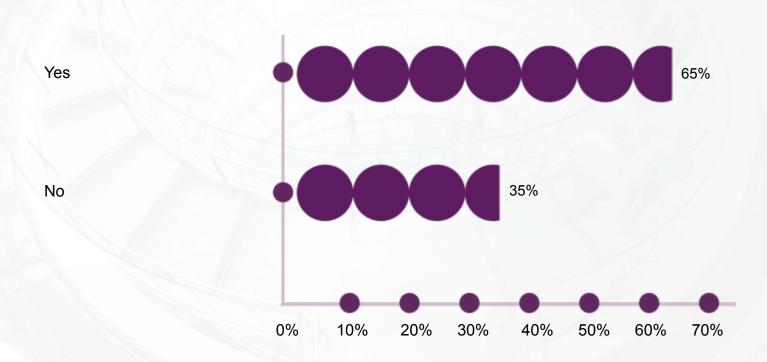
Not at all important



Nearly 2/3 are integrating application release management with ITSM

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Is Application Release Management integrated with your IT Service Management strategy (e.g. integrated DevOps)?



Scheduling and automation lead in integrating app release management with ITSM

OTIL

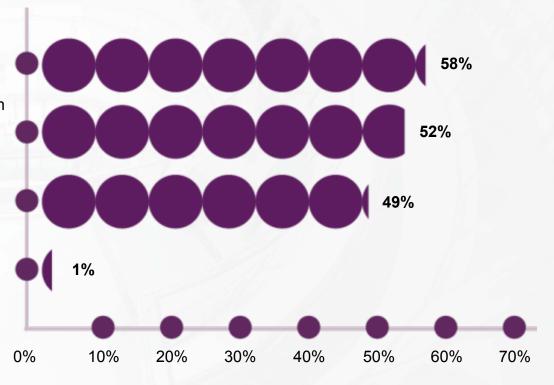
How is ITSM integration achieved?

Releases are scheduled via the service desk platform

The service desk helps in supporting automation requirements for release review, provisioning and/or SLA assessments (is the new service meeting SLA expectation?)

Service desk operators are notified of releases

Other



71% view ITIL as playing a tangible role in supporting the move to DevOps and Agile

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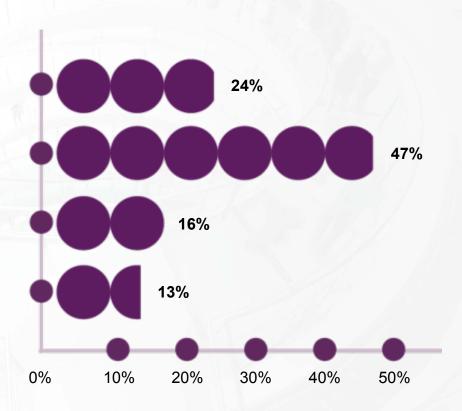
Has ITIL been a part of your overall move to support DevOps and Agile?

Yes, to a large degree

Yes, somewhat

Yes, only marginally

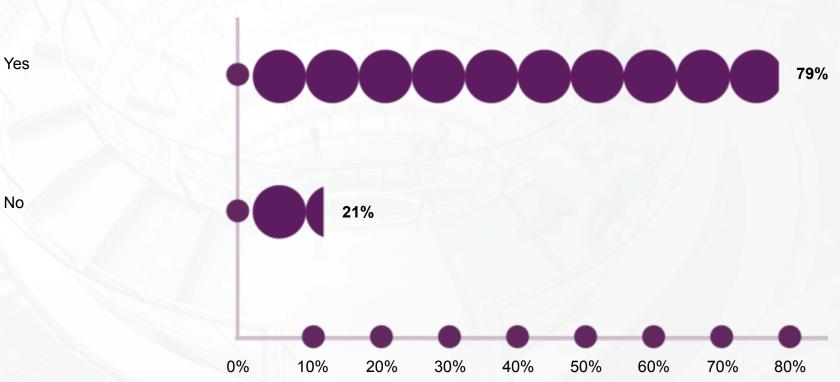
No



79% are sharing knowledge of known defects between service desk agents and development

CITIL

Do service desk agents and development teams share knowledge of known defects or planned resolutions to ongoing issues?



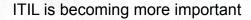


How and Where is ITIL Valued Today?

Nearly half see Cloud and Agile as making ITIL more important, only 5% see it diminishing

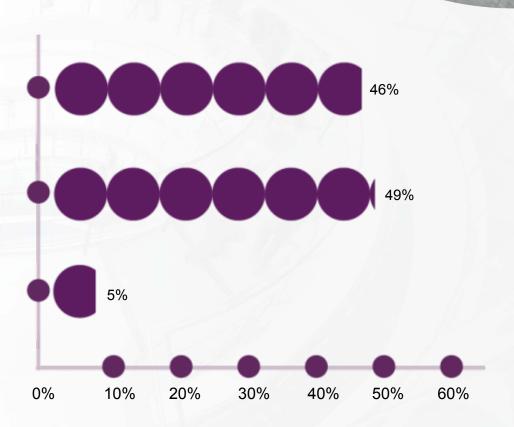


How has the importance of ITIL changed in the past year due to trends like Cloud and Agile?



ITIL remains at the same level of importance

ITIL is becoming less important



68% find ITIL resources very or exceedingly valuable, 0% not at all valuable



Overall, how valuable do you find ITIL resources such as print, Internet, training, accreditation and events, etc?

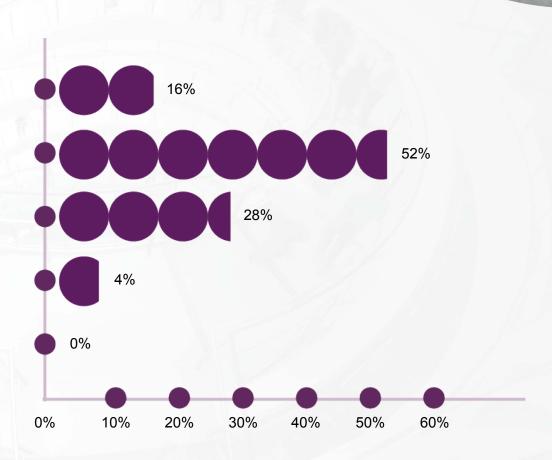
Exceedingly valuable

Very valuable

Somewhat valuable

Marginally valuable

Not at all valuable



ITIL's support for working together in unified processes leads in defining ITIL's value

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How can ITIL benefit me in the workplace?

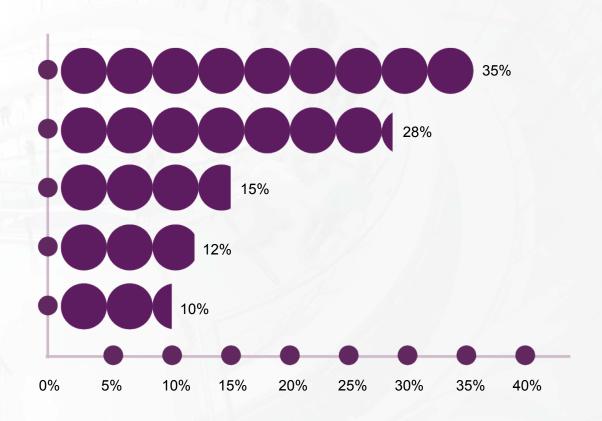
ITIL helps me to work more effectively with others in unified processes

ITIL helps me to do my job with added insight and context

ITIL is good for my career because of management priorities

ITIL has opened the door to a broader community of people like me with similar concerns

ITIL is good for my career for other reasons



Certification and training is deemed to be the most valuable single resource

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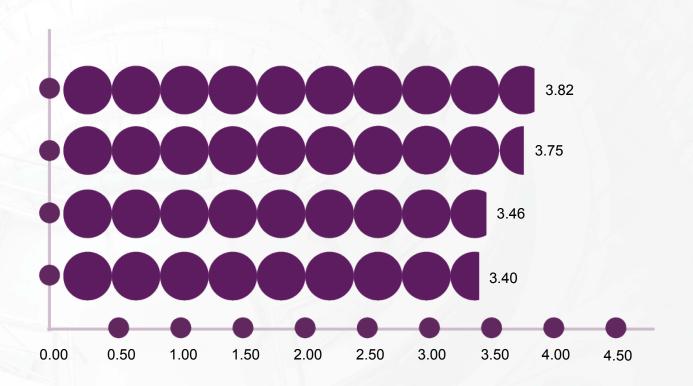
How valuable are each of the following as resources?

ITIL certification and training

ITIL electronic and Internet

ITIL print publications

ITIL-related events



If you haven't taken ITIL training, then why?

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What are the main reasons?

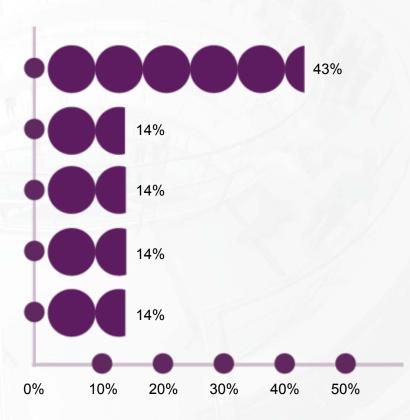
No time, too busy with other things

Too expensive – my company won't pay for it

I don't see the value

I prefer to mix and match from other resources

Other



ITIL helps IT organizations improve service quality and relevance, and enhance productivity

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In your opinion, which of the following are most reflective of the value that your organization has achieved through ITIL?

Improved IT services in terms of quality through the use of proven best-practice processes

Improved productivity

Improved IT services in terms of relevance through the use of proven best-practice processes

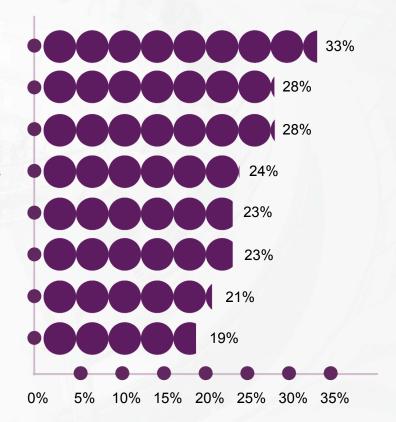
Better overall alignment and adaptability to business needs

Improved value creation for IT overall

Improved customer satisfaction through a more professional approach to service delivery

Improved agility and flexibility in provisioning services

Reduced costs



While reducing costs and agility are least reflective of ITIL-delivered value



In your opinion, which of the following are least reflective of the value that your organization has achieved through ITIL?

Reduced costs

Improved agility and flexibility in provisioning services

Better overall alignment and adaptability to business needs

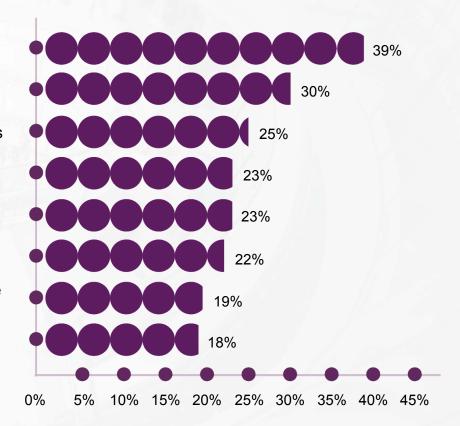
Improved productivity

Improved value creation for IT overall

Improved customer satisfaction through a more professional approach to service delivery

Improved IT services in terms of relevance through the use of proven best-practice processes

Improved IT services in terms of quality through the use of proven best-practice processes



Roughly half see CPD as contributing both to the business AND to the individual



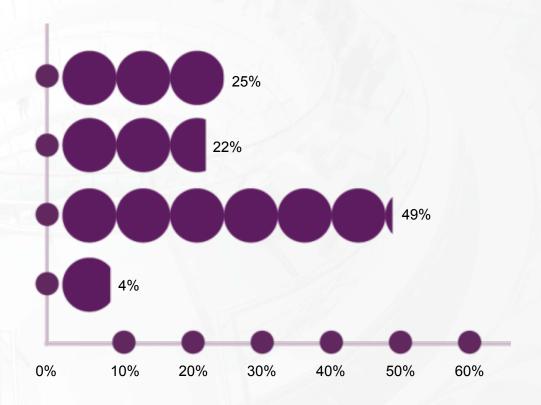
Do you think that continued professional development adds value to the individual and the business for which they work?

Yes, to the individual

Yes, to the business

Yes, to both the individual and the business for which they work

No





Recommendations for Improving ITIL

In 'usefulness to your organization' 'tech-savvy' content tops simplicity

OTIL

ITIL's usefulness to you: if you were to single out one thing to improve each of the following, what would it be?

Better content – more adapted to changing technologies like automation, analytics and Cloud

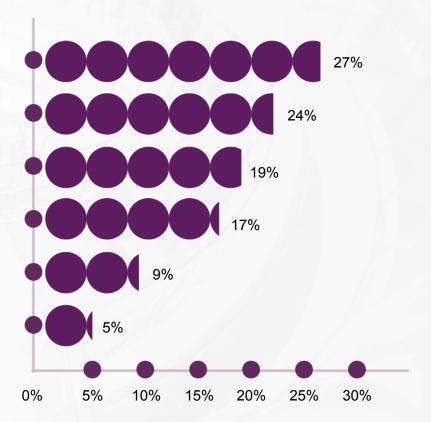
Better content – simpler, more easily understood terms and processes

Better materials overall – in terms of structure and presentation

Broader/better support for training and certification

More industry forums and events

More active use of social media and the Internet



Whereas in 'usefulness to you' simplicity, presentation and support lead



ITIL's usefulness to you: if you were to single out one thing to improve each of the following, what would it be?

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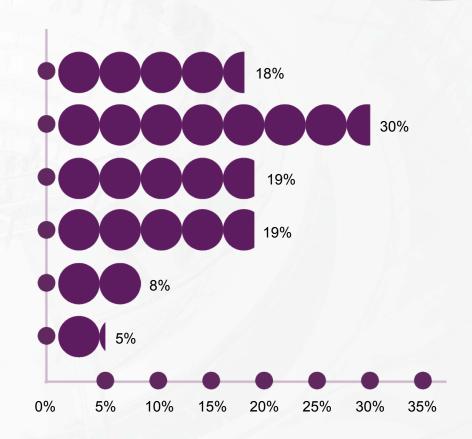
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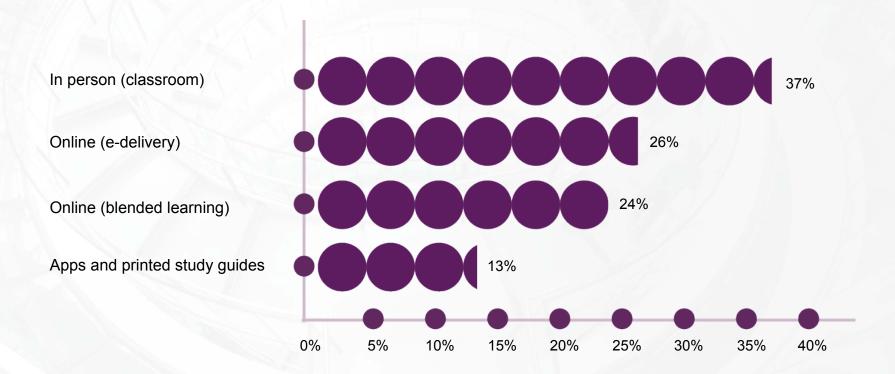
More industry forums and events

More active use of social media and the Internet



61% prefer training either in person, or via blended learning online

How would you best like to be trained in ITIL?

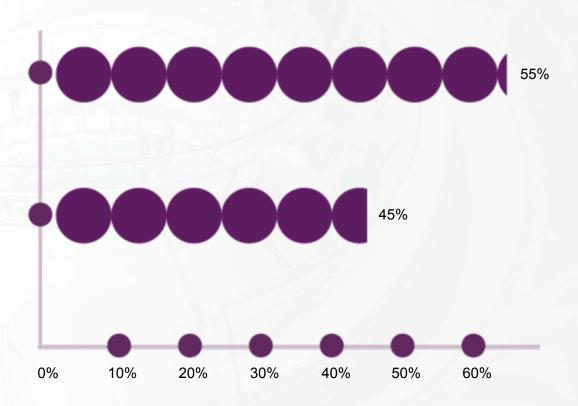


Modular evolution edges out changes to ITIL core

How would you like to see ITIL evolve?

Modular changes surrounding the ITIL core, to minimize disruptions whilst providing additional levels of currency and reliability

Changes in ITIL core – to keep up with current trends



Technology-specific and role-related modules are the most favoured

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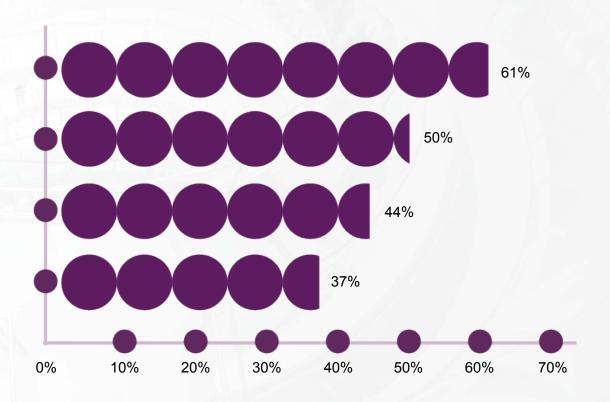
What modules would you find the most useful?

Technology-specific modules

Role and individual modules

Industry sector-specific modules

Career path-specific modules



CPD and innovation in ITIL delivery are preferred as enhancements

In which of these enhancements to ITIL would you be most interested?

Continuous professional development (CPD)

More innovation in the way ITIL is delivered

Better-defined ITIL career paths

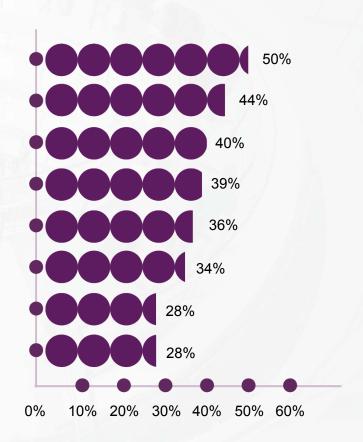
More innovation in the way ITIL is portrayed or/trained

More digitization of content

More localized content

Better links to academia

Community-based web forum





Summary and Conclusions

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ADOPTION

- ITIL 2011 is more than 2/3 more widespread than 2007 or ITIL v2
- ITIL 2011 adopters are generally more progressed in ITIL training, CMDB and BSM adoption, as well as in other aspects

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VALUE

- 68% view ITIL as 'very' or 'critically' valuable, only 4% as marginal and 0% as 'not at all'
- Nearly half see Cloud and Agile as making ITIL MORE important
- The private sector globally is currently more positive about ITIL than the public sector
- Executives (Directors and above) are more positive about ITIL than general IT, most likely because they most strongly own the need for IT transformation
- Most progressed in certification feel ITIL helps them to work more effectively with others in unified processes – at the very heart of what ITIL is/should be about
- Improved service quality, IT productivity and improved service relevance led in achieved ITIL benefits

Resource Perspectives and ITIL Evolution

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- ITIL certification was prized as the #1 resource
- Improved content re. simpler and more easily understood processes was the #1 recommendation for improving ITIL's footprint in the market (followed by content improvements targeted at changing technologies)
 - These were reversed in #1 and #2 positions when it came to improving ITIL's relevance to the organization
 - But resumed position for ITIL's 'usefulness to you'
- Modular changes beat out core changes 55% to 45%

