

Market Share Analysis: IT Operations Management Software, Worldwide, 2011

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The IT operations management software market grew at a high-single-digit rate of 8.7% in 2011 to more than \$18.3 billion. The fastest-growing segments include tools for improved automation, management and performance.

Key Findings

- In 2011, consistent with 2009 and 2010 ranking, the Big Four (IBM, CA Technologies, BMC Software and HP) IT operations management (ITOM) vendors, combined with Microsoft, dominated worldwide market share, with 53.5% of the market. However, as the overall market has increased in size, the combined share of these vendors has decreased by nearly 2% in the past three years.
- Of the largest 20 vendors, the fastest-growing in 2011 were ServiceNow, Citrix Systems and SolarWinds. Citrix claimed the most prevalent change in rank, specifically driven by increased spending on virtualization desktop and management software.
- The fastest-growing segments in 2011 were workload automation and IT process automation (distributed), configuration management, availability and performance management (distributed), and network management (distributed), indicating that better utilization of assets is a primary goal of many IT departments.
- North America, Western Europe, and mature Asia/Pacific countries continue as leading consumers of ITOM software in terms of dollars spent, accounting for 88% of the ITOM market. All regions experienced vigorous growth, with emerging Asia/Pacific, Greater China, North America and Latin America admirably outpacing the industry average.
- The size of the ITOM market was increased by approximately \$1.2 billion in 2011 and historically for 2010 and 2009 to include estimated revenue for Fujitsu and NEC, as well as to account for a number of cloud management platform (CMP) vendors added to "other vendors" in the "other ITOM" category.

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Market Share Data

Table 1 provides 2011 market share data for the top ITOM software vendors; Table 2 includes regional split and growth; and Table 3 displays split and growth by ITOM subcategory.

Table 1. ITOM Software Vendors, Total Software Revenue, Worldwide, 2009-2011 (Millions of Dollars)

Rank 2010	Rank 2010	Rank Change	Vendor	2009	2010	2011	Share (%) 2009	Share (%) 2010	Share (%) 2011	Growth (%) 2010	Growth (%) 2011
1	1	0	IBM	3,031.3	3,126.5	3,256.4	19.3	18.6	17.8	3.1	4.2
2	2	0	CA Technologies	1,855.0	2,064.0	2,258.1	11.8	12.3	12.3	11.3	9.4
3	3	0	BMC Software	1,611.9	1,693.5	1,833.0	10.3	10.1	10.0	5.1	8.2
4	4	0	Microsoft	1,026.6	1,143.5	1,271.9	6.5	6.8	6.9	11.4	11.2
5	5	0	HP	1,176.7	1,141.7	1,185.4	7.5	6.8	6.5	-3.0	3.8
10	6	+4	Citrix Systems	179.0	403.9	619.3	1.1	2.4	3.4	125.7	53.3
6	7	-1	Oracle	474.9	559.7	562.5	3.0	3.3	3.1	17.9	0.5
7	8	-1	NEC	493.6	504.7	549.9	3.1	3.0	3.0	2.3	9.0
9	9	0	Fujitsu	425.7	463.4	492.5	2.7	2.8	2.7	8.9	6.3
8	10	-2	Quest	444.9	465.2	468.1	2.8	2.8	2.6	4.5	0.6
11	11	0	VMware	192.4	330.2	391.1	1.2	2.0	2.1	71.6	18.4
12	12	0	Compuware	197.8	265.9	305.0	1.3	1.6	1.7	34.4	14.7
12	13	-1	Symantec	292.7	283.3	277.6	1.9	1.7	1.5	-3.2	-2.0
14	14	0	NetScout Systems	227.3	254.5	269.0	1.4	1.5	1.5	12.0	5.7
15	15	0	Hitachi	201.3	234.5	265.7	1.3	1.4	1.5	16.5	13.3

Rank 2010	Rank 2010	Rank Change	Vendor	2009	2010	2011	Share (%) 2009	Share (%) 2010	Share (%) 2011	Growth (%) 2010	Growth (%) 2011
16	16	0	SolarWinds	116.4	141.0	185.0	0.7	0.8	1.0	21.1	31.2
18	17	+1	Opnet	92.7	118.7	145.2	0.6	0.7	0.8	28.0	22.3
17	18	-1	EMC	137.7	131.7	132.8	0.9	0.8	0.7	-4.4	0.8
19	19	0	ServiceNow	28.0	62.0	130.0	0.2	0.4	0.7	121.4	109.7
			Others	3,490.2	3,457.4	3,704.4	22.2	20.5	20.2	-0.9	7.1
			Total	15,696.0	16,845.4	18,302.9	100.0	100.0	100.0	7.3	8.7

Source: Gartner (May 2012)

Table 2. ITOM Software Spending and Growth by Region, Total Software Revenue, Worldwide, 2009-2011
(Millions of Dollars)

Rank 2011	Region	2009	2010	2011	Growth (%) 2011
1	North America	7,191.7	7,790.7	8,615.1	10.6
2	Western Europe	4,292.0	4,482.2	4,753.8	6.1
3	Mature Asia/Pacific	2,343.1	2,495.4	2,664.7	6.8
4	Latin America	435.9	480.6	534.4	11.2
5	Greater China	395.6	455.2	515.6	13.3
6	Eastern Europe	359.2	386.6	404.3	4.6
7	Emerging Asia/Pacific	215.3	246.4	283.5	15.0
8	Middle East and North Africa	199.1	222.3	234.2	5.3
9	Eurasia	164.1	175.0	179.6	2.7
10	Sub-Saharan Africa	99.8	111.0	117.6	5.9
	Total	15,696.0	16,845.4	18,302.9	8.7

Source: Gartner (May 2012)

Table 3. ITOM Software Spending and Growth by Subsegment, Total Software Revenue, Worldwide, 2009-2011 (Millions of Dollars)

	2009	2010	2011	Growth (%) 2010	Growth (%) 2011
Application Performance Monitoring (Distributed)	1,618.6	1,744.2	1,901.2	7.8	9.0
Application Performance Monitoring (Mainframe)	241.3	220.1	240.5	-8.8	9.3
Asset Management	438.8	452.5	445.4	3.1	-1.6
Availability and Performance Management (Distributed)	2,366.2	2,566.3	2,817.7	8.5	9.8
Availability and Performance Management (Mainframe)	1,129.8	1,114.8	1,145.3	-1.3	2.7
Configuration Management	3,182.5	3,571.9	4,047.6	12.2	13.3
DBMS Management (Distributed)	922.9	1,012.5	1,060.6	9.7	4.8
DBMS Management (Mainframe)	821.4	830.1	897.9	1.1	8.2
IT Services Desk and Help Desk	1,258.9	1,325.6	1,424.0	5.3	7.4
Network Management (Distributed)	1,488.3	1,641.1	1,799.7	10.3	9.7
Network Management (Mainframe)	298.6	251.1	212.6	-15.9	-15.3
Other ITOM	572.8	703.9	734.6	22.9	4.4
Workload Automation and IT Process Automation (Distributed)	859.0	909.1	1,068.9	5.8	17.6
Workload Automation and IT Process Automation (Mainframe)	496.9	502.1	506.9	1.0	1.0
Total	15,696.0	16,845.4	18,302.9	7.3	8.7

DBMS = database management system

Source: Gartner (May 2012)

Analysis

Overall Market Performance Analysis

A complement to "Market Share: All Software Markets, Worldwide, 2011," this report analyzes 2011 revenue growth rates, as well as vendor and software segment market share, in the worldwide ITOM software market. The ITOM market includes 14 segments that comprise application performance monitoring, asset management, availability and performance, configuration management, DBMS management, IT service desk and help desk, workload automation and IT process automation, network management, and other ITOM. Most subsegments are categorized by mainframe and distributed products.

Gartner's analysis of the ITOM market for 2011 vendor software revenue (as shown in Table 1) demonstrates strong growth for the second consecutive year after a sharp decline in 2009 despite (or perhaps because of) slow economic growth, tight IT budgets, and merger and acquisition (M&A) activity. Turbulent IT markets and a stagnant economy drive changes in IT, as well as in IT delivery models. Key vendors continued to expand product portfolios, buy companies where appropriate and expand their reach into emerging markets. 2011 represented continued resiliency; the total ITOM market expanded both in terms of revenue dollars and worldwide markets.

The market for ITOM software at the regional level remains as it was in previous years, with North America, Western Europe and mature Asia/Pacific the prime consumers. Nearly 90% of this market is concentrated in developed markets, suggesting that, on the IT adoption curve, ITOM is a relatively late technology in terms of adoption by comparatively sophisticated "Type A" companies. Nonetheless, as demonstrated in Table 2, some regions did not experience the high-double-digit growth of Greater China and emerging Asia/Pacific, North America, and Latin America — the biggest laggards were Eurasia and Eastern Europe, with 2.7% and 4.6% growth, respectively. All other areas saw high-single to mid-double-digit growth.

Across the ITOM segments, growth was up nearly 9% from 2010, with product segments workload automation and IT process automation (distributed), configuration management, and availability and performance management (distributed) the main contributors. Network management (mainframe) and asset management were the only subcategories that experienced a decline in this market, due in part to the bundling of stand-alone tools into product suites that better target end-user requirements.

Many organizations still lack the appropriate tools to manage and optimize assets. Because the economy remained somewhat weak, especially in the second half of 2011, organizations operating with tighter budgets required better capabilities for using resources. Vendors such as VMware and Citrix managed high growth rates on the back of virtualization technologies. Opnet and SolarWinds also experienced strong company performance in the areas of application performance monitoring and network management. ServiceNow had the highest growth by far, due in part to the popularity of software as a service (SaaS) as a licensing model for IT organizations. In general, for the same reasons, economic recovery will continue to drive new spending in this software market.

Pushing the growth of the ITOM market is continued investment in virtualization (desktop) management tools and promising cloud computing technologies, which are the key drivers behind

the growth in the configuration management and availability and performance segments. Continued strong growth in network management (distributed) and workload automation and IT process automation (distributed) demonstrates that IT organizations are still investing heavily in more traditional technology and process improvement initiatives. The evolution of IT services desk tools into IT services support management tools has also contributed to growth in the market as vendors are furthering existing foundational technologies with the addition of features such as mobility, collaboration, IT services visualization, and more advanced analytics and reporting.

Mainframe markets are mixed. Most segments declined or remained flat in 2011, with the exception of DBMS management (mainframe) and application performance monitoring (mainframe).

The ITOM market, from a competitive perspective, is still dominated by the Big Four and Microsoft. Microsoft obtains most of its revenue for ITOM through Client Access Licenses, and unlike the Big Four, it does not engage in heterogeneous environments. Citrix, Fujitsu, NEC, Oracle, Quest and VMware are large, multiproduct vendors that make up the category of top 10 ITOM vendors with less than \$1 billion in revenue. The remaining smaller vendors tend to specialize in one or two ITOM segments, although even smaller vendors are pursuing multiple-segment offerings to take advantage of client cross-selling and larger suite purchases.

Overall, the 2011 ITOM market share did not offer many surprises since the competitive landscape at the top end did not change between 2011 and 2010. However, the overall ITOM market size has been increased by approximately \$1 billion (for all three years included in the 2011 market share report) to accommodate estimated revenue for NEC and Fujitsu, as well as for a number of CMP vendors. Gartner believes that, although primary users of NEC and Fujitsu software reside in Japan and parts of Asia/Pacific, it is important to include this revenue to most accurately represent the size of the ITOM market. As a result of the overall increase in market size, a shift in market rank percentages occurred.

Top Vendors Analyzed

The top five ITOM vendors, ranked by revenue, grew 7% and accounted for nearly 54% share, or \$9.8 billion, of the overall ITOM software market in terms of revenue in 2011. The other more than 30 players represented in this study accounted for the remaining 46% share of revenue and saw similar combined revenue growth in 2011.

Our top 20 ranking for 2011 based on revenue shows that the top five vendors from the 2010 rankings retained their positions in 2011. Among the top 20 vendors, in terms of revenue growth, ServiceNow (with SaaS or on-premises subscription offerings) led the group, followed by Citrix, SolarWinds and Opnet, with more than 20% revenue growth in 2011.

Without major acquisitions, the top three vendors will not easily change positions — with \$1 billion spread among the top three, it would take six to 10 years to organically grow that much revenue. The vendors to watch in terms of dynamics will be those with revenue ranging from \$100 million to \$500 million. Strategies on business models (SaaS, subscription and so forth), as well as partnering programs to obtain reach into regions outside North America, Western Europe and mature Asia/Pacific, will be key to growth.

In the following section, we provide a brief analysis of the performance of the top five ITOM software vendors and a few others we believe are notable for the strong growth achieved in 2011.

IBM Retains No. 1 ITOM Leadership Position for More Than a Decade

Although IBM's ITOM revenue in 2011 grew below the market average, IBM continues to maintain the No. 1 position by nearly a billion dollars over the closest competitor. IBM competes in all 14 ITOM segments and claims one of the top three leadership positions in terms of revenue in most subcategories. IBM is the clear market share leader in the combined mainframe management segments, which accounted for 28% of its \$3.3 billion in total ITOM revenue. Although IBM experienced a 4.1% decline in 2011 revenue compared with 2010 for the five mainframe segments, its mainframe management products continue to account for nearly \$1 billion of the vendor's ITOM revenue.

IBM's strategy is shifting the market's perception from selling an array of IT products and services toward the development and implementation of global IT and business solutions, with an emphasis on high-growth and emerging geographic markets. IBM continues to develop a global operating model and emphasizes vertical-industry solutions leveraging IBM hardware, software and services to deliver increasingly higher margins; a sound strategy that allows the vendor to remain No. 1 in ITOM.

Much of IBM's value proposition for ITOM continues to be products that offer an end-to-end approach to IT infrastructure and operations management for midsize to large enterprises. In 2011, the vendor grew organically but was uncharacteristically quiet in terms of M&As in the ITOM market. IBM acquired security vendor Q1 Labs and grid computing vendor Platform Computing in 2011.

CA Technologies Maintains Solid Above-Market-Average Growth for Third Year

CA Technologies' (hereinafter referred to as CA) ITOM product portfolio is the largest of the vendor's software market segments. It leads in the application performance monitoring (distributed), DBMS management (mainframe), workload automation and IT process automation (mainframe), and other ITOM categories. CA offers products in all 14 ITOM market segments and positions itself as being a hardware- and enterprise-software-agnostic ITOM vendor for large and midsize enterprises.

In 2011, CA's ITOM market share position was again second only to IBM's. Although all vendors faced economic uncertainty, only CA achieved above-average growth in 2011 for the third year in a row, with the highest rate among the Big Four (BMC, HP and IBM). Only Microsoft, with significantly limited market focus (being active in three ITOM subcategories), outpaced CA's growth. CA spread its growth across all 14 segments with application performance monitoring, asset and network management experiencing the strongest growth (more than 20%), while only other ITOM and workload automation and IT process automation (mainframe) experienced slight declines. Forty percent of CA's revenue is associated with five mainframe subcategories, with a combined growth rate of 8.4%, ensuring that its mainframe products remain a strong contributor to overall profitability. Coupled with 10% growth of distributed products, this demonstrates CA's ability to drive consistent execution across its entire portfolio — a considerably positive move away from its historically uneven reputation.

CA demonstrates a sensible strategy as it continues to focus on high-growth markets in areas such as automation, cloud computing and SaaS, while divesting itself from those businesses that it deems no longer strategic. Emerging assets, such as AppLogic and Nimsoft, have already demonstrated market success, while the vendor ensures that its mainframe products remain a strong contributor to its overall profitability. CA has differentiated itself by looking at the mainframe not merely as a money machine, but as a platform for innovation consistent with the demographic changes occurring in terms of its enterprise support. Acquisitions are likely to continue to play a role in rounding out the vendor's product portfolio, but its success will hinge increasingly on the execution of its sales channels, including developing a sustained presence in emerging regions, such as Asia/Pacific and Latin America, where past efforts have been inconsistent.

2011 was an uncharacteristically slow M&A year for CA, with no major acquisition in the ITOM market, although there were smaller acquisitions of application monitoring vendor WatchMouse, network management vendor Torokina Networks, and ITKO to complement its ITOM portfolio with service virtualization for application development teams.

BMC Software Continues Strong Growth in Core Flagship Products

BMC maintained the third largest ITOM vendor position in 2011, with \$1.8 billion in revenue and 10% market share. BMC's revenue grew 8.2% compared with 2010, which is in line with the 8.7% average for the overall ITOM market. BMC has an expansive portfolio, with products across the 14 ITOM market segments and a focus on broad management functionality across a heterogeneous environment.

BMC has maintained a strong and consistent strategy in the past several years. Its Business Service Management platform remains relevant in both the virtualized and emerging cloud environments. BMC has created broad market awareness and specific client messaging with its "value paths" marketing. Each path considers a user's specific scenario that addresses business problems or challenges, and it provides entry points to the BMC portfolio at a variety of maturity levels. BMC's branding and solution marketing resonates with clients because it provides a business-focused approach that enables BMC to be responsive to existing and changing client requirements.

Despite IBM's aggressive, pricing-led efforts to capture BMC's mainframe management software installed base, BMC continues to demonstrate impressive growth; 31% of BMC's total ITOM revenue in 2011 came from the five mainframe segments, which BMC managed to grow 6.4%. While inertia remains a big factor in the mainframe market, BMC has proved better able to withstand IBM more than other players, due in part to a commitment to functional currency and a strong acquisition strategy.

BMC continues to acquire smaller ITOM vendors to fill in gaps. It acquired application performance monitoring vendor Coradiant, mobility vendor Aeroprise, and application release management vendor StreamStep in 2011.

Microsoft — A Nontraditional ITOM Vendor Moves "Up the Stack"

In 2011, Microsoft's above-market-average growth widened the gap with HP beyond the neck-and-neck results of 2010. The vendor solidly claimed the fourth rank, with \$1.3 billion, reflecting 11.2% year-over-year growth.

Unlike the other large ITOM vendors, Microsoft has revenue concentrated in three ITOM market segments, with the vast majority of revenue in configuration management (where it is the clear market leader) and availability and performance management (distributed) (where it is third in market share). The vendor also has marginal revenue in the other ITOM segment. Overall growth in these areas is attributed to growing demand for virtualization and cloud management tools. Although Microsoft is not a traditional ITOM vendor, it is moving up the stack with the tools necessary to manage the performance of the Microsoft platform. Unlike BMC, CA, HP and IBM, Microsoft does not have a broad scope of management functionality within ITOM and concentrates on products based on its Windows operating system and Microsoft applications.

Microsoft continued to make acquisitions in 2011 (notably Skype) but acquired little that will add revenue to the ITOM market.

HP Low but Steady Growth Reverses Last Year's Decline

HP's low but positive growth in 2011 reversed a negative growth rate in 2010. Although the vendor's revenue grew to \$1.2 billion, the growth rate was unable to stop the widening gap between HP and the fourth largest market share ITOM vendor, placing HP solidly into fifth place. HP is targeting services, cloud computing and analytics to expand its historical focus on devices, infrastructure, security and management. However, this transformation has been challenging for HP to execute. With a focus on broad ITOM functionality in a heterogeneous environment, HP suffered from a management transition and loss of sales focus on ITOM in 2011.

Unlike BMC, CA and IBM, which have products in all 14 ITOM market segments, HP has products in only seven ITOM market segments. The vendor doesn't lead a particular segment but is No. 2 or 3 in several. The configuration management market was especially hard for HP, whose revenue decreased 13.0% in 2011, while the average growth in this market segment was 13.3%.

HP has many strong ITOM products but has struggled to keep up with its main competitors and the overall growth of the market. The vendor has lost focus on the ITOM market, and Gartner clients report that HP sales representatives are often absent from ITOM competitive bids. HP has also been slow to respond to the trend of offering ITOM tools utilizing the SaaS pricing and delivery model. HP continues to refine its messaging as a strategic business partner to the IT organization but struggles with the historic perception that HP products are complex, difficult to implement and costly to integrate.

HP continued to make acquisitions in 2011 (notably Autonomy) but acquired little that will add revenue to the ITOM market.

Other Notable Vendors

While the Big Four and Microsoft combined continued to grow revenue at just below the market average in 2011, the overall ITOM market continued to grow. And while the ITOM market share of the top five combined lost nearly 2%, other players made significant gains in terms of growth rates and in acquiring a larger share of the total.

VMware and Citrix continue to grow significantly in the ITOM market, especially in the configuration market. This is due to the increasing use of virtualization and virtualization management, of which configuration management is a large part. Citrix also benefits from its desktop virtualization products. Although growth in 2011 was high for Citrix (53.3%) and VMware (18.4%), both vendors were significantly down from their 2010 growth of 125.7% and 71.6%, respectively, which is evident that the virtualization market continues to mature.

Opnet and SolarWinds also had high growth rates (22.3% and 31.2%, respectively), thanks to strong performance in application performance monitoring and network management, which were strong-performing ITOM market segments in 2011.

ServiceNow had the highest growth by far (109.7%) due to the popularity of SaaS as a licensing model for IT organizations. ServiceNow had \$130 million in total revenue in 2011; in April 2011, it filed a Form S-1 with the Securities and Exchange Commission to go public.

Mergers and Acquisitions

In terms of M&As, 2011 was an active year but was absent of any large acquisitions in the ITOM market (see Table 4).

Table 4. Major M&A Activity in the ITOM Software Market, 2011

Acquiring Company	Company Acquired	Date of Acquisition or Deal Closure
IBM	Q1 Labs	October
	Platform Computing	October
CA	WatchMouse	August
	Torokina Networks	January
	ITKO	August
BMC	Coradiant	April
	Aeroprise	July
	StreamStep	October
VMware	Digital Fuel	June

Source: Gartner (May 2012)

Vendors Covered

Named vendors covered in this report are ASG Software, BMC Software, CA Technologies, Citrix Systems, Compuware, EMC, FrontRange, Fujitsu, Hitachi, HP, IBM, LANDesk, Microsoft, NEC, NetIQ, NetScout Systems, Novell, Numara Software, Opnet, Oracle, Quest, ServiceNow, SolarWinds, Symantec, Tripwire, UC4 and VMware.

The ITOM software vendors that make up "other vendors" include but are not limited to those listed in Table 5.

Table 5. "Other Vendors" Included in the ITOM Software Market, 2011

Vendor Name	Vendor Name	Vendor Name	Vendor Name
Adaptive Computing	Fluke Networks	NetApp	ServiceMesh
Advanced Systems Concept	Fortisphere	Netbrain	ServicePilot
Akorri	Help Systems	Netcordia	SevOne
AlarmPoint	Honico	NetEvidence	Shunra
AppDynamics	Hornbill Systems	Netuitive	SL
Appnomic	Hyperformix	Network Instruments	SMA
Arcturus	Idera	New Relic	Splunk
Argent	iET Solutions	newScale	Stonebranch
Aternity	Inetco	Nextthink	Stratevia
Axios Systems	InfoVista	Nicus Software	Sumerian Technology
Bay Dynamics	Integrated Research	Nolio	Sumologic
BlueStripe	Integrien	Oblicore	Surgient
CFEngine	Intelliden	OmniTI	Sysaid
Cherwell	Ipswitch	Opnet	Systar
CiRBA	ITRS	Opscode	Tango/04
Cisco	iWave	Opsview	TeamQuest

Vendor Name	Vendor Name	Vendor Name	Vendor Name
Cloupia	Kace	OpTier	TechExcel
Confio	Kaseya	Orsyp	Tek-Tools
Correlsense	Keynote	Paglo	Trometric
DBI	Knoa	Papertrail	Univa
Dell Kace	Kratos Networks	Platform Computing	Uptime Software
Digital Fuel	LiveTime	PMG	UrbanCode
DynamicOps	LogicMonitor	Precise	Varalogix
dynaTrace	Lucierna	PuppetLabs	Veeam
EasyVista	ManageEngine (Zoho)	Racemi	VKernel
eG Innovations	ManagelQ	Redgate	VMTurbo
Elastra	ManageSoft	Redwood Software	Voipfuture
eMite	Matrix42	Reflex Systems	WisageTech
Enigmatic	Metron	RightScale	Workmeter
Entuity	MidVision	SAS	XebiaLabs
Eucalyptus Systems	Monitor 24-7	Scalable Systems	Zenoss
Evolgen	Nastel Technologies	ScienceLogic	Zyrion

Vendor Name	Vendor Name	Vendor Name	Vendor Name
ExtraHop	Neptuny	Serena	

Source: Gartner (May 2012)

Recommended Reading

Some documents may not be available as part of your current Gartner subscription.

"Market Share: All Software Markets, Worldwide, 2011"

"Forecast: Enterprise Software Markets, Worldwide, 2009-2016, 1Q12 Update"

"Market Definitions: Software"

"Forecast Analysis: Enterprise Infrastructure Software, 2011-2016, 1Q12 Update"

"Cool Vendors in Application Performance Monitoring, 2012"

"APM Innovators: Driving APM Technology and Delivery Evolution"

"BMC Software Acquires Numara Software to Increase Presence in Small or Midsize Business Market"

"Cool Vendors in IT Operations Management, 2012"

"Agenda for Enterprise Infrastructure Software, 2012"

Acronym Key and Glossary Terms

CMP	cloud management platform
DBMS	database management system
ITOM	IT operations management
M&A	merger and acquisition
SaaS	software as a service

Evidence

The data for this report comes from Gartner's annual survey of global ITOM software vendors. The survey involved a combination of primary and secondary research and was conducted between December 2011 and March 2012. The primary survey was also supplemented with secondary research on companies using company websites, financial filings and reports, press releases, email, and telephone interviews.

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