

TRANSFORMING SMEs IN THE DANUBE REGION

RESULTS OF THE PROJECT ITSM4SME



ITSM4SME CONSORTIUM

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PROJECT CONSORTIUM

FOREWORD

Small and medium-sized enterprises (SMEs) play a fundamental role in the economic system of the European Union: SMEs represent over 99 percent of all companies and provide two-thirds of the jobs in the private sector. Their innovativeness and economic success have significant influence on growth, jobs and prosperity in Europe.

Information technologies are regarded as key drivers of innovation in small and medium-sized enterprises (SME). Modern information technologies (IT) offer SMEs today many opportunities to improve their competitiveness and market position. Thus, business processes can be designed efficiently, open up new market segments and strengthen the innovation capacity significantly. However, many SMEs still have difficulties in utilizing these new technologies efficiently in order to foster process and product innovation. This is partly due to the fact that many SMEs don't use IT Service Management and waste resources in running basic IT-functions like the maintenance of printers, software or servers.

Information Technology Service Management (ITSM) is a discipline for managing IT systems centred on the customer's perspective of IT's contribution to the business. Thus, by strengthening the performance of SME's IT departments, ITSM enables process innovation (e.g. eProcurement) and product innovations (e.g. client services) can be promoted. The EU-funded project "IT Service Management for small and medium-sized Enterprises of the Danube Region" (ITSM4SME) aims to make SMEs in the Danube Region aware of the potential of ITSM, to inspire SMEs about the use of information technology and to allow IT-enabled innovations. The aims of the project have been achieved inter alia through a simplified method for IT service management for small IT organisations, practical case studies, a "do-it-yourself" service management modelling tool, an eLearning portal and by training more than 300 participants from SMEs in pilot training courses in Bulgaria, Romania and Slovenia.

This result booklet will take you on an almost 24-month journey through the project ITSM4SME. Firstly, you will get to know the background of the project, the project itself and the three regions. In the middle part you will learn more about the topic of IT Service Management and later on you will get an insight of all the details of the specific ITSM4SME approach. An interview and a case study will provide you with some insights into our practical experience. Last but not least, we will talk about the lessons we learned and how the results of the project could be used after the project.

We wish you a pleasant reading!

June 2015 - The ITSM4SME Consortium

INTRODUCTION



JANOS K. - GENERAL MANAGER
DC – Cable TV & Internet provider

For a small company acting in the countryside an interesting training is like oxygen and we struggle to participate. The ITSM methodology is already helping us because we are in a change process and we are dealing with professional and cultural challenges. We need to clarify some issues about responsibilities, and modelling is not only a way to design structures, but also to communicate and reinforce control. We will probably be able to go faster and better than before.



IOAN C. - GENERAL MANAGER
EOZ – IT solutions provider

First of all, I have to admit that I knew a lot about the topic of ITSM, but the way that the content of training material is compiled seems really adapted to the needs of SMEs regarding IT. As IT solution and service provider we need to deal with different types of projects, from small to big, from independent with partners from different industries. Therefore, we find the combination of service approach with the modelling part the most useful for augmenting the value of our solutions. The "cookbook" approach is more than an intriguing word for advertising; it is a way that we could improve internal processes and external customer relationships. We will also communicate better internally in order to become more reliable externally.

ITSM4SME AND THE NEED FOR INNOVATION

Dieter Hertweck

"Innovation" – a fuzzy term and still the dominating concept of the European Union's economic world. Let's start with some thoughts that explain what ITSM4SME has to do with it.

Innovation – thinking in new ways and realizing new thoughts in research or on the market – has become the key process of economic activity in the European Union.

**Being the most competitive and most dynamic knowledge-based economy in the world!
Growing in a smart, sustainable and inclusive way!**

Those are the ambitious but by far not unrealistic visions described by the European Council in Lisbon in the year 2000, which have then been further developed into the Europe 2020 jobs and growth strategy. Innovation might start with a brilliant idea, but it is much more than that: successful and intelligent development needs a productive and encouraging environment. Building such an environment might start with a strategy: formulating goals and processes on the management level of an enterprise or describing policy recommendations on high administrative levels are for sure important cornerstones. But becoming more competitive is finally people's business. Therefore, the bases of a successful knowledge economy are its knowledge workers: employees who have the capability of thinking as an entrepreneur, who change old ways of thinking into new ideas in everyday work. Innovation needs an organizational structure.

Knowledge workers are the designer of such a structure. They have various options to start creating their own innovation environment: they can select more advanced ways of production, they can choose the best location for their business, and they can setup high productive teams and departmental structures, or try to generate short and fast ways of communication with external partners – and so on. Information Technology (IT) of an enterprise is the key element ITSM4SME deals with, when it comes to innovation.

Why is IT so important? Because modern IT offers enterprises manifold chances to enhance their competitiveness and their position on the market. Thanks to IT, business processes can be designed in a totally new and efficient way. But 99.8 percent of all newly founded small and medium-sized enterprises (SMEs), don't take serious notice of the innovation potential given to them by IT.

IT is rather seen as too complex or too technical. Establishing a management structure to govern IT is often perceived as a bureaucratic burden, rather than an opportunity to increase profitability by most of European SMEs. Changing this view is the aim of the ITSM4SME project implemented in EU's Leonardo Lifelong Learning Program is to transfer know-how about IT service management enabled innovations into the IT departments and functions of small and medium sized enterprises.

Like mentioned before, enhancing competitiveness is people's business. The project partners of ITSM4SME teach the already pre-developed and successfully tested INNOTRAIN IT approach to transfer good IT practices for innovations into innovation scenarios of SME.

The following report gives you an overview of how ITSM4SME has implemented this concept and what are the experiences that both the project partners and the trainees within ITSM4SMEs made. This report outlines the innovation potential of the trainings to the trained SME in Bulgaria, Romania and Slovenia.

ITSM IN SMALL ENTERPRISES: A SCIENTIFIC REVIEW

Philipp Küller

Micro, small and medium-sized enterprises (SME) play an important role in today's society and economy, since they represent 99% of all enterprises in the European Union (EU). For the former European Commissioner for Enterprise and Industry Günter Verheugen, SMEs "are the engine of the European economy. They are an essential source of jobs, create entrepreneurial

spirit and innovation in the EU and are thus crucial for fostering competitiveness and employment." [1]. Over 86 million jobs, which means two-thirds of all jobs in the EU, depend on the entrepreneurship and innovation capabilities of these enterprises.

Enterprise Category	Headcount Annual Work Unit	Annual Turnover	OR	Annual Balance Sheet Total
Medium-Sized	< 250	≤ EUR 50 Millionen	OR	≤ EUR 43 Millionen
Small	< 50	≤ EUR 10 Millionen	OR	≤ EUR 10 Millionen
Micro	< 10	≤ EUR 2 Millionen	OR	≤ EUR 2 Millionen

Figure 1 - How the EU defines SMEs

Managing today’s complexity of IT and business simultaneously is a tremendously hard job – in particular for SMEs. Proprietors and managers of SMEs often don’t know how IT contributes to their business and occupy themselves with managing basic IT functions, which waste financial and human resources as well as limit their capacity for process and product innovation. In the early 1990’s, the OECD wrote a report about SMEs and their relation to technology and competitiveness. It was recognised that IT would have a high influence on SMEs development, but the accompanying specific issues and opportunities were not clear [2]. “Although IT enabled SMEs were identified as a driver for our economy” [3], as indicated by Levy and Powell, research in this area remained scarce and difficult issues between IT and SMEs continue to persist until today.

However, ITSM has the potential to provide an opportunity for SMEs to solve these problems, as long as the suggested methods and tools are simple, clearly applicable and less resource consuming, otherwise ITSM will fail to produce the improvements in SMEs performance that are needed for their continuing success. But what in fact is IT Service Management?

Rob Addy describes IT Service Management as “the planned and controlled utilization of IT assets (including systems, infrastructure and tools), people and processes to support the operational needs of the business as efficiently as possible whilst ensuring that the organization has the ability to quickly and effectively react to unplanned events, changing circumstances and new business requirements as well as continuously evaluating its processes and performance in order to identify and implement opportunities for improvement” [4].

IT Governance and IT Service Management have inherited much from Corporate Governance and operational IT Management but have then developed into a discrete discipline with internationally recognized frameworks and standards such as COBIT, ITIL or ISO 20 000. Some researchers, including Peterson and van Grembergen, suggest therefore that IT Governance should be implemented in a framework of structures, processes, and relational mechanisms in order to be effective [5].

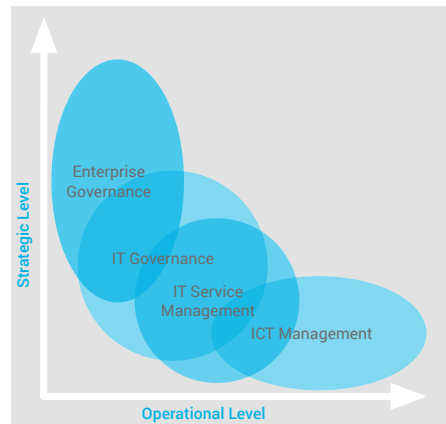


Figure 2 - Governance and Management

According to other researchers, like Luftman and Kempaiha IT Governance and its related frameworks and methods are enablers of strategic IT alignment [6]. Their goal is to enable the transition from a strategic to an operational level without losing the focus on business objectives. Van Grembergen and De Haes also emphasize that the link between IT and the business is the crucial factor in IT Governance [7].

This is not only applicable in large organisations but also in SMEs. Even though small enterprises might not have a designated IT department it is crucial that any person who is in charge of IT decisions (e.g. the owner of the business) is aware that every single IT investment and IT service needs to be aligned to his business strategy even when the enterprise strategy is rather simple. According to Porter, any single action in a business needs to add value otherwise the action must not be taken [8]. Di Renzo and Feltus, as well as Fink, argue that low value adding or non-value adding activities such as over-expenditure on IT or IT service shortfalls due to false economies are more important for an SME's success or failure since their financial and human resources are usually very limited [9], [10]. Therefore, in accordance to Duffy, Luftmann, Weill and Broadbent, the orchestration of IT functions and non-IT functions within an SME should be made clear to decision makers in order to gain leverage and free resources for innovation and competitive advantage [11]–[13].

Scientific publications about IT Service Management and IT Governance can be found numerous in the last decades, but in relation to SMEs, the publications are very scarce and hard to find. There is little evidence that basic IT problems that trouble SMEs have been resolved, which confirms our contention that new approaches are needed.

In 2003, Di Renzo and Feltus published a paper on how very small enterprises, which can be considered as a subset of SMEs, can assess their processes with the NAOMI approach [9]. The NAOMI model is business value driven and designed in five process areas. The processes themselves are based on a combined approach of ISO/IEC 15504 and ITIL. Their approach has a strong focus on process alignment and maturity levels and provided a rather simple method to assess related processes. However, their reliance on ITL, which is a relatively complex framework, often makes NAOMI too complex for SMEs to manage their operations. In 2005, a consortium of the Linux Solutions Group (LiSoG – today known as Open Source Business Alliance), Salzburg University and different business partners worked on the Open-ITIL project [14]. The project, as described by the consortium, aimed to provide SMEs with knowledge, processes and descriptions for the implementation of ITSM

aligned with ITIL and to enable the verification of open source software based on a reference implementation. A group around Mastrianni has discussed a flexible architecture to support the delivery of information technology (IT) systems management services in 2007 [15]. They developed a method, which is able to combine different tools and services to create specific, customized IT service solutions. And in 2009, Ayat and others have published their work on 'CMDB Implementation Approaches and Considerations in SME/SITU's Companies' [16]. Even though we agree that CMDB is one of the core components of ITSM, we argue that an ITSM process can only be implemented with a holistic methodology. We see CMDB as a tool and commodity, which is necessary but interchangeable. The paper of Lin et al. in 2010 about 'SME Oriented Service Delivery Mechanism and an Implementation' picks up an interesting approach to combine ITSM and Service Oriented Architecture (SOA) [17]. Weng and Weng address also in 2010 the growing demand of outsourced IT services and the resulting hybrid operation of the IT in SMEs [18].

Starting in 2011, many publications have been created within the former project INNOTRAIN IT. The paper of Vogt et al. (2011) discusses the usage of domain specific engineering approach for adoption of ITSM for the domains of SMEs compared to emergency management [19]. Küller et al. describe the adoption of the enterprise architecture management toolkit ADOit as tool for transparency in SMEs, which should be the basis for an ITSM implementation [20]. Moreover, results from a survey in six countries in Central Europe about the utilisation of ITSM in SME can be found in the publication of Grabowski et al. [21] as well as in Zajac & Soja [22]. They demonstrate the low adoption rate of eight percent for ITSM in Central Europe and also investigate the difference between transition versus developed economies.

In 2014, Marrone et al. present the results from a survey in Australia, the United Kingdom (UK), United States of America (USA) and Germany–Austria–Switzerland (D–A–CH) [23]. They investigate a higher adoption rate, which could confirm, that the European activities are successful. Also in 2014, Ciesielska showed, that employee competences and training are the key success factors for implementing service management [24]. Such factors have been

mainly addressed by the trainings of INNOTRAIN IT and ITSM4SME [25]. Both projects trained over 1,200 employees in SMEs in the last five years in Austria, Bulgaria, the Czech Republic, Hungary, Germany, Poland, Romania, and Slovakia. Their simplified ITSM approach is thereby aligned with many different frameworks like ITIL, Val-IT, COBIT and MOF. In 2014, the FedSM project (www.fedsm.eu) presents a standard family which aims to facilitate a lightweight service management implementation based on and compatible with ISO 20 000 and ITIL.

In the last five years, the activities fostered by the European Union have ensured that ITSM is more applicable for small and medium-sized companies. A lot of companies have been trained during the projects. However, as the studies show, many companies are still not aware of ITSM and more CxOs need to be convinced about the possible benefits of the ITSM implementation in their company. This could be a great task for the emerging disciplines service science and service systems engineering.

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LEONARDO DA VINCI

Claus Hoffmann

The ITSM4SME project was funded with the support of the European Commission within the framework of Lifelong Learning Programme. The Leonardo da Vinci sub-programme supported practical projects in the field of vocational education and training (VET). Initiatives ranged from those providing work-related training to individuals, to larger cooperation efforts. Transnational co-operation projects were funded with

the aim of improving the quality of training systems through the development of innovative contents, methods and procedures within vocational education and training.

The starting point of the ITSM4SME project was the realisation that E-Skills are crucial to boost competitiveness, productivity and innovation in Europe. Especially in the Danube Region, there is a need to ensure that knowledge, skills and competences of managers and IT practitioners meet the highest global standards. To utilise the economic potential of IT today, it needs to be managed smartly with standardised and reliable IT service processes. Those are based on standardised IT management methods like ITIL, COBIT or TOGAF. A survey of the former INNOTRAIN IT project amongst six Central European Countries showed the huge potential of IT service management (ITSM) for efficiency and innovation. But only few European SMEs have started to use ITSM in their IT departments (61% of the SMEs in Central Europe are aware of ITSM frameworks, 35% plan or run an implementation project, but only 8% of the SMEs from Eastern countries practiced it). One major barrier is the missing skills for ITSM of the IT managers. Although Slovenia, Romania and Bulgaria have started getting IT service provision hotspots for western companies, the needed service know-how is very specialised and not easy transferable to local SMEs. On the other hand, it explains the great demand for ITSM know-how in these countries. This leads to the paradox situation that the ICT-sector in these countries contributes more strongly to the national GDP than in most of the western countries, but the needed innovation and productivity growth don't reach the local SMEs that represent 99% of all the native businesses of the transition economies in the Danube Region.

Following the CEN Workshop ICT Skills 2011, another major barrier is that students educated in IT management at university are mostly employed by big companies, so there is no knowledge transfer from the tertiary sector to SMEs. Therefore it is crucial for the economic development of the Danube Region – and for the achievement of the Lisbon goals on European level – to empower the existing workforce of SMEs with ITSM trainings. Based on the European e-Competence Framework 2.0, ITSM skills were

trained in the ITSM4SME project in an SME-adequate manner. The new skills are necessary for managing the IT-driven innovation process that changes SMEs' technologies, business processes, services and products. These skills were combined with methods that help IT managers to implement the necessary changes of the business organisation.

Hence the main reason of the project ITSM4SME was to tackle this barrier of efficiency and innovation in the Danube Region. The main aim of the project was the improvement of the vocational education and training in the addressed regions. Innovative ITSM trainings and services for learning and information were developed according to the qualification needs of IT managers and IT staff of SMEs in Bulgaria, Romania and Slovenia. These innovative trainings have enhanced the qualification of the IT workforce of SMEs and improved the regional situation with regard to innovation, employment and competitiveness, thus supporting the EU Strategy for the Danube Region.

FACTS AND FIGURES ABOUT ITSM4SME

Wilfrid Utz

The ITSM4SME project is based on the outcomes of the EU project INNOTRAIN IT that concluded in March 2013. The approach of ITSM4SME is to provide IT Service Management (ITSM) concepts tailored to the regional needs of small and medium-sized enterprises (SME) as a trigger for IT-based innovation processes.

Within the ITSM4SME project the results are adapted and transferred from the "INNOTRAIN IT sphere" (Poland, Hungary, Czech Republic, Slovakia, Germany, Austria, 1,000 IT experts trained) into the target regions of Bulgaria, Romania and Slovenia (regional requirements adaptation elicitation, content translation of training material, modelling tool and training platform). The core competence partners on conceptual and technical level from INNOTRAIN IT were merged with the expertise of regional partners from the three target regions.

The objective of the project was to establish the basis for ITSM in the involved Danube regions by the training of 200 participants on all levels (CEO, CIO, IT Managers, IT experts) in two vocational education and training (VET) modules in a face-to-face and an additional eLearning module with video presentations and a modelling tool.

Duration	October 2013 – September 2015
Consortium	Heilbronn University (DE) (Coord.) Asociația Absolvenților Universității Petru Maior (RO) Beatrix Lang GmbH (DE) BOC Asset Management GmbH (AT) CATRO Management Services d.o.o. (SI) Institute of Technology and Development (BG)
Programme	LifeLong Learning Programme, Transfer of Innovation, Multilateral Projects Leonardo Da Vinci
Budget	EUR 399,877.15
Funding	EUR 299,907.88

THE PARTNER REGIONS: PROFILES, STRENGTHS AND WEAKNESSES

Liviu Ciucan-Rusu

For recent EU members and former components of the eastern communist bloc, as Bulgaria, Romania and Slovenia, a transfer of know-how in the field of management and IT is more than welcomed, especially for small and medium sized companies. In the quest for economic performance, both in competition and partnership with large companies, SMEs are forced to make an accurate assessment of their potential and focus on boosters of productivity and innovation. The following pages will present a synthetic overview of the economic environment and the most

evident findings about the awareness and potential of adopting the principles and methods of ITSM.

BULGARIA

Sofia is the largest city of Bulgaria, located near the Vitosha Mountain in the western part of the country. It occupies a strategic position at the centre of the Balkan Peninsula. Sofia, as an economic heart of Bulgaria, hosts most major Bulgarian and international companies operating in the country. The city and its surrounding Yugozapaden NUTS II planning region have a GDP of €18,400, which makes it the most developed region in the country.

Sofia is becoming an outsourcing destination for multinational companies, among them IBM, Hewlett-Packard, SAP, Siemens, Software AG. From 2007 to 2011, the city attracted a cumulative total of \$11.6 billion in foreign direct investment. Sofia is a major hub of international railway and automobile transport with its developing infrastructure and strategic location. Sofia concentrates a significant portion of the national higher education capacity, including 109,000 university and college students and 22 of Bulgaria's 51 higher education establishments.

An important part of SMEs in Bulgaria have very small IT departments – between 1 and 5 people. ITSM model should be highly customized to work with such micro companies. This means some of the roles in the model to be consolidated, and some to be even removed. There is also another part of SMEs which are using external companies for IT services (outsourcing). However, in general, there is little knowledge of ITSM processes for both IT personal and the management in SMEs in Bulgaria. In order to succeed in changing this lack of knowledge about ITSM, therefore there is a need to present it in a proper way to the management and IT staff of these companies.

For the CEOs and SME management, we should put more attention on financial benefits of single ITSM processes: using single configuration management database will save a lot of time to IT personal; reduced personal effort means cost saving; continuing service improvement on place (like automation or service improvement plans) will reflect in more optimized IT delivery and less money spent IT; providing

real examples of success stories of ITSM implementation; providing real data for realized cost savings in some cases. The approach to IT personal should be a bit different. They need to see the benefit from their perspective. Having clear processes which are well documented will save them a lot of administrative effort – something that IT people always try to avoid. In addition, this will give them an option to concentrate on more important technical work. Another important benefit for IT staff is to have incident and change management on place, with respective levels of approval, which will lower the risk of failure due to human mistakes or lack of planning.

The companies providing IT services could benefit from ITSM implementation by optimizing their efforts and providing improved and cost effective IT services. On the other hand, the service recipients will get a

to my business partners or competitors? How to reduce downtime for a service? How to speed the time for a PC to be rebuilt?

The Project should be based on an easy to understand and implement approach. All training activities and content need to be prepared for people who are not aware of ITSM and they first need to see the benefits from the model, before they start training how to implement it.

ROMANIA

Defined according to the EU NUTS II principles, the „Center” Region covers the majority of the historical region of Transylvania, in the central part of the country, surrounded by the Carpathians Mountains, where the main rivers of Romania tributary to Danube spring.

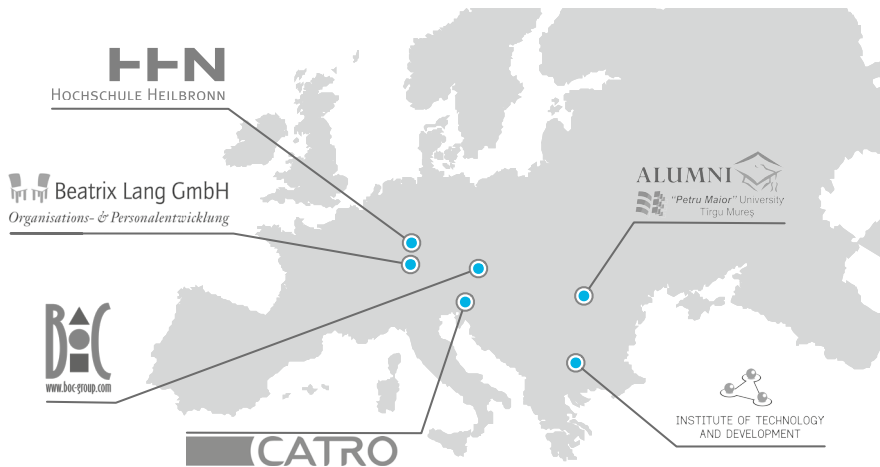


Figure 3 - ITSM Consortium and Regions

better overview and understanding of their environment, which will allow them to create their own IT strategy.

The training itself needs to be able to address various real life questions like towards ITSM: What should be the process to onboard new employees from IT perspective? How could this be optimized? How could ITSM help me when I move to a new office location? Should I plan a change? How to make this transparent

The economy of the region can be considered well balanced by the criteria of the sectoral development and contribution to GDP: 48% services, 33% industry, 10% construction, 8% agriculture. In terms of buying power, the amount per capita is about 11,500 Euro – the second place excepting the Capital Region, representing ~ 45% of the European average.

Regarding the dynamics of the companies, in the Centre Region there are about 30 companies per

1,000 inhabitants, higher than the Romanian average, but only at 72% of the European average. About 12% of the total number of the Romanian SMEs are established in the Centre Region, employing more than 320,000 people, and generating almost 11% of the turnover of SMEs in Romania.

Tourism is an important industry in the Centre Region, figures placing it in the second place in Romania. The cultural heritage (fortresses, citadels and churches) and the development of the business partnerships are the main factors of a positive trend.

Situated in the "heart of Transylvania", the Mures County spreads on 6,714 km², combining a variety of landscapes (mountains, hills and plane) along the upper part of the Mures and Tarnava rivers, one third of the surface being covered by forests. The 551,000 inhabitants (82/km²) are divided almost equally in the urban area (11 cities and towns) and the rural area. There is a mixture of ethnic origins, about 40% of the population belonging to minority communities, mostly Hungarians.

Almost 12,000 companies, most of them SMEs (only 40 large companies) activate in the county, providing 103,000 jobs and having a total turnover of approx. 5.7 billion Euro. The main industries of the Mures County are: chemical – fertilizers and pharmaceuticals; gas extraction and distribution; wood – furniture and violins; textiles; automotive – parts and cables; electrical wires; food and beverages. Regarding the agriculture, we can find orchards (apple trees especially) and vineyards, sugar beet, vegetables and cereals, and an important number of cows and sheep. In the field of services, health care is very well established in the county, and lately tourism has been showing a positive trend due to the virgin nature, cultural heritage and balneal assets.

In terms of ITSM, as an integrative way to boost sustainable development of SMEs, some findings need to be mentioned: It is evident that we are encountering a very interesting and current topic related to the challenge of competitiveness in SMEs; There is a certain risk of adopting classical ITSM methods and concepts; The reality of SMEs in Romania is very heterogeneous: micro and small companies with very little awareness and understanding of ITSM,

medium companies with significant investment in IT, but conflicts regarding the functioning of ITS; Very often service providers experienced the "over-trial" method, learning from mistakes being a way of acting under the pressure of high flexibility and reduced IT costs; Sometimes there is a confusion between process management and ITSM, IT specialists bearing the pressure of "hammer and anvil" both from the top management – high expectations and first line exploitation – errors and misunderstandings; There are many business processes where the reaction is time critical, some of the companies (especially the trading ones) have already understood; There is also some confusion about cutting IT costs under the pressure of competition and economic downturn; IT Infrastructure in medium companies is often standardized and adaptation is a challenge.

Every company (special focus on micro and small) should be aware of ITSM, as a factor of competitiveness, so there is a strong need to involve top management in ITSM seminars and trainings (fields of strategy, change management, communication).

SLOVENIA

Slovenia is situated in the extreme south of Central Europe, borders in the west with Italy, in the north with Austria, in the north-east with Hungary and in the south with Croatia. The country has access to the sea. The total size of Slovenia is 20,273 km². The length of the Slovenian Adriatic coast is 46.6 km. The capital of Slovenia, Ljubljana, is located in the central part of the country. It has about 280,000 residents. The capital is also the largest economic centre, and other economically important cities are Maribor (the second largest city of Slovenia), located in the eastern part of the country and Koper, located in the south-west, which houses the Port of Koper, a major transportation hub of the country. Slovenia is home to approximately 2 million people, education in Slovenia is at an extremely high level. GDP per capita (2012 estimate) is 22,192 USD, total GDP is 45,617 Billion USD.

Almost two-thirds of people are employed in services, and over one-third in industry and construction. Slovenia benefits from a well-educated workforce, well-developed infrastructure, and its location at the

crossroads of major trade routes. The main industries are motor vehicles, electric and electronic equipment, machinery, pharmaceuticals, and fuels. Electricity production is by source hydro, thermal, nuclear and renewable energy (photovoltaic modules were, biogas power plants and wind power (by 2020). Slovenia's SMEs are still suffering from the consequences of the crisis, at different degrees according to their sector of activity. Slovenia has 108,366 SMEs (99.8% of total enterprises), employing 7.7% of active population.

The indicators tracking the various aspects of innovation show Slovenian SMEs to be on par or above the EU average, except in introducing products or process innovations. They perform better than their EU peers in converting those products or processes into sales. Regarding the use of IT infrastructure to sell or purchase online, Slovenian SMEs are exactly on par with their European counterparts.

According to the methodologies and standards used for IT governance and management in Slovenia, the respondents exposed usage of: ISO (presumably ISO 9001) in 19% in public and 58.8% in private sector, ITIL in 14.3% in public and 35% in private, and as third Cobit with 4.8% in public and 12.5% in private sector. Related to frameworks it has to be noted though, that most probably the organizations using Cobit or ITIL are probably medium or even more likely large enterprises. Although the statistics show greater importance of e-commerce, the improvement for SME is still low although not being strictly related to SME, the awareness of business dependency of IT is increasing amongst IT staff as well as top management.

Regarding the introduction of IT service management, there arises the debate about the role of organizational culture and contribution of ITSM to the business. Organizations are often practicing IT service management that emerged as common sense and for SMEs the service management has to be treated in a more holistic view, justifying a value of IT. In addition, the consulting services for SME should be more business than IT related.

IT SERVICE MANAGEMENT: WHAT IS IT ABOUT?



STELA B. - PROGRAM MANAGER
Chamber of Commerce and Industry Mures

Since the membership to the Chamber of Commerce and Industry is on voluntary base in Romania, we need to focus on the topics that can bring value to our work. Another risk arises from the fact that SMEs have to share their human resources among several training programs. After the targeted advertising of the two modules of training, we were pleased to see the registrations, and during the trainings, in which we also participated, interesting debates arose. Owners and executives from SMEs need to be challenged in topics such as innovation, change management and business modelling, because sometimes they forget or ignore to communicate their strategy to their IT personnel or to suppliers.



TAMÁS B. - FOUNDER
Recomed - Start-up in pharma services

When starting a small business the enthusiasm of young founders like us often tends to replace professional assessment of risks. ITSM training made us a little bit more cautious about the development and implementation of our strategy. We must also emphasize the approach of the innovation process, and "Blue Ocean" is something that remained in the background of my mind.

AN INTRODUCTION TO IT SERVICE MANAGEMENT

Benjamin Oražem

It is noon on a normal working day. It is lunch time but at 13:15 you have an important business meeting. What do you do? You actually have a few options: not to eat; go home and prepare your lunch on your own; take a sandwich; or go to the restaurant. Not eating is normally not a good idea. You may get nervous and tense, which may have a negative impact on the meeting. You may definitely go for a sandwich but eating sandwiches every day... The cheapest but healthiest way would therefore be to go home and cook. But there is not enough time. As the restaurant is in the neighbourhood and you have enough time you decide to go to the restaurant.



"SORRY WE'RE SO CROWDED TONIGHT, FOLKS, BUT BEING NEXT TO THE KITCHEN DOOR, YOU'LL GET FAST SERVICE."

Figure 4 - Sorry, we're so crowded tonight ...

Unfortunately, the lunch of your preference is out. Slightly disappointed you take the second daily lunch option. The time is passing and you are waiting. The waiter ignores you. You are getting upset, but finally you get your meal. It is cold, underdone, not fresh and there is definitely not enough of it. The waiter argues that they have had a problem with their oven for a

whole week now and it is difficult to get a good cook. But you actually don't care. It is 13:20 so you are late for the meeting. You end up dissatisfied, upset and still hungry.

Although the service of the restaurant provided you with some output – served food, the lunch did not have any value for you as it did not provide you with the desired outcome in the sense of enjoyable tasty food that satisfies your hunger, being provided quickly and for an affordable price. You have experienced bad service. Once consumed, the service cannot simply be returned. With actually the same ingredients but with a different attitude, behaviour and culture, better organization, planning and control, the outcome could be completely different.

As the restaurant did not facilitate the outcome desired by their customer, they lost the customer – you. The business of the restaurant suffered because of bad sizing as well as badly performed cooking and serving failed to provide the desired business outcome of the restaurant – a satisfied returning customer. It would probably not be any better if any of the services alone performed better.

It is the same with information technology (IT) and services provided by the technology. Perhaps not yet as relevant for restaurants as for some other organizations, which depend on timely processed and quickly provided information, IT can provide significant business value. It may even represent a source of sustainable competitive advantage. But as with the food ingredient, the technology itself will not provide or facilitate desired business outcomes. It has to provide valuable services that have to be used adequately in the value chain. It is not only important what is provided but also how it is provided. In the same way the knowledge about how to run a successful restaurant and its effective operations management provide value to the restaurant, IT service management (ITSM) provide value of IT for the business. No matter if IT services are provided internally or by external IT service provider. As it was mentioned earlier, preparing lunch on your own seems to be cheaper and healthier, but in modern times with contemporary life dynamics this is often not possible. You either go to the restaurant or eat sandwiches every day. There are people that do the latter – perhaps because they have a late

dinner afterwards. The preferences should therefore also be taken into the customer value equation.

What about size? Does it mean that a meal in small restaurants is cheaper or not that good? Not at all. The importance of knowledge about how to harness all and every single service into the end-to-end value stream does not depend on size of a restaurant or an organization. Small organizations may sometimes provide even greater value to their customers. Knowledge about how to manage services is different but not less important. IT service management is therefore as important for large as for small and medium sized business. Since the best practice in IT service management was actually developed for large organizations it needs some further adjustments and simplification for small and medium sized organizations. Although simple is not always easy.

The foremost goal of IT service management is to align IT services and the associated technologies (hardware/software) to the business process and to guarantee the best possible support of financial processes by the IT organization. IT Service Management describes the conversion of the information technology to customer and service orientation. Conversely, innovative information technologies can affect the business model and the underlying processes. Therefore, IT should not be seen as a supporting function, but as a means for preparing the way that enables the small and medium enterprises (SME) to open up new business areas.

By introducing simple ITSM principles, an SME can manage its IT processes and IT services efficiently and effectively and thus provide users with an optimal IT landscape that is less susceptible to interruption and thus also more cost-effective over the long term.

A simplified ITSM method provided within ITSM4SME project can support an SME in the following points:

Making it clear what value is contributed by IT. In many cases, IT is viewed only as a cost factor; therefore, SMEs often cut costs in the wrong places. However, if the added value of IT is clearly evident, the investment decision is on a different basis.

Planning the IT / business strategy. Precisely for SMEs, planning ahead is important. Therefore, the IT landscape should be structured so that it can respond flexibly to changing requirements of the business processes. The objective is to integrate and align IT so that it provides optimum support to business objectives (business alignment).

Legal assurance (IT compliance). SMEs are subject to an increasing number of legal regulations related to data and IT (e.g. Data Protection acts); when granting credit, a company's IT landscape also plays an increasingly important role (see Basel II). If SMEs follow the ITSM philosophy, they will be in conformity with many of these regulations and be able to recognize the corresponding gaps.

Monitoring IT effectiveness and efficiency based on clear performance indicators. You can't manage what you can't measure. Therefore, for SMEs, it is important to define corresponding performance indicators and operating figures (known as Key Performance Indicators – KPI) to verify the quality of IT services and take appropriate measures. Introducing an IT optimisation process (Continual Service Improvement). Business process changes and new technologies are reviewed continually. Things that seem "optimal" today can already be out of date tomorrow.

Improved change management. We are all familiar with the situation: soon after a new computer or software program is purchased, it no longer works the way it should. ITSM processes help SMEs identify these kinds of problems before they occur and eliminate them directly.

Better outsourcing, insourcing and smart sourcing options. An SME cannot and should not deal with all IT questions on its own, as comprehensive management ties up too many resources. ITSM gives SMEs a way to easily identify which IT services should be outsourced. It also helps to manage external service providers so that there is neither too much nor too little capacity.

STATUS QUO OF ITSM IN THE DANUBE REGION

Martin Kinitzki

Despite the crucial role that small and medium-sized enterprises (SME) play in the economy, they have to tackle a number of development barriers that are present in the market. SMEs have to cope with the difficulties of obtaining credits and capital, the lack of which reduces their access to new technologies. It is also evident that SMEs are neglected as far as the systematic approach to IT management is concerned. For this reason, the support of SMEs is one of the European Commission's priorities for economic growth, job creation and economic and social cohesion.

Being aware of the importance of information technologies and the fact of it being an essential key driver of innovation in small and medium-sized enterprises, many SMEs are still struggling difficulties in utilizing the capabilities of new information technologies efficiently. This is mostly the result of missing IT Service Management.

The main result of the ITSM4SME workshops organized throughout the whole Danube Region are findings that have been mentioned in all regions equally and describe the status quo of ITSM in the Danube Region. These have been the starting point for the development of an adequate ITSM solution for SMEs of the Danube Region.

1. ITSM Awareness. The awareness of ITSM is very low. It is not surprising that companies do not deal with this topic. The missing awareness is a major barrier to ITSM and needs to be addressed, especially at a CxO level.

2. ITSM Knowledge. The knowledge of ITSM is very low and there is a lack of own experts in the SMEs. Unfortunately, SMEs are also not willing to pay for an

external expertise. This situation can be compared with the "less-developed" regions of the INNOTRAIN IT project.

3. ITSM Maturity. The enterprises in the regions are found at a very low level of the ITSM innovation spiral (maturity level). Therefore the focus of the training courses has been on the introduction of ITSM and the former innovation part has been planned to be considered at an advanced stage.

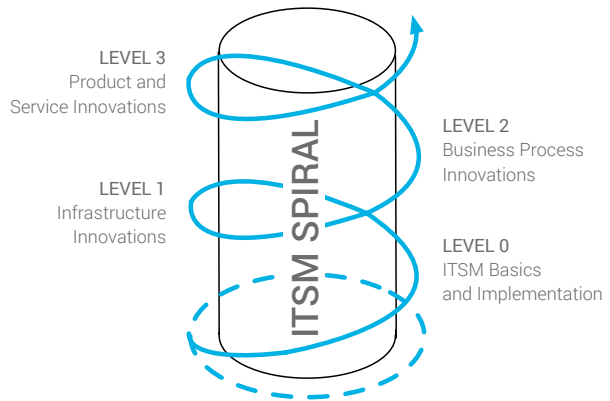


Figure 5 - Innovation Spiral

4. Trends. People in the IT are interested in technological trends. Therefore, current trends (e.g. Cloud Computing) have been used to raise participants' interest for the trainings. However, it seems that organizations still do not recognize the value of IT.

Besides the findings mentioned in all regions there are also regional findings like companies facing difficulties in communication between IT and the business or the fear of high risk adopting classical ITSM frameworks. In order to obtain acceptance by small and medium-sized enterprises the methods and training courses had to address all these issues and meet the derived requirements. Not only IT departments have to be convinced but the management must also stand behind this approach to secure further successful development. The developed ITSM concept is presented in the following chapter.

IT SERVICE MANAGEMENT: QUICK. SIMPLE. CLEAR.



EMANUEL T. - EXECUTIVE MANAGER
A S - Constructions of Sport Grounds

We are a small company and we are acting mostly in the B2G business, sport building infrastructures for local communities, therefore we need to compete in the public bids, very often with big players. After the ITSM training we are determined to model our business strategy, set for growth, in order to have a better online marketing one hand and to improve the distribution of human resources on projects.



PETRUTA B. - HEAD OF CIPUPM
Adult Education Center of the "Petru Maior" University

When I was first informed about the ITSM4SME project I saw the opportunity to partner with Alumni UPM. Our centre tries to bring into the front of our potential trainees attractive and useful modules of training and ITSM has the combination of ingredients that makes it really special: it takes IT&C from a very specialized sphere and professional "wooden" language to a more accessible approach.

ITSM4SME – THE CONCEPT BEHIND

Philipp Küller

ITIL, COBIT, eTOM – in large enterprises the different available reference and best practice frameworks are very well established and many employees have been skilled up and certified. But there is much more potential for their application in micro, small and medium-sized companies. How exactly could that potential be unfolded?

In several workshops and training sessions, the consortium learned that the role of IT differs significantly in small companies. A real "CIO" with a strategic focus does seldom exist, the strategic role of the IT for the business processes isn't realized, IT-departments are understaffed and priorities are set in another fashion. Even though organizations would want to leverage IT in a greater extent and with a higher value, and manage IT in a more structured, customer and service focused way, they would face different barriers (see the grey box below). ITSM4SME has therefore developed an approach to reduce the barriers and to motivate participants to focus on benefits and the drivers for ITSM – which are presented beneath:

Barriers for ITSM in SME

- Missing Awareness about Potentials of ITSM
- Work Overload of the IT Staff
- Lack of IT and ITSM Knowledge – Unskilled Employees
- High Level of Complexity of existing ITSM Approaches
- Missing Training Opportunities geared to SMEs
- Concerns about increasing Costs
- General Aversion against Organisational Changes

Drivers for ITSM in SME

- Enhancement of Business Service Quality
- IT-enabled Innovations on Product- and Service Level
- Transparent and Improved IT-Processes
- Reduction of Workload
- Comparability and Reduction of Costs

Transparency and Reduction of Costs – Through the implementation of ITSM, SMEs will get to know the structure of their IT in depth. Many unnecessary costs incurring in IT departments are based on poor coordination and organisation of processes. With the introduction and consistent implementation of ITSM it is possible to reduce costs in the medium-term. A way to achieve this would be to focus on the core tasks of the IT department and to outsource less business-relevant functions (e.g. printer management) to a specialised service provider to save costs. However, this is only possible if the internal service costs are transparent and can be compared to the real cost of outsourcing.

Business Services – Enhancement of Quality and Innovation – The strategic alignment of IT with the business strategy and goals is especially important to meet the real requirements of business as "customer" of the IT department. Companies using IT Service Management tend to be also characterized as more innovative and flexible, thus possibly providing more IT based innovations on business process and product levels.

Workload Reduction – IT departments, if they exist, are often overwhelmed with less-strategic tasks in undefined processes. Standardization and optimization of IT processes reduces the workload of the staff and allows the inclusion of strategic activities during the processes. Patterns like a service-desk or a configuration management database or even high level service architecture can reduce efforts with operational activities. Additionally, the selective outsourcing of less strategic services could free additional resources. This driver appeals mainly to understaffed IT departments.

Compliance & enhanced Risk Management – IT has an impact on several value creating business processes of a company. An IT failure has repercussions on entire departments and ultimately on the income situation of the company. This can lead in extreme cases even to bankruptcy. In the strict application of ITSM best practices many managers see a reduction of the risk of a total IT failure and a positive effect on the observance of regulations and laws like Basel II or SOX. This may also have a positive impact on the rating of the company.

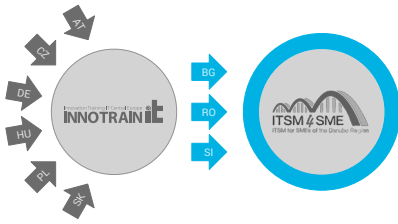


Figure 6 - ITSM4SME: The continuation of the project INNOTRAIN IT

The gained insights as well as the lessons we learned through workshops with the target group and different experts have been the basis for the project consortium to define five essential principles for the adaption of the methods and concepts of the former project INNOTRAIN IT to the needs of SMEs in the Danube Region:

1. Management Attention – Convicting CEO and CIO
2. Sensible Simplification of Methods with a Path to further Details
3. Alignment and Linkage with existing Frameworks like ITIL and COBIT
4. Creation of a possible Implementation Path and focus on organizational change management– Practical Insights from Implementation Pilots
5. Focus on different Target Groups (e.g. Topic, Sector, Company Size) with more specific Content

The five principles have been reflected and led to a completely revised training concept and a modernised ITSM method to foster awareness about ITSM and to offer a simplified approach for SMEs in the Danube Region. Thus, the ITSM training is no longer separated by content modules, but by target groups: A short introductory course for executives (CEO, CIO, etc.) and an extensive and practical course for IT professionals. The training concept is described in detail in one if the

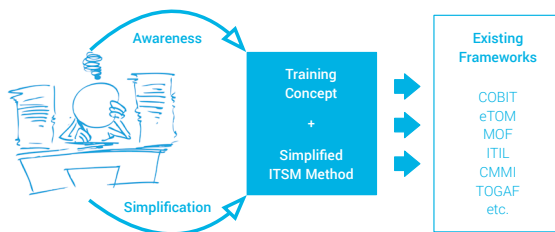


Figure 7 - Awareness and Simplification bridging the gap to ITSM in SME

following chapters. Furthermore, the prevailing ITSM method has been further developed with the feedback from the target group and updated to be still aligned with the latest versions of ITIL and COBIT. The new simplified ITSM method is presented in the subsequent chapter.

SIMPLIFIED ITSM METHOD FOR SME: THE COOKBOOK APPROACH

Philipp Küller

Starting point of the development of a domain-specific ITSM method for small and medium-sized enterprises in Danube Region was the INNOTRAIN IT initiative (www.innotrain-it.eu) – implemented through the CENTRAL EUROPE Programme and co-financed by the European Regional Development Fund – to foster innovation in SMEs across Europe. The INNOTRAIN IT consortium, consisting of universities and economic development agencies, developed an IT Service Management (ITSM) method and a training approach. It was a symbiosis of existing ITSM frameworks, customized from the insights of an Central Europe wide SME survey with 160 participants, 24 case studies from Austria, Czech Republic, Germany, Hungary, Poland and Slovakia as well as the feedback of a focus group composed of IT-Leads and ITSM-Experts.

In order to address the drivers and tackle the barriers (remember the last chapter!) the developed ITSM method had to be simple enough to be accepted by SMEs, but universal enough to support their business. The INNOTRAIN IT method does not serve as an additional ITSM framework; it is rather a model that is upwards compatible with

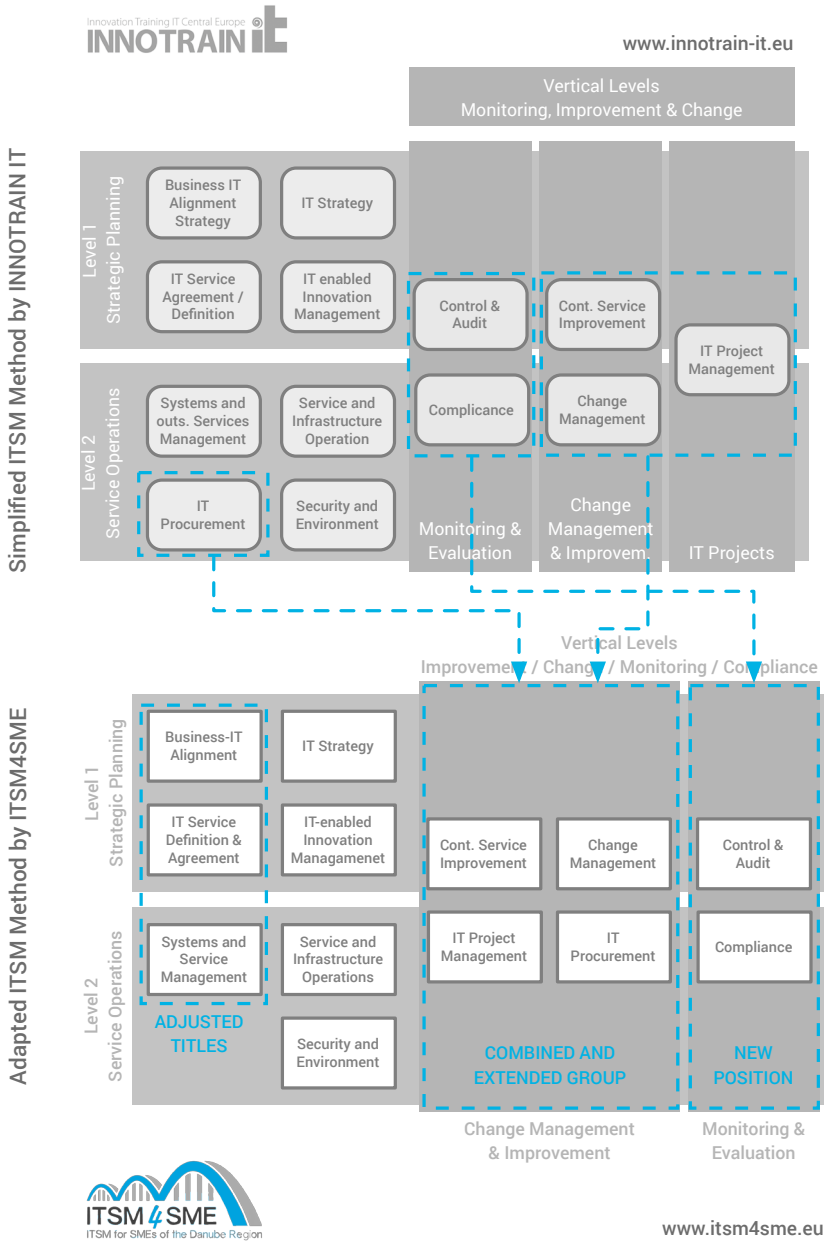


Figure 8 - Transforming from INNOTRAIN IT to ITSM4SME

existing approaches like ITIL, COBIT, TOGAF and other initiatives in the Enterprise Architecture (EA) domain. This approach guarantees flexibility for SMEs to migrate to a more extensive framework when the company grows and needs more rigours to manage their IT services. The central goal was to make the SMEs aware of the basic principles of IT service management as an innovation driver and to describe the positive effects of using such an approach. These goals have been reached using different concepts in combinations:

- Provision of a 'cookbook' about ITSM, explaining the different patterns in a framework and platform neutral and easy understandable way (today known as ITSM Guide).
- Modularization and simplification of common patterns of various ITSM frameworks and methods (e.g. ITIL, COBIT, TOGAF)
- Simple prioritization by the definition of must-have modules and optional modules on the training and implementation path.
- Definition of a possible implementation process and explanation of the best-of-breed approach to select, to adapt and adopt existing frameworks.

In ITSM4SME the focus groups in Bulgaria, Romania and Slovenia confirmed the usability of the simplified

the implementation part has been strengthened and the innovation management part is positioned differently as a reference point and outlook.

The ITSM method is based on and will create bridges to existing frameworks. Some of the most important frameworks like the IT Infrastructure Library and COBIT5 are available as updated versions. This fact has been reflected and references have been also updated. Furthermore, the modules have been revised to be fitting with the latest technological developments like Cloud Computing or Big Data. Finally, some modules have been slightly renamed without changing their context to avoid confusions and to be more precise.

The simplified ITSM method contains different modules, covering a specific topic and containing approaches, processes, patterns and guides as well as references to the more detailed frameworks. To get a better overview the modules are structured in different levels as shown in the module map below. Modules in the horizontal levels describe the strategic planning and the operation of IT. The vertical areas contain modules which are related to both – to the strategic planning as well as to service operations.

Each module in the IT Service Management Guide is explained as simply and briefly as a recipe in a cook-



Figure 9 - Implementation Path

ITSM method for SMEs of the Danube Region and proposed adaptation based on regional requirements, leading to a modified framework model. The structural changes have been documented in the "big picture" on page 21. This figure shows the IN-NOTRAIN IT method on the top, the ITSM4SME below and visualizes the changes between both methods.

Based on the results of focus groups the following observations were made: enterprises in the regions are at a very low ITSM maturity level: They apply seldom ITSM methods or tools. Thus, the emphasis had to be more on the implementation of ITSM instead of the more advanced innovation methods. Therefore,

book. This short guide with approximately one hundred pages is available online as part of the eLearning and as a free download on www.itsm4sme.eu.

HOW DO YOU IMPLEMENT ITSM IN YOUR ORGANISATION?

Most frameworks treat the introduction of ITSM in an organisation only marginally. However, this guidance is essential for SMEs and an explicit part of the ITSM guide developed. IT service management can be introduced in companies in different ways. Depending on the maturity level and experience in the company, different scopes on the processes are applied. In ad-

dition to incident and problem management, change management is frequently the first step of an ITSM implementation. The change management scheme should be developed at the earliest stage possible, as it is the core for continuous service improvement.

The modular design of the simplified ITSM method allows introducing relevant modules step-by-step. This approach has been combined with a prioritising: modules that are mandatory for all companies have been marked as 'basic modules', while modules where the need depends on the requirements of the specific company have been marked as 'optional'. The mandatory modules provide the basis for a successful use of ITSM, while the optional modules supplement them. The selection of modules depends to a large extent on the company and its facets, the strategy and requirements. The process model below shows an example of a blueprint of an introductory path. Further details are explained in the ITSM Guide.

ITSM AWARENESS IN SME: INTERREGIONAL TRAINING APPROACH

Claus Hoffmann

As seen before, it is necessary to increase the awareness of CEOs and CIOs about the benefits of ITSM to make IT-departments more efficient and innovative. Therefore, the starting point of the ITSM4SME

training sessions was to address CEOs of small companies and IT-decision makers of medium-sized companies based on their everyday life challenges they want to solve with IT. Those could be external drivers like new compliance requirements or the need for cost efficiency of web based business services (e.g. sales activities via web shop, new technological trends like cloud computing) as well as internal drivers like risk reduction by reliable backup and computer administration routines, reduction of printer maintaining costs and much more. The pre-training communication phase in the project was focused on gaining SMEs for ITSM by helping them to solve their special business and technological issues.

The ITSM4SME training approach was totally different than existing trainings based on the established frameworks like ITIL or COBIT. In these trainings, participants are normally educated in the ITSM vocabulary and mostly in service delivery processes. Thereby however, participants tend to miss the basic and essential ITSM philosophy: the alignment between business and IT strategy. The ITSM4SME approach addresses these weaknesses. We not only trained IT staff, but also IT affine CEOs of SMEs, starting with a solution for their special problems based on a case study that was explored and documented by the research project partners at the beginning of the project. This case study training approach is supported by a down stripped and less complex ITSM method for SMEs (read more in chapter that includes only the most pertinent parts of the major frameworks ITIL, COBIT, MOF, eTOM, etc.).

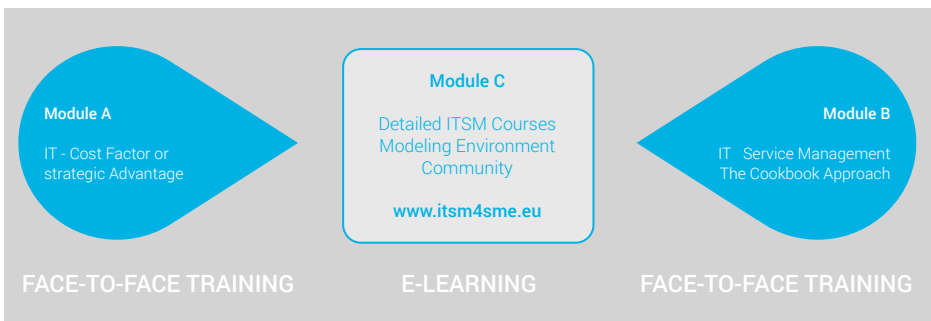


Figure 10 - ITSM4SME Training Approach

Consequently, the first training course named “IT-Cost factor or strategic Advantage” focused on the needs and topics of decision makers like CEO, CIO, department leads and managers. The concept considered the shorter availability of the target group to join a training course. Thus, the main topics of a short initial course (2-3 hours) were the awareness about the topic ITSM, the benefits of the usage of the paradigm and the innovation potential of information technologies. The attention of the management should ensure the introduction within the company and that operational employees attend the second training course and learn the “doing” of ITSM.

The second training module – “IT Service management: The cookbook approach” – addressed all types of IT staff – from managers to developers. Besides the basic concepts of ITSM and the philosophy, problem based-learning was used to explain the concepts of ITSM. The solutions, which were presented during the trainings in the form of case studies, have been modelled by using the modelling tool ADDit®. Once they had internalized the ITSM philosophy, they could go on a suggested innovation path and find other service solutions on their own that helped them to improve their business.

The second training course delivered to the participants also fundamental knowledge and social skills for organisational change. In the state of the training technology, this component is mostly totally underestimated and not part of the existing ITSM framework trainings. But every change of business and IT services leads to the situation that employees are confronted with a change of their individual working situation. Therefore, the second training module was very valuable for the participants to implement IT service management methods and innovations successfully in their organisation.

After the face-to-face training course, the participants were passed to the ITSM4SME Online Training Platform (www.itsm4sme.eu). Thereby, no expenses for hardware or software were necessary – the trainees only needed an internet connection and a web browser. Thus, the participants could deepen their knowledge about IT service management independently of time and place following a blended learning approach. The platform provided a struc-

tured eLearning course including video presentations and self-assessments. The courses comprised 23 units in the chapters “IT Service Management: Introduction & Philosophy”, “Strategic Planning”, “Service Operations”, “Improvement, Change, Monitoring & Compliance”, “ITSM Implementation in SMEs”, “Managing Organisational Changes” and “Enterprise Architecture Modelling”. In addition, the participants were able to use the modelling tool on the platform to model their whole enterprise architecture from the strategy via processes and services to software and hardware (read more in the next chapter).

ENTERPRISE ARCHITECTURE MANAGEMENT: FOSTERING TRANSPARENCY FOR ITSM

Wilfrid Utz

In today's fast-changing markets, business requirements need to be reflected across all functions and levels of an organisation in a time efficient and effective manner. Enterprise Architecture Management (EAM) pursues the goal of increasing business efficiency by optimising enterprise IT to better support

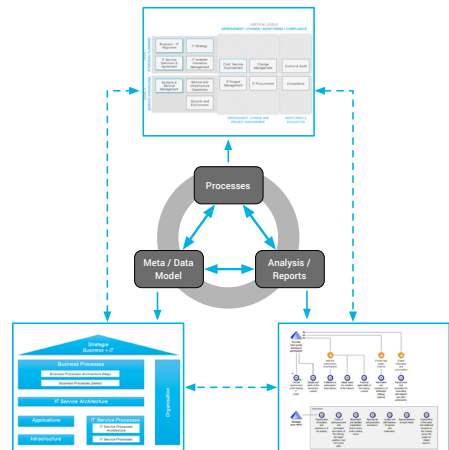


Figure 11 - Mapping ITSM4SME Results to Business Objective Compliance Architecture Framework

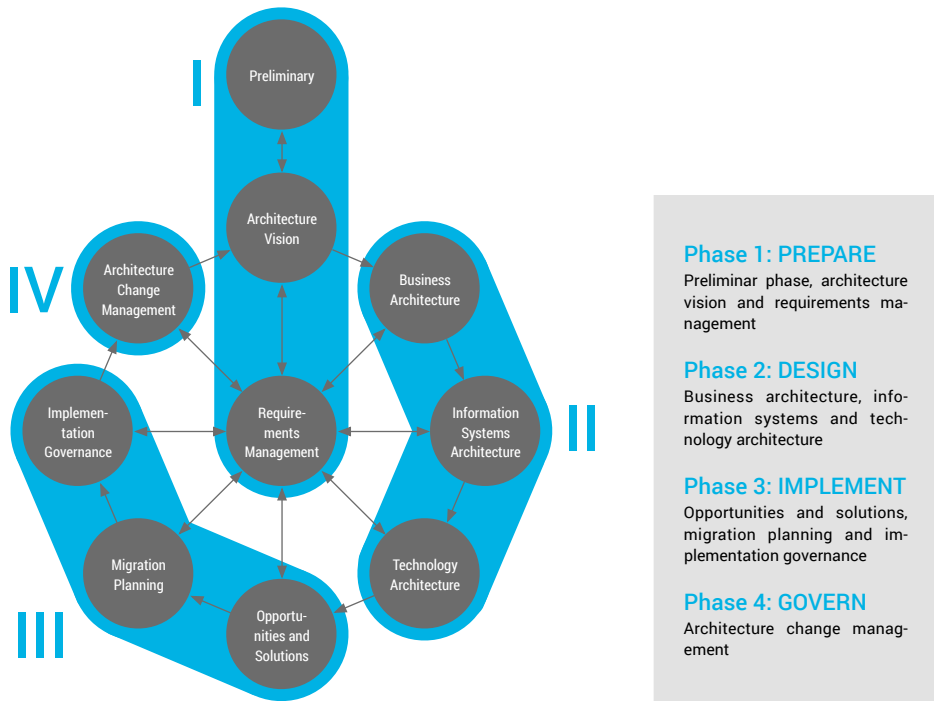


Figure 12 - BOC's Enterprise Architecture Management Approach based on TOGAF

business processes as well as defining appropriate maintenance and update measures. Translating information from business to IT and vice versa in a transparent and structured way enables modern, reliable and manageable assets in the enterprise. Consequently EAM is positioned in the following as the discipline to combine and integrate various management approaches (such as IT Service Management, Business Process Management, Strategy Management among others) in a coherent and holistic framework. Tool support is regarded as crucial for such framework to operationalize functionalities, consequently in the following the EAM approach "Business Objective Compliance Architecture Framework (BOCAF)" developed by ITSM4SME partner BOC and implemented in the ADOit EAM Toolkit (www.adoit-community.com) is introduced. An adapted and simplified version of BOCAF has been the basis for the modelling environment used during the ITSM4SME

training courses in Bulgaria, Romania and Slovenia.

ENTERPRISE ARCHITECTURE MANAGEMENT: A COMPLIANCE VIEWPOINT

As introduced above, EAM combines elements from different domains/functions of an enterprise into a combined framework. This prescribes that most prominently the business and IT level are analysed from a common viewpoint and underpinned by data/meta structures as an evidence layer. This layer enables continuous assessment and analysis compliance on a business, regulative and technological level.

From a structural viewpoint, Figure 11 provides an overview of the EAM core elements and their interaction; Processes represent the business perspective, Meta/Data Models depict assets as available

on different levels of abstraction and functions, and Analysis/Reporting functionality enables to understand the relations/dependencies in an interactive/graphical way to foster transparency for management approaches and compliance.

ENTERPRISE ARCHITECTURE MANAGEMENT: FRAMEWORK

Various frameworks aim to provide guidance as best practices and standards in setting up procedures to define the scope of EAM in organisations. The most prominent example for such a framework is TOGAF (The Open Group Architecture Framework, www.opengroup.org) that aims to provide an approach for analysis, documentation, management of distributed and heterogeneous enterprise architectures with a strong focus on bridging the gap between business requirements/capabilities and IT infrastructures.

Figure 12 above exemplifies TOGAF as realized in BOC's ADOit Enterprise Architecture Management Toolkit. The phases and steps in TOGAF focusing on the Architectural Development Method (ADM) resulting in 4 distinct phases, each phase supported by tool functionality, enabling a consist management of artefacts in the 4 architectural phases.

ENTERPRISE ARCHITECTURE MANAGEMENT: APPLICATION SCENARIOS

EAM targets to enable management approaches on both business and IT level. The following list provides an indication on possible scenarios that can be realized, help to understand, organize and manage an organisation and foster the overall goal of business-IT alignment:

(IT) Master Planning

Master Planning is concerned with the design of the target architecture and provides information on how the target architecture will be implemented (migration plan). The target architecture must be financially and technologically achievable while being grounded in the business needs of the organization.

Inventory of the Enterprise Architecture

As input for sustainable and intelligent decisions in the enterprise. A compiled inventory of enterprise

architecture assets creates transparency and allows planning of changes in business process, services, applications, infrastructure elements.

Demand and Project Portfolio Management

Based on the inventory, demand planning functionality enables a maintaining and adjusting the architecture to new requirements. Impact of projects currently planned and running is made accessible.

Technology / Application / Information Architecture Management

Managing the technology base as the sustainable layer to run business process it is essential to continuously monitor and refresh the underlying architecture layers. This should be done in a holistic approach on technology, application and data/information level.

FURTHER INFORMATION

Further details on implementation of the Architecture Management Approach (ADM) of TOGAF in ADOit are available online at the ADOit community page: www.adoit-community.com.

BREAKING THE INNOVATION BARRIERS IN SME



DANIEL S. - PROJECT MANAGER
RORCF - Research and Training Institution

It is really challenging to be a training partner at such training. But when we started to work on provided training material we had a great experience, even greater with the implementation. Representatives of small companies, especially in the field of accounting and financial services, were surprised to find topics such as strategy, economic performance, innovation and change management. They also admitted that they never thought of IT&C as a factor of competitive advantage, because it is often outsourced and different providers interfere, and after the training some question marks emerged.



JOCHEN R. - HEAD OF SERVICE MANAGEMENT
Bechtle GmbH - IT Service Provider

Small companies are founded on the basis of do-it-yourself-inventory. This is what has made them successful, an economic driving force. But at the same time this philosophy often makes them stick to solutions that don't keep pace with their growth. Also, many SMEs tend not to subcontract services that could be brilliantly done by external experts. Often enough, IT Service Management is not innovation but conservation, although those SMEs develop highly innovative products or offer ground-breaking services.

MAKE IT(SM) SIMPLE & UNDERSTANDABLE – INTERVIEW WITH DIMITAR TRIFONOV

Svetlozar Ivanov

Svetlozar Ivanov: The main focus of our project is to present ITSM to SME. It is known that large corporations could be characterized as caring about profit, market-share and risk-control. But what do small businesses care about?

Dimitar Trifonov: Easy answer – it's the COST. Small businesses are typically short of time and money. They typically operate on narrow margins and low-to-no cash reserves. But unfortunately, in many ways they are inefficient: focused on minimizing cost, they produce a waste (real money of the owner). And the main risk here comes with the lack of processes or processes optimization.

Svetlozar Ivanov: ITSM4SME provides a good set of best practices for processes, but what does "best practices" mean to small businesses?

Dimitar Trifonov: I have read a good article on this subject on the Internet and it stated: achievable, applicable and acceptable. A simple example was given for moving the organization through three levels of change maturity:

1. Know about changes
2. Know about them before they happen
3. Have a say in whether they happen

So it is all about that: MAKE IT(SM) simple and understandable. Then it will be acceptable, applicable and achievable

Svetlozar Ivanov: Is that what you have experienced during your work?

Dimitar Trifonov: Absolutely. This is the way we do our daily business. We present our solution in light of ITSM. The benefit of having scalable, manageable and effective IT solution is what makes our customer buy a product. Often we present an analysis of customer

Dimitar Trifonov is the manager of Microsoft Solutions at "Data Systems Engineering" Ltd, a company operating in IT consulting, audit of information systems and information security. Dimitar has broad experience as IT manager mainly in PC sales, ship building and repair and consulting. He has been a part of different projects related to ITSM mainly in SME scope.



current expenses for particular IT service, against short and long term forecast for the expenses after our solution has been implemented. We actually bundle this practice together with a product. At the end our customers receive a bit of ITSM process and a solution.

Svetlozar Ivanov: Maybe the biggest challenge during ITSM4SME was to show SMEs that IT Service Management is a field that matters. How do you explain the use of IT Service Management to your customers?

Dimitar Trifonov: With numbers (smiling). Things which our customers understand easily are cost, continuity and capacity. In general, we try to create awareness. Of course we also offer to take ownership of IT service management for our clients and extend the services we provide to them

Svetlozar Ivanov: What kind of new insights did you gain at the ITSM4SME training?

Dimitar Trifonov: Well, first of all, I really appreciate the material which was presented to us. A simple search in Google will provide you with millions of pages for ITSM and you will be lost in a matter of minutes. The subset presented is a good overview and underlines the most applicable parts for SME. I think that you did a good job with the examples, too. Presenting real scenarios (at least they look real) offers a much wider understanding of the benefits we get from ITSM and this is the spark we need. Last but not least is the modeling section: although I find it a bit complicated

at the beginning, it gives enough transparency over the process and the importance of having a model. You have done a great job bringing all this to small businesses in Bulgaria. Thank you for the training!

Thank you very much for this interview!

GRILLED KEBAB – A CASE FOR ITSM AT ALEBON

Benjamin Oražem

Small and medium enterprises normally excel in their core business, which, in most cases, also represents a single source of their competitive advantages. Not many of them are actually aware that combining complementary resources from a different industry domain can represent a huge potential for a new or significant barrier to erosion for their existing competitive advantages. Information technology, whose full potential Slovenian small and medium enterprises have yet to discover, may represent one of such sources of competitive advantage. But in the end, the selection of the right sources for achieving sustainable competitive advantage and the way in which IT will contribute to their success story is a business decision and above all, a reflection of a personal preference and openness of SME owners and managers.

Let's take for example Alebon – a small but successful Slovenian company with no more than sixteen employees. The company is one of the leading companies engaged in the production of original grilled kebab intended for use in the food industry, as well as for end consumers. And they have included IT as a source of their competitive advantage extremely well. But why are they so special, and where does a small kebab manufacturer see the value of IT?

Well, not only do they use IT heavily, but they are using it wisely and in a highly advanced way. Moreover, they not only outsourced most of their IT but also the production of their core business product – kebab. In terms of IT, all the outsourced business and supporting IT services are used as a service in a cloud whenever possible. Every IT decision is valued and financially evaluated. If some legacy IT systems

are implemented in a traditional hosting manner and not as a service in a cloud, it is because those legacy systems cannot leverage cloud's pay as you go model effectively. The heavy usage of IT leads to easier and automated business processes. However, using merely standardized IT services in the cloud alone, although being cost effective, would not represent a real source of competitive advantage. The success of Alebon's IT is therefore in the excellent and unique integration layer on the top of those standardised IT services. This way, all IT services (hosted and those in the cloud) are integrated into a comprehensive business system. Such integration provides them with not only an excellent business intelligence system for analysing past events, but also gives them capacity for a solid prediction. Interestingly, they have recently included even weather conditions in their automatic manufacturing order procedure.

Although this is an example of a good recipe and pattern of effective use of IT, it is still just about how they use IT services. A more important question, though, is why they are using it. Firstly, all co-owners are highly entrepreneurial oriented with extraordinary mutual trust and respect, which somehow is a significant success factor. Secondly, they know what they want from IT. As the co-owner responsible for finance and investments is not only good at business but is also a highly IT-savvy person, he or she knows how to underpin those business needs with adequate IT services. From the business perspective all they want is to increase revenue, decrease costs and avoid risks. But the key is in their customer intimacy competitive strategy which amongst all other is based on the following simple principle: Their customer will NEVER run out of supplies and goods. They would deliver it even if a customer forgot to order it. In other words, they always have everything in stock. This would normally imply a huge stock of even perishable goods, unless they have a highly optimized logistic and production planning system. With their smart IT they managed to reduce the production planning cycle to seven – ten days. There was some investment needed but significantly less than their yearly savings on bound capital and warehouse space. The second exceptional business idea was related to the mitigation of risks. They have all their claims insured. In case some customer would not be able to pay the debt, they would get refunded by the insurance

company. But they have to comply with strict insurance conditions, which require excellent cash flow control. For companies of their turnover, the yearly waiving of debts would be around € 20,000, whereas their investment in the development of additional IT functionality was only € 15,000. Direct benefits with return on investment shorter than one year are obvious, but there is also an indirect bonus. With their excellent cash flow control and insured claims their creditworthiness has increased, hence cost of money has decreased. This way the money can be further wisely invested into further business growth. It can therefore easily be said that Alebon is saving and even earning money by investing in IT.

We cannot say that IT service management will provide you with brilliant new business ideas like in the given example, but it will definitely help you select and manage the right IT services that will effectively and efficiently support your business, providing you with business value.

CONCLUSION AND STEPS AHEAD



LILIANA H. - MANAGING PARTNER
Kore – Consultancy and Training in Quality Management

There is a trend in Romanian small companies to get different types of certification, but some of them are ready only in official declarations. Things get more complicated when we deepen the design of processes in order to define procedures, infrastructures, responsibilities. Because nowadays almost nothing can ignore IT&C, the ITSM trainings can provide both a better understanding of the company – from strategy to organization, and a system of modelling processes and infrastructures. Quality is more about planning and conceiving and ITSM asks for deep management reflections in that area.



DIETER H. - PROFESSOR
Hermann Hollerith Zentrum – Research Centre

Is there a “golden rule” for IT service management in small and medium-sized companies? Yes, of course: ITSM must be as simple and applicable as possible – like in all management matters. The rules and things you must structure should be clear and understandable. Research and experts lean towards highly difficult solutions that aim at a 100 % solution for problems. But often even the 80% solution is better, more sufficient and applicable in practice

LESSONS LEARNED FROM OVER 300 PARTICIPANTS IN THREE REGIONS

Krassen Stefanov

Launched in the last quarter of 2014 in Bulgaria, Romania and Slovenia, ITSME4SME trainings had passed through the initial phase of establishment to a proven set of knowledge delivery. There was real interest on the part of the businesses and the information was quickly spread throughout the country. There were participants from various company sizes (9 – 70 employees) as well as a variety of industries (furniture, textile, web-commerce, consulting).

In the initial phase of the sessions we strictly followed the provided content, but we became aware very quickly that we should be flexible and adaptable to the interest and focus of every group. There were good practices shared by the participants which then became part of the content, there were sections which were moved to the self-study part of the training. Trainers asked provoking questions and provided scenarios in which the participants had to explain about their current practices or challenges. The common conclusion of all sessions was that there are no doubts that ITSM could have a positive impact on small businesses.

LESSONS LEARNED

- Participants prefer examples and scenarios to be discussed during face-to-face training.
- Different industries had variation of the IT services footprints in the company.
- Learning from mistakes was shared among the participants as an approach to optimize their IT services.
- Investment in IT service management and processes is an easily recognizable gap
- Small businesses need simplified ITSM processes

WHAT WAS RECOGNIZED?

- Quality and experience of the lecturers
- Quality of the materials

- Flexibility of training time (several sessions were open for registration)
- Training environment

WHAT COULD BE IMPROVED?

One page document needs to be created with list/links to all materials and websites related to the training.

From the beginning ITSM has proven to be an interesting and current topic, since the realities of companies change with the development of information and communication technology. But there are still misunderstandings and conflicts among management and IT practitioners since there is little education and training on a common basis. ITSM4SME Method is more about the decision making process addressed to internal and external services using IT&C as a factor of creating value and competitive advantage within SME.

SOME COMMON OPINIONS

- The reality of SMEs in Romania is very heterogeneous: micro and small companies with very little awareness and understanding of ITSM, medium companies with significant investment in IT, but conflicts regarding the functioning of ITS;
- Very often service providers experienced the "over-trial" method, learning from mistakes being a way of acting under the pressure of high flexibility and reduced IT costs;
- Sometimes there is some confusion between process management and ITSM, IT specialists bearing the pressure of "hammer and anvil" both from the top management – high expectations and first line exploitation – errors and misunderstandings;
- There are many business processes where the reaction is time critical, some of the companies (especially the trading ones) have already become aware of the fact;
- There are also some confusions about cutting IT costs under the pressure of competition and economic downturn;
- IT Infrastructure in medium-sized companies is often standardized and adaptation is a challenge.
- Every company (special focus on micro and small) should be aware of ITSM, as a factor of competi-

tiveness, so there is a strong need to involve top management in ITSM seminars and trainings (fields of strategy, change & quality management, innovation, communication);

- The training modules seem to fit the training needs and can be a way of inspiring small companies to better understand the impact of ITSM and to better collaborate with providers (fields of outsourcing, IT infrastructure)
- Access to a modelling tool and case studies contributes to the quality of the performed trainings
- The opportunity to continue with online trainings is also a plus
- There are streams to expand the trainings working with partners and stakeholders in the future

The ITSM4SME project was a good lesson for trainers, learning how to manage a training session, to improve their training skills and to promote their organizations for future collaborations.

ITSM4YOU – ADAPTATION AND ADOPTION OF THE ITSM4SME RESULTS

Krassen Stefanov

The dissemination and exploitation of the project results are a vital part of the ITSM4SME project and the team strives not only to come up with valuable outcomes, but also to promote and support the trans-

fer of knowledge, information and results through the entire duration of the project to the selected target groups and, if possible – to a wider community". Both activities – dissemination and exploitation of the results – are the core of the exploitation strategy. The results of ITSM4SME project can contribute to real changes at a micro level – improving the life of individuals and groups and at a macro level – by influencing systems and policy. Such changes are only possible if the results are effectively adopted. The key to success in choosing exploitation mechanisms is to select those of them that are most appropriate to the type of results and the end users envisaged.

BUSINESS MODELS BASED ON ITSM4SME

To get a better understanding, the project team started to develop possible business models in different workshops in Sofia and Tirgu-Mures. According to Teece (2010), a "business model articulates the logic and provides data and other evidence that demonstrates how a business creates and delivers value to customers. It also outlines the architecture of revenues, costs, and profits associated with the business enterprise delivering that value. [...] In essence, a business model embodies nothing less than the organizational and financial 'architecture' of a business." This shows, that the business model concept is the ideal starting point to sustain ideas and results from projects after the funding period. The business models explain how the future businesses could create value re-using the funded results. The business model connects the potential from the project with realization of economic value. The four developed

Business Models based on ITSM4SME Results

Training	Education	Consulting	Research
Sustainable integration of an SME adequate ITSM training offer in the VET system of Bulgaria, Romania, Slovenia as well as the dissemination and exploitation of project results.	Non-commercial exploitation of the training results aiming at inclusion of different aspects of ITSM4SME training competences, ITSM best practices, methods, knowledge and skills into different educational activities.	Consulting of companies and organisation in all questions about IT service management and especially about the implementation of ITSM. Furthermore, the modelling environment could be useful in the area of enterprise architecture management.	Research on further improvement of the existing project results for raising their effective utilisation in Europe. Using the concepts and ideas for new areas of research appeared as a consequence of the project results dissemination and exploitation.

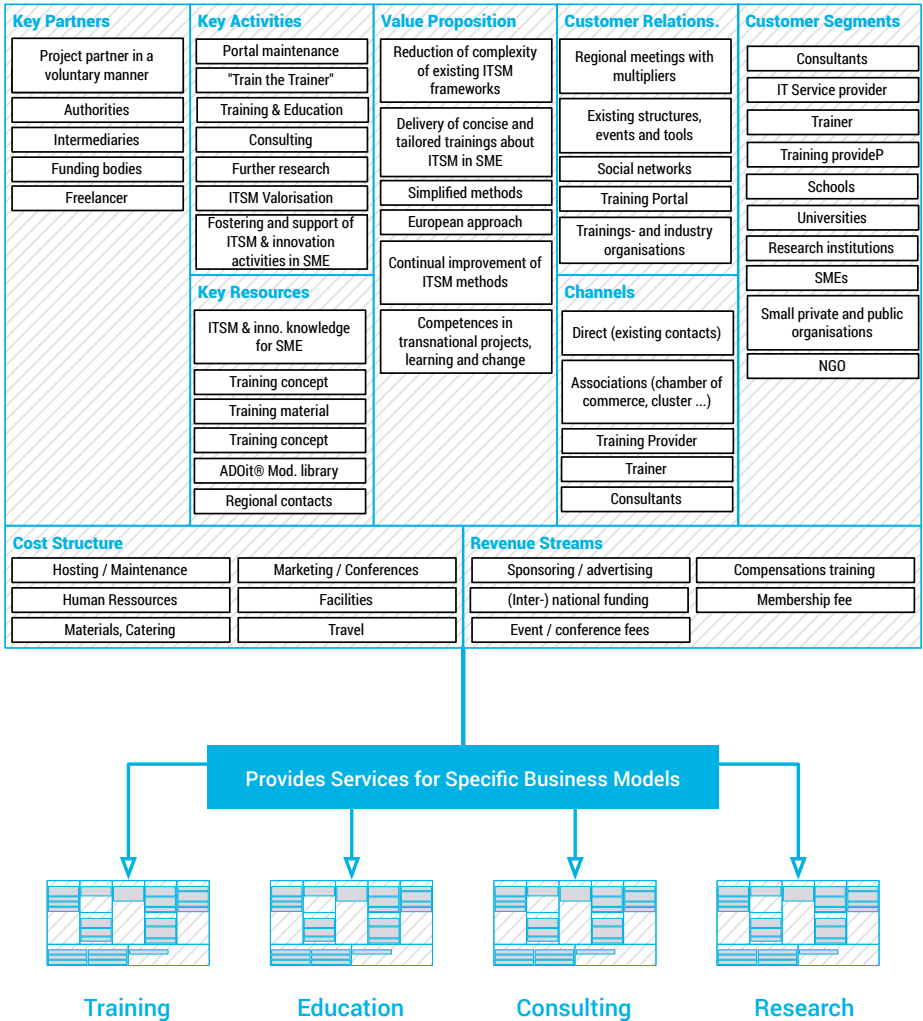


Figure 13 - ITSM4SME Business Model Development

business models for Training, Education, Consulting and Research (see figure 13) make use of the different results of the project (table below). They could be implemented by companies and organisations.

HOW COULD THE RESULTS OF THE PROJECT BE USED?

During the last two years, the ITSM4SME consortium has developed 41 project results. Not all of the results could be usefully transferred and reused. Thus, the partners assessed in two workshops each result of the project and where the project culminates in a new method or a new product, as it is often the case in ITSM4SME, then the transfer, commercialisation and sustainability are appropriate mechanisms to be used.

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The table below presents the main project results identified at the workshops in Sofia and their capacity for exploitation in the four business models for exploiting and reusing these results by the consortium and third parties.

Description	Training	Consulting	Education	Research & Further Development
Competency - based training document	•	•	•	•
Mapping Competence Framework	•	•	•	•
Training Slides	•		•	
Modelling Scenarios	•	•	•	•
Modelling Library	•	•	•	•
ITSM Guide	•	•	•	•
Training Platform incl. Website	•		•	•
Train-the-Trainer Concept	•			•
Lessons-learned from the Training	•		•	•
Approach to adapt the methods and concepts		•	•	•
Communication Strategy incl. Media Templates		•		•
Project Result Booklet		•	•	•
Transition Plan		•		•
Competence Requirements for Trainer / Translator / Manager		•	•	

ARE YOU INTERESTED IN THE RESULTS AND THE BUSINESS MODELS?

The selected results are Creative Commons licensed, which allows the sharing and adaptation of the results, and have been made available on the project library www.itsm4sme.eu as well as on ADAM, the projects and products portal for Leonardo da Vinci (www.adam-europe.eu).

The details about all exploitation activities, the business models and the results have been summarized in the exploitation strategy of the project. This document is also available online for free.

A LOOK INTO THE FUTURE: ITSM AS ANOTHER BRICK FOR COMPETITIVENESS

Philipp Küller

E-skills are crucial to boost competitiveness, productivity and innovation of small and medium-sized enterprises. In Europe there is a need to ensure that knowledge, skills and competences of IT managers and IT practitioners meet the highest global standards. Since the 1980s larger companies have started to use IT service management (ITSM) methods to run their IT departments effectively and to align their IT to their business strategy. But for European SMEs especially in the Danube Region it is still very difficult to implement ITSM frameworks like ITIL, TOGAF or COBIT in their companies. They are complex and skills are simply missing...

Our trainer had up to 480 minutes to convince and train people in IT Service Management – quite a hard job for the trainers in Bulgaria, Romania and Slovenia. And in one day of ITSM training, even the best trainer can pass on only the basic knowledge. However, this basic knowledge serves SMEs as the necessary foundation to start the simple innovation process:

1. Proper IT Service Management doesn't consist of hardware only – it rather connects people with

hardware in the form of strategically formulated processes!

2. An IT service provides an IT-based added value due to the support, the optimization, the simplification or even the enabling of a business process.
3. IT Service Portfolio (Catalogue) is defined from the business perspective instead of the IT perspective.

Claims like these, taken from the philosophy slides of one of our training courses, enabled participants to understand the key of the sustainable use of information technologies: It's an individual challenge, because business IT shouldn't fit only the pages of a distributor's catalogue but also the goals of a concrete enterprise and, of course, the individual needs of people working in a company. The foremost goal is the understanding, that IT isn't just a cost centre, but a driver for innovations on process and even product level in small and medium-sized enterprises.

The project took the first step with over 300 participants in about 30 pilot training courses in the three regions. However, there is much more work to be done to establish ITSM throughout Europe. Thus, the partners committed to cooperate further on the topic of IT service management for small and medium-sized organisations. The existing materials will be made available to all interested parties in the regions also after the project. New initiatives and projects have already been planned by the partners and will be established soon in different European regions.

WWW.ITSM4SME.EU

