

» FLEXERA

2023 State of ITAM Report

ITAM and FinOps intersect and save companies millions



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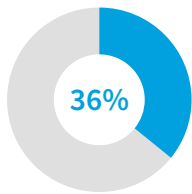
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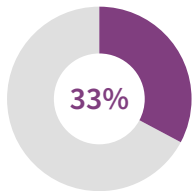
Report highlights

Here's a sample of key findings from this year's report based on a survey of 500 IT executives from around the world. Scroll to find out more.

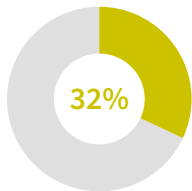
Estimated wasted spend remains significant across the IT estate



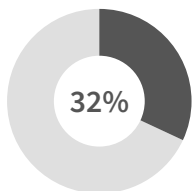
Estimate the percentage of your **desktop software** spend that's underutilized or wasted.



Estimate the percentage of your **data center software** spend that's underutilized or wasted.

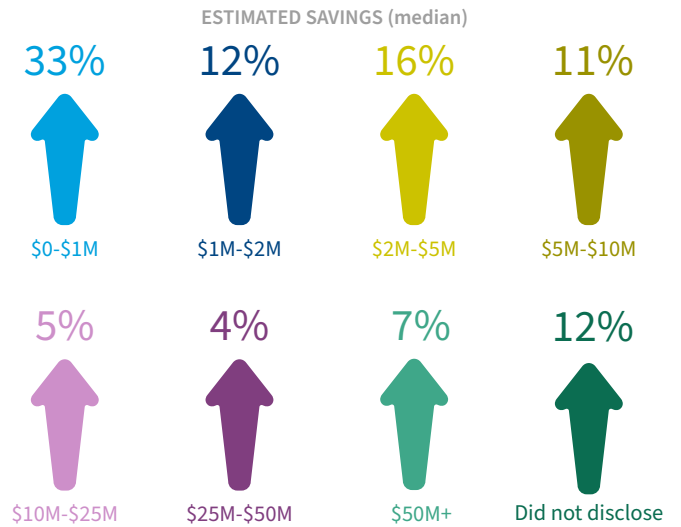


Estimate the percentage of your **SaaS** spend that's underutilized or wasted.



Estimate the percentage of your **IaaS/PaaS** spend that's underutilized or wasted.

Estimate the combined savings and cost avoidance you've realized from your SAM program in the past year in millions of US dollars



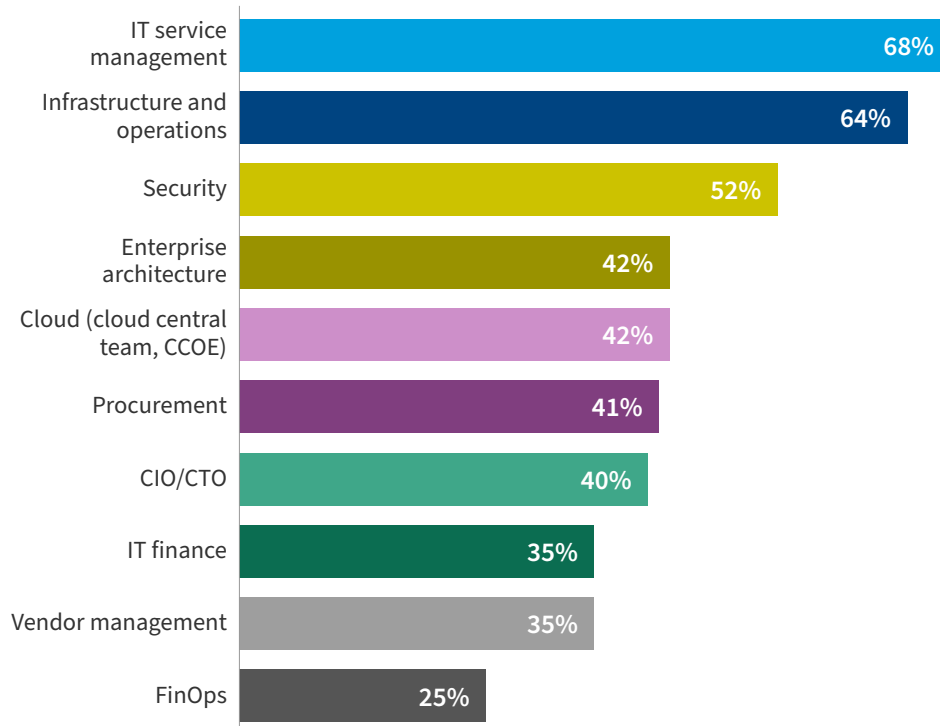
N=500
Source: Flexera 2023 State of ITAM Report



N=431 Desktop, N=434 Data center, N=431 SaaS, N=418 IaaS/PaaS
Source: Flexera 2023 State of ITAM Report



What's the level of significant interaction between your SAM team and the following teams?

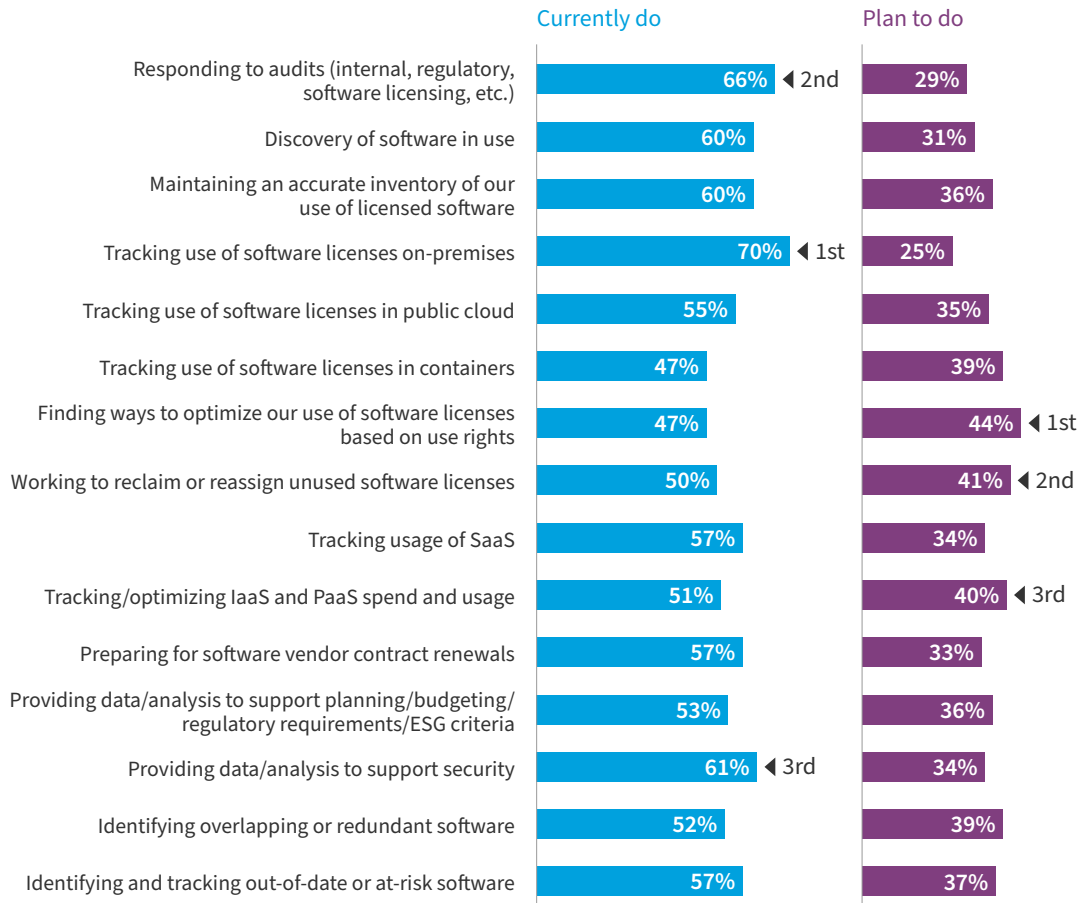


N=500

Source: Flexera 2023 State of ITAM Report

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What SAM-focused responsibilities does your ITAM team have?

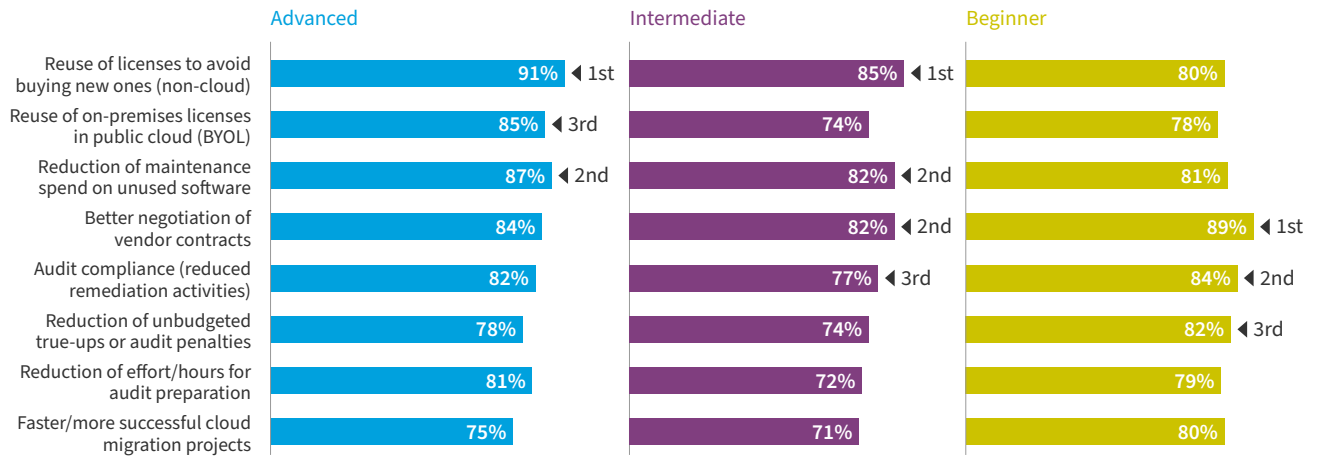


N=500

Source: Flexera 2023 State of ITAM Report



Savings from SAM programs tend to increase as programs mature



N=497

Source: Flexera 2023 State of ITAM Report



Methodology

Five hundred technical professionals and executive leaders worldwide participated in the survey in March of 2023. The network includes professionals across industries and context areas.

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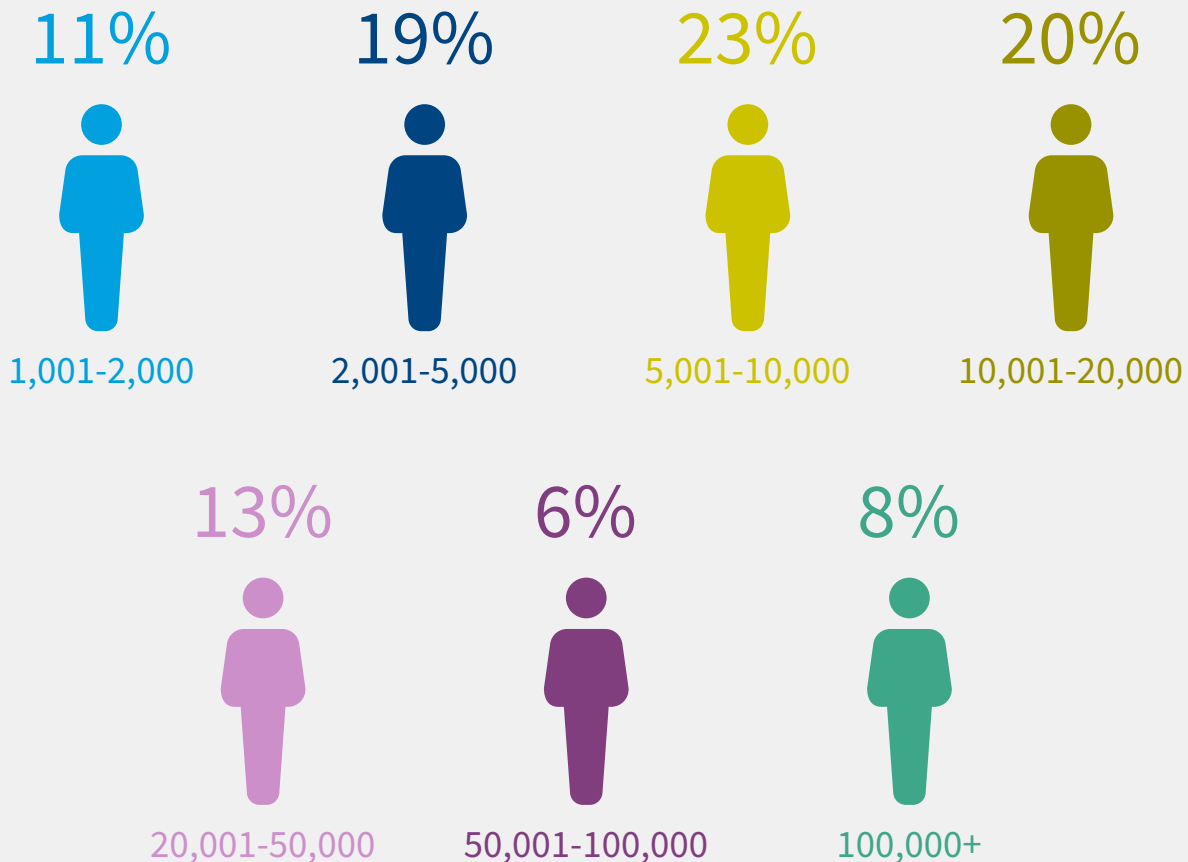
High-functioning enterprises increasingly rely on ITAM practitioners to tackle new and evolving challenges. Saving money has increasingly become ITAM teams' number one initiative, but new responsibilities don't end there. FinOps teams, central cloud teams, security teams, ESG (environmental, social and governance) teams, ITSM teams and enterprise architecture teams are improving their business outcomes by leveraging data from ITAM teams and tools. Vendor audits are still top of mind for many organizations. However, regularly optimizing spend across cloud, on-premises and SaaS is shaving millions more off annual expenditures.

The *Flexera State of ITAM Report* reveals:

- ITAM is a critical and strategic function in the enterprise
- Asset management challenges
- Top initiatives for SAM teams
- Prevalence of audits
- Cost of audits
- SAM and HAM success metrics focus on saving money
- Role of CMDBs and demand for greater visibility into IT assets
- European Spotlight

This year's survey is weighted more heavily toward larger companies, with 89% of respondents in organizations with more than 2,000 employees and 14% in organizations with more than 50,000 employees.

What size is your organization?



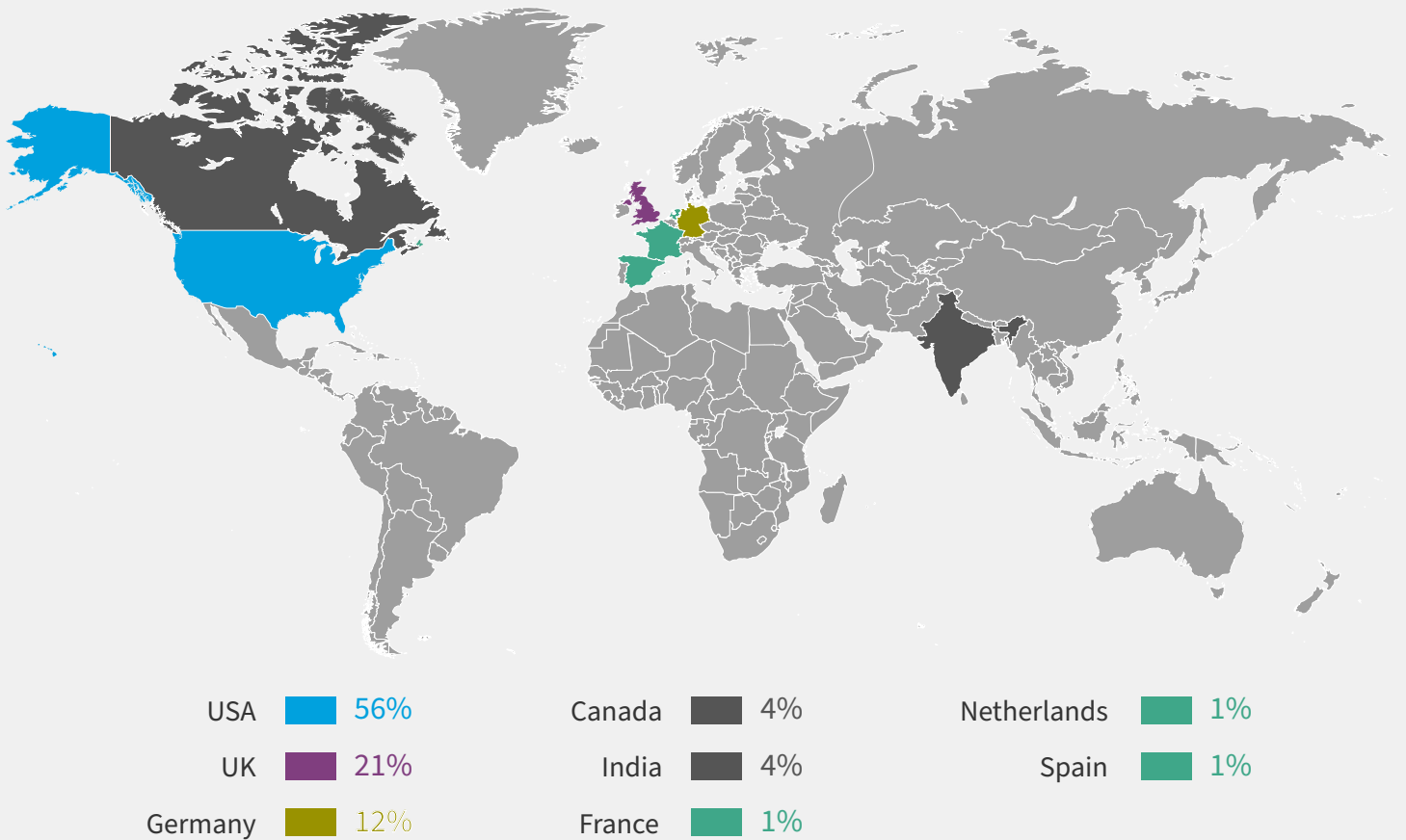
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Source: Flexera 2023 State of ITAM Report

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More than half (60%) of respondents are from North America and one-third come from Europe, including the UK (21%), Germany (12%) and France (1%).

Where are your headquarters located?



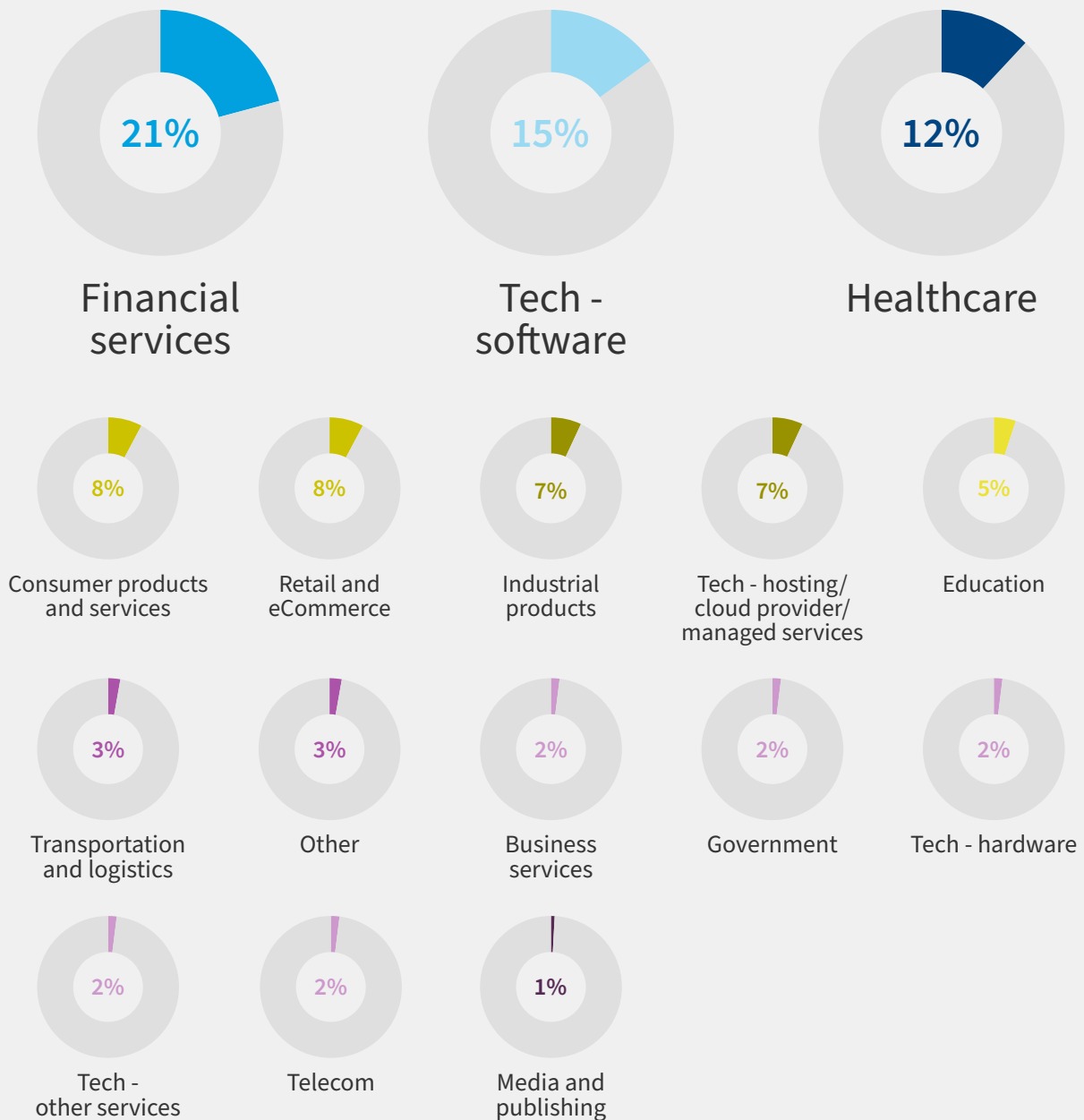
N=500

Source: Flexera 2023 State of ITAM Report

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Financial services (21%), technology software (15%) and healthcare (12%) are the most prominent industries represented. The *other* category includes industries with less than 3% representation.

What's your company's industry?



N=500

Source: Flexera 2023 State of ITAM Report

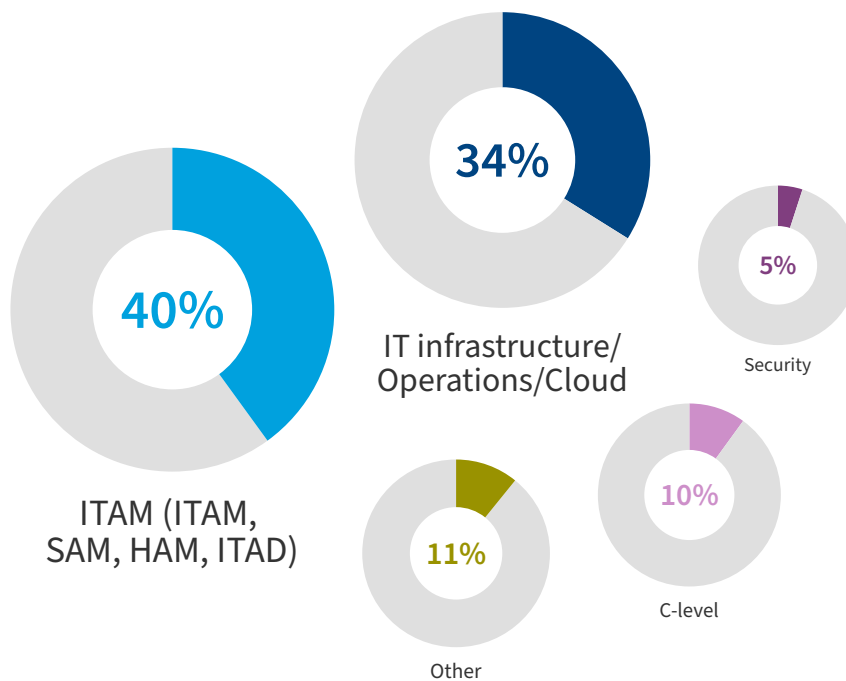


ITAM is a critical and strategic function in the enterprise

The ITAM function continues to broaden in response to the growth of FinOps, SaaS and cloud. There continues to be an increased focus on sustainability. For example, the ITAM function now includes ITAD (IT asset disposition)—safe, secure and environmentally responsible disposal of unused technological assets.

Nearly three-quarters of respondents work in ITAM (**40%**) or IT infrastructure, operations or cloud (**34%**).

What best describes your function?



N=500

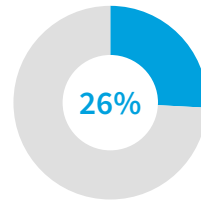
Source: Flexera 2023 State of ITAM Report

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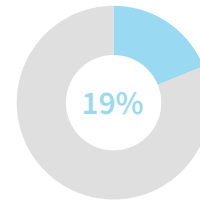
What's your role?

Two-thirds of respondents

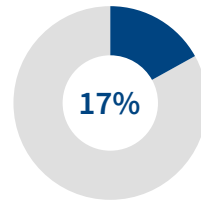
are manager level or higher. One-fifth (21%) of respondents are VP or higher.



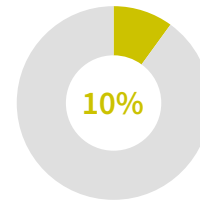
Manager/
Senior manager



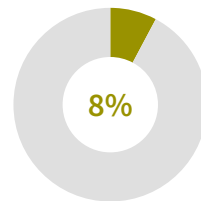
Director/
Senior director



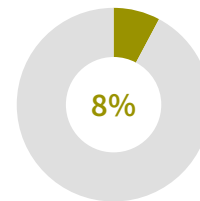
SAM/ITAM/HAM
analyst or
practitioner



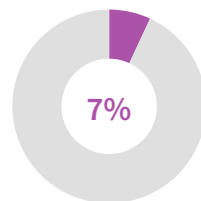
Architect



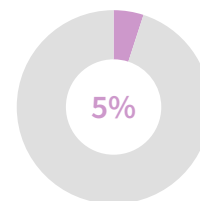
IT practitioner



VP/SVP/EVP



C-level



President/
Managing director/
General manager

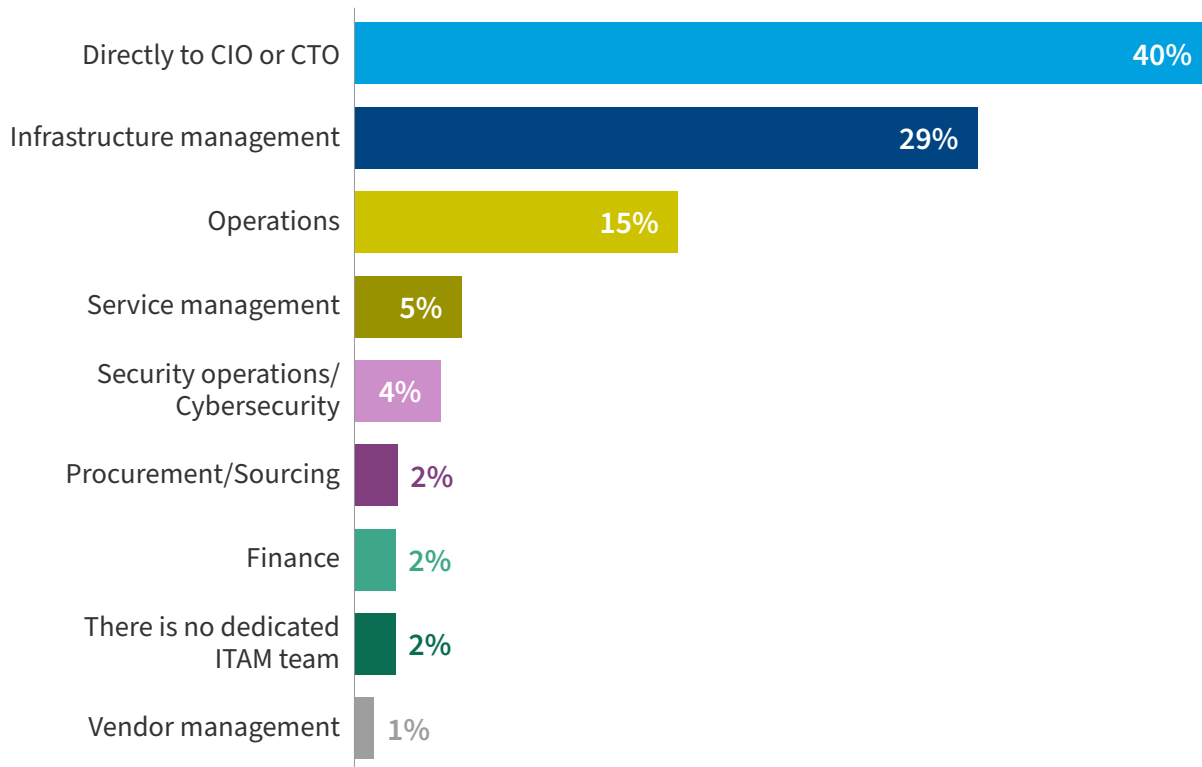
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Source: Flexera 2023 State of ITAM Report

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Forty percent of ITAM teams report to the CIO or CTO this year compared to **43%** last year, and **29%** report to infrastructure management.

Where does your ITAM team report?



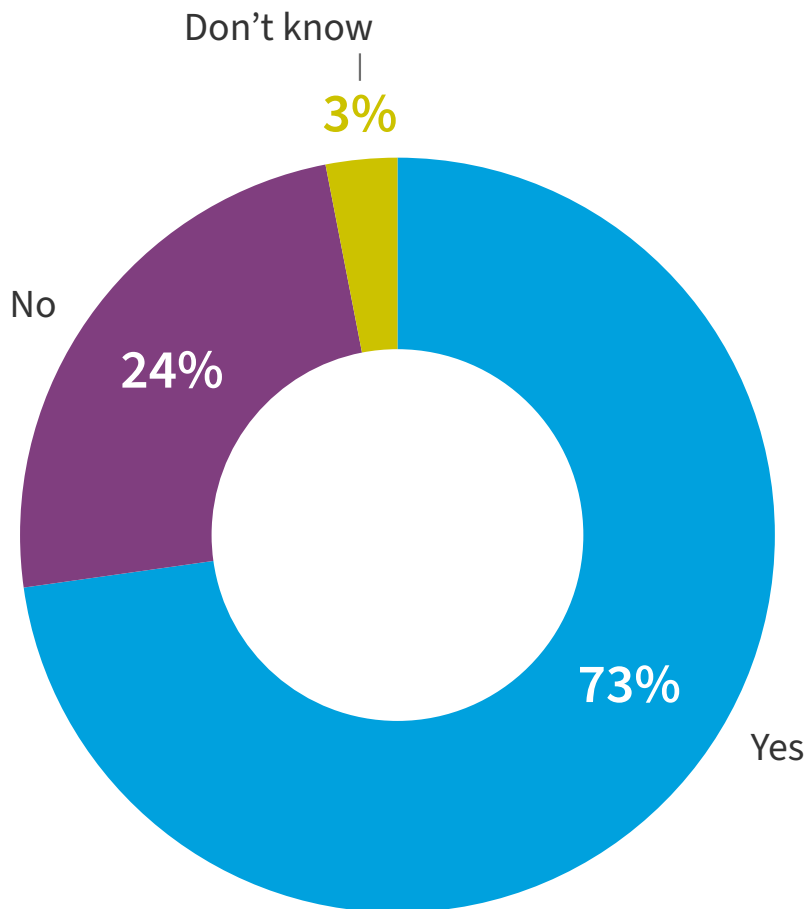
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Source: Flexera 2023 State of ITAM Report

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A cloud center of excellence (CCOE), a centralized way to manage an organization's cloud journey, remains the norm (73%), up slightly from 69% last year. CCOEs are becoming more centrally involved in digital transformation efforts.

Does your organization have a central cloud team such as a CCOE?



N=500
Source: Flexera 2023 State of ITAM Report

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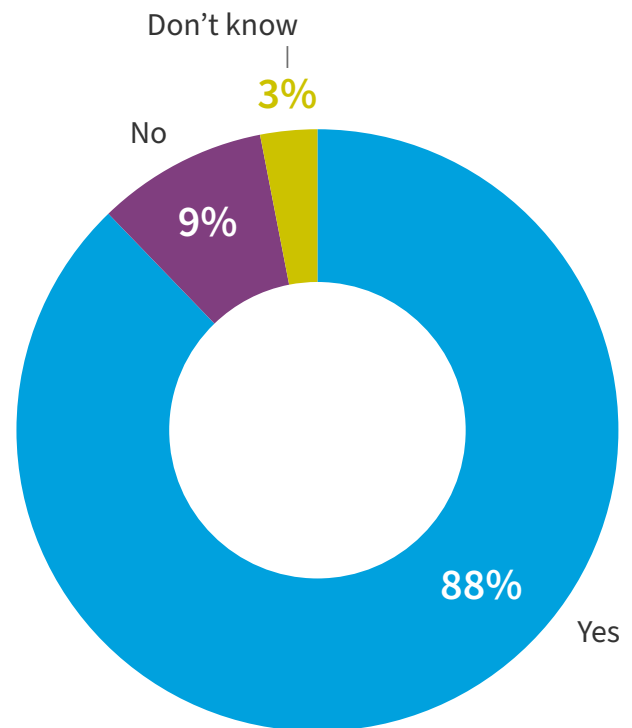
Almost nine of ten CCOEs

have an ITAM/SAM member on the team. The CCOE will have the most exposure and influence on an organization's cloud journey.

» FLEXERA POV

Enterprises should include ITAM practitioners in their CCOEs to ensure that software licensing is incorporated into cloud cost planning and deployment.

Does a member of your ITAM/SAM team participate in, or contribute to, your organization's cloud central team/CCOE?



N=366

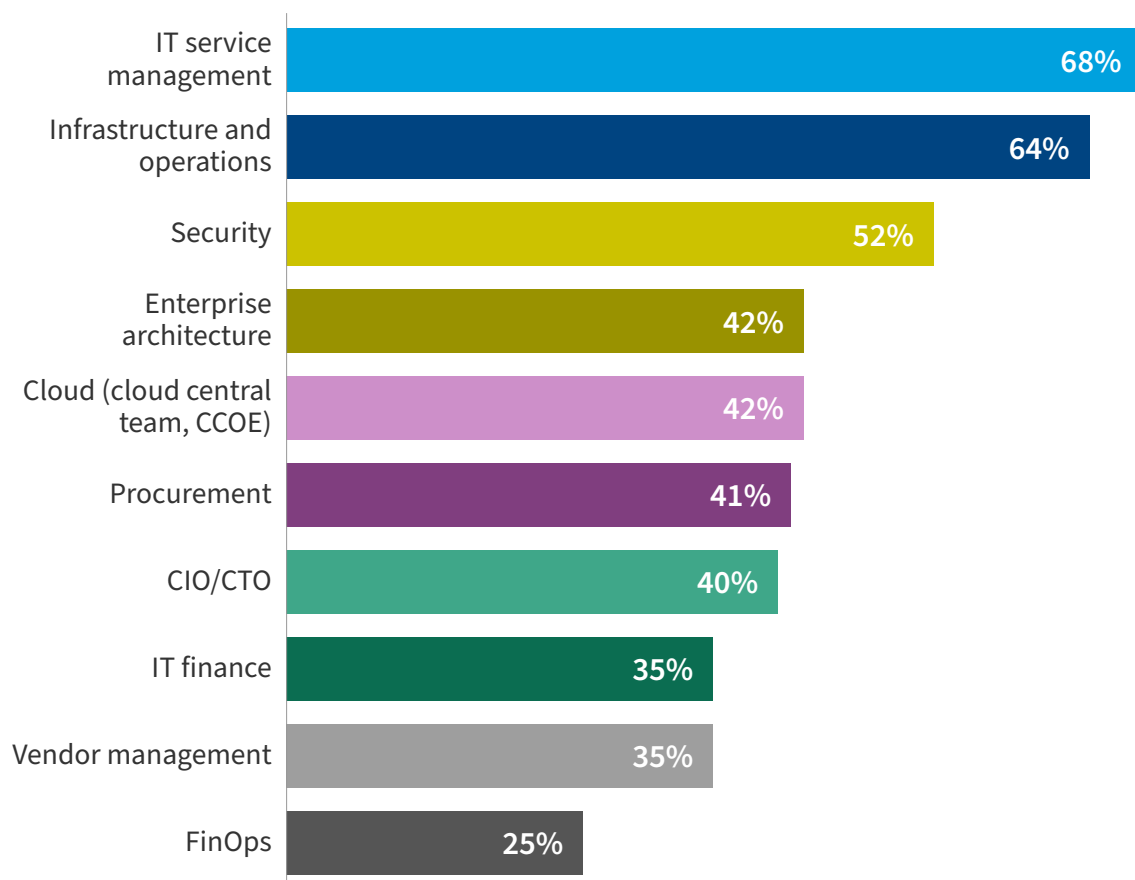
Source: Flexera 2023 State of ITAM Report

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SAM teams are critical and interact with teams across an enterprise. This year, a quarter of respondents interacted significantly with FinOps teams. Four in ten (40%) interacted with *CIOs/CTOs*, 42% with *cloud teams* and 52% with *security teams*.

Due to its growing popularity, FinOps is a new category in the survey this year. Already **25%** of SAM professionals interact with FinOps teams.

What's the level of significant interaction between your SAM team and the following teams?



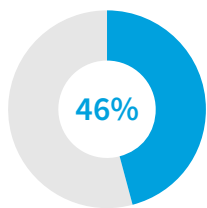
N=500

Source: Flexera 2023 State of ITAM Report

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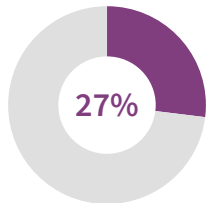
Asset management challenges

Which statement best describes where you are in implementing SAM in your organization?



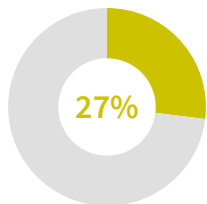
Advanced

- Ongoing tracking plus optimization of software licenses, beyond just audits
- Tracking SaaS and cloud usage



Intermediate

- Ongoing tracking of software licenses, beyond just audits



Beginner

- Primarily audit response
- Just starting to develop SAM practice/processes

N=500

Source: Flexera 2023 State of ITAM Report

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Almost half

report advanced SAM practices, including ongoing tracking, plus optimization of software licenses beyond just audits and tracking SaaS and cloud usage. There is a higher percentage of beginners this year at 27%, up from 24% last year.

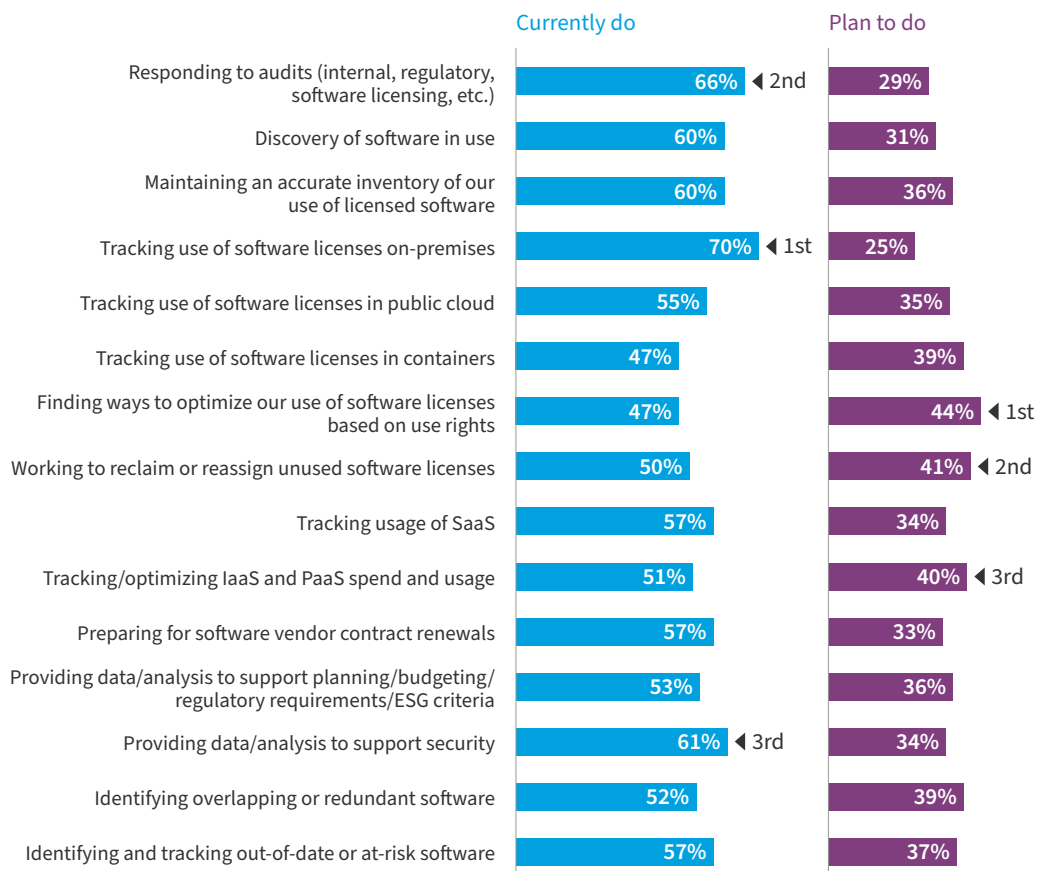
» FLEXERA POV

As SaaS and cloud usage and their associated costs eclipse those of on-premises software, ITAM professionals must continue to increase their expertise and involvement in FinOps.

Tracking the use of software licenses on-premises is currently the most common activity for ITAM teams. Security was added to this year’s survey and immediately jumped near the top, with 61% providing data/analysis to support security. In the future, ITAM teams plan to focus on finding ways to optimize our use of software licenses based on use rights (44%), working to reclaim or reassign unused software licenses (41%), and tracking/optimizing IaaS and PaaS spending and usage (40%).

» FLEXERA POV
 ITAM and SAM professionals should build strategies to share data and skills to help a broad set of processes ranging from FinOps to security.

What SAM-focused responsibilities does your ITAM team have?



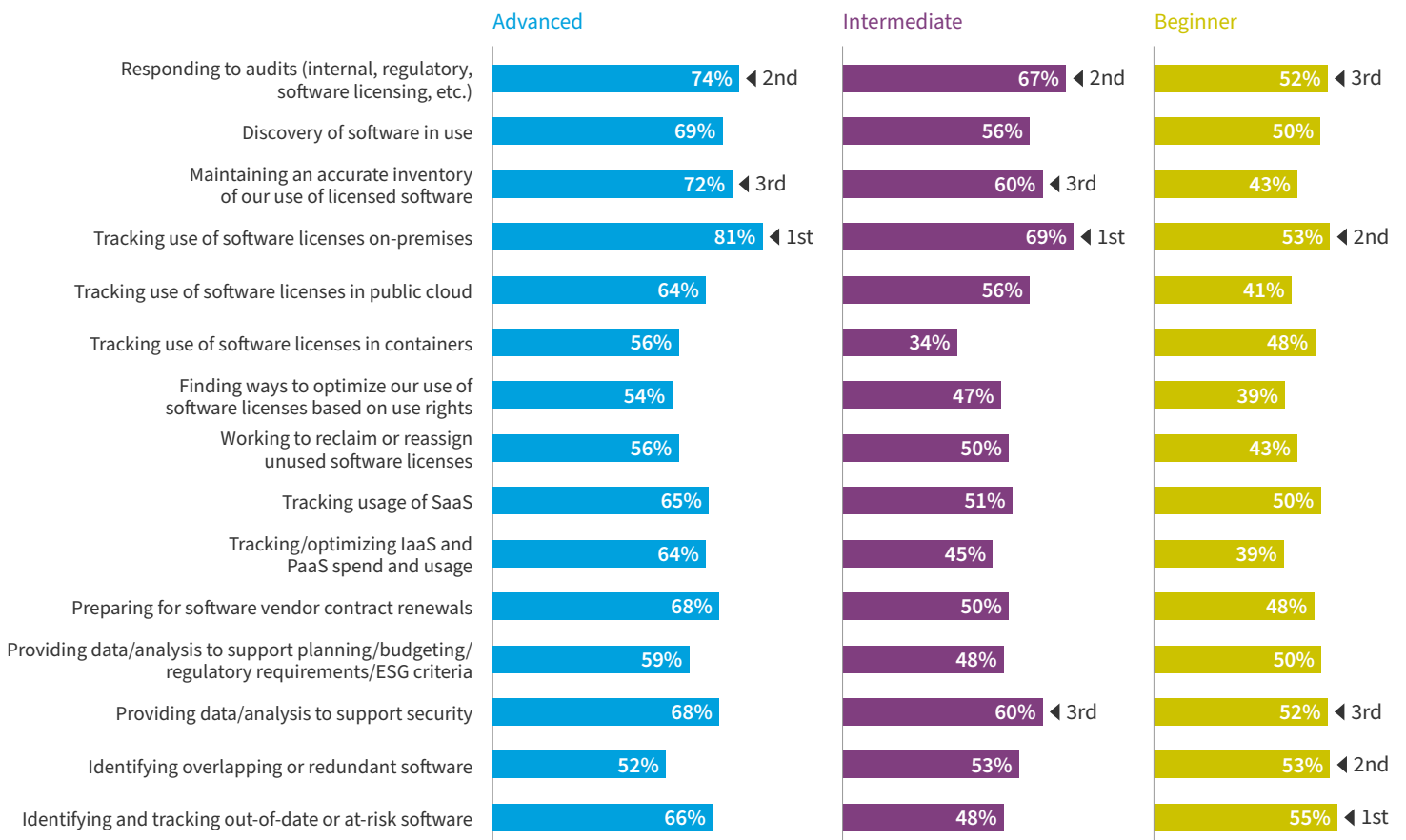
N=500
 Source: Flexera 2023 State of ITAM Report



As was the case last year, *tracking the use of software licenses on-premises* is the top responsibility for intermediate and advanced users, and *responding to audits* is second.

More than half of advanced users track the use of licenses in SaaS (65%), public cloud (64%) and containers (56%).

SAM responsibility by maturity



N=229 Advanced, N=131 Intermediate, N=132 Beginner
 Source: Flexera 2023 State of ITAM Report

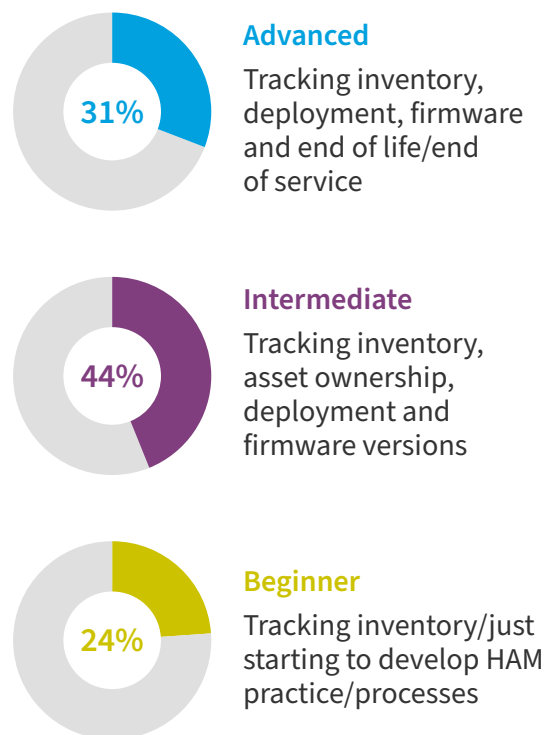


Hardware asset management (HAM) remains less advanced than SAM. As previously discussed, 46% of SAM respondents do advanced activities, compared to 31% of HAM.

» **FLEXERA POV**

There is a need for ITAM teams to mature HAM processes to catch up with the more mature SAM processes.

Which statement best describes where you are in implementing HAM in your organization?

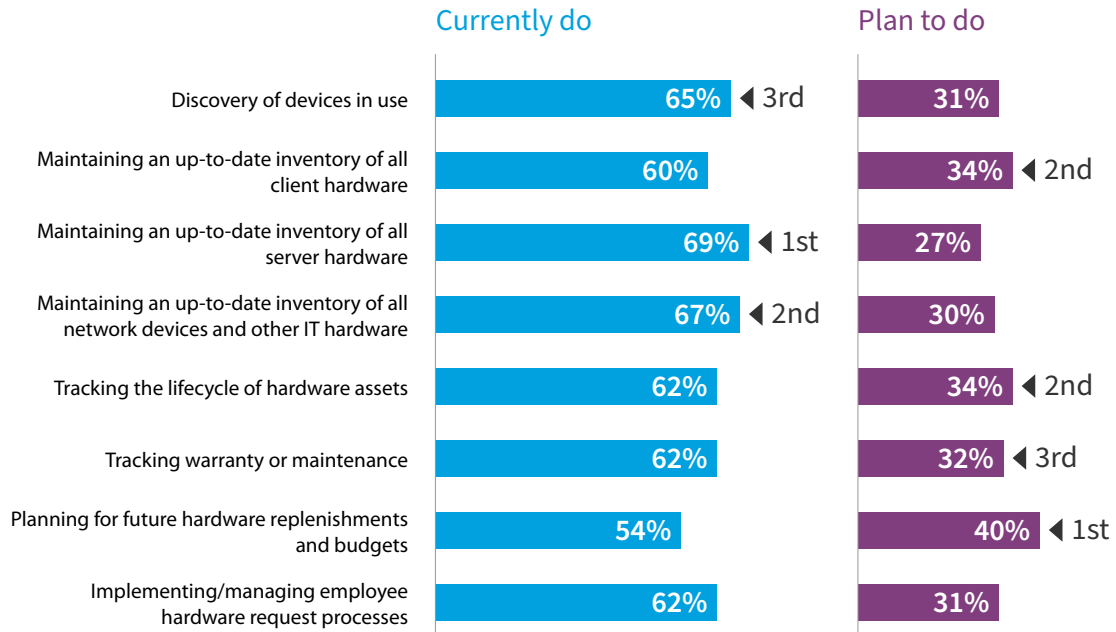


N=500

Source: Flexera 2023 State of ITAM Report

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What HAM-focused responsibilities does your ITAM team have in your organization?



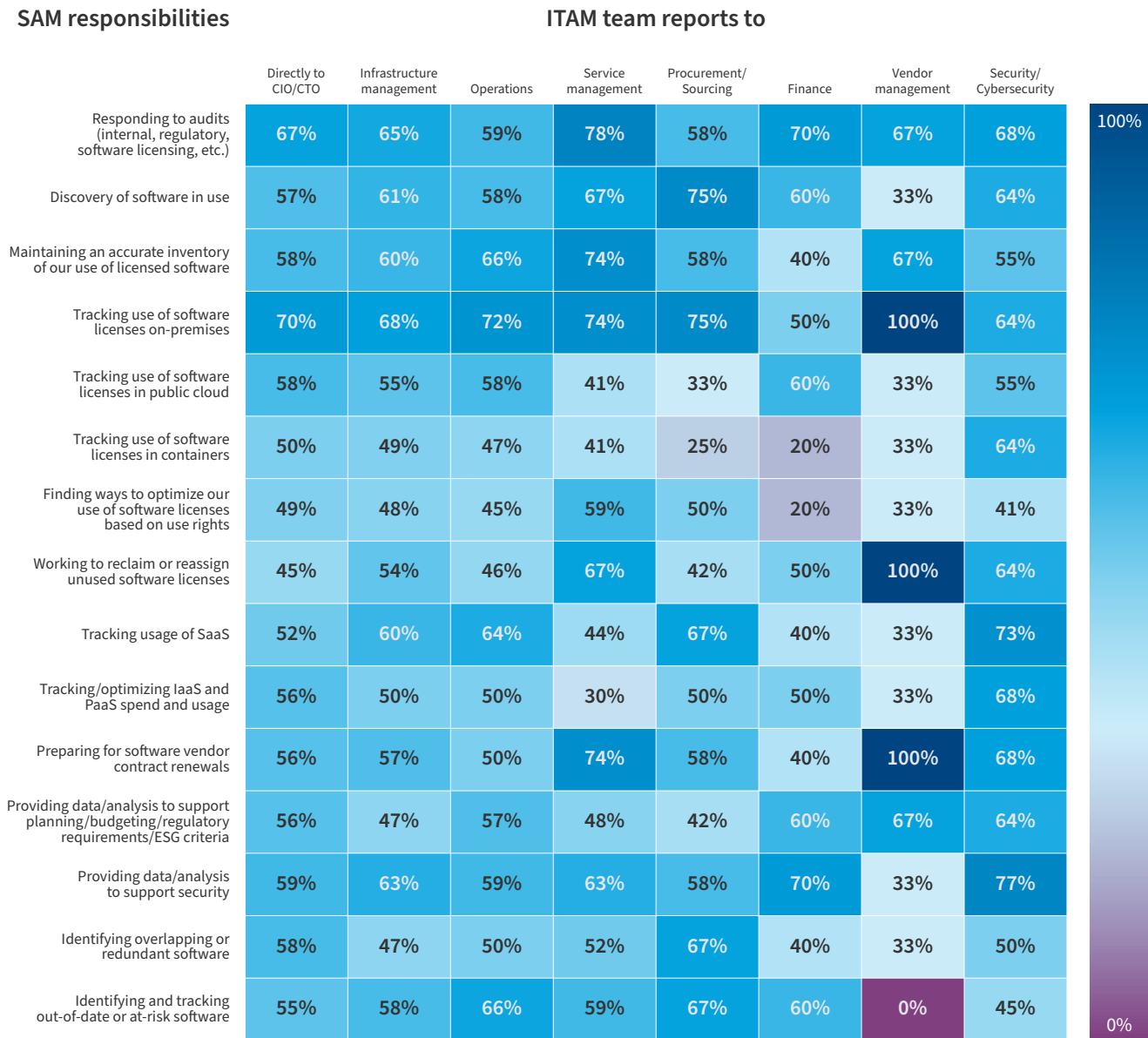
N=500

Source: Flexera 2023 State of ITAM Report



Similar to last year, SAM teams reporting directly to the C-level have the broadest responsibilities. Teams reporting to vendor management are most likely to *provide data/analysis to support ESG efforts (67%)*, and teams reporting to security are most likely to *provide data/analysis to support security efforts (77%)*.

SAM team responsibilities and where they report

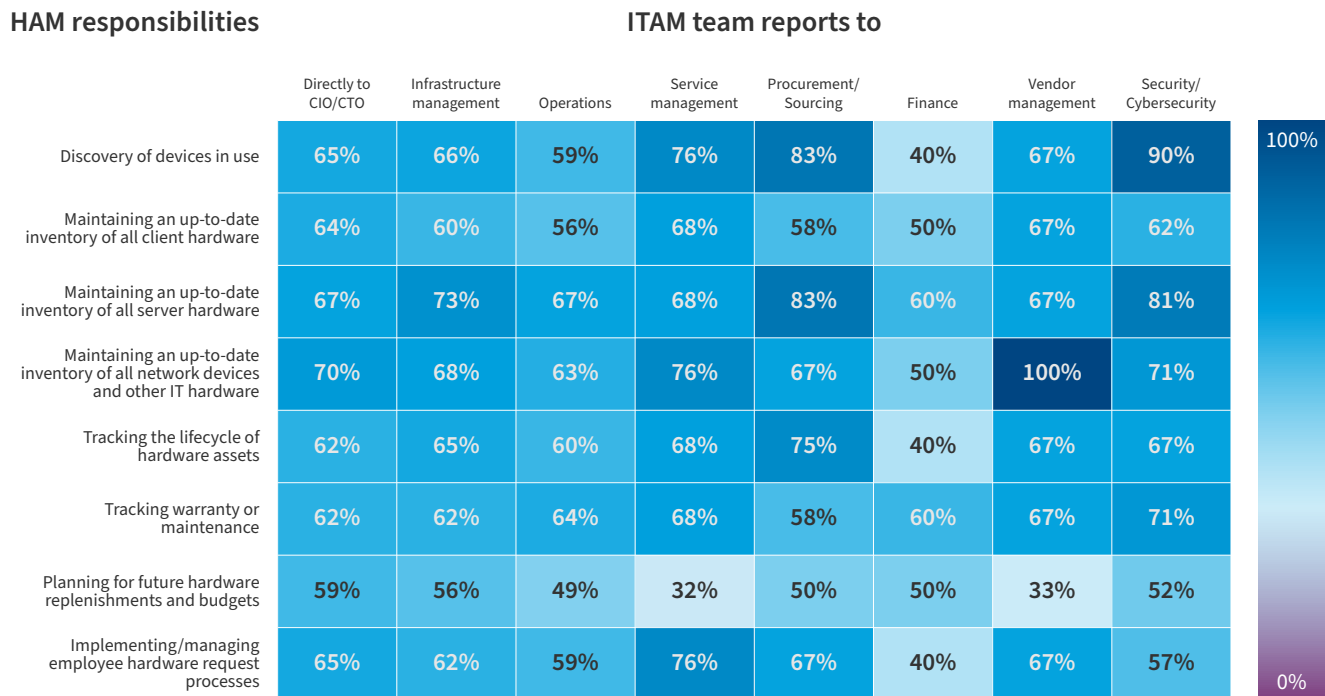


N=500
Source: Flexera 2023 State of ITAM Report



HAM teams saw a marked increase in cybersecurity responsibilities. For example, *the discovery of devices in use* was 90% this year for teams reporting to security, up from 63% last year.

HAM team responsibilities and where they report



N=491

Source: Flexera 2023 State of ITAM Report

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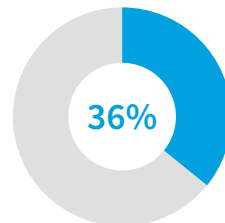
Estimated wasted spend remains significant across the IT estate

Wasted IT spending remains a challenge.

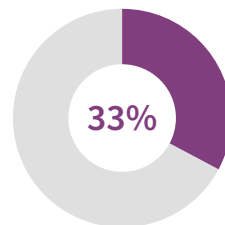
Respondents estimated 36% of desktop software spend, 33% of data center spend, 32% of SaaS spend and 32% of IaaS/PaaS spend are wasted.

» FLEXERA POV

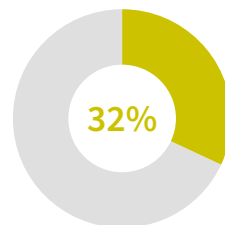
ITAM professionals must focus more on desktop software as we move into a more permanent work-from-home/hybrid work environment.



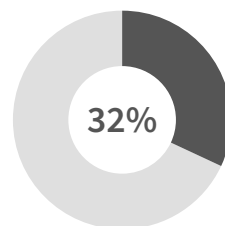
Estimate the percentage of your **desktop software** spend that's underutilized or wasted.



Estimate the percentage of your **data center software** spend that's underutilized or wasted.



Estimate the percentage of your **SaaS** spend that's underutilized or wasted.



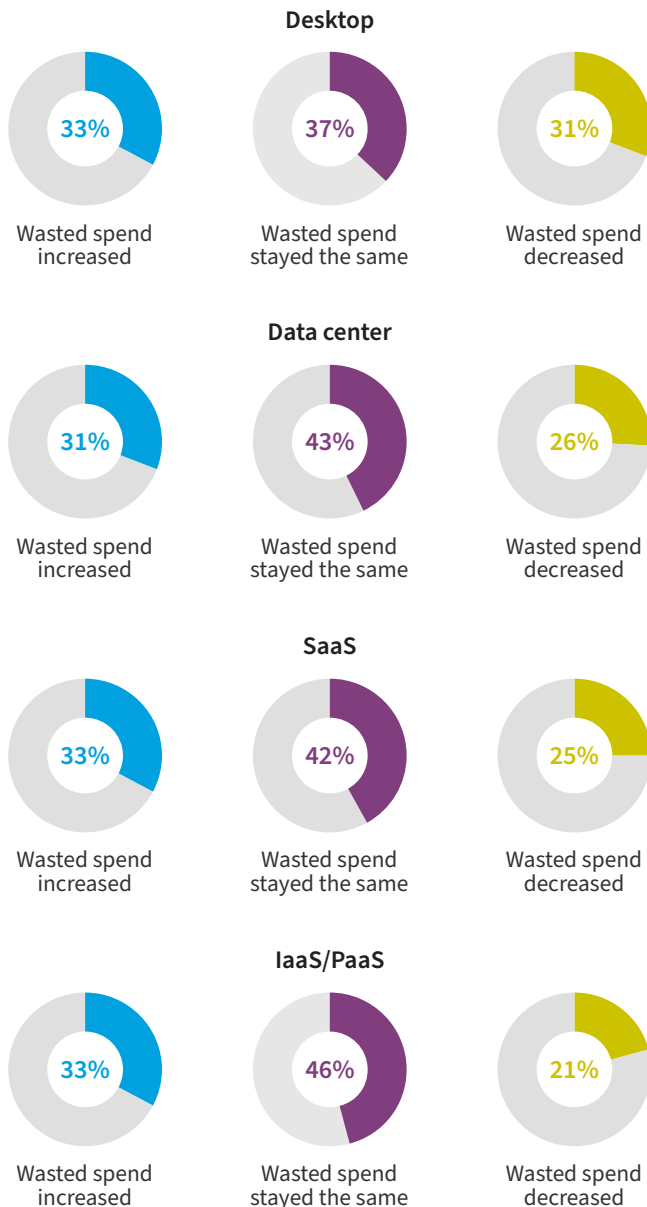
Estimate the percentage of your **IaaS/PaaS** spend that's underutilized or wasted.

N=431 Desktop, N=434 Data center, N=431 SaaS, N=418 IaaS/PaaS
Source: Flexera 2023 State of ITAM Report

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Three in ten (31%) respondents said wasted spend was decreasing year over year with *desktop software*, while 33% said wasted spend was increasing with *IaaS/PaaS*.

How has spending changed over the past year?



One-third of respondents say wasted IaaS/PaaS spending increased in the past year, underscoring the need for FinOps tools and processes.

N=500
Source: Flexera 2023 State of ITAM Report

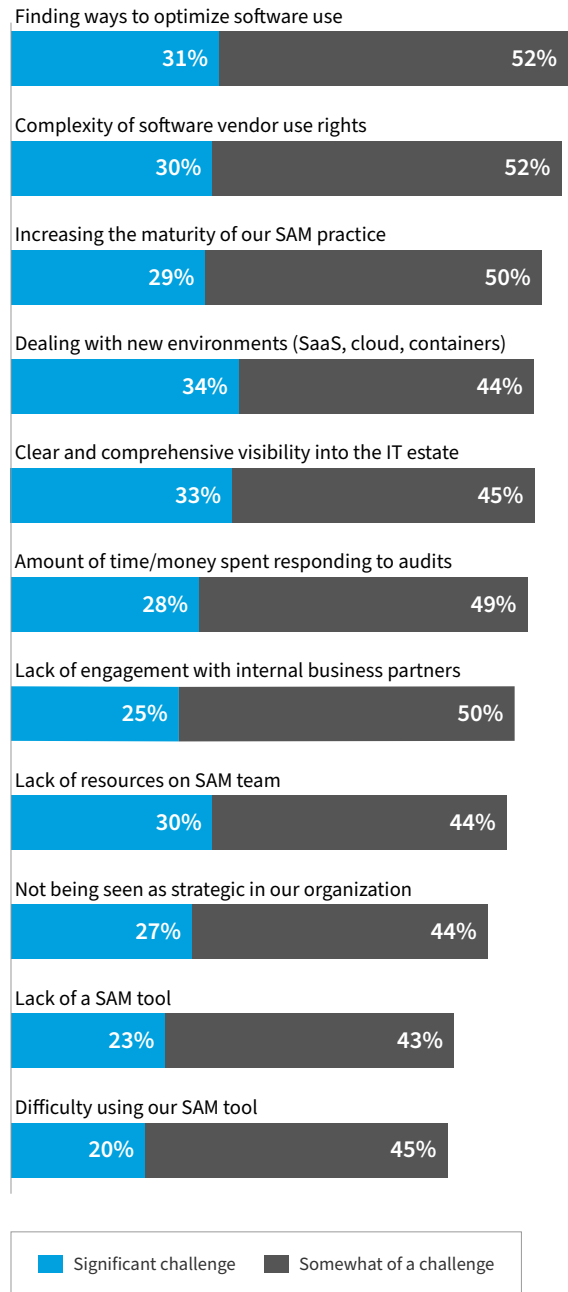


ITAM challenges hinder organizations from recovering wasted spend. *Dealing with SaaS, cloud and containers* is a significant challenge (34%), as is gaining *clear and comprehensive visibility into the IT estate* (33%). More than eight in ten (83%) said *finding ways to optimize software use* is a challenge.

» FLEXERA POV

A clear, comprehensive view of your IT estate can identify millions of dollars in savings opportunities.

What are your challenges with SAM?



N=500

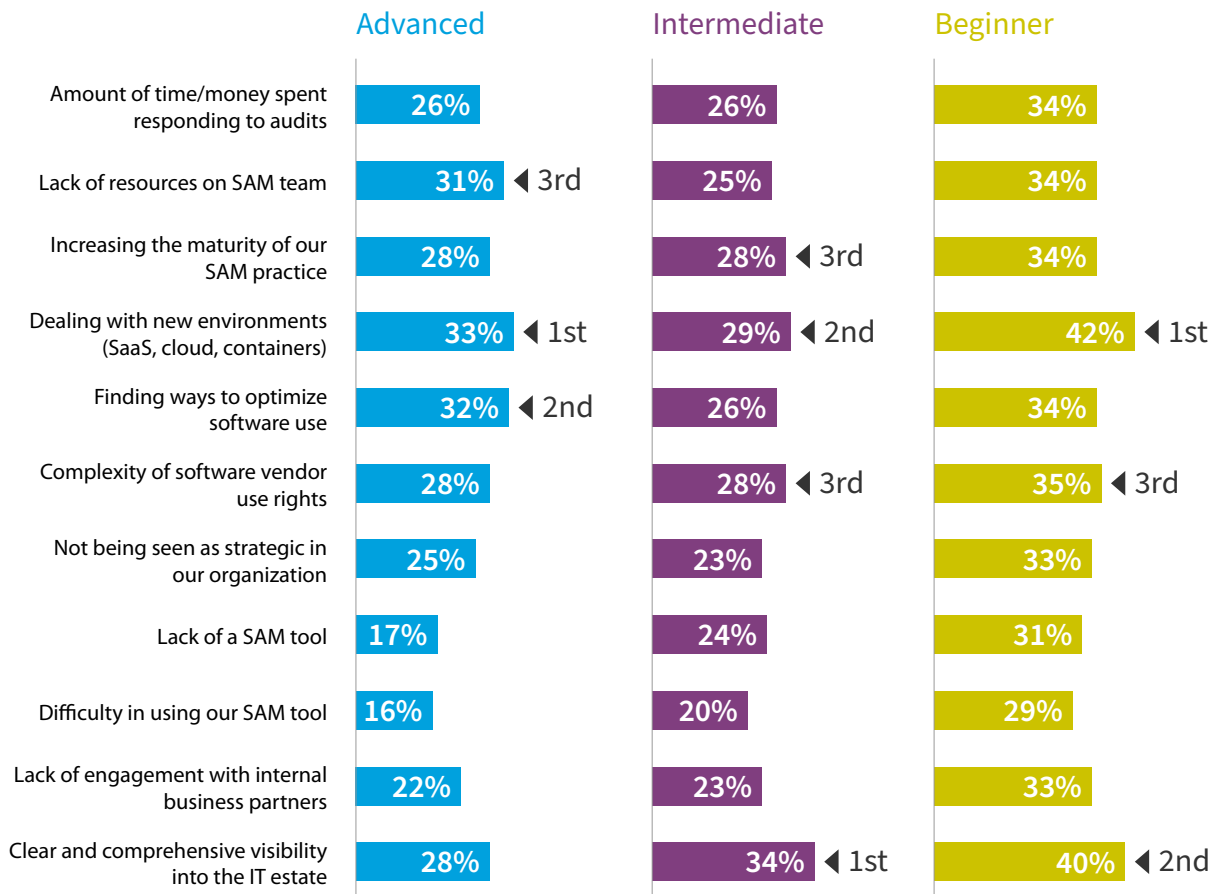
Source: Flexera 2023 State of ITAM Report



Audits are a challenge and can be costly, no matter the SAM team’s maturity level. However, beginners and advanced users struggle the most with *new environments (SaaS, cloud, containers)*. Finding ways to optimize software use remains critical and a significant challenge across maturity levels.

SAM tools are becoming more effective and easier to use for mature users, as **84%** of advanced users don’t find using them a challenge, compared to **71%** of beginners.

SAM challenges by maturity



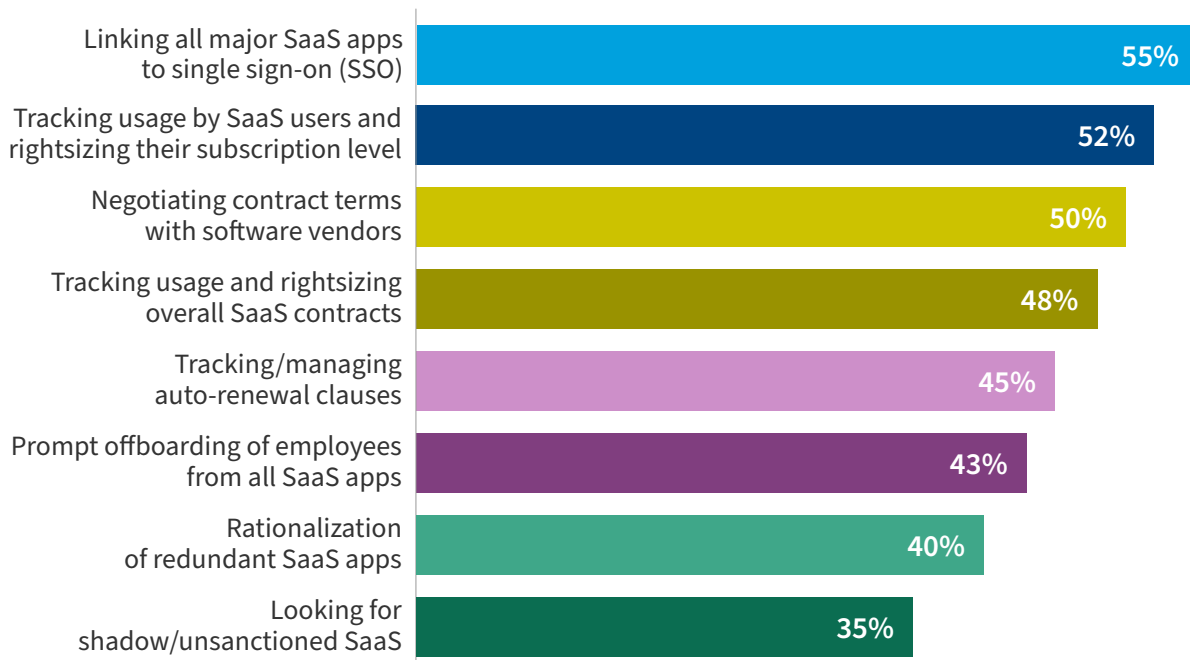
N=497
Source: Flexera 2023 State of ITAM Report



Top initiatives for SAM teams

Respondents still struggle to implement best practices for governing the use of SaaS and optimizing SaaS spending, with less than half *tracking usage and rightsizing overall SaaS contracts* (48%). More than half have *linked all major SaaS applications to single sign-on (SSO)* (55%).

What practices have you implemented for managing SaaS?



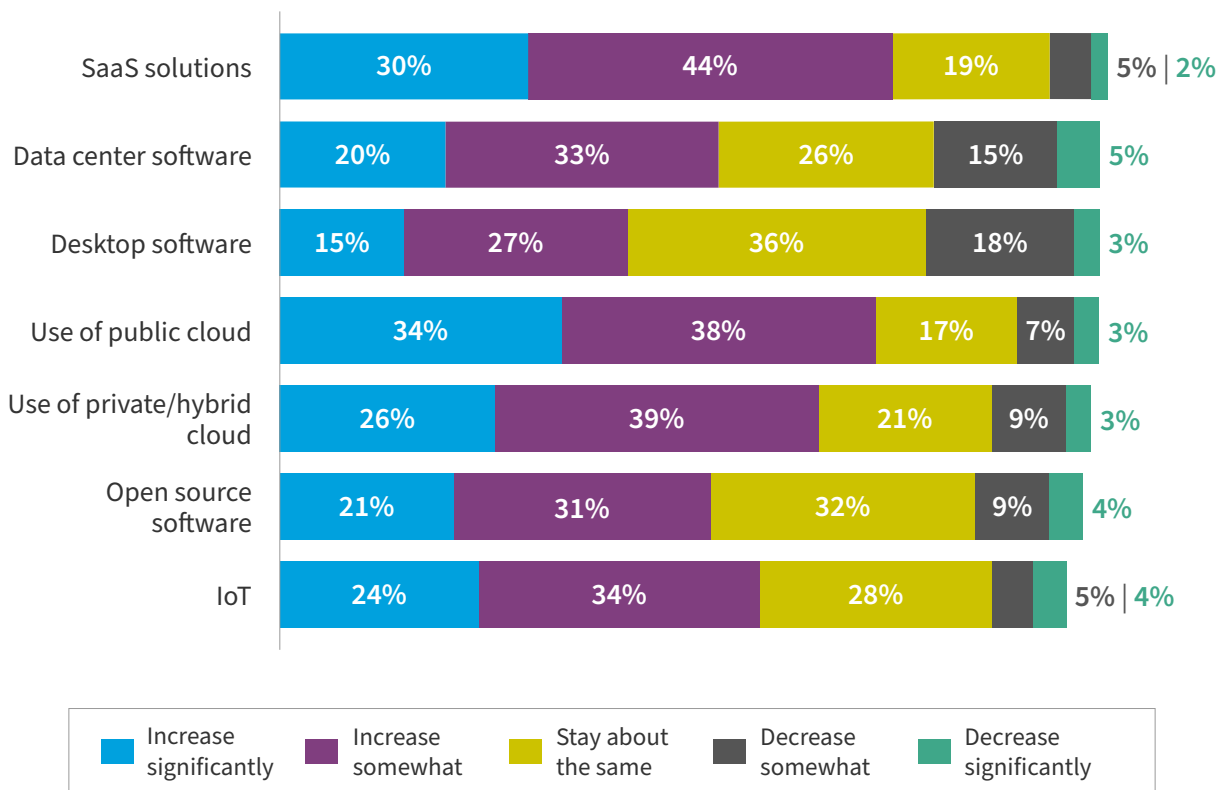
N=500

Source: Flexera 2023 State of ITAM Report

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SAM professionals expect SaaS software and cloud computing to drive the most significant change in focus over the next three years. Three-fourths (74%) expect an increased focus on SaaS, and 72% expect more focus on public cloud computing.

For your SAM practice, how do you expect your focus on the following areas to change in the next three years?



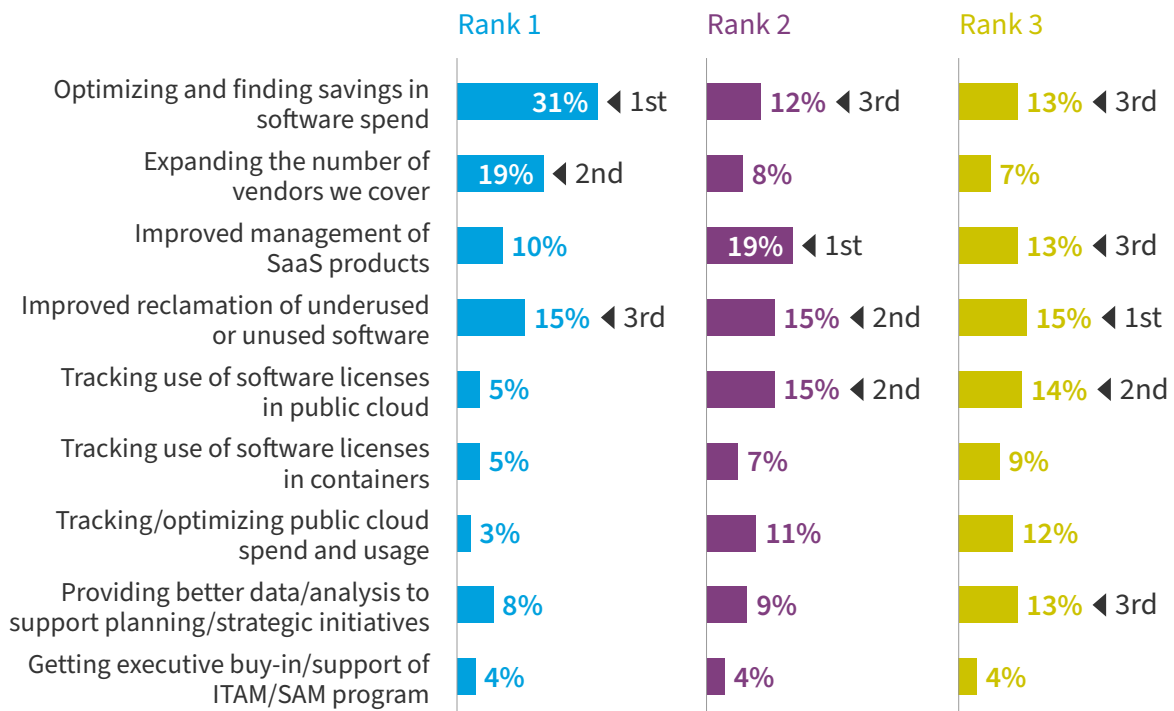
N=500

Source: Flexera 2023 State of ITAM Report

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Optimizing spend is a top SAM initiative in 2023 (and was the top challenge in the *Flexera 2023 State of the Cloud Report* for the first time). Three in ten (31%) ranked *optimizing cloud spending* as the top initiative this year, compared to 28% last year. Less than half of respondents named *improved reclamation of underused or unused software* or *improved management of SaaS products* as a top three initiative.

On what SAM initiatives do you want to make progress in the next year?

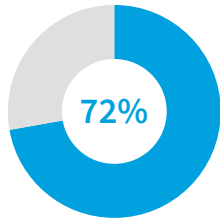


N=500

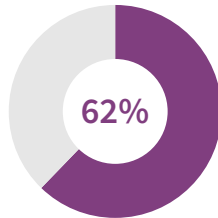
Source: Flexera 2023 State of ITAM Report



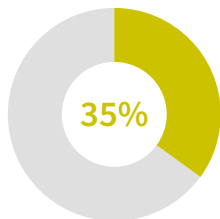
Does your organization have a defined sustainability policy or process for hardware assets?



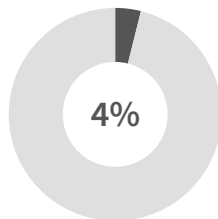
Recycling



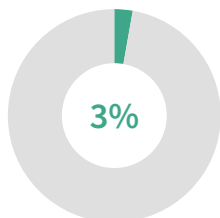
Longer retention period



Donation



Don't have any policies



Don't know

Nearly
three-quarters
of respondents

are recycling their retired hardware assets.

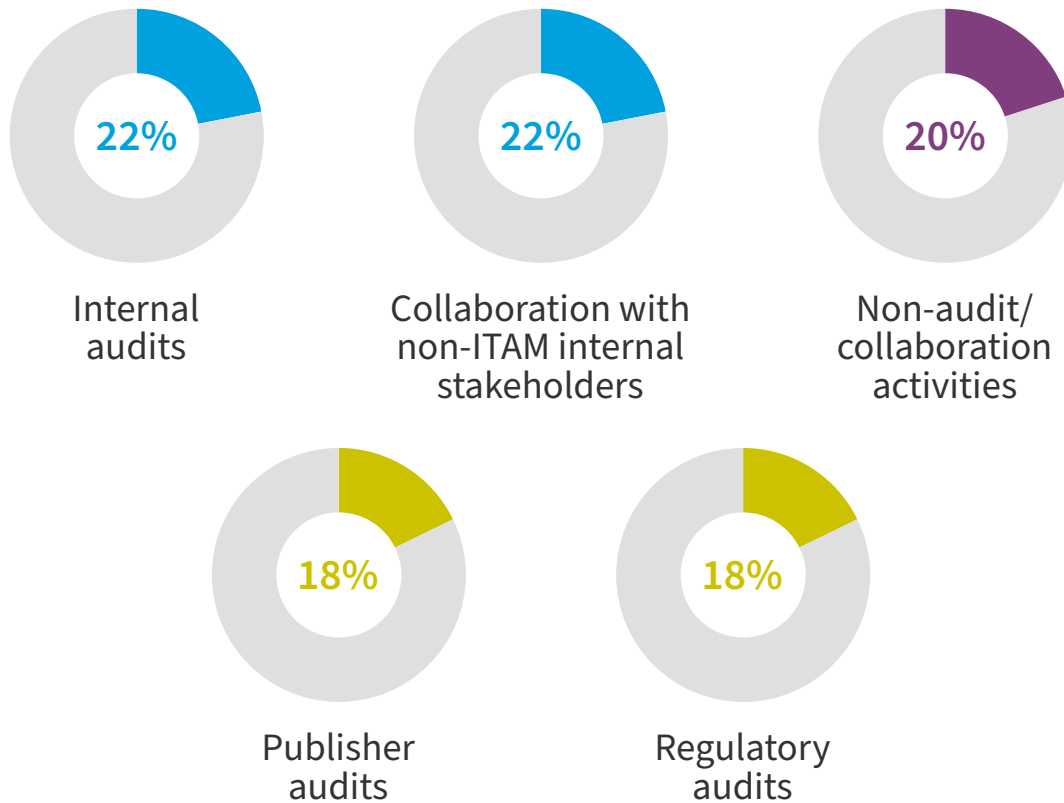
N=500

Source: Flexera 2023 State of ITAM Report

flexera.

Time spent supporting software publisher audits is down for the third straight year.

Estimate the percentage of your SAM team's time that's spent responding to audits



N=500

Source: Flexera 2023 State of ITAM Report

flexera

Time spent responding to publisher audits dropped to **18%**, compared to **24%** last year and **27%** in 2021.

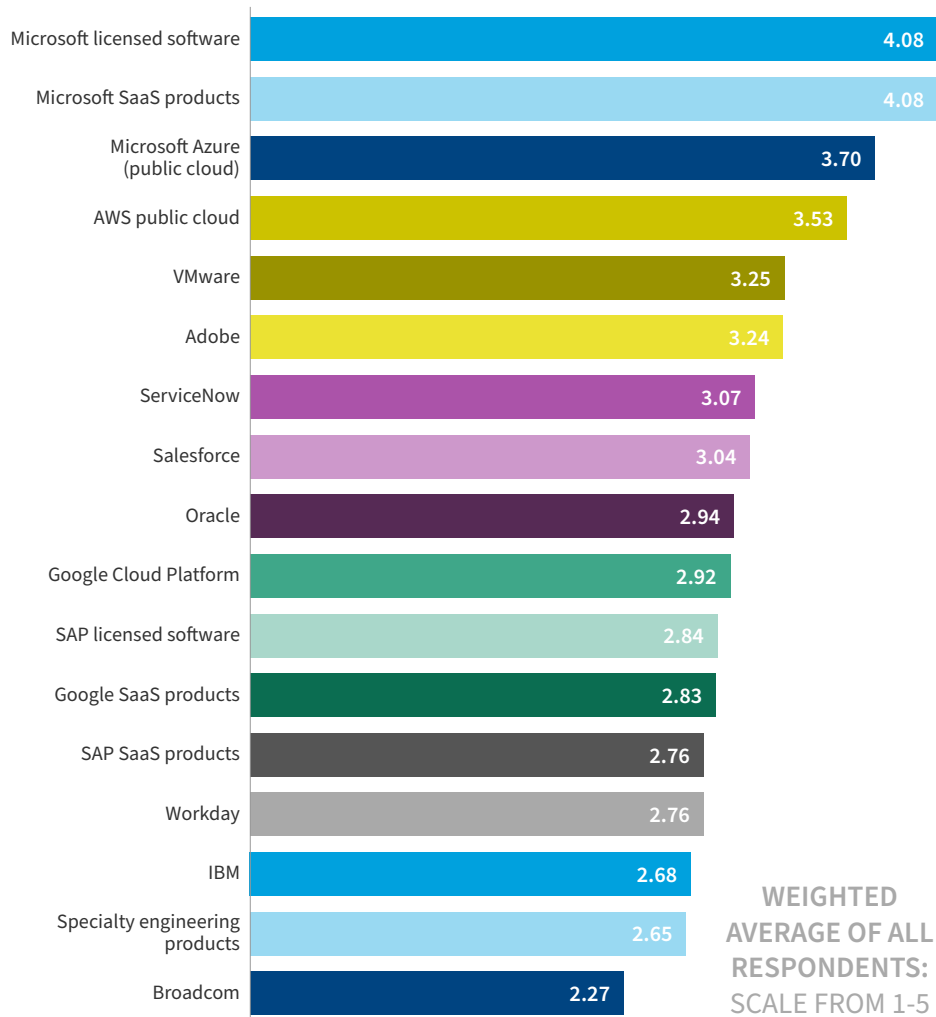
» FLEXERA POV

As ITAM tools improve usability and provide deeper insights into the hybrid IT estate, time spent supporting audits will continue to decrease.

Vendor snapshot: Prevalence of audits

When asked to rate, on a scale from 1 to 5, how relevant technology providers are to a SAM program, respondents placed Microsoft in the top three spots: Microsoft licensed software (4.08), Microsoft SaaS products (4.08) and Microsoft Azure public cloud (3.7).

How relevant are these technology providers to your SAM program?

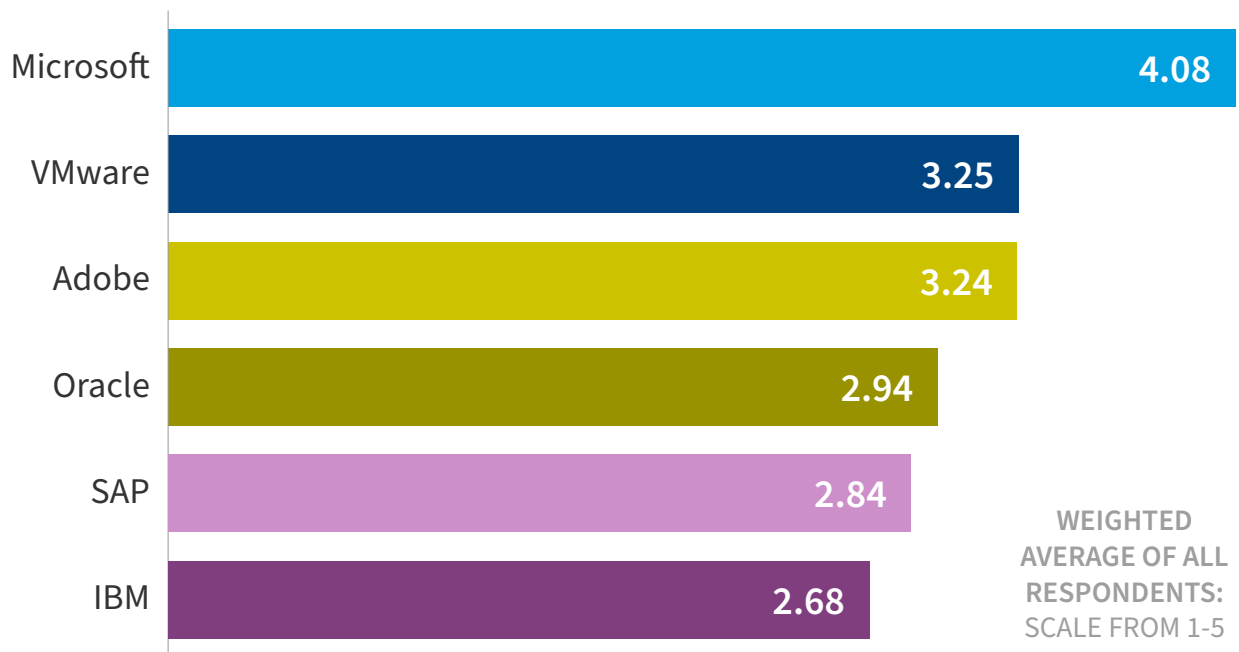


N=500
Source: Flexera 2023 State of ITAM Report

flexera

SAM teams continue to focus holistically on Microsoft, driven by Microsoft's Enterprise Agreements.

How relevant are these software vendors to your SAM program?



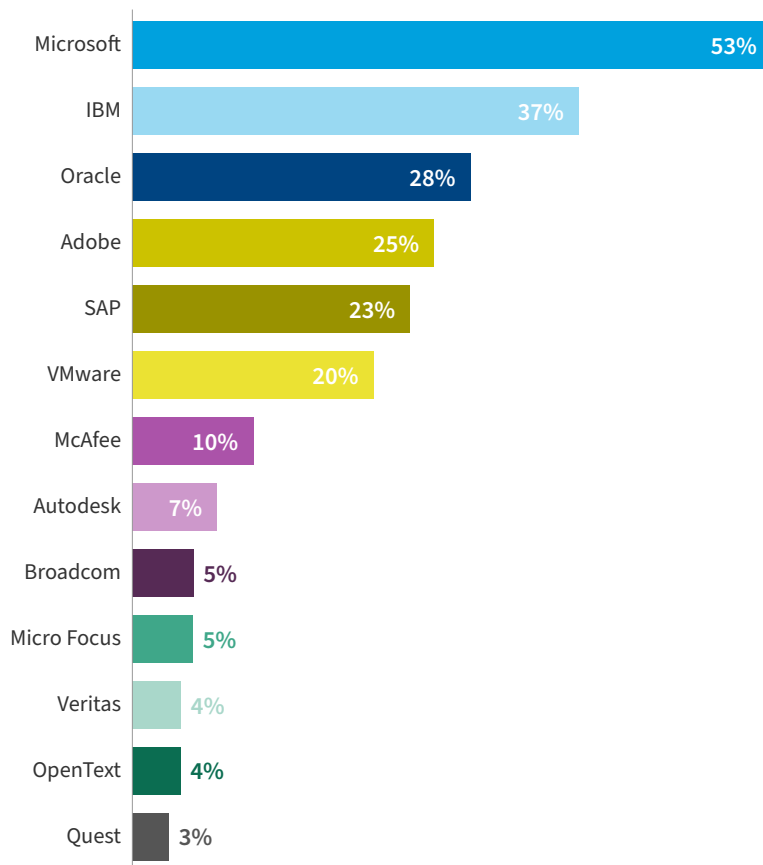
N=500

Source: Flexera 2023 State of ITAM Report

flexera.

Respondents reported an increase in the number of audits by Microsoft in the past three years (53%). During the same three-year period, a significant number of respondents reported having been audited by IBM (37%), Oracle (28%) and Adobe (25%).

Which vendors have audited your organization in the past three years?



7 point increase

There has been an increase in the number of respondents reporting Microsoft audits, **up from 46% in 2021 to 53% this year.**

N=500

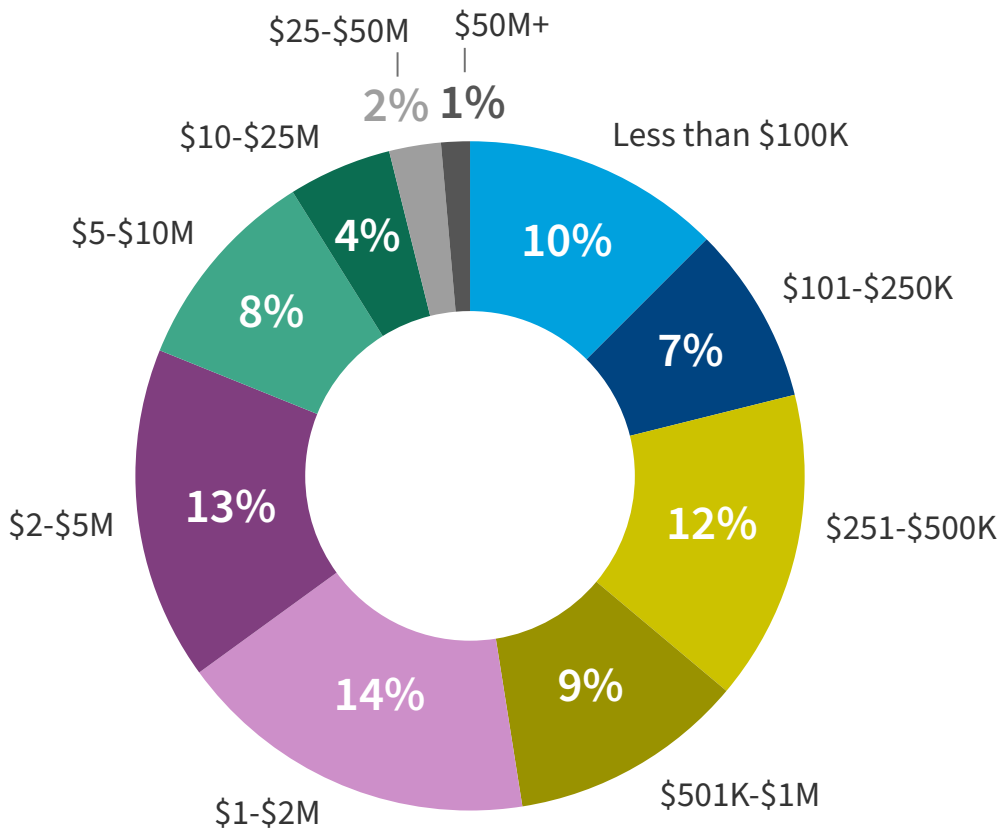
Source: Flexera 2023 State of ITAM Report

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Cost of audits

Software audits continue to be very expensive. Fifteen percent of respondents said they paid more than \$5 million in the past three years due to software vendor audits (up from 9% last year).

Estimate how much your organization has paid over the past three years as a result of audits by software vendors



\$25 million

Three percent of respondents report paying \$25 million or more in software audits over the past three years, and 12% report paying \$5 million or more.

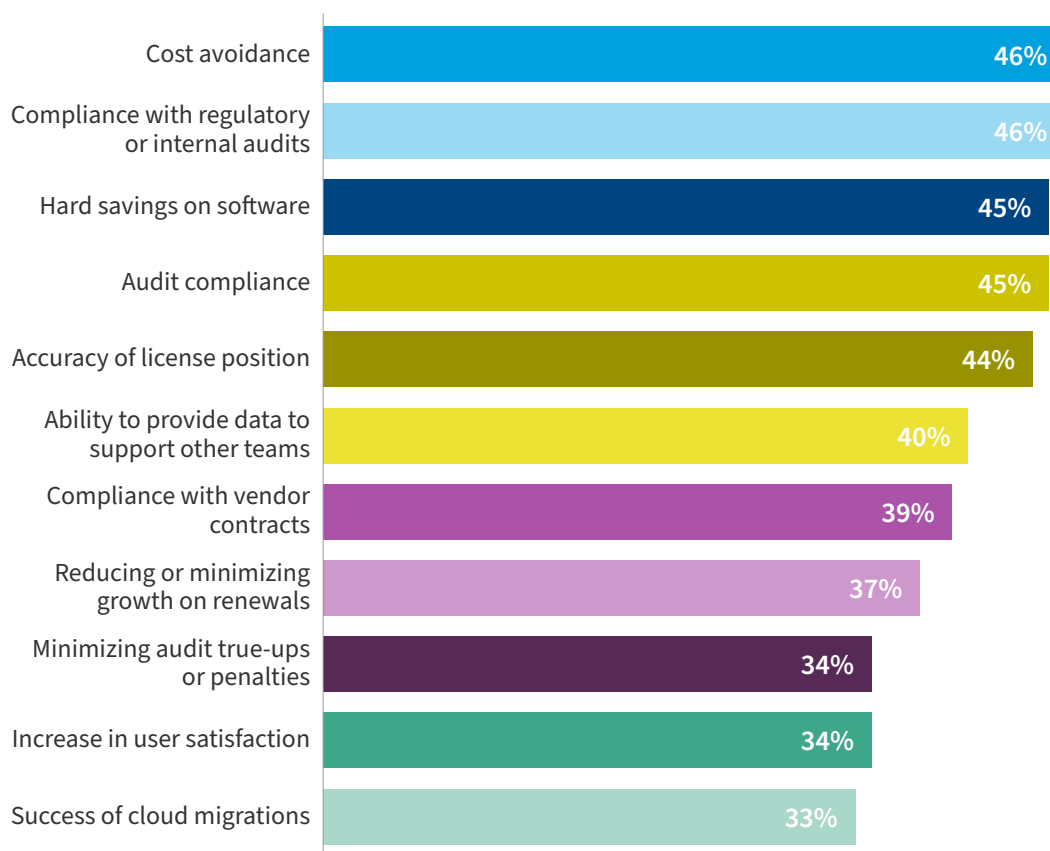
N=500
Source: Flexera 2023 State of ITAM Report

flexera.

SAM and HAM success metrics focus on saving money

As a metric to measure success of SAM initiatives, *cost avoidance* increased the most. Last year, 41% said they used cost avoidance as a metric for SAM initiatives; this year that percentage rose to 46%. Other common ways to measure SAM initiatives include *compliance with regulatory or internal audits* (46%), *audit compliance* (45%), and *hard savings on software* (45%).

What metrics are used to measure success of your SAM initiatives?



N=500

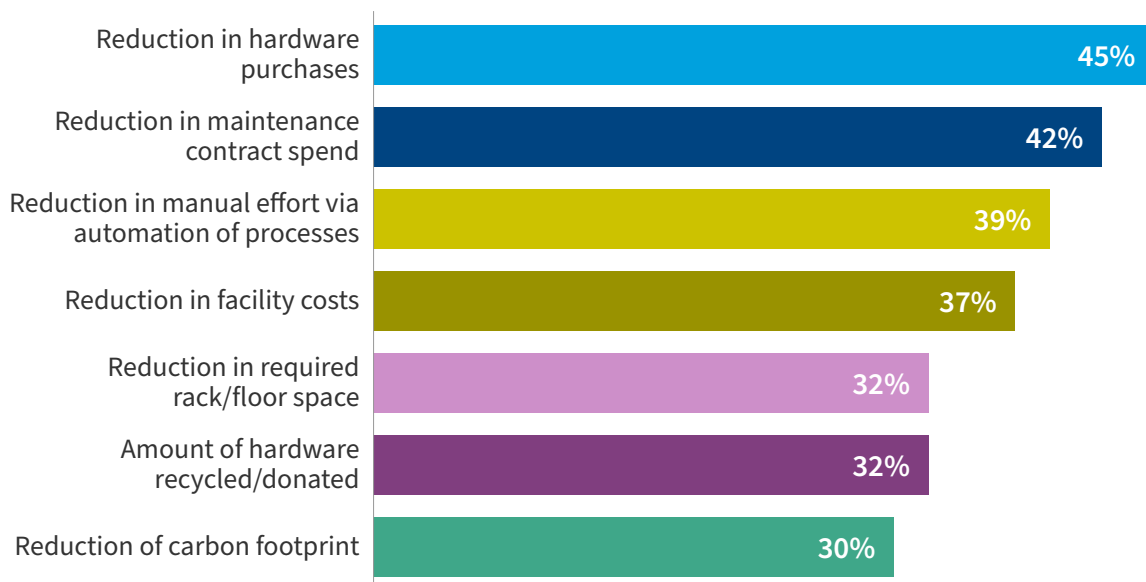
Source: Flexera 2023 State of ITAM Report

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HAM programs are much more cost-focused this year. The top 3 measures of success for HAM teams are *reduction in hardware purchases* (45%), *reduction in maintenance contract spend* (42%), and *reduction in facility costs* (37%). HAM initiatives are also measuring *carbon footprint* more, increasing from 25% last year to 30% this year.

Nearly one-third of HAM programs measure carbon footprint.

What metrics are used to measure success of your HAM initiatives?



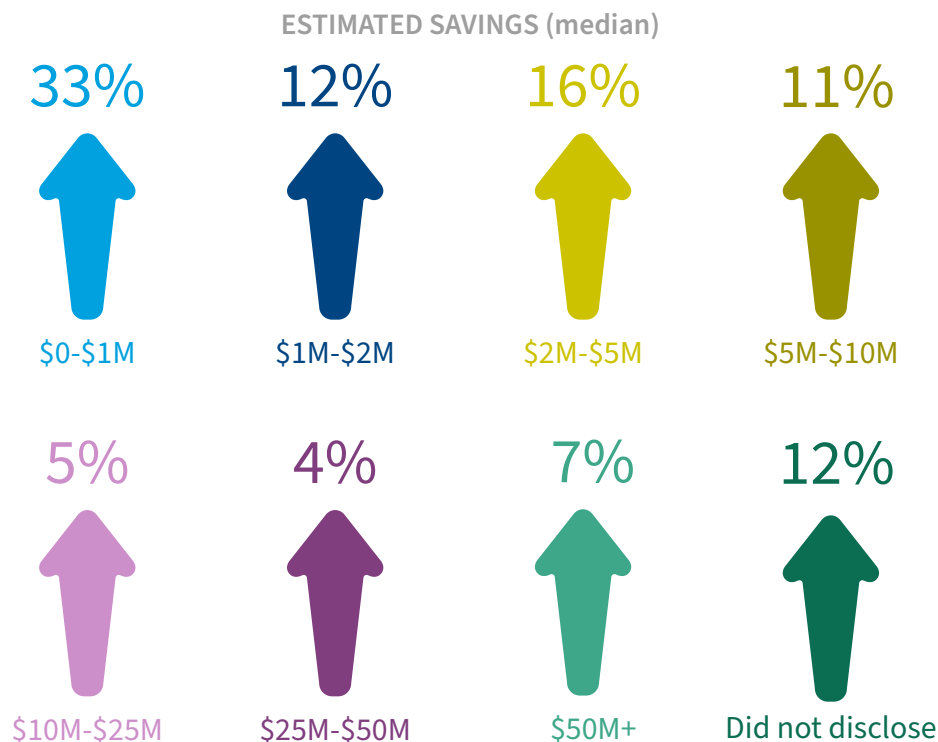
N=500

Source: Flexera 2023 State of ITAM Report

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SAM programs are saving tens of millions of dollars. Over half (55%) of respondents saved more than \$1 million, and 16% of respondents claim SAM programs saved more than \$10 million in the past year.

Estimate the combined savings and cost avoidance you've realized from your SAM program in the past year in millions of dollars



N=500

Source: Flexera 2023 State of ITAM Report

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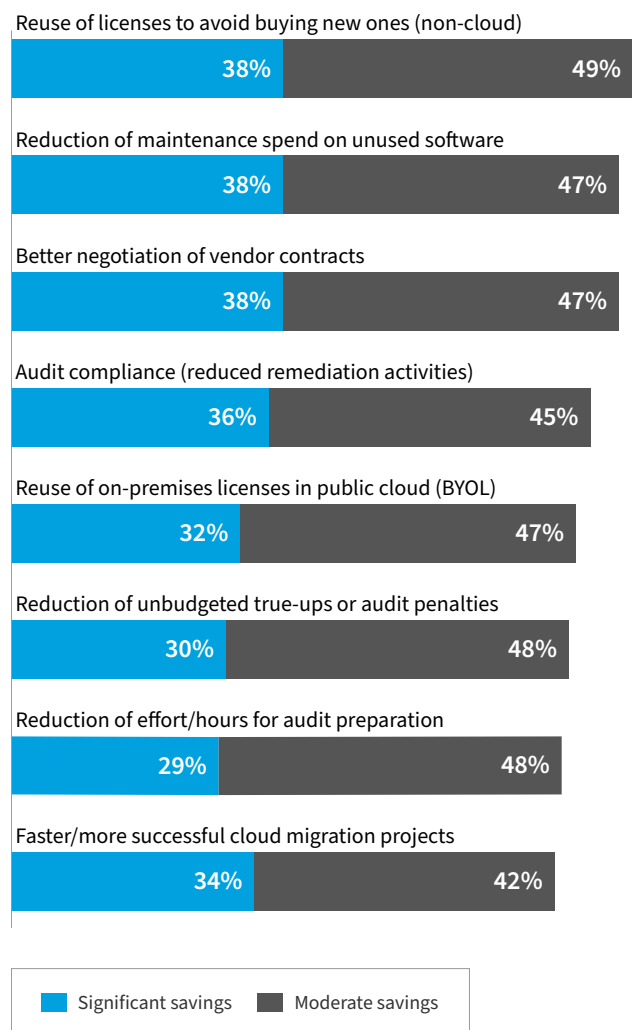
\$25+ million in savings—One in ten companies with active SAM programs claim savings of more than \$25 million in the past year.

SAM programs were most successful in realizing savings through *better negotiation of vendor contracts* (85%), *reduction of maintenance spend on unused software* (85%) and *reuse of licenses to avoid buying new ones (non-cloud)* (87%). Audit-related initiatives were slightly less successful at realizing actual savings.

In what areas have you realized actual savings in the past year due to your SAM program?

Almost nine of ten

respondents find savings through the reuse of licenses to avoid buying new ones (non-cloud).



N=500

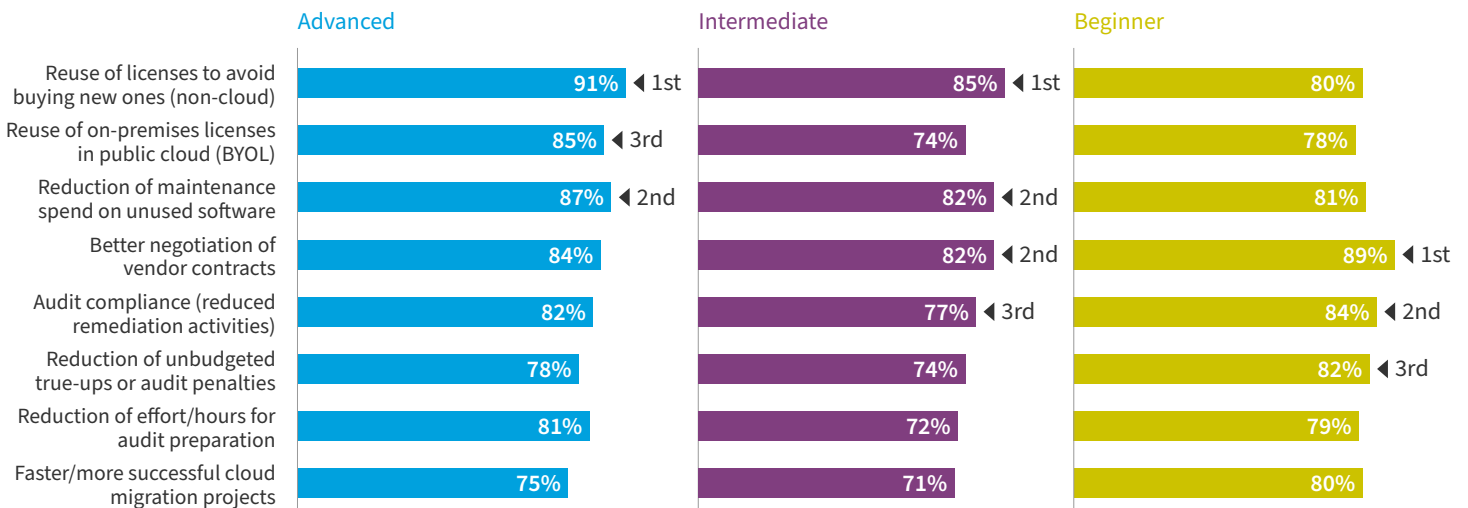
Source: Flexera 2023 State of ITAM Report



Advanced SAM teams are focusing on license optimization more this year (91%) than last (84%). Beginner teams focus more on better vendor contract negotiation (89% this year, 81% last year).

Advanced SAM teams are more concentrated on license optimization than ever.

Savings from SAM programs tend to increase as programs mature



N=497

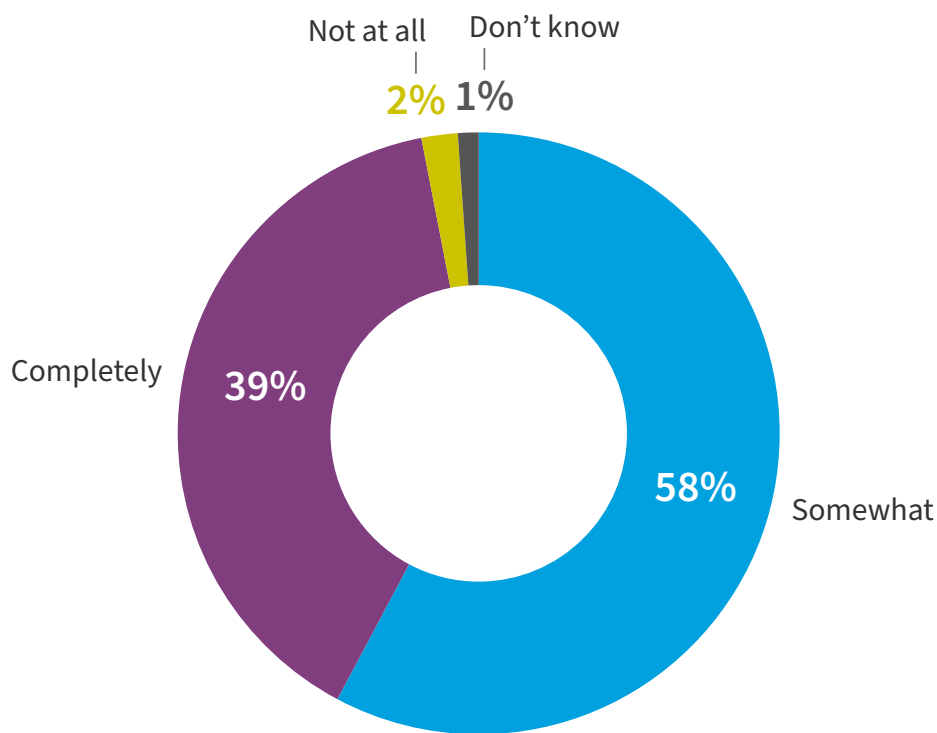
Source: Flexera 2023 State of ITAM Report



Role of CMDBs and demand for greater visibility into IT assets

As ITAM and FinOps tools and processes improve, there's an increase in respondents who have visibility into their IT estate. Complete visibility improved from 35% last year to 39% this year. Still, 61% of respondents said they don't have complete visibility into IT assets that impact business outcomes.

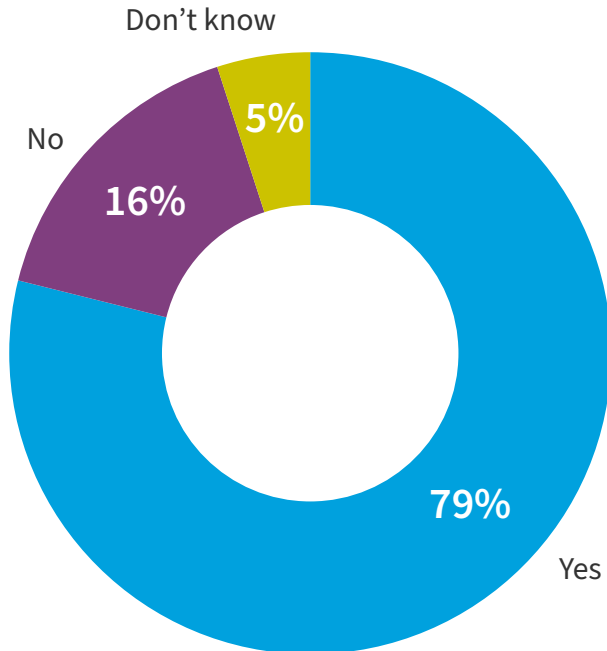
Does your organization have complete visibility into IT assets and their impact on business outcomes?



N=500
Source: Flexera 2023 State of ITAM Report

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Do you use your CMDB in your ITAM practice?



N=500

Source: Flexera 2023 State of ITAM Report

flexera

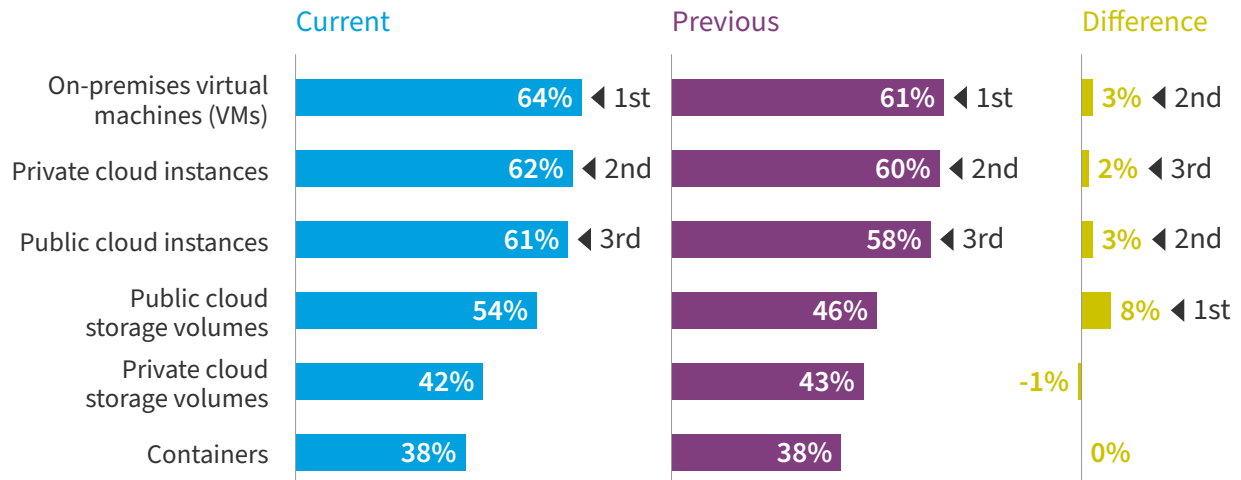
Almost eight in ten respondents use CMDBs.

» FLEXERA POV

As organizations increase their use of transient assets such as cloud instances or containers, they must reassess their IT asset tracking procedures to ensure their CMDBs don't become bloated with outdated and irrelevant entries.

CMDBs continue to track broader assets: Almost two-thirds (64%) track *on-premises VMs*, 62% track *private cloud instances* and 61% track *public cloud instances*. Thirty-eight percent track *containers* in their CMDB.

What assets do you track in your CMDB?



2023: N=397, October 2022: N=388
Source: Flexera 2023 State of ITAM Report

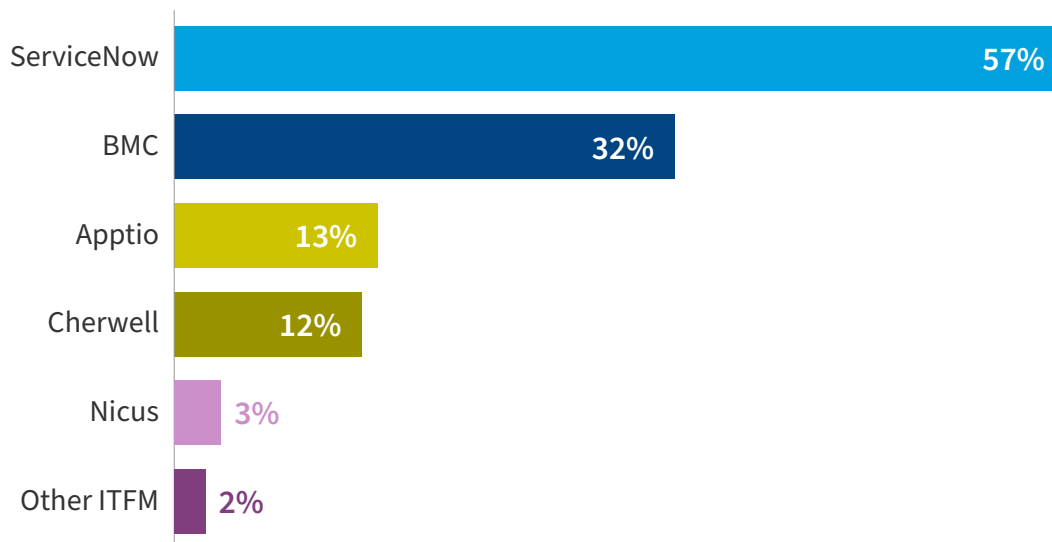
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Respondents are most likely to export data from asset management tools into enterprise systems or CMDBs such as ServiceNow (57%), BMC (32%), Apptio (13%) and Cherwell (12%).

» FLEXERA POV

Having high-quality data on IT estates improves the performance of other platforms and teams, including security, enterprise architecture and CMDBs.

Do you export data from your asset management tools into any of the following enterprise systems or CMDBs?



N=500

Source: Flexera 2023 State of ITAM Report

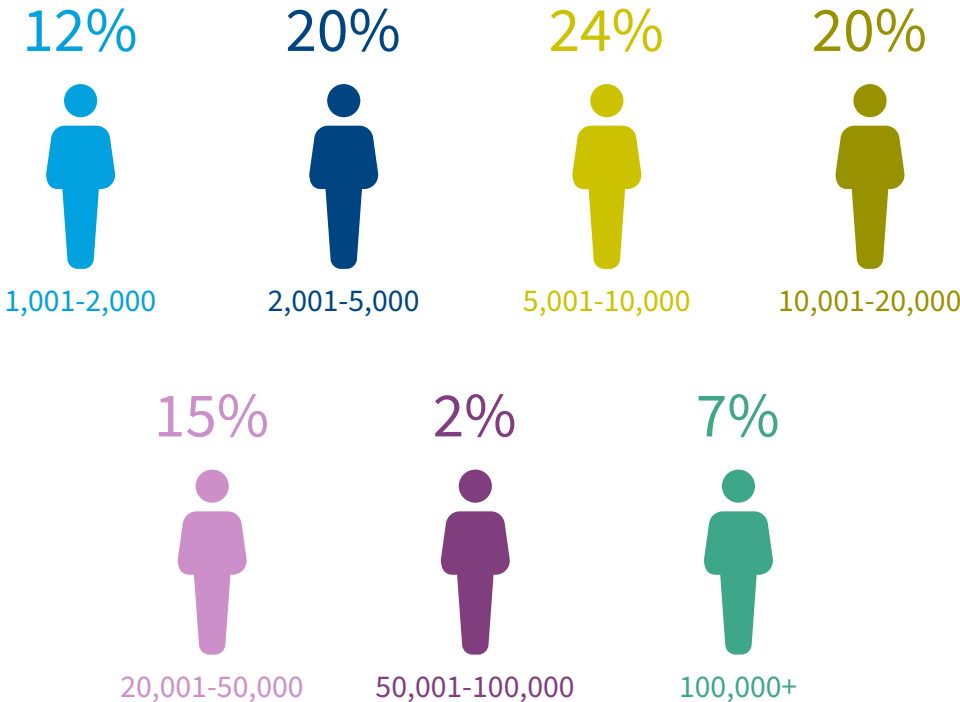
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European Spotlight



This year's survey is weighted more heavily toward larger European companies, with 88% of respondents in organizations having more than 2,000 employees. Almost a quarter (24%) are in organizations with more than 20,000 employees.

What size is your organization?

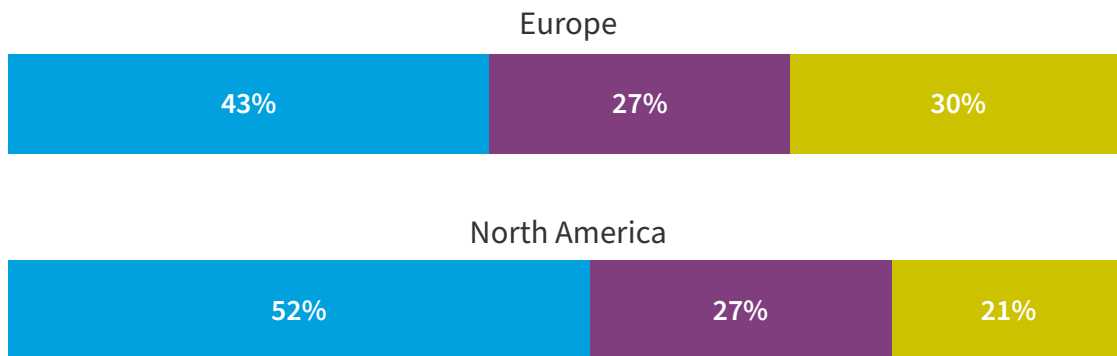


N=181
Source: Flexera 2023 State of ITAM Report



In this year's survey, Europe has more beginners (30% to 21% in North America), and North America has more advanced users (52% to 43% in Europe).

Which statement best describes where you are in implementing SAM in your organization?



Advanced

- Ongoing tracking plus optimization of software licenses, beyond just audits
- Tracking SaaS and cloud usage

Intermediate

- Ongoing tracking of software licenses, beyond just audits

Beginner

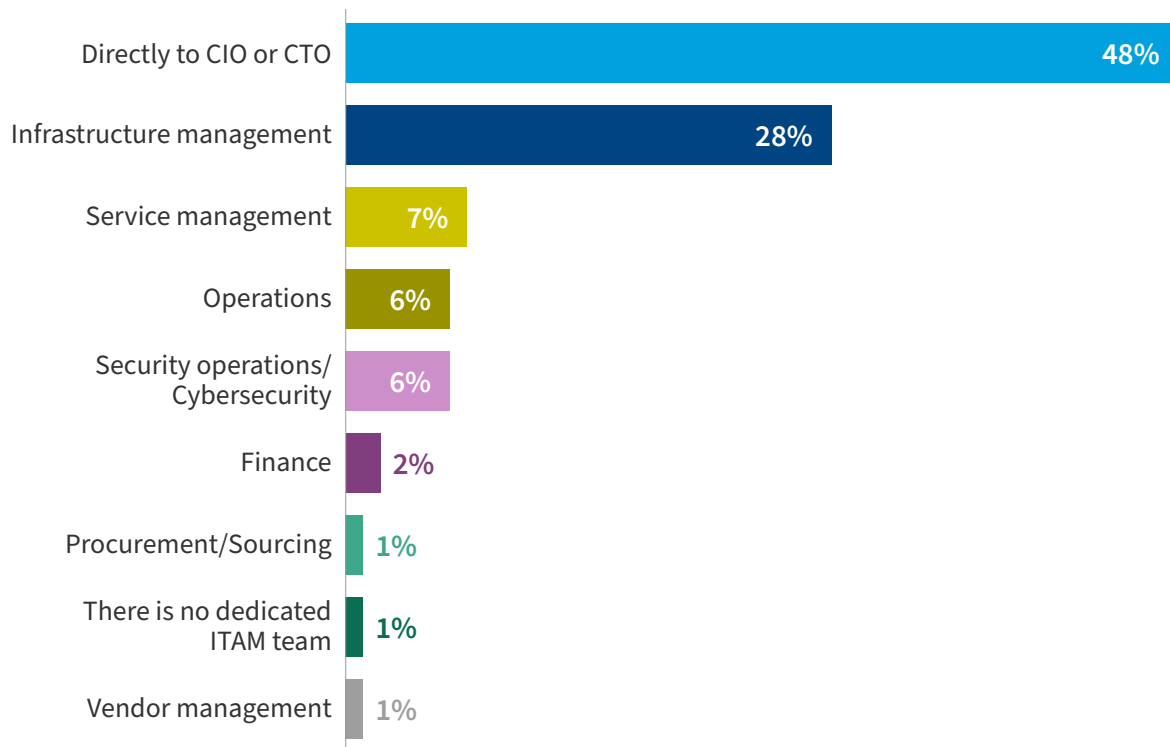
- Primarily audit response
- Just starting to develop SAM practice/processes

N=181 Europe, N=275 North America
Source: Flexera 2023 State of ITAM Report

flexera

As with the global survey, many ITAM teams report directly to the CIO/CTO. In Europe, this number was 48% (up from 44% last year). Reporting to the CIO/CTO provides more visibility within the organization and ability to accomplish goals.

Where does your ITAM team report in your organization?



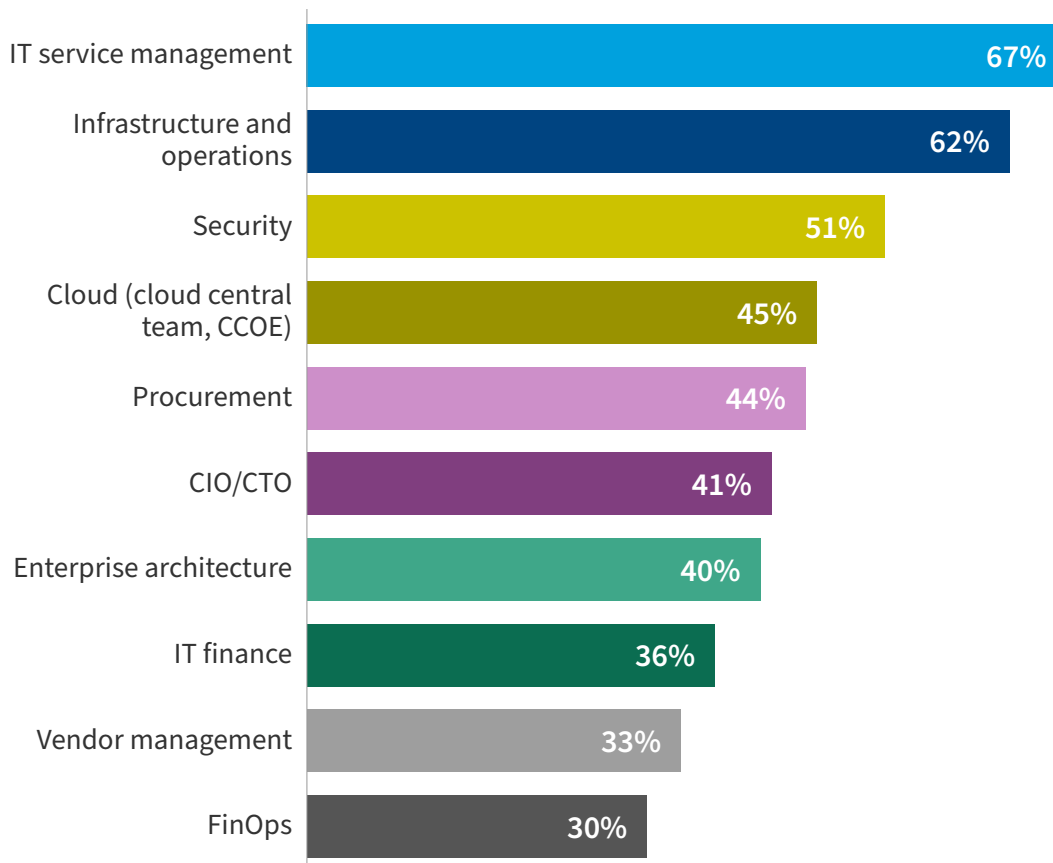
N=181

Source: Flexera 2023 State of ITAM Report

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European ITAM teams are most likely to interact with *IT service management* (67%), *infrastructure and operations* (62%) and *CIOs/CTOs* (41%). Three in ten (30%) European teams interact with *FinOps* teams, compared to 25% globally.

What's the level of significant interaction between your SAM team and the following teams?



N=181

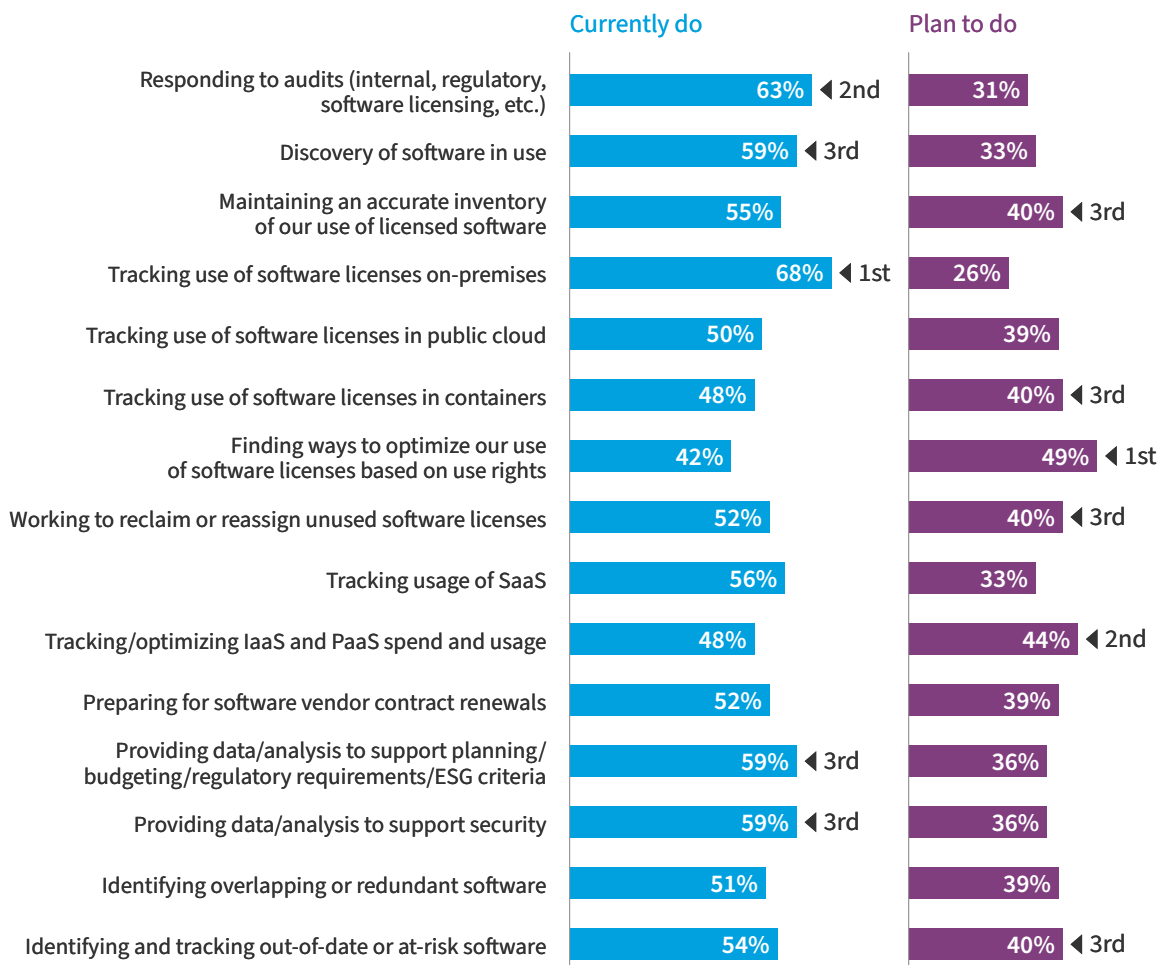
Source: Flexera 2023 State of ITAM Report

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Currently, SAM teams in Europe focus on a broad set of activities, including *tracking the use of software licenses on-premises* (68%), *responding to audits* (63%), *software discovery* (59%), and *providing data to security and ESG teams* (also 59% each).

» FLEXERA POV
 SAM tools and teams are increasingly becoming critical for organizational ESG and security initiatives.

What SAM-focused responsibilities does your ITAM team have in your organization?

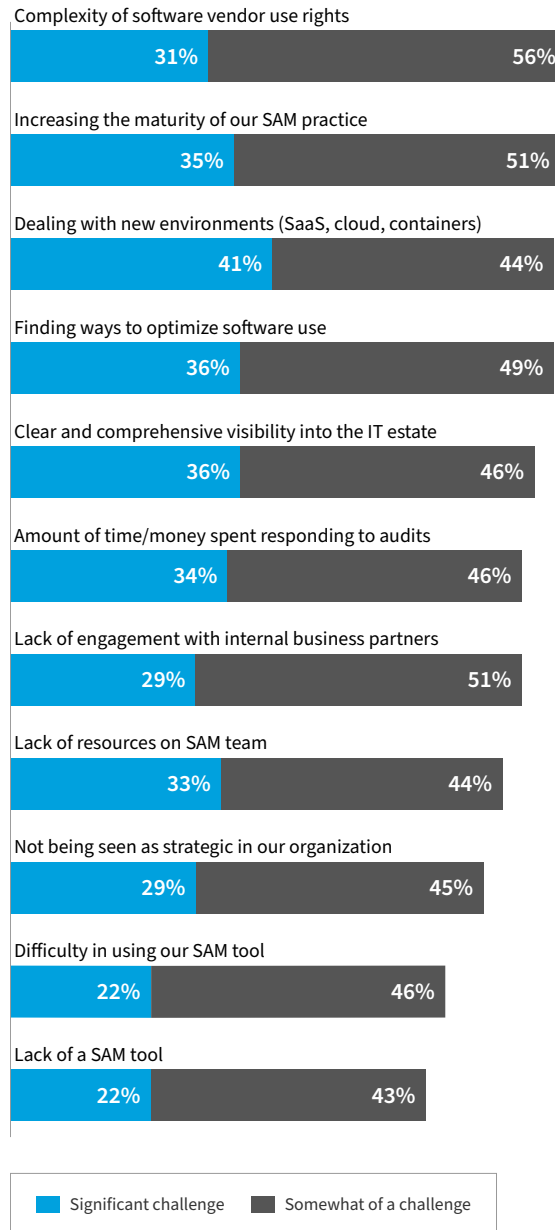


N=181
 Source: Flexera 2023 State of ITAM Report



SAM challenges were different this year over last year's in Europe. Challenges around *software vendor use rights* jumped to the top spot this year (87% called it a challenge); *time/money spent on audits* (80%) dropped to sixth place.

What are your challenges with SAM?



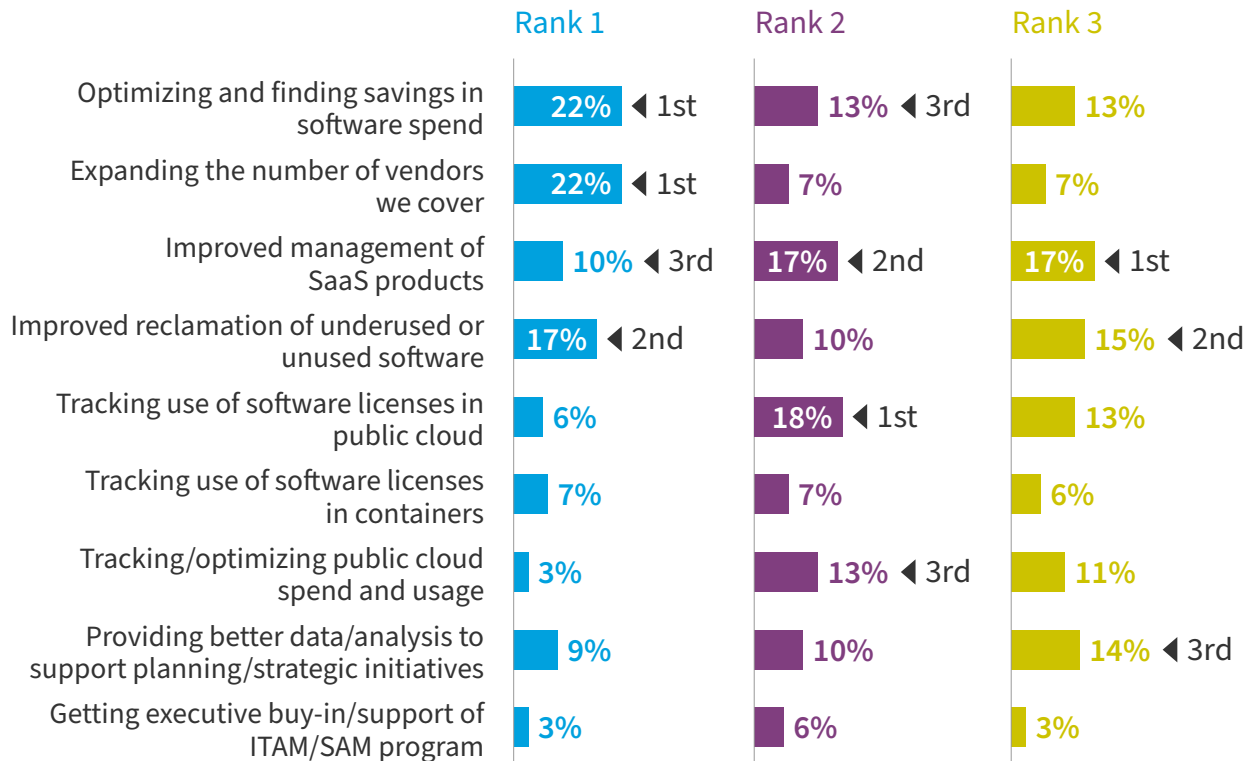
N=181

Source: Flexera 2023 State of ITAM Report

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Similar to the global pool of respondents, optimizing and finding savings in software spend is a top initiative this year.

On which SAM initiatives do you want to make progress in the next year?



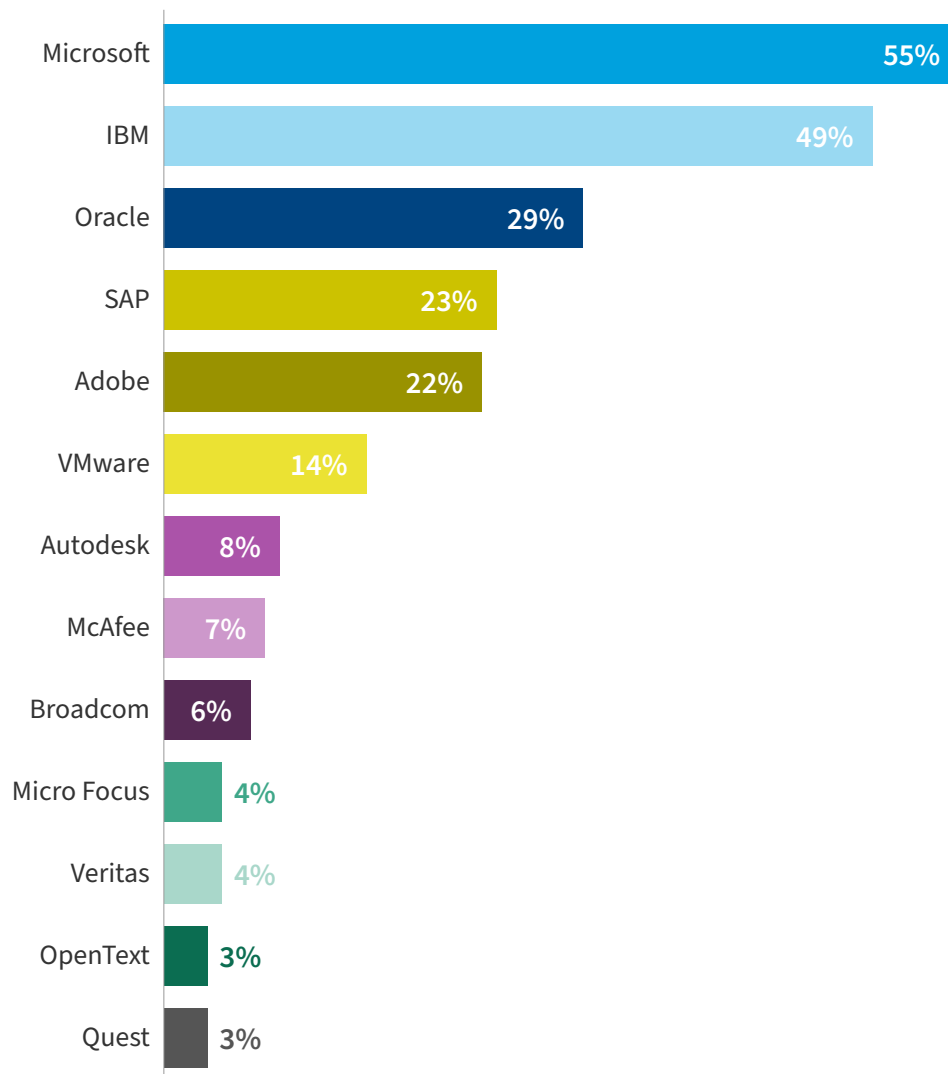
N=181

Source: Flexera 2023 State of ITAM Report



Similar to the global survey, respondents in Europe have been audited the most by Microsoft (55%), IBM (49%) and Oracle (29%) over the past three years. European respondents reported more IBM audits (49% in Europe compared to 37% globally).

Which of the following vendors have audited your organization in the past three years?



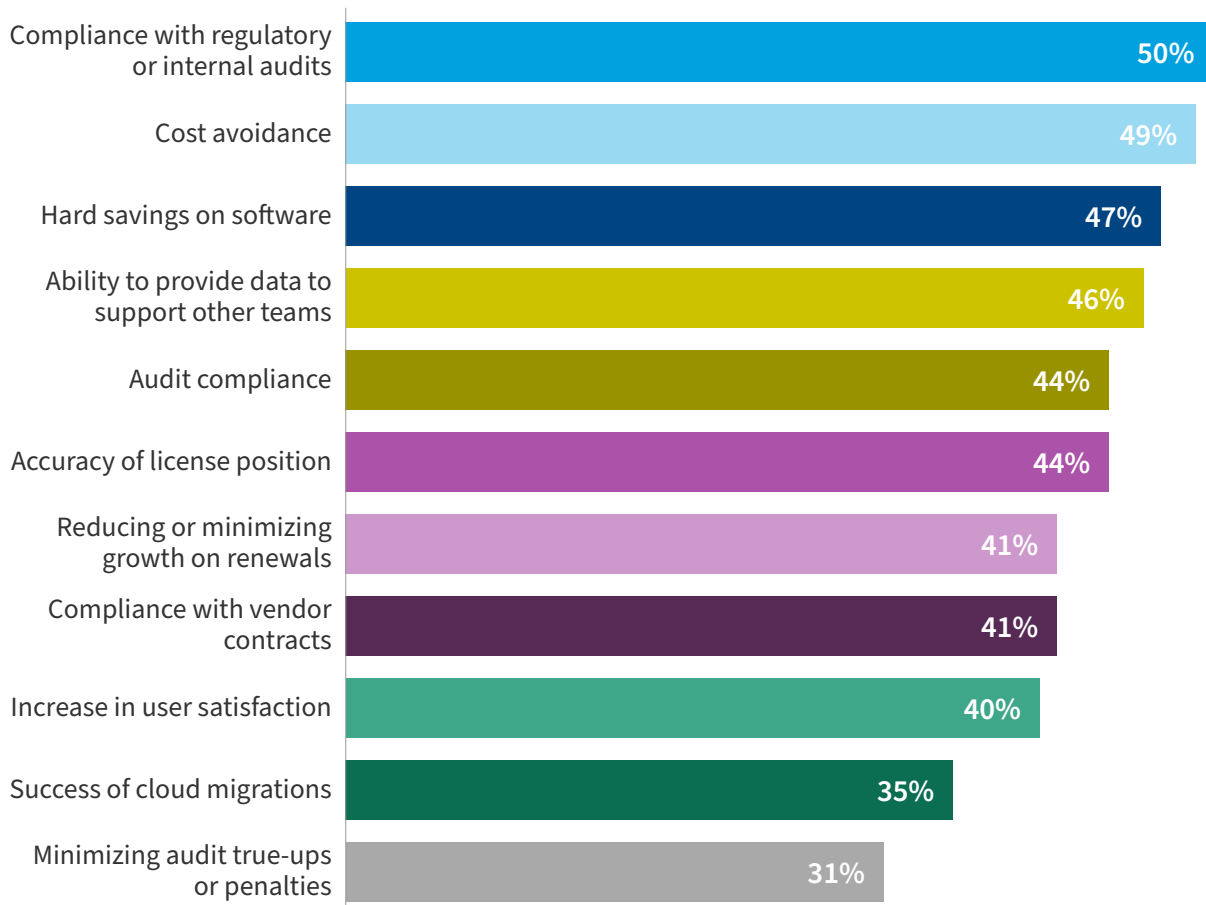
N=181

Source: Flexera 2023 State of ITAM Report

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As is the case globally, *cost avoidance* is increasing as a measurement for SAM initiative success, growing to 49% this year over 43% last year. *Compliance with regulatory or internal audits* remains the top measurement at 50%.

What metrics are used to measure success of your SAM initiatives?



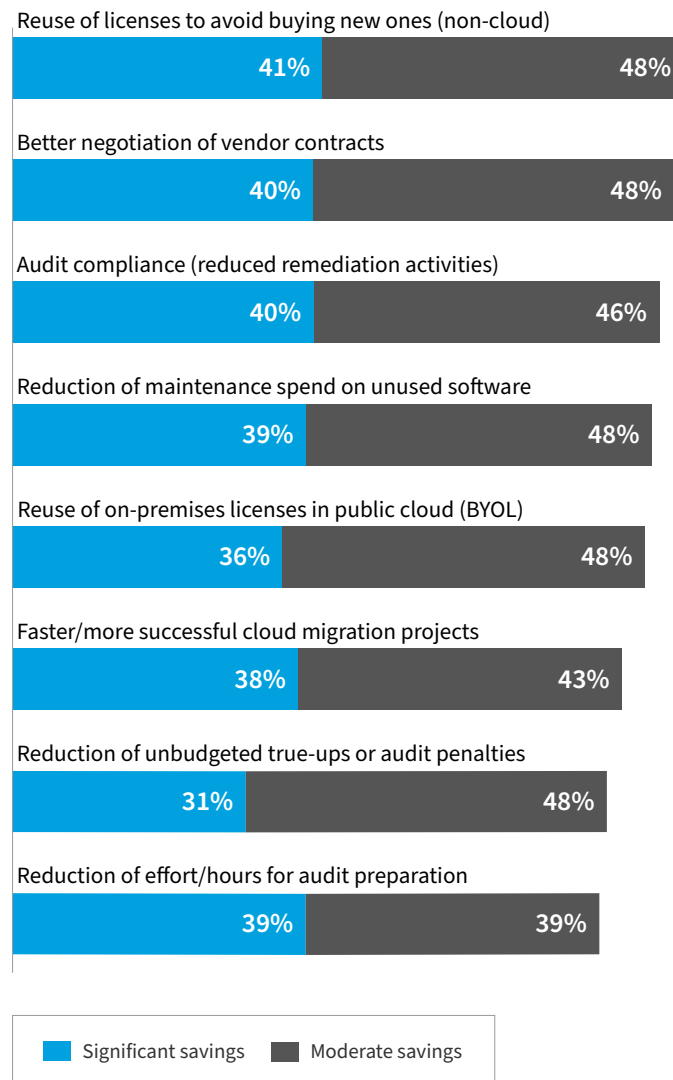
N=181

Source: Flexera 2023 State of ITAM Report

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As with global respondents, the most savings (89% for Europe, 87% from global) came from the *reuse of on-premises licenses*. However, European respondents saw even more savings across all categories than their global counterparts. Europeans also saw an increase in the *reuse of on-premises licenses in public cloud* (often called bring your own license, or BYOL, 77% last year to 84% this year), with a jump from 29% to 36% in the *significant* category.

In what areas have you realized actual savings in the past year due to your SAM program?



N=181

Source: Flexera 2023 State of ITAM Report

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Global summary

We are seeing a greater focus on corporate efficiencies around the globe. ITAM professionals find themselves at the nexus of a number of key enterprise initiatives, including cost savings, FinOps, security and even ESG programs tracking carbon emissions. This is putting more pressure on ITAM teams to stay nimble and flexible, and manage a single source of truth for IT data and insights.

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