



The IT4IT™ Standard, Version 3.0

A Reference Architecture for Managing Digital



The IT4IT™ Standard, Version 3.0

The Open Group Publications available from Van Haren Publishing

The TOGAF® Standard, 10th Edition:

Introduction and Core Concepts
Architecture Development Method
Content, Capability, and Governance
Leader's Guide
ADM Practitioners' Guide
Business Architecture
Enterprise Agility and Digital Transformation
A Pocket Guide

The TOGAF Series:

The TOGAF® Standard, Version 9.2
The TOGAF® Standard, Version 9.2 – A Pocket Guide
TOGAF® 9 Foundation Study Guide, 4th Edition
TOGAF® 9 Certified Study Guide, 4th Edition
TOGAF® Business Architecture Level 1 Study Guide

The Open Group Series:

The IT4IT™ Reference Architecture, Version 3.0
IT4IT™ for Managing the Business of IT – A Management Guide
IT4IT™ Foundation Study Guide, 2nd Edition
The IT4IT™ Reference Architecture, Version 2.1 – A Pocket Guide
Cloud Computing for Business – The Open Group Guide
ArchiMate® 3.1 Specification – A Pocket Guide
ArchiMate® 3.1 Specification
The Digital Practitioner Pocket Guide
The Digital Practitioner Foundation Study Guide
Open Agile Architecture™ – A Standard of The Open Group

The Open Group Press:

The Turning Point: A Novel about Agile Architects Building a Digital Foundation
Managing Digital

The Open Group Security Series:

O-TTPS – A Management Guide
Open Information Security Management Maturity Model (O-ISM3)
Open Enterprise Security Architecture (O-ESA)
Risk Management – The Open Group Guide
The Open FAIR™ Body of Knowledge – A Pocket Guide

All titles are available to purchase from:

www.opengroup.org

www.vanharen.net

and also many international and online distributors.

The IT4IT™ Standard, Version 3.0

A Reference Architecture for Managing Digital

THE *Open* GROUP



Title: The IT4IT™ Standard, Version 3.0
Subtitle: A Reference Architecture for Managing Digital
Series: The Open Group Series
A Publication of: The Open Group

Publisher: Van Haren Publishing, 's-Hertogenbosch - NL, www.vanharen.net
ISBN Hardcopy: 978 94 018 0940 5
ISBN eBook: 978 94 018 0941 2
ISBN ePub: 978 94 018 0942 9
Edition: First edition, first impression, December 2022

Layout and Cover Design: The Open Group

Copyright: © 2022 The Open Group. All rights reserved.

No part of this publication may be reproduced, stored in a retrieval system, or transmitted, in any form or by any means, electronic, mechanical, photocopying, recording, or otherwise, without the prior permission of the copyright owner. Any use of this publication for commercial purposes is subject to the terms of the Annual Commercial License relating to it. For further information, see www.opengroup.org/legal/licensing.

The IT4IT™ Standard, Version 3.0

Document Number: C221

Published by The Open Group, December 2022.

Comments relating to the material contained in this document may be submitted to:

The Open Group
Apex Plaza
Reading
Berkshire, RG1 1AX
United Kingdom
or by electronic mail to: ogspecs@opengroup.org

Table of Contents

Preface	3
The Open Group	3
The IT4IT™ Forum	3
The IT4IT Name	4
This Document	5
The Transformation Journey	5
Who Benefits from the IT4IT Standard?	6
Evolution of the Standard	6
The IT4IT Standard, Version 3.0 Release Highlights	7
Related Industry Standards	10
Referenced Documents	12
Normative References	12
Informative References	12
Trademarks	17
Acknowledgements	19
1. Introduction	24
1.1. Objective	24
1.2. Conformance	24
1.3. Normative References	24
1.4. Terminology	24
1.5. Future Directions	25
2. Definitions	26
2.1. Contract	26
2.2. Digital Product	26
2.3. Digital Product Backbone Data Object	26
2.4. Functional Component	26
2.5. Key Data Object	26
2.6. Service Offer	26
2.7. Service Offer Backbone Data Object	27
2.8. System	27
2.9. System of Record	27
2.10. Value Network	27
2.11. Value Stream	27
3. Digital Management	28
3.1. Foundational Concepts	28

3.2. Top-Down Decomposition of the IT4IT Architecture	29
3.3. The IT4IT Functionality Groups	30
3.4. The Digital Value Network	31
3.5. The Seven IT4IT Value Streams	33
3.5.1. Evaluate	34
3.5.2. Explore	34
3.5.3. Integrate	34
3.5.4. Deploy	35
3.5.5. Release	35
3.5.6. Consume	35
3.5.7. Operate	35
3.6. Introducing Functional Components and the Data Model	35
3.7. Concepts Recap	38
4. Digital Product	39
4.1. Merging “Application”, “Service”, and “Products”	39
4.2. Digital Product Definition	40
4.2.1. System Definition	41
4.2.2. Service Offer Definition	42
4.2.3. Contract Definition	43
4.2.4. Price Definition	44
4.3. From IT Service to Digital Product	44
4.4. Examples of Digital Products	46
4.4.1. eCommerce Websites	46
4.4.2. Mobile Applications	46
4.4.3. Operational Technology	47
4.4.4. Smart Devices with Digital Interfaces	47
4.4.5. Digital Platforms	48
4.4.6. Interplay Among Digital Products	48
4.5. Granularity and Dependency of Digital Products	49
4.5.1. Examples of Digital Product Granularity	49
4.6. Benefits of Formalism between Internal Digital Product Teams	50
4.7. Managing the Digital Product	50
4.8. The Digital Product Management Competency	51
4.9. Shared Resources	52
4.10. Digital Product Lifecycle Concerns	52
4.11. Code, Dependencies, and Instance Resource Management	54
4.12. Data-Driven Opportunities and Concerns	54
4.13. Service Contract Lifecycle Concerns	55

4.14. Digital Product Fulfillment and Lifecycle Management	55
4.15. The Digital Product Instance	55
4.16. Consumer Types and Interaction Methods	56
4.17. Complex Digital Product Systems	57
5. IT4IT Value Streams	59
5.1. Evaluate Value Stream	59
5.1.1. Evaluate Scenarios	62
5.1.2. Gather Influencers Stage	63
5.1.3. Identify Gaps Stage	65
5.1.4. Propose Investments Stage	66
5.1.5. Define Backlog Mandates Stage	67
5.1.6. Ensure Governance Stage	68
5.2. Explore Value Stream	70
5.2.1. Explore Scenarios	72
5.2.2. Prioritize Backlog Items Stage	73
5.2.3. Define Digital Product Architecture Stage	75
5.2.4. Refine Product Backlog Stage	77
5.2.5. Finalize Roadmap & Scope Agreement Stage	79
5.3. Integrate Value Stream	81
5.3.1. Integrate Scenarios	85
5.3.2. Plan Product Release Stage	86
5.3.3. Design & Develop Stage	88
5.3.4. Build, Integrate, & Test Stage	89
5.3.5. Accept & Publish Release Stage	90
5.4. Deploy Value Stream	92
5.4.1. Deploy Scenarios	94
5.4.2. Plan & Approve Deployment Stage	95
5.4.3. Fulfill Deployment Stage	97
5.4.4. Validate Deployment Stage	98
5.4.5. Observe Deployment Stage	99
5.5. Release Value Stream	100
5.5.1. Release Scenarios	103
5.5.2. Define Service Offer Stage	105
5.5.3. Implement Service Offer Stage	106
5.5.4. Publish Service Offer Stage	108
5.6. Consume Value Stream	109
5.6.1. Consume Scenarios	112
5.6.2. Select an Offer Stage	113

5.6.3. Agree to Service Offer Stage	113
5.6.4. Subscribe to Service Offer Stage	114
5.6.5. Provide Service Support Stage	115
5.6.6. Publish Service Status Stage	116
5.7. Operate Value Stream	117
5.7.1. Operate Scenarios	119
5.7.2. Detect Issue Stage	121
5.7.3. Diagnose Issue Stage	122
5.7.4. Resolve Issue Stage	124
6. Strategy to Portfolio Functions	126
6.1. Strategy Function	128
6.1.1. Policy Functional Component	128
6.1.1.1. Policy Data Object	129
6.1.2. Strategy Functional Component	131
6.1.2.1. Strategic Theme Data Object	132
6.1.2.2. Strategic Objective Data Object	132
6.1.3. Enterprise Architecture Functional Component	133
6.1.3.1. Architecture Roadmap Item Data Object	135
6.1.3.2. Architecture Blueprint Data Object	135
6.1.3.3. Value Stream Data Object	136
6.2. Portfolio Function	137
6.2.1. Portfolio Backlog Functional Component	137
6.2.1.1. Portfolio Backlog Item Data Object	138
6.2.2. Proposal Functional Component	139
6.2.2.1. Scope Agreement Data Object	142
6.2.3. Product Portfolio Functional Component	143
6.2.3.1. Digital Product Data Object	145
7. Requirement to Deploy Functions	147
7.1. Develop Function	150
7.1.1. Product Backlog Functional Component	150
7.1.1.1. Product Backlog Item Data Object	152
7.1.2. Requirement Functional Component	154
7.1.2.1. Requirement Data Object	156
7.1.3. Product Design Functional Component	158
7.1.3.1. Product Design Data Object	160
7.1.4. Source Control Functional Component	161
7.1.4.1. Source Data Object	163
7.1.5. Pipeline Functional Component	164

7.1.5.1. Pipeline Data Object	166
7.1.6. Build Package Functional Component	167
7.1.6.1. Build Package Data Object	168
7.1.7. Release Composition Functional Component	169
7.1.7.1. Product Release Data Object	170
7.1.7.2. Product Release Blueprint Data Object	171
7.2. Test Function	173
7.2.1. Test Functional Component	173
7.2.1.1. Test Case Data Object	176
7.2.1.2. Test Plan Data Object	177
7.2.2. Defect Functional Component	178
7.2.2.1. Defect Data Object	179
8. Request to Fulfill Functions	181
8.1. Consume Function	184
8.1.1. Consumption Experience Functional Component	184
8.1.1.1. Interaction Data Object	186
8.1.2. Identity Functional Component	187
8.1.2.1. Identity Data Object	188
8.1.2.2. Entitlement Data Object	189
8.1.3. Offer Functional Component	189
8.1.3.1. Service Offer Catalog Data Object	190
8.1.3.2. Service Offer Data Object	191
8.1.4. Order Functional Component	192
8.1.4.1. Order Data Object	194
8.1.4.2. Subscription Data Object	194
8.1.5. Chargeback Functional Component	195
8.1.5.1. Chargeback Contract Data Object	196
8.1.5.2. Chargeback Record Data Object	197
8.2. Fulfill Function	198
8.2.1. Change Functional Component	198
8.2.1.1. Change Data Object	200
8.2.2. Fulfillment Orchestration Functional Component	201
8.2.2.1. Desired Product Instance Data Object	204
8.2.3. Resource Functional Component	205
8.2.3.1. Resource Data Object	206
8.2.4. Fulfillment Functional Component	207
8.2.4.1. Fulfillment Book Data Object	208
8.2.5. Usage Functional Component	209

- 8.2.5.1. Usage Record Data Object 210
- 9. Detect to Correct Functions 212
 - 9.1. Support Function 215
 - 9.1.1. Service Level Functional Component 215
 - 9.1.1.1. Service Contract Data Object 216
 - 9.1.1.2. KPI Data Object 217
 - 9.1.2. Incident Functional Component 218
 - 9.1.2.1. Incident Data Object 219
 - 9.1.3. Problem Functional Component 221
 - 9.1.3.1. Problem Data Object 222
 - 9.1.4. Knowledge Functional Component 223
 - 9.1.4.1. Knowledge Item Data Object 225
 - 9.2. Assure Function 226
 - 9.2.1. Configuration Functional Component 226
 - 9.2.1.1. Actual Product Instance Data Object 227
 - 9.2.2. Monitoring Functional Component 228
 - 9.2.2.1. Service Monitor Data Object 230
 - 9.2.2.2. Log Data Object 231
 - 9.2.3. Event Functional Component 232
 - 9.2.3.1. Event Data Object 233
 - 9.2.4. Diagnostics & Remediation Functional Component 234
 - 9.2.4.1. Runbook Data Object 235
- 10. Supporting Functions 236
 - 10.1. Financial Management Function 237
 - 10.1.1. Cost Modeling Functional Component 238
 - 10.1.1.1. Cost Model Data Object 239
 - 10.1.2. Investment Functional Component 240
 - 10.1.2.1. Budget Item Data Object 240
 - 10.2. Governance, Risk, & Compliance Function 241
 - 10.3. Workforce Management Function 242
 - 10.4. Sourcing & Vendor Management Function 243
 - 10.5. Intelligence & Reporting Function 244
 - 10.6. Collaboration & Communication Function 245
- 11. IT4IT Concepts and Metamodel 246
 - 11.1. IT4IT Metamodel 246
 - 11.2. IT4IT Abstractions 247
 - 11.3. Level 1 248
 - 11.4. Level 2 248

11.5. Level 3	249
11.6. Formal Reference Architecture Model	249
11.7. Concepts at Level 1: End-to-End Overview	249
11.7.1. Value Network	250
11.7.2. Value Stream	250
11.7.3. Functional Groups	251
11.7.4. Functional Component	253
11.7.5. Key Data Object	254
11.7.6. System of Record	255
11.7.7. Relationships	255
11.7.8. Digital Product Backbone Data Objects	258
11.7.9. Service Offer Backbone Data Objects	258
11.7.10. Level 1 ArchiMate Model	258
11.8. Concepts at Level 2: Value Stream Documentation	260
11.8.1. Value Stream	260
11.8.2. Scenario	260
11.8.3. Value Stream Stage	260
11.8.4. Stakeholder	261
11.9. Concepts at Level 3: Vendor-Independent Architecture	263
11.9.1. Key Attributes	263
11.9.2. Cardinality	264
11.9.3. Data Flow	265
11.9.4. System of Record Integration	267
11.9.5. System of Engagement Integration	268
11.10. Concepts at Level 4 and Level 5	269
11.10.1. Level 4: Vendor and System Integrator Extensions	269
11.10.2. Capabilities	270
11.10.3. Essential Services	270
11.10.4. Scenarios and Processes	270
11.10.5. Level 5: Implementation Architecture	272
Appendix A: Value Stream – Functional Component – Data Object Tables	273
A.1. Functional Components	273
A.2. Data Objects	274
A.3. Value Streams	275
A.4. Functional Component Map	276
Appendix B: Acronyms and Abbreviations	279
Index	285

Preface

The Open Group

The Open Group is a global consortium that enables the achievement of business objectives through technology standards. With more than 870 member organizations, we have a diverse membership that spans all sectors of the technology community – customers, systems and solutions suppliers, tool vendors, integrators and consultants, as well as academics and researchers.

The mission of The Open Group is to drive the creation of Boundaryless Information Flow™ achieved by:

- Working with customers to capture, understand, and address current and emerging requirements, establish policies, and share best practices
- Working with suppliers, consortia, and standards bodies to develop consensus and facilitate interoperability, to evolve and integrate specifications and open source technologies
- Offering a comprehensive set of services to enhance the operational efficiency of consortia
- Developing and operating the industry's premier certification service and encouraging procurement of certified products

Further information on The Open Group is available at www.opengroup.org.

The Open Group publishes a wide range of technical documentation, most of which is focused on development of Standards and Guides, but which also includes white papers, technical studies, certification and testing documentation, and business titles. Full details and a catalog are available at www.opengroup.org/library.

The IT4IT™ Forum

The IT4IT Forum is a group of member organizations that work together to solve shared challenges in Digital Product Management in the digital enterprise.

The mission of the IT4IT Forum is to continuously develop and drive the adoption of an open standard that:

- Provides a vendor-neutral reference architecture that delivers value-driven improvement to business outcomes
- Accelerates the adoption and delivery of end-to-end management of Digital Products and services

A key objective of the IT4IT Forum is to drive adoption of the IT4IT Standard through a variety of activities including publishing how-to guides in the IT4IT extended body of knowledge.

The IT4IT Forum is composed of a diversity of member organizations, such as technology vendors, service providers, consulting companies, end-user organizations, training companies, academic

institutions, and other digital enterprises. All come together in a technology independent, industry independent, and vendor-neutral environment to work together in a non-competitive, consensus-driven environment governed by The Open Group Standards Process.

Member organizations and their employees that participate in the Forum activities can expect benefits, including:

- Gaining competitive advantage through early access to pre-publication thought leadership
- Realizing more reliable outcomes by solving shared challenges with other like-minded professionals
- Establishing personal and professional relationships and a network of contacts for use long into the future
- Expanding digital management business insight through collaboration with other member organizations
- Establishing credibility as a thought leader in the industry by becoming a named contributor or co-author on standards of The Open Group and other publications
- Growing professional capabilities and promotion through dynamic learning exchanges in Forum discussions with other members

Proposals from IT4IT Forum members drive the strategy and content for successive versions of the IT4IT Standard. If you would like to contribute to future versions of the IT4IT Standard, we invite you to explore membership in The Open Group IT4IT Forum.

For further information about membership in the IT4IT Forum, visit <http://www.opengroup.org/it4it-forum>.

For further information about the IT4IT Standard itself, visit <http://www.opengroup.org/it4it>.

The IT4IT Name

The business is increasingly dependent upon IT to enable their business capabilities and optimize their business value streams. IT is part of any business process and/or business product.

As a result, IT management is becoming a critical capability to ensure sustainable business success. To manage the increasing complexity of IT and digital, an organization needs to optimize their end-to-end IT management activities involved in the planning, development, delivery, and operations of Digital Products.

A more integrated approach is needed to optimize these IT value streams. The name “IT4IT” refers to this integrated approach of managing the IT specifically needed to enable and automate IT itself, such as portfolio and product backlog management, source code management, testing, deployment, identity management, monitoring, etc. “IT4IT” refers to all digital management capabilities and practices needed to manage the IT/Digital Product Portfolio and thus ultimately be efficient in optimizing business outcome.

This Document

This document is the specification of The Open Group IT4IT Standard, Version 3.0, a standard of The Open Group.

The IT4IT Standard addresses a critical gap in the Digital Transformation toolkit: the need for a unifying architectural model that describes and connects the capabilities, value streams, functions, and operational data needed to manage a Digital Product Portfolio at scale.

Traditional management paradigms, in which the technology budget is a combination of one-off projects and keep-the-lights-on operations, have constrained the value that could be delivered by technology. A fundamentally different approach is needed.

In recent years, this need continues to evolve rapidly as business management itself has become digital management. In other words, as the business delivers Digital Products, IT becomes the business.

By showing how to shift the focus of digital investment from project expense to product-based value delivery, the IT4IT Standard provides a powerful model for standardizing the digital automation fabric to support constant innovation and accelerated digital service delivery.

The ultimate target is a new style of technology management – “managing digital” – in which the primary metric for measuring IT investment value (and for measuring the performance of IT leaders) is the level of innovation and measurable business value delivered by a well-managed Digital Product Portfolio.

The Transformation Journey

The principle of product centricity shifts the focus of technology management away from the details of frictional project delivery and operations silos to a more holistic model focused instead on value-based consumption, customer focus, strong collaboration with consumers on end-to-end journeys, scalable automation, greater cost transparency, and the multi-sourced delivery of a broad Digital Product Portfolio.

Crucially, the IT4IT Standard provides a practical roadmap and blueprint for moving away from traditional practices and transitioning to a modern ability to manage digital at scale. The transition to managing digital typically includes several relevant journeys, such as moving from:

- Project-based to product-based technology investment management
- Waterfall methodologies to Agile planning and development
- Silo-oriented automation models to integrated, automated DevSecOps at scale
- Reactive order-taking to effectively managed and measured service brokerage
- Opaque operational and financial reporting to effective full-lifecycle, end-to-end visibility, and control of technology investment outcomes

Who Benefits from the IT4IT Standard?

“Building a new fully integrated approach for managing IT – going beyond the traditional process models and disjointed solution landscapes – based on a common industry data model will give an important boost to our effort of becoming a world-class IT provider.”

Hans van Kesteren, VP & CIO Global Functions, Royal Dutch Shell, at the launch of The Open Group IT4IT Forum

The IT4IT Standard provides an approach to making digital investment decisions and managing digital outcomes that is particularly useful for:

- C-level executives responsible for Digital Transformation, as a top-down view of digital value creation
- Product Managers and Product Marketing Managers whose portfolios include significant digital content, as a way to integrate marketing priorities with product delivery practices
- Governance, risk, and compliance practitioners, as a guide to controlling a modern digital landscape
- Enterprise and IT Architects, as a template for IT tool rationalization and for governing end-to-end technology management architectures
- Technology buyers, as the basis for Requests for Information (RFIs) and Requests for Proposals (RFPs) and as a template for evaluating product completeness
- Consultants and assessors, as a guide for evaluating current practice against a well-defined standard
- Technology vendors, as a guide for product design and customer integrations
- Technical support staff, as a guide for automating and scaling up support services to deal with modern technology deployment velocity

Evolution of the Standard

The approach put forward over the lifetime of this standard has been based on the long-standing thought experiment of “running IT as a business”, a common theme in IT management discussions for the past 40 years (see Betz, p.10 for extensive citations).

A history of the IT4IT Standard, including references to related standards, concepts, and industry themes, is published as a separate case study in the IT4IT Body of Knowledge; see The Open Group Case Study: *On the Origin of the IT4IT™ Standard* [Y202].

As part of the ongoing evolution of the IT4IT Standard, the IT Value Chain concept from Version 2.1 of the IT4IT Reference Architecture has been retired in favor of a focus on Digital Product Portfolio Management and the set of associated IT4IT Value Streams.

The Value Network metaphor has been proposed to describe the broad collaboration needed to connect core practices described in the IT4IT Standard to non-technology business domains such as

Human Resources (HR), Finance, Vendor Management, Customers, Partners, and Suppliers. It is consistent with the approach taken in the release to describe the standard in those terms; however, the Value Network concept has not been formally adopted by the IT4IT Forum at this time.

The IT4IT Standard, Version 3.0 Release Highlights

The following topics have been included/enhanced in Version 3.0 of the IT4IT Standard:

- Introduction of Digital Product

A standard definition for “Digital Product” has been introduced. The Digital Product concept underpins and strengthens the traditional emphasis of the IT4IT Standard on treating the enterprise portfolio of IT applications/services as the primary metaphor for understanding and managing IT investment. As this thinking has matured, a “shift to product” has become a mainstream objective in IT strategy.

The updated terminology and extended Digital Product definition reflect and support this trend and its implications for financial planning, value management, organization around Agile/DevOps teams, and the exploitation of modern automation options across the Digital Product lifecycle, from strategy to support.

- Introduction of Digital Product Backbone

The concepts of service and a service backbone have been significantly improved in two ways. First, as part of the shift to product semantics, the term “service” is used primarily to describe the delivery of products “as a service” when the Digital Product is purely an act that is performed. The service backbone found in prior versions of the IT4IT Standard has been renamed “Digital Product Backbone” to account for a larger variety of topics that includes smartphones and other physical products, automated workflows, and even Robotic Process Automation “bots”. Second, the backbone has been simplified and made more straightforward, with a single primary data object at each stage.

- Move from Value Chain to Digital Value Network

The use of “Value Network” as a concept for managing IT has been introduced. In the move to Digital Product semantics, Value Network replaces the Porter Value Chain [Porter] as the top-level, business view of the IT4IT Standard.

- New value streams

The introduction of seven new value streams has replaced the four value streams of the IT4IT Value Chain of the IT4IT Standard, Version 2.1. Essentially, two value streams, “Evaluate” and “Explore”, are derived from Strategy to Portfolio. Requirement to Deploy is replaced with the “Integrate”, “Deploy”, and “Release” value streams; the “Consume” value stream replaces Request to Fulfill; and Detect to Correct is replaced with the “Operate” value stream. These new value streams are much more consistently and formally defined.

A common question is: what is the relationship between the new value streams in Version 3 and the value streams in Version 2.1?

Although strongly connected by data integrations and data flows, the original four IT4IT Value Streams are aligned to traditional IT organizational structures, which in most companies represented functional and cultural silos.

As the IT4IT Standard evolved into Version 3, IT organizations were also evolving and the old silos were giving way to concepts such as cross-functional development teams, new IT investment models, and DevOps integrations of development, deployment, and operations.

The new value streams in Version 3 take this evolution of industry into account, and align with modern IT management directions that are moving ever more strongly away from silos and toward the end-to-end integration of managing digital.

A close examination of both versions of the standard will quickly reveal the relationship between the old and new value stream definitions, and point the way to a migration path for those who have already implemented against the older version:

- Four functional groups derived from the value streams of the earlier IT4IT Standard, Version 2.1

In the IT4IT Standard, Version 2.1 the four value streams – Strategy to Portfolio, Requirement to Deploy, Request to Fulfill, and Detect to Correct – were also defined to represent the groupings of the IT4IT Functional Components. We have preserved the groupings, but no longer refer to the groups as value streams:

- Updated Strategy to Portfolio functional components

In Strategy to Portfolio, a Strategy functional component is introduced and significant updates have been made to the way strategy, architecture, and Digital Product work together.

- Updated Requirement to Deploy functional components

Requirement to Deploy has been upgraded significantly to reflect modern Agile and DevOps operating practices. This includes renaming some data objects and functional components to reflect the typical terms used in Agile.

- Updated Request to Fulfill functional components

Change Management has been moved from Detect to Correct to Request to Fulfill to reflect that change is an activity managed by the Deliver functions. Furthermore, Request to Fulfill sees the introduction of Identity Management, as well as the better formalization of the Service Offer Catalogs and Consumption Experience.

- IT Financial Management (ITFM) Support functions

The IT4IT Reference Architecture has been updated to improve the description of how Financial Management capabilities are supported by the standard. Financial Management is one of the

Supporting Functions in the overall Digital Value Network, and its impacts on core functions and data objects have been updated to more effectively describe these impacts and interactions.

- Use of the ArchiMate® modeling language as the standard notation

The ArchiMate Specification has replaced most instances of the “informal notation” used in previous releases. This generally improves the rigor of the diagrams. It also enables the automatic creation of these diagrams from the data held in the ArchiMate model of the IT4IT Reference Architecture that is available for download with the IT4IT Standard, Version 3.0. This ensures a high level of consistency across the model.

- Removal of the Key Performance Indicator (KPI) lists

The lists of KPIs associated with the four value streams in the previous release have been removed. The creation and management of appropriate metrics and KPIs for activities described in the IT4IT Standard are addressed at various points in the text of the standard. The Open Group Guide: *Intelligence & Reporting Supporting Activity in the IT4IT™ Reference Architecture* [G18E] describes a recommended way of approaching metrics and KPIs.

- General consistency and flow of the overall standard

Inconsistencies of terminology and structure that were reported against prior versions of the IT4IT Standard have been resolved.

Related Industry Standards

The IT4IT Reference Architecture provides the overall framework for managing a “digital factory”, covering the value streams, capabilities, and data flows needed to manage the entire Digital Product lifecycle. The IT4IT Standard can be combined with other practices and standards providing additional guidance for specific capabilities or functions. Therefore, the IT4IT Reference Architecture can be complemented with other practices and standards, such as those listed below.

Enterprise Architecture

- The Open Group ArchiMate[®] Specification
- The Open Group Open Agile Architecture[™] Standard
- The Open Group TOGAF[®] Standard

(Scaled) Agile Development

- Kanban
- Large Scale Scrum – LeSS
- Nexus[™] for Scaling Scrum
- Scaled Agile Framework[®] (SAFe[®])
- Scrum

Project Management

- PRINCE2[®] for Project Management
- The Project Management Body of Knowledge (PMBOK[™]) Guide

IT Service Management

- ISO/IEC 20000: Information Technology – Service Management
- ITIL[®] for IT Service Management from AXELOS
- The VeriSM[™] Framework

IT Governance

- COBIT[®] for IT Governance by ISACA
- ISO/IEC 38500: Corporate Governance of Information Technology

Software Asset Management

- ISO/IEC 19770: Software Asset Management

Security and Risk Management

- ISO/IEC 27000 : Information Security Management systems
- NIST Cybersecurity Framework

Other Practices

- Capability Maturity Model Integration (CMMI®)
- DevOps
- OASIS™ Topology and Orchestration Specification for Cloud Applications (TOSCA™)
- Object Management Group® (OMG®) Unified Modeling Language™ (UML®)
- Site Reliability Engineering
- The Open Group Digital Practitioner Body of Knowledge™
- The Open Group FACE™ Technical Standard
- The Open Group Healthcare Enterprise Reference Architecture (HERA)

Referenced Documents

The following documents are referenced in this Standard.

(Please note that the links below are good at the time of writing but cannot be guaranteed for the future.)

Normative References

Normative references for this standard are defined in Section 1.3.

Informative References

The following documents are referenced in this standard or provide further information:

- [Agile Manifesto] *Manifesto for Agile Software Development*, by Beck et al. 2001; refer to: <http://agilemanifesto.org/principles.html>
- [Allspaw & Robbins] *Web Operations: Keeping the Data On Time*, by John Allspaw and Jesse Robbins, July 2010, published by O'Reilly Media
- [Behr et al.] *The Visible Ops Handbook: Implementing ITIL® in Four Practical and Auditable Steps*, by Kevin Behr, Gene Kim, and George Spafford, June 2005, published by Information Technology Process Institute
- [Benson et al.] *From Business Strategy to IT Action: Right Decisions for a Better Bottom Line*, by Robert J. Benson, Thomas L. Bugnitz, and William B. Walton, April 2008, published by Wiley
- [Betz] *Architecture and Patterns for IT Service Management, Resource Planning, and Governance (Making Shoes for the Cobbler's Children)*, by Charles T. Betz, November 2011, 2nd Edition, published by Morgan Kaufmann
- [Bourque & Fairley] *Guide to the Software Engineering Body of Knowledge (SWEBOK®): Version 3.0*, edited by Pierre Bourque and Richard E. Fairley, January 2014, published by IEEE Computer Society Press
- [C119] *SOA Reference Architecture (C119)*, a standard of The Open Group, December 2011, published by The Open Group; refer to: www.opengroup.org/library/c119
- [C155] *The Open Group IT4IT™ Reference Architecture, Version 2.0 (C155)*, a standard of The Open Group Standard, October 2015, published by The Open Group; refer to: www.opengroup.org/library/c155
- [C171] *The Open Group IT4IT™ Reference Architecture, Version 2.1 (C171)*, a standard of The Open Group, January 2017, published by The Open Group; refer to: www.opengroup.org/library/c171
- [C19C] *ArchiMate® Model Exchange File Format for the ArchiMate Modeling Language, Version 3.1 (C19C)*, a standard of The Open Group, November 2019, published by The Open Group; refer to: www.opengroup.org/library/c19c
- [C19E] *Open Messaging Interface (O-MI), The Open Group Standard for the Internet of Things (IoT), Version 2.0 (C19E)*, December 2019, published by The Open Group; refer to: www.opengroup.org/library/c19e
- [C202] *O-DEF™, the Open Data Element Framework, Version 2.0 (C202)*, a standard of The Open Group, February 2020, published by The Open Group; refer to: www.opengroup.org/library/c202
- [C207] *FACE™ Technical Standard, Edition 3.1 (C207)*, a standard of The Open Group, July 2020, published by The Open Group; refer to: www.opengroup.org/library/g207

[Carbone]	<i>IT Architecture Toolkit (Enterprise Computing)</i> , by Jane Carbone, May 2004, published by Prentice Hall
[CMMI for Acquisition]	<i>CMMI[®] for Acquisition, Version 1.3</i> , by CMMI Product Team, November 2010, published by Carnegie Mellon University Software Engineering Institute; refer to: https://resources.sei.cmu.edu/asset_files/technicalreport/2010_005_001_15284.pdf
[CMMI for Development]	<i>CMMI[®] for Development, Version 1.3</i> , by CMMI Product Team, November 2010, published by Carnegie Mellon University Software Engineering Institute; refer to: https://resources.sei.cmu.edu/asset_files/technicalreport/2010_005_001_15287.pdf
[CMMI for Services]	<i>CMMI[®] for Services, Version 1.3</i> , by CMMI Product Team, November 2010, published by Carnegie Mellon University Software Engineering Institute; refer to: https://resources.sei.cmu.edu/asset_files/TechnicalReport/2010_005_001_15290.pdf
[COBIT]	<i>ISACA: Control Objectives for Information and Related Technology (COBIT[®])</i> ; refer to: www.isaca.org
[Cockburn]	<i>Writing Effective Use Cases</i> , by Alistair Cockburn, October 2000, published by Addison-Wesley
[Cook]	<i>Building Enterprise Information Architectures: Reengineering Information Systems</i> , by Melissa A. Cook, February 1996, published by Prentice Hall
[Duvall et al.]	<i>Continuous Integration: Improving Software Quality and Reducing Risk</i> , by Paul M. Duvall, Steve Matyas, and Andrew Glover, June 2007, published by Addison-Wesley
[G160]	<i>IT4IT[™] for Managing the Business of IT, A Management Guide (G160)</i> , The Open Group Guide, January 2016, published by The Open Group; refer to: www.opengroup.org/library/g160
[G18E]	<i>Intelligence & Reporting Supporting Activity in the IT4IT[™] Reference Architecture (G18E)</i> , The Open Group Guide, October 2018, published by The Open Group; refer to: www.opengroup.org/library/g18e
[G18F]	<i>Service Brokering with the IT4IT[™] Standard (G18F)</i> , The Open Group Guide, December 2018, published by The Open Group; refer to: www.opengroup.org/library/g18f
[G191]	<i>Tool Rationalization using the IT4IT[™] Reference Architecture Standard (G191)</i> , The Open Group Guide, April 2019, published by The Open Group; refer to: www.opengroup.org/library/g191
[Humble & Farley]	<i>Continuous Delivery: Reliable Software Releases through Build, Test, and Deployment Automation</i> , by Jez Humble and David Farley, August 2010, published by Addison-Wesley
[IBM Rational Software]	Rational Software: Rational Unified Process Best Practices for Software Development Teams, revised January 2011, published by Rational Software; refer to: ftp://ftp.software.ibm.com/software/rational/web/whitepapers/2003/rup_bestpractices.pdf
[IEEE 730-2014]	<i>IEEE 730-2014: IEEE Standard for Software Quality Assurance Processes</i> , June 2014; refer to: https://standards.ieee.org/standard/730-2014.html
[ISO/TC 258]	<i>ISO/TC 258: Project, Program, and Portfolio Management</i> ; refer to: https://www.iso.org/committee/624837.html
[ISO/IEC 21]	<i>ISO/IEC Guide 21-2:2005 Regional or National Adoption of International Standards and Other International Deliverables – Part 2: Adoption of International Deliverables other than International Standards</i> ; refer to: https://www.iso.org/standard/39800.html
[ISO/IEC 98]	<i>ISO/IEC 98-3:2008 Uncertainty of Measurement – Part 3: Guide to the Expression of Uncertainty in Measurement (GUM:1995)</i> ; refer to: https://www.iso.org/standard/50461.html
[ISO/IEC 19770]	<i>ISO/IEC 19770-1:2017: Information Technology – Software Asset Management – Part 1: IT asset management systems — Requirements</i> ; refer to: https://www.iso.org/standard/68531.html
[ISO/IEC 20000]	<i>ISO/IEC 20000-1:2018: Information Technology – Service Management – Part 1: Service Management System Requirements</i> ; refer to: https://www.iso.org/standard/70636.html

- [ISO/IEC 27001] *ISO/IEC 27001: Information Security Management*; refer to: <https://www.iso.org/isoiec-27001-information-security.html>
- [ISO/IEC 27002] *ISO/IEC 27002:2022: Information security, cybersecurity and privacy protection — Information security controls*; refer to: <https://www.iso.org/standard/75652.html>
- [ISO/IEC 38500] *ISO/IEC 38500:2015: Corporate Governance of Information Technology*; refer to: <https://www.iso.org/standard/62816.html>
- [ITIL] *ITIL[®] Foundation, ITIL 4 Edition, 2019*, published by AXELOS_; refer to: <https://www.axelos.com/certifications/itil-service-management>
- [Kaplan] *Strategic IT Portfolio Management: Governing Enterprise Transformation*, by Jeffrey Kaplan, May 2009, published by Jeff Kaplan
- [Kern et al.] *IT Production Services*, by Harris Kern, Rich Schiesser, and Mayra Muniz, July 2011, published by Prentice Hall
- [Leffingwell et al.] *Scaled Agile Framework[®] (SAFe[®])*, by D. Leffingwell, A. Yakyma, et al, 2014; refer to: <http://scaledagileframework.com>
- [Limoncelli et al.] *The Practice of Cloud System Administration: Designing and Operating Large Distributed Systems, Volume 2: DevOps and SRE Practices for Web Services*, by Thomas A. Limoncelli, Strata R. Chalup, and Christina J. Hogan, September 2014, published by Addison-Wesley Professional
- [Luckham] *The Power of Events: An Introduction to Complex Event Processing in Distributed Enterprise Systems*, by David C. Luckham, May 2002, published by Addison-Wesley
- [Maizlish & Handler] *IT Portfolio Management Step-By-Step: Unlocking the Business Value of Technology*, by Bryan Maizlish and Robert Handler, October 2010, published by Wiley
- [Martin] *Great Transition: Using the Seven Disciplines of Enterprise Engineering*, by James Martin, October 1995, published by Amacom
- [McFarlan] *Portfolio Approach to Information Systems*, by F. Warren McFarlan, September 1981, published in the Harvard Business Review 59(5); refer to: <https://hbr.org/1981/09/portfolio-approach-to-information-systems>
- [Merriam-Webster] *Merriam-Webster Dictionary*; refer to: www.merriam-webster.com/
- [O'Donnell & Casanova] *The Configuration Management Database (CMDB) Imperative: How to Realize the Dream and Avoid the Nightmares*, by Glenn O'Donnell and Carlos Casanova, February 2009, published by Pearson
- [OGC] *Application Management*, by Office of Government Commerce, June 2002, published by The Stationary Office
- [O'Loughlin] *The Service Catalog: A Practitioner Guide*, by Mark O'Loughlin, March 2010, published by Van Haren Publishing
- [Porter] *Competitive Advantage: Creating and Sustaining Superior Performance*, by Michael E. Porter, January 2004, published by Free Press
- [PMBOK Guide] *A Guide to the Project Management Body of Knowledge (PMBOK[™] Guide)*, January 2013, published by Project Management Institute
- [Quinlan] *Chargeback and IT Cost Accounting*, by Terence A. Quinlan, January 2003, Published by IT Financial Management Association
- [Quinlan & Quinlan] *Readings in IT Financial Management*, by Terence A. Quinlan and Susan J. Quinlan, 2003, published by IT Financial Management Association
- [Remenyi et al.] *The Effective Measurement and Management of ICT Costs and Benefits*, by Dan Remenyi, Frank Bannister, and Arthur Money, February 2007, published by CIMA Publishing