VENDOR SELECTION MATRIX™ AIOPS SOLUTIONS

The Top Global Vendors 2023

May 2023

RESEARCH IN ACTION

independent research & consulting

FOREWORD

Every year, Research In Action surveys 10,000+ enterprise IT and business decision makers in order to gain insights on strategy, investments and ongoing challenges of technology innovation in the IT and Marketing Automation realm. These surveys give us access to a wealth of direct and unfiltered feedback from the buyers. It also helps us to understand how buying decisions are made in today's business environment. The Vendor Selection Matrix™ is a primarily survey-based methodology for vendor evaluation, where 63% of the evaluation is based on a survey of enterprise IT or business decision makers and 37% on the analyst's judgement. The analyst's input is fed by a combination of intensive interviews with software or services vendors and their clients, plus their informed, independent point-of-view as an analyst. All of this combines to make Research in Action **Vendor Selection Matrix™ reports so unique**. This approach is one of the key differentiators of Research In Action in market research. For this report, we interviewed 1,500 enterprise IT and business managers with budget responsibility in enterprises globally. We selected those vendors which achieved the best evaluations scores from the buyers but disregarded those with fewer than 15 evaluations.

As more organizations have embarked on digital transformation and the complexity of IT environments has grown, there has been a corresponding increase in the adoption of AIOps solutions to gain insight from the volumes of data available across the technology stack. This year, I have produced two reports, one evaluating only those vendors that focus primarily on AIOps, and another group of vendors that focus on Observability and AIOps together. My prediction is that in the future, AIOps will not be able to stand on its own, and that this practice will become a subset of Observability. The goals of IT organizations should be to identify, understand, and resolve problems across their entire technology ecosystem, and the combined solutions of Observability and AIOps can automate this journey. The bottom line is that IT organizations have already invested in AIOps automation tools and have most likely have achieved the promised benefits. The next step should be to investigate Observability as part of the journey.

This Vendor Selection Matrix™ report provides you with a useful guide to key AIOps market trends and identifies the top vendors in the AIOps space. It is designed to help you make an informed decision about which vendors are best suited to your needs. Enjoy reading it please feel free to contact us if you have any questions.

You only live once (YOLO)!

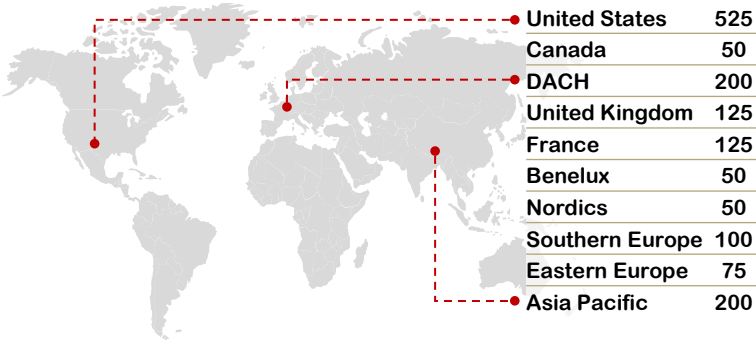**Eveline Oehrlich**

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OUR SURVEY DEMOGRAPHICS: IT AUTOMATION IN GLOBAL ENTERPRISES

Country Breakdown

United States	525
Canada	50
DACH	200
United Kingdom	125
France	125
Benelux	50
Nordics	50
Southern Europe	100
Eastern Europe	75
Asia Pacific	200

Industry Breakdown

Energy	90
Financial Services	260
Government & Non-Profit	70
Life Sciences	160
Manufacturing	400
Technology, Media & Telecoms	200
Consumer Packaged Goods & Retail	100
Professional Services	120
Travel & Transportation	100
Total	**1,500**

Company Size Breakdown

(Enterprises with revenue > € 250 million p.a.)

Headcount	Value
< 2,500	120
2,500 – 5,000	350
5,000 – 10,000	510
10,000 – 50,000	400
> 50,000	120

Headcount

Job Title Breakdown

VP IT Infrastructure	160	Chief Operations Officer	60
IT Manager	160	VP Technology	50
VP IT	125	Sourcing And Vendor Management	40
Chief Information Officer	120	Business Executive	30
IT Operations Manager	120	VP IT Financial Management	30
VP Service Desk	120	VP Enterprise Architecture	25
Chief Technology Officer	100	Project Manager	25
Project Management Office	80	VP Application Development	20
Chief Digital Officer	65	VP DevOps	20
VP IT Shared Services	65	Chief Financial Officer	15
VP Operations	60	Chief Sales Officer	10
		Total	**1,500**

All Research in Action surveys are gender neutral and 100% confidential.

100,000+
Data Points

1,500
Enterprise Managers

37%
Analyst's Opinion

63%
Survey Results

The Vendor Selection Matrix™ Evaluation Methodology:

The basis of our competitive vendor evaluation reports is always an extensive buyer survey.
We then select those vendors which achieved the best evaluations scores from the buyers but disregard those with fewer than 15 evaluations.
The final matrix scores are a combination of the survey results, vendor input and analyst's opinion.

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OUR MARKET IMPACT OVER 12 MONTHS

**Members In
Our Survey Panel**

125,000 IT Automation
90,000 Marketing Automation

**30 Research
Reports Published**

400+ vendors evaluated
14,000 views per report (average)

**10,000+ Active Enterprise
Survey Participants**

all with budget responsibility

**25 Press
Releases**

2,000 views per press release (average)

**Vendor Selection Matrix™: The right mix makes all the difference
63% customer evaluations + 37% analyst's judgement = 100% success**

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WHAT IS AN AIOPS SOLUTION?

An Artificial Intelligence for Operations (AIOps) solution empowers diverse IT teams with comprehensive analysis of volumes and categories of data to improve key processes, tasks, and decision-making. The use of a specific AIOps solution automates the ingestion of rapid volumes of data, uses machine learning to analyse the data, present the results to either predict, alert or advise on issues, and helps its user to make proactive decision. The solutions should support a wide range of stakeholders to analyse, act, and predict on a high volume of available data.
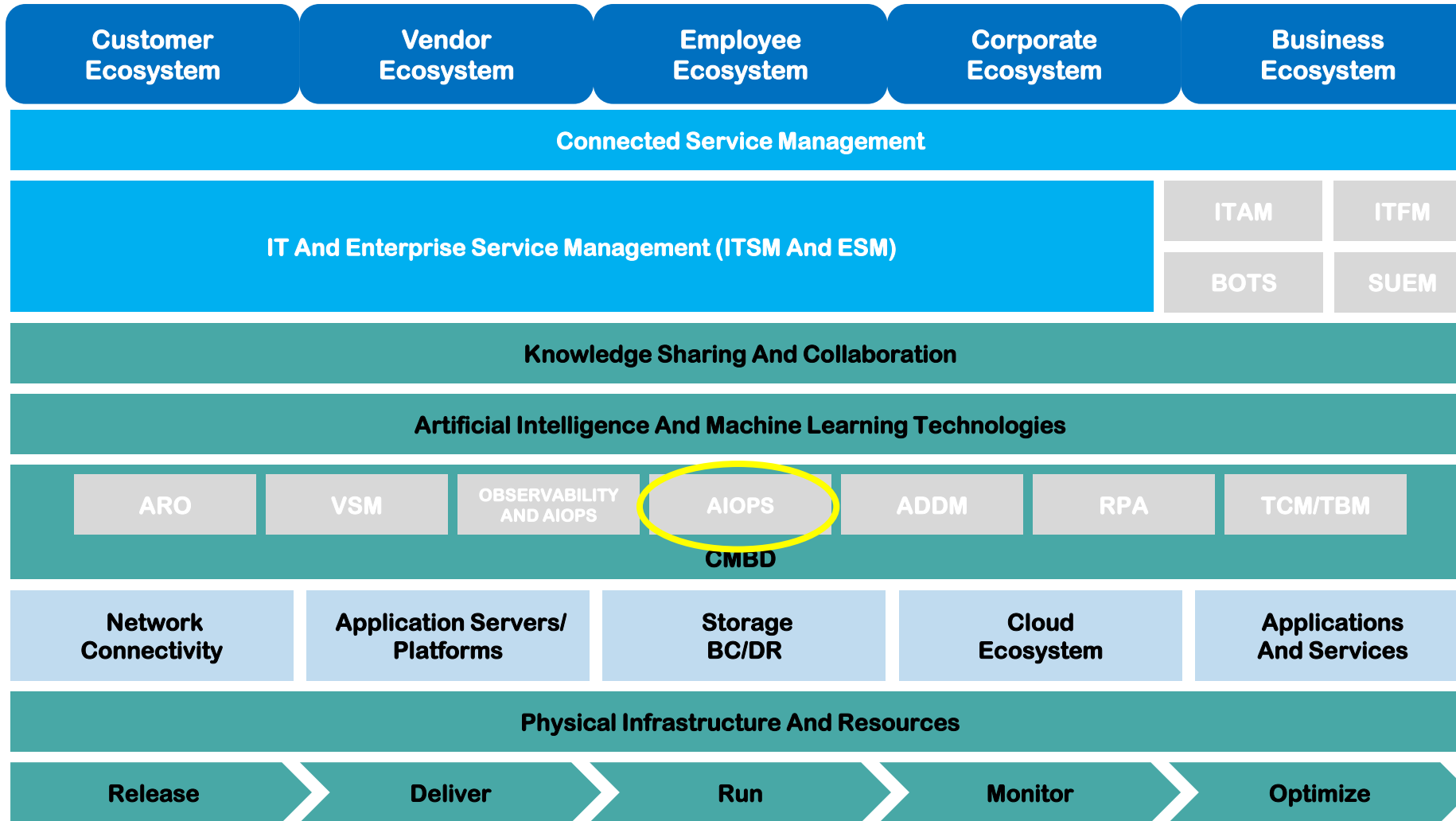
The solution should include, but is be limited to:

- Access and ingest data from multiple sources such as existing tools within development and IT operations teams.

- Include real-time and historical data analysis capabilities using machine learning algorithms.

- Enable storage of relevant data (including access for further analysis or deep dives).

- Provide input for action and additional insight with prescriptive responses to the analysis of observed and ingested data.

- Suggested actions can then be integrated with automated remediation or fulfilment solutions.

- Role-based dashboards for overview and insights (results of the data analysis).

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THE IT AUTOMATION MARKETEXTURE

Customer Ecosystem	Vendor Ecosystem	Employee Ecosystem	Corporate Ecosystem	Business Ecosystem

Connected Service Management

IT And Enterprise Service Management (ITSM And ESM)

ITAM	ITFM
BOTS	SUEM

Knowledge Sharing And Collaboration

Artificial Intelligence And Machine Learning Technologies

ARO	VSM	OBSERVABILITY AND AIOPS	AIOPS	ADDM	RPA	TCM/TBM

CMBD

Network Connectivity	Application Servers/ Platforms	Storage BC/DR	Cloud Ecosystem	Applications And Services

Physical Infrastructure And Resources

Release	Deliver	Run	Monitor	Optimize

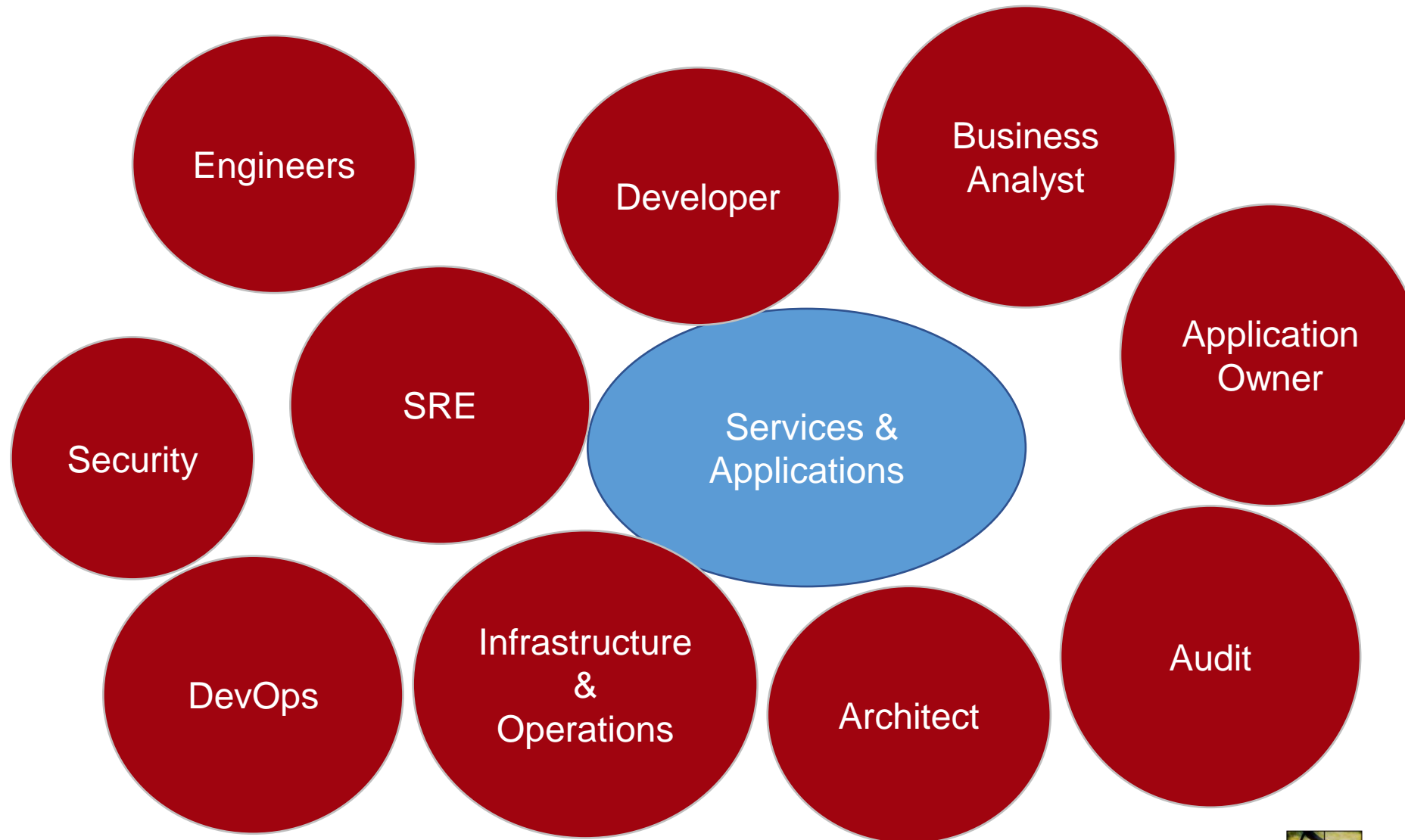IT Automation solutions are necessary for a modern digital operating model.

IT Automation solutions are foundational for any transformation to reduces toil and decrease manual errors.

IT Automation solutions can enforce good practices to optimize digital service quality and speed of service delivery.
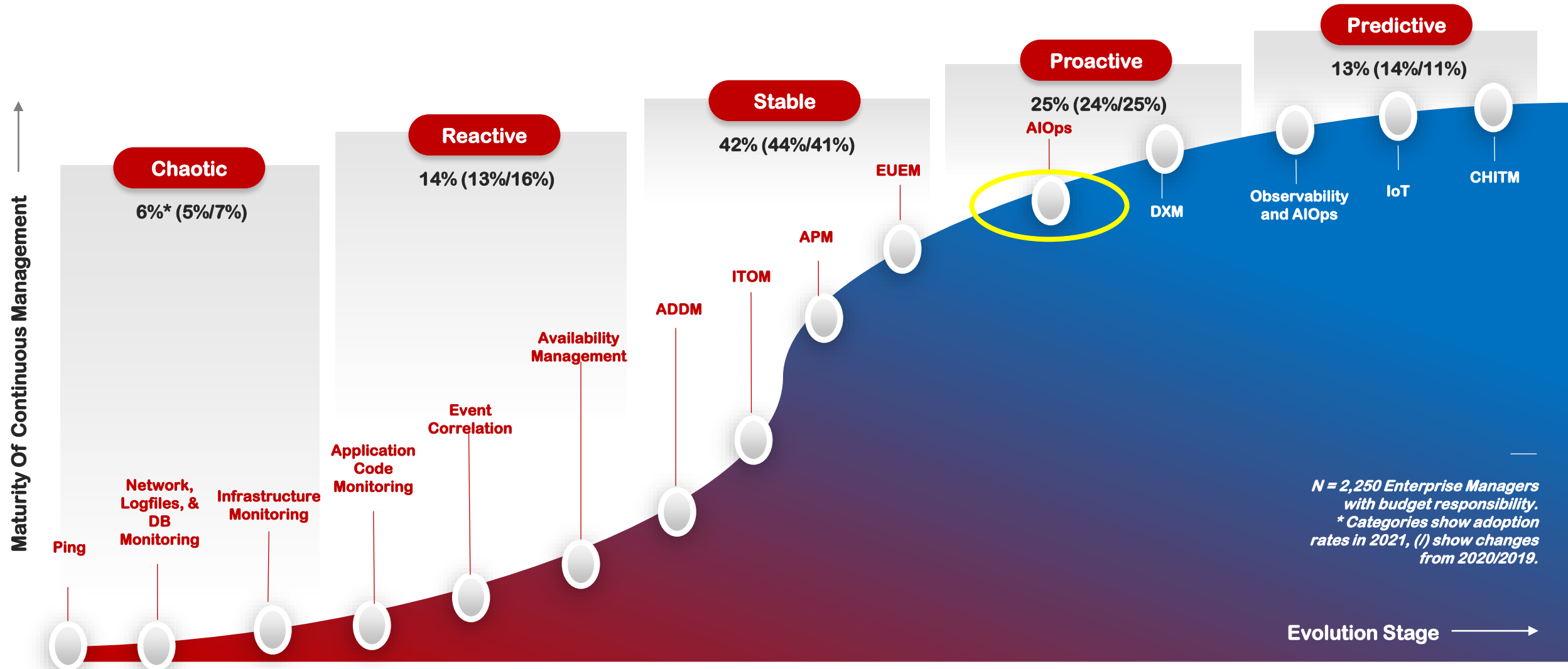
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CONTINUOUS MANAGEMENT (CM)

VISIBILITY NEEDS ACROSS IT AND BUSINESS

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CONTINUOUS MANAGEMENT (CM)

MATURITY S-CURVE 2021

Maturity Of Continuous Management

Chaotic
6%* (5%/7%)

Reactive
14% (13%/16%)

Stable
42% (44%/41%)

Proactive
25% (24%/25%)

Predictive
13% (14%/11%)

Ping

Network, Logfiles, & DB Monitoring

Infrastructure Monitoring

Application Code Monitoring

Event Correlation

Availability Management

ADDM

ITOM

APM

EUEM

AIOps

DXM

Observability and AIOps

IoT

CHITM

N = 2,250 Enterprise Managers with budget responsibility.
* Categories show adoption rates in 2021, (/) show changes from 2020/2019.

Evolution Stage

All acronyms are defined in the report Appendix

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RESEARCH:

GLOBAL PERSPECTIVE: IT OPERATIONS IS PLAGUED BY SPIRALING COSTS AND SKILL SHORTAGE
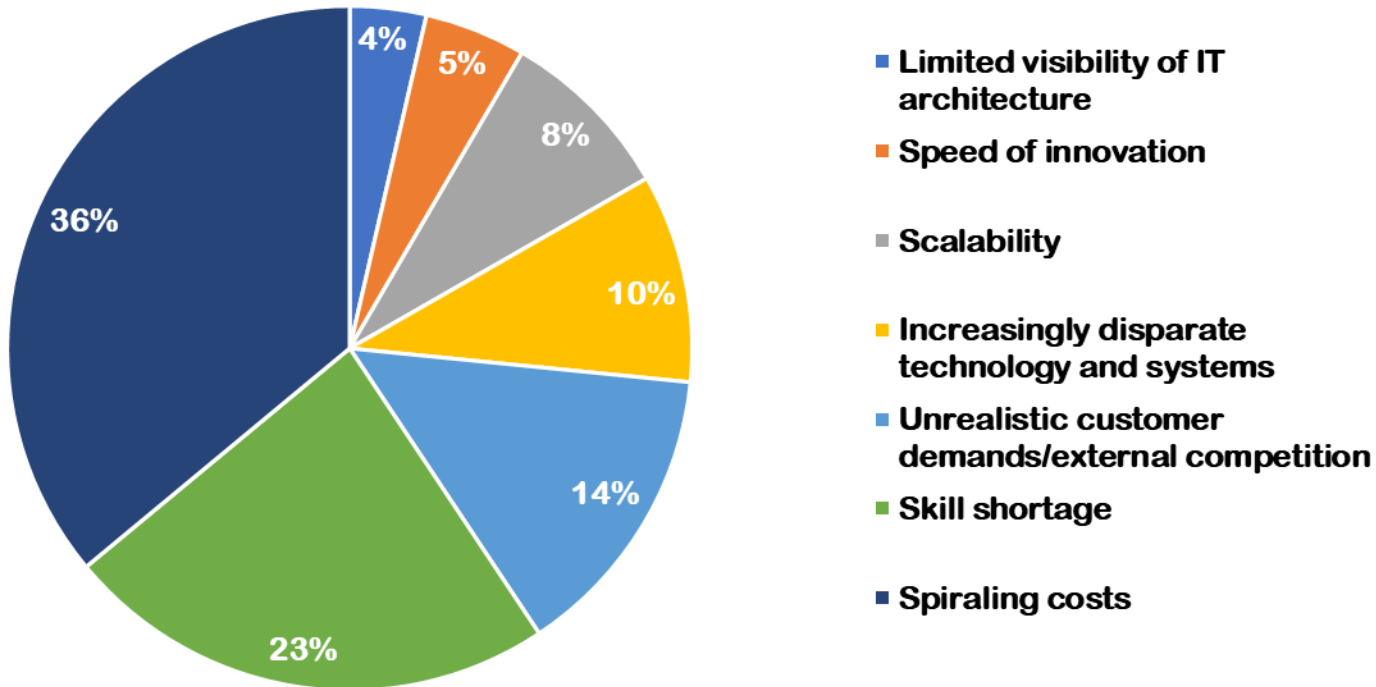
Pie chart:
- 4% — Limited visibility of IT architecture
- 5% — Speed of innovation
- 8% — Scalability
- 10% — Increasingly disparate technology and systems
- 14% — Unrealistic customer demands/external competition
- 23% — Skill shortage
- 36% — Spiraling costs

N = 1,500 Enterprise IT and Business Managers with budget responsibilities.

Question:
What is your top challenge today in IT operations?

Visibility across the complex IT infrastructure is a challenge for most IT operations teams.

As IT infrastructure keeps gaining in complexity, the challenge of having visibility across it is for **36%** of survey respondents the biggest challenge. Without such visibility, troubleshooting, remediation and making improvements is tough.

The skill shortage **(23%)** has put IT organizations in an endless loop of missed opportunities and improvements.

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RESEARCH:
THERE ARE REGIONAL DIFFERENCES AROUND THE CHALLENGES OF IT OPERATIONS
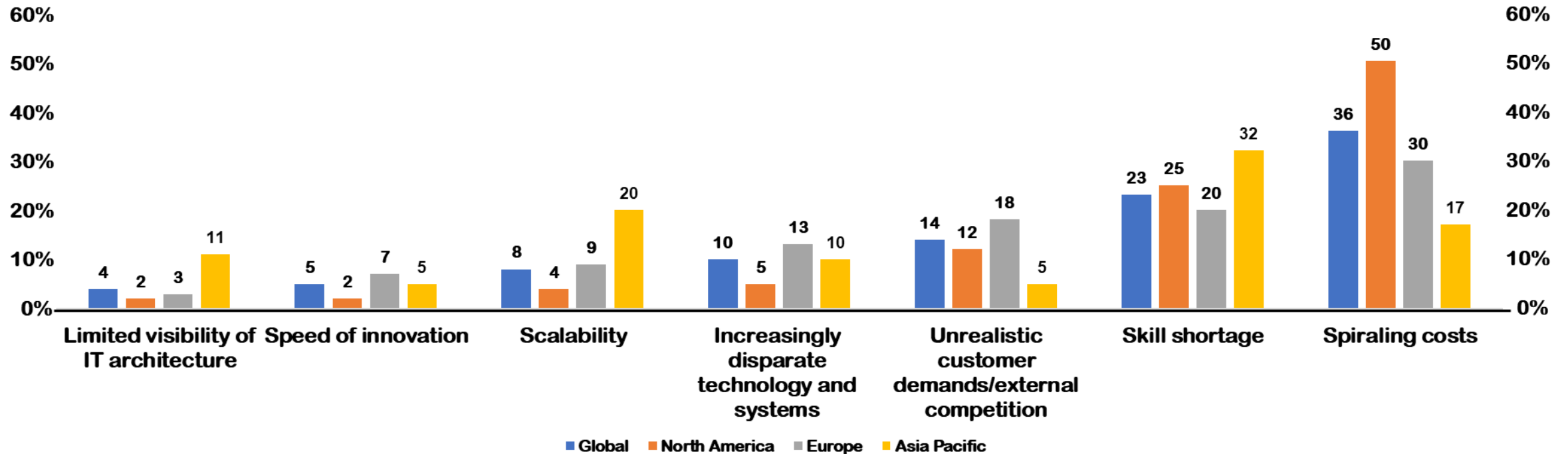
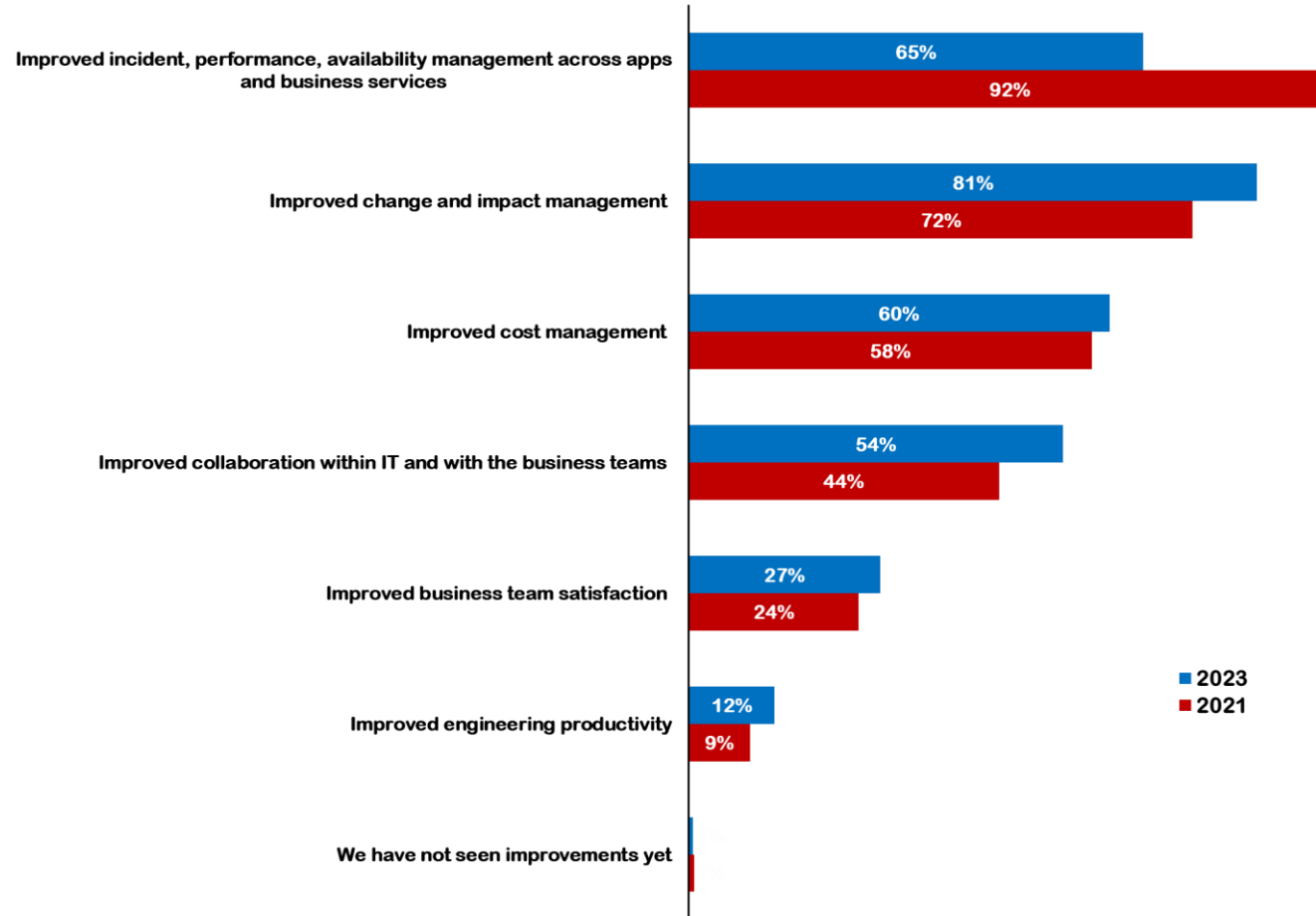N = 1,500 Enterprise IT and Business Managers with budget responsibilities.

Question:
What is your top challenge today in IT operations?

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RESEARCH:
TOP FIVE CRITICAL AIOPS SOLUTIONS USE CASES

Improved incident, performance, availability management across apps and business services
- 2023: 65%
- 2021: 92%

Improved change and impact management
- 2023: 81%
- 2021: 72%

Improved cost management
- 2023: 60%
- 2021: 58%

Improved collaboration within IT and with the business teams
- 2023: 54%
- 2021: 44%

Improved business team satisfaction
- 2023: 27%
- 2021: 24%

Improved engineering productivity
- 2023: 12%
- 2021: 9%

We have not seen improvements yet

■ 2023
■ 2021

N = 1,500 Enterprise IT and Business Managers with budget responsibilities.

Question: Which three use cases do you see important while leveraging AIOps within your IT organization?

AIOps can help to improve proactiveness for IT operations.

IT data is noisy which makes it difficult to determine what caused what. **81% of survey respondents leverage AIOps to understand patterns finding relationships to further analyze what happened or to determine impact.**

With massive amounts of data being generated by complex hybrid IT infrastructures, filtering, correlating and inferring root cause must be automated to save labor cost and allow experts to shift towards more value-added work. **60% of survey respondents are leveraging AIOps to improve management costs.**

Applications and services are owned across a variety of roles which all need to notified and to then collaborate next steps, specifically if dispersed across multiple geographic locations.

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RESEARCH:

AIOPS IS STILL MOSTLY USED BY IT OPERATIONS AND IT SERVICE MANAGEMENT TEAMS

Chart: "In which of the following areas are you applying AIOps today?" (2023 vs. 2021)

Area	2023	2021
IT Operations/Continuous Operations	87%	82%
IT Service Management	86%	79%
Customer Experience and Application Owners	57%	67%
Continuous Deployment	43%	40%
Security Operations	20%	18%
Continuous Integration and Delivery	8%	9%
Application Development and Design		4%
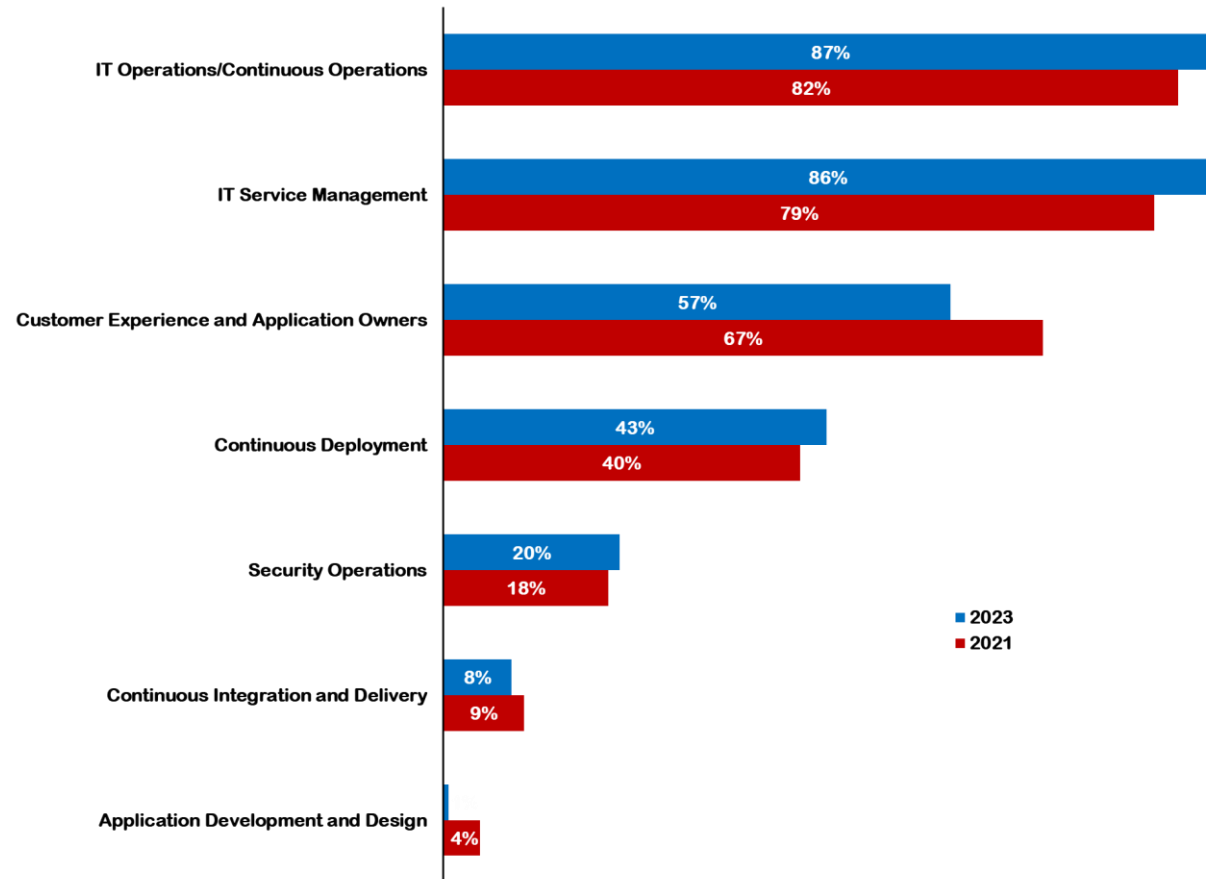
N = 1,500 Enterprise IT and Business Managers with budget responsibilities.

Question:
In which of the following areas are you applying AIOps today?

Slight shifts in terms of which teams are using AIOps.

Still, the biggest users of AIOps in 2023 are the IT Operations and IT Service Management teams to improve their automation to intelligently pinpoint service and infrastructure issues, accelerate remediation, and drive service quality improvement.

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WHAT THE DATA MEANS:
AIOPS SOLUTIONS ARE LEVERAGED TO DETERMINE PROBABLE ROOT CAUSE

AIOps remains mainly used by those who need to keep services and applications running.

The primary goal of AIOps is to optimize IT operations by leveraging AI technologies to improve efficiency, reduce downtime, and enhance overall service quality. Therefore, we tested the assumption those who heavily rely on maintaining smooth service and application operations would be the primary users of AIOps solutions. Our data confirms this assumption. However, it's worth noting that the adoption of AIOps is not limited to just organizations concerned with operational stability. AIOps can also provide valuable insights and analytics for strategic decision-making, performance optimization, and proactive problem identification. It has the potential to benefit various stakeholders involved in IT operations, including developers, IT administrators, and business leaders.

Identifying probable root cause of issues is main use case for AIOps.

Identifying the probable root cause of issues is a primary use case for AIOps because it helps IT teams navigate complex IT environments, resolve problems faster, improve operational efficiency, and enable proactive monitoring and anomaly detection. By leveraging AI technologies, AIOps provides valuable insights and automates processes that would otherwise require significant manual effort and expertise.

Tool consolidation dream has kept the adoption of AIOps going.

Tool consolidation can help organizations by integrating different tools and systems into a unified platform. This integration enables data aggregation from various sources, such as monitoring tools, service desk platforms, and event management systems, providing a holistic view of the IT environment. Additionally, by consolidating tools and leveraging AIOps capabilities, organizations can benefit from enhanced visibility, better insights, and automated decision-making. This can lead to improved incident detection and resolution, faster troubleshooting, proactive performance monitoring, and better resource allocation.

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INSIGHTS: TOP MARKET TRENDS 2023 AIOPS SOLUTIONS

Business centric questions must be answered, not just technology centric.

Technology-centric questions revolve around the technical aspects of a application or service and focus only on the technical implementation and management of the technology related. Business-centric questions center on the impact and outcomes of technology on the business as a whole. Examples are how can technology drive business objectives, improve processes, and deliver customer value. AIOps must, besides taking a technology-centric approach, also be extended into answering questions which address business value and outcomes.

Domain expertise is still essential for triaging and investigation.

IT domain expertise remains important for triaging and problem resolution because it helps organizations to effectively manage complex, rapidly changing technologies, applications and systems. The different experts also can ensure that seamless integration is possible, and customization and optimization efforts ensure security and compliance. Additionally, IT domain experts can effectively communicate with both technical and non-technical stakeholders, helping to bridge the gap between these groups. Also, domain experts play an essential role in training and developing other IT professionals, helping to build a strong, knowledgeable team that can effectively manage the organization's IT systems and infrastructure.

The network is the challenge and the Achilles heal in the future.

The network and its components is a crucial aspect within IT architectures of today and in the future. It functions as the connecting fabric between devices and systems, it supports cloud computing, facilitates remote work. Additionally, network connections enable big data and analytics, ensure security and boundaries embracing new networking technologies. As the digital transformation continue to grow, the importance of a strong, secure, flexible, scalable network infrastructure will only increase.

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VENDOR SELECTION MATRIX™

AIOPS SOLUTIONS
THE TOP GLOBAL VENDORS 2023

These are the Top vendors as selected by 1,500 users from buyer companies based upon product, company and service quality.

VENDOR NAME	SOLUTION
AVANTRA	Avantra
BIG PANDA	BigPanda Autonomous Operations Platform
MOOGSOFT	Moogsoft AIOps
NEW RELIC	NewRelic One
SCIENCELOGIC	ScienceLogic SL1 Platform
SPLUNK	Splunk Enterprise including Splunk IT Service Intelligence; Splunk Observability Cloud

This list is alphabetical and includes all relevant AIOps platform solution vendors named by the survey respondents.

For this report we interviewed 1,500 enterprise IT and business managers with budget responsibility in enterprises globally. We selected those vendors which achieved the best evaluations scores from the buyers but disregarded those with fewer than 15 evaluations.

NOTE: If a vendor does not respond, Research in Action will complete its scoring assessment based on analyst experience and desk research. The vendor's products and quick facts will be documented in the report, though a full vendor scorecard will not be written.

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VENDOR SELECTION MATRIX™

AIOPS SOLUTIONS
THE TOP GLOBAL VENDORS 2023

Vendor Quick Facts

VENDOR NAME	MARKET PRESENCE	GROWTH RATE	CUSTOMER TRACTION	GOOD TO KNOW
AVANTRA	Medium	High	Good	Offers an automated SAP AIOps monitoring solution that focues on intelligent automation.
BIG PANDA	Medium	High	Good	Offers a solution with a clear focus on incident intelligence and automation.
MOOGSOFT	Medium	High	Good	Enriches observability and automates the entire incident management lifecyle.
NEW RELIC	Medium	Medium	Strong	Revolutionizes IT infrastructure management and optimizes digital experience.
SCIENCELOGIC	Medium	Low	Strong	Provides a comprehensive solution leveraging AI and ML to reduce MTTR.
SPLUNK	Big	Very High	Strong	Offers domain agnostic and specific capabilities to accelerate the path towards proactive IT operations.

MARKET PRESENCE	GROWTH RATE	CUSTOMER TRACTION
Very Big	Very High	Strong
Big	High	Good
Medium	Medium	Medium
Small	Low	Low

NOTES:
- Market Presence combines the market share and perceived Mindshare (or Share of Mind).
- Growth Rate is the anticipated growth rate for this year where Medium is the average growth for this market.
- Customer Traction combines the vendor's customer retention rate and the Research In Action Recommendation Index (RI). The RI is collected and calculated by asking the survey participants: "Would you recommend this vendor in this market to your peers - Yes or No?".

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VENDOR SELECTION MATRIX™
EVALUATION CRITERIA

STRATEGY

Vision And Go-To-Market	**30%**	› Does the company have a coherent vision in line with the most probable future market scenarios? › Does the go-to-market and sales strategy fit the target market and customers?
Innovation And Differentiation	**30%**	› How innovative is the company in this market? › Does the solution have a unique selling proposition and clear market differentiators?
Viability And Execution Capabilities	**15%**	› How likely is the long-term survival of the company in this market? › Does the company have the necessary resources to execute the strategy?
Recommendation Index	**25%**	› Would customers recommend this vendor in this market to their peers?

EXECUTION

Breadth And Depth Of Solution Offering	**30%**	› Does the solution cover all necessary capabilities expected by customers?
Market Share And Growth	**15%**	› How big is the company's market share and is it growing above the market rate?
Customer Satisfaction	**25%**	› How satisfied are customers with the solution and the vendor today?
Price Versus Value Ratio	**30%**	› How do customers rate the relationship between the price and perceived value of the solution?

NOTES:
- 63% of the evaluation is based on the survey results, 37% is based on the analysts' assessment.
- 40% of the evaluation is based on the survey results: (1) Recommendation Index, (2) Customer Satisfaction, (3) Price Versus Value.
- 15% of the evaluation is based on the analysts' assessment: (1) Viability And Execution Capabilities, (2) Market Share And Growth.
- 45% of the evaluation is based on a combination of survey results and analysts' assessment: (1) Vision And Go-To-Market (2) Innovation And Differentiation (3) Breadth And Depth Of Solution Offering.

The Research In Action Recommendation Index (RI) is collected and calculated by asking the survey participants: "Would you recommend this vendor in this market to your peers - Yes or No?".

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VENDOR SELECTION MATRIX™

AIOPS SOLUTIONS
THE TOP GLOBAL VENDORS 2023

STRATEGY LEADER

MARKET LEADER

AIOPS Solutions
The Top Global Vendors 2023

STRATEGY

CHALLENGER

EXECUTION LEADER

EXECUTION

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THE TOP VENDORS (LISTED ALPHABETICALLY)

AVANTRA

BIG PANDA

MOOGSOFT

NEW RELIC

SCIENCELOGIC

SPLUNK

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VENDOR SELECTION MATRIX™
AIOPS SOLUTIONS

Avantra is a market leader in the AIOps solutions with an automated SAP AIOps monitoring that focuses on intelligent automation.

GENERAL

Avantra is focused on enabling SAP customers and MSPs in their digital transformation journey. Its automation solution has been adopted by 500 customers and MSPs to ensure improved and uninterrupted business experiences, operations, and assure audit compliance with the SAP environment. Used by some of the world's largest companies in the automotive, manufacturing, and retail industries, Avantra works with partners such as AWS, Google, Microsoft, Red Hat and ServiceNow to innovate the SAP operations space.

BOTTOM LINE

For organizations and Managed Service Providers looking to improve the automation around their SAP operations require a reliable, innovative and dedicated AIOps capability for their SAP environment, the Avantra AIOps platform and its latest release, Avantra 23, provides a centralized view of SAP operations. The tool is easy to use, and the advanced dashboard functionality provides a single-pane of glass for SAP monitoring.

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AIOPS SOLUTIONS

BigPanda is a market leader in AIOps solutions, with a clear focus on incident intelligence and automation.

GENERAL

BigPanda was founded in California in 2011. The company now has more than 200 employees and serves global enterprises. BigPanda's AIOps solution prevents business and IT outages and improves incident management by using AI and ML to identify patterns, trends and anomalies, enabling IT operations teams to be more proactive. In its latest round of funding in January 2022 (led by Advent International, through its dedicated technology fund, and New York-based global venture capital and private equity firm Insight Partners, with participation from other existing investors), the company raised $ 190 million.

BOTTOM LINE

The focus of BigPanda Incident Intelligence and Automation is to create a more effective and efficient incident management system. Organizations interested in gaining a deeper understanding of the nature of incidents, identifying patterns and trends, and automating response actions that lead to more effective incident prevention, detection, and remediation of incidents should evaluate BigPanda as a solution partner.

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VENDOR SELECTION MATRIX™
AIOPS SOLUTIONS

Moogsoft is a market leader in AIOps solutions and enriches Observability and automates the entire incident management lifecycle for a seamless experience.

GENERAL

Founded in 2012 by the creators of Netcool, Moogsoft has been successful in selling AIOps to large enterprise customers. In 2019, the company announced its Moogsoft Cloud, which provides actionable insights for ITOps, DevOps, and SRE teams. The solution ingests cross-domain metrics, event, log, trace, and change data and leverages M/L and AI for incident correlation and automated remediation.

BOTTOM LINE

Different teams within IT operations, data centers, cloud-native, or SREs and DevOps can benefit from Moogsoft Cloud. Agility, collaboration, complexity, visibility, and rising monitoring costs are just some of the challenges that Moogsoft can address, without requiring changes to tools, workflows, people, or organizational structures.

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VENDOR SELECTION MATRIX™
AIOPS SOLUTIONS

New Relic is a market leader in AIOps solutions and revolutionizes IT infrastructure management and optimizes digital experience.

GENERAL

New Relic is a software analytics company that provides a suite of tools and services designed to help businesses monitor and optimize their software applications and infrastructure. The company was founded in 2008 and is headquartered in San Francisco, California. Since its inception, the company has focused on application performance management (APM) capabilities with deep-level code diagnostics. New Relic One, which unifies management domains, enables an intelligent and contextual management approach across the technology ecosystems and services.

BOTTOM LINE

New Relic One provides organizations with a comprehensive monitoring and management solution that leverages AI and machine learning to more effectively monitor, diagnose, and optimize software applications and infrastructure, resulting in improved performance, increased reliability, and overall user experience.

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VENDOR SELECTION MATRIX™
AIOPS SOLUTIONS

ScienceLogic is an execution leader in AIOps solutions offering a comprehensive solution leveraging AI and ML to reduce MTTR.

GENERAL

ScienceLogic is a privately held IT monitoring and management company that was founded in 2003 by David Link and Chris Cordray. Headquartered in Reston, Virginia, USA, the company provides monitoring and management solutions for hybrid IT infrastructures. Its solution initially addressed the needs of Managed Services Providers (MSPs) and Global Systems Integrators (GSIs), as they all shared the need to handle massive amounts of data and aggregate it across a variety of different architectures. The ability to gain comprehensive insight across the IT environment by leveraging automation, machine learning, and advanced analytics has also attracted global enterprise IT organizations.Today, the company has more than 700 paying customers using its solution.

BOTTOM LINE

ScienceLogic SL1 platform is a highly flexible and integrative platform that enables organizations to seamlessly connect to a wide range of tools and systems. The comprehensive solution provides IT operations teams with the ability to combine monitoring, event management, automation, and advanced analytics powered by AI and machine learning.

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AIOPS SOLUTIONS

Splunk is a market leader in AIOps solutions offering domain agnostic and specific capabilities to accelerate the path towards proactive IT operations.

GENERAL

Founded in 2003, Splunk helps organizations collect, index, and analyze massive amounts of data from multiple sources to gain insights into IT operations, security, and business performance. The company is headquartered in San Francisco, California. It has achieved outstanding double-digit growth with revenues $ 3.65 billion in 2022. The company serves customers in a wide range of industries, including finance, healthcare, retail, and telecommunications, and continues to grow by offering its data platform to a wide range of IT functions.

BOTTOM LINE

For the IT operations teams who are looking to accelerate their ability to manage the diverse and hybrid business services across complex application and technology stacks, Splunk's domain-agnostic and domain-specific approach addresses many different and critical use cases with many of out-of-the-box capabilities.

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THE RESEARCH IN ACTION GMBH VENDOR SELECTION MATRIX™ METHODOLOGY

Vendor Selection Matrix™ Disclaimer:

The Vendor Selection Matrix™ is a primarily survey-based methodology for comparative vendor evaluation. Research In Action GmbH does not endorse any vendor, product or service depicted in our research publications, and does not advise technology users to select only those vendors with the highest ratings. The information contained in this research has been obtained from both enterprise as well as vendor sources believed to be reliable. Research In Action GmbH's research publications consist of the analysts' opinions and should not be considered as statements of fact. The opinions expressed are subject to change without further notice. Research In Action GmbH disclaims all warranties, expressed or implied, with respect to this research, including any warranties of merchantability or fitness for a particular purpose. All trademarks are recognized as the property of the respective companies.

About:

Research In Action GmbH is a leading independent information and communications technology research and consulting company. The company provides both forward-looking as well as practical advice to enterprise as well as vendor clients.

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APPENDIX: IT AUTOMATION MARKETEXTURE DEFINITIONS

- **Application Discovery and Dependency Mapping (ADDM)** solutions automatically discover various applications running on server and network devices within the business hybrid infrastructure and maps the dependencies between them providing a holistic view of all the resources running and the relationships between them.

- **Application Performance Management (APM)** solutions manage the performance and health of applications within a IT enterprise.

- **AI Powered Chatbot Platforms** which are used to build applications that answer questions, provide advice and/or recommendations using natural language processing and other dialog related technologies.

- **Artificial Intelligence and Machine Learning (AI/ML)** are both technologies and are leveraged in automation solutions. Artificial intelligence (AI) is the ability of a computer program or machine to think and learn (AI can mimic human cognition). Within IT Automation AI is used to correctly interpret a variety of data, to learn from such data, and to use those learnings to achieve specific goals and tasks through flexible adaptation. Machine learning enables computers with the ability to learn without being programmed (explicit algorithms). It explores the study and construction of algorithms which can learn and make predictions on data. The algorithms follow programmed instructions or can make predictions or decisions based on the data. Machine learning is used when explicit algorithms cannot be done (e.g., computer vision, search engines, optical character recognition).

- **Artificial Intelligence for Operations (AIOps)** solutions equip IT enterprise teams with analysis of volumes and categories of data to improve key processes, tasks and decision making. The adoption of these tools automates the ingestion of fast volumes of data; leverage machine learning to analyze the data, present findings to either predict or alert on issues, and leverage the knowledge for automation or decision making.

- **Application Release Orchestration (ARO)** solutions equip IT enterprise organizations and their teams with the automation of the software deployment cycle across hybrid technology environments.

- **Configuration Management Database (CMDB)** is a database which captures IT components referred to as configuration items (CIs), which can be software, hardware, a document, article, or any such item that is part of the information system of the organization.

- **Continuous Hybrid Management (CHM)** platforms or solutions that empower, automate and continuously manage the ongoing demands of all digital functions within an enterprise no matter if they are within IT or business teams.

- **Connected Service Management (CSM)** platforms or solutions are part of the management domain which manage the entire spectrum of customer, employee and digital experiences.

- **Digital Process Management (DPM)** solutions automate and manage the digital processes across different business functions.

- **Enterprise Service Management (ESM)** is a category of business management software - typically a suite of integrated applications that a service organization uses to capture, manage, save and analyze data critical to their service business performance. It automates service offerings across internal functional areas such as (1) Human resources, (2) Vendor management, (3) Technical services, (4) Field services, (5) Financial management and (6) Shared services organizations.

- **Hybrid Cloud Management (HCM)** solutions manage the Cloud infrastructures and applications from an end-to-end perspective.

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APPENDIX: IT AUTOMATION MARKETEXTURE DEFINITIONS

- **IT Asset Management (ITAM)** software manages the full lifecycle of IT assets which typically includes all software, hardware, networking, Cloud services, and client devices. In some cases, it may also include non-IT assets such as buildings or information where these have a financial value and are required to deliver an IT service. IT asset management can include operational technology (OT), including devices that are part of the Internet of Things. These are typically devices that were not traditionally thought of as IT assets, but that now include embedded computing capability and network connectivity.

- **IT Financial Management (ITFM)** software enables the accurate and cost-effective management of IT assets and resources with the aim to plan, control, recover (or overall manage) costs which are occurring while providing IT and Enterprise Services to the organization.

- **The IT Infrastructure Library (ITIL)** is the de facto standard for IT Service Management process definitions today.

- **IT Operations Management (ITOM)** solutions monitor and control IT Services and infrastructure and enable IT to execute routine tasks necessary to support the operation of applications, services and hardware components within an organization; typically included are the provisioning of IT infrastructure, capacity management, cost-control activities, performance and security management and availability management for all IT infrastructure and assets.

- **IT Service Management (ITSM)** refers to the entirety of activities – directed by policies, organized and structured in processes and supporting procedures – that are performed by an organization to plan, design, deliver, operate and control Information Technology (IT) services offered to internal customers. It is thus concerned with the implementation of IT Services that meet customers' needs, and it is performed by the IT service provider through an appropriate mix of people, process and information technology.

- **Observability and AIOps** solutions enable the aggregating, correlating and analyzing of steady streams of performance data from distributed applications and the hybrid infrastructure which support the applications. Artificial Intelligence and Machine Learning capabilities are part of this which are reflected through the additional add on of AIOps in the name of this market.

- **Robotic Process Automation (RPA)** solutions enable the automation of tasks, processes and procedures which are normally conducted by a human. RPA solutions create software robots that mimic human actions. Typically, these are tasks that a human would do. (Ro)Bots and Virtual Agents are part of RPA solutions.

- **Secure Unified Endpoint Management (SUEM)** software enables the management and securing of mobile applications, content, collaboration and provides for the management of all endpoints like smartphones, tablets, laptops, printers, ruggedized devices, Internet of Things (IoT) and wearables.

- **Technology Cost Management (TCM) or Technology Business Management (TBM)** software enables the planning, management and visibility of the supporting and required business and IT technology resources from a cost and capacity perspective by visualizing, planning, prioritizing and optimizing the usage and demands of technology resources (people, processes and technologies) for the enterprise.

- **Value Stream Management (VSM)** software solutions capture, visualize, and analyze the flow of work across the entire Agile software delivery project. The capabilities include end-to-end visibility, traceability and governance over the entire process and help to plan, track, and steer work at the team, program, portfolio, and enterprise levels. It includes the people working on a project, the systems which are operated and leveraged, and the flow of information and materials between teams. It enables the measurement of speed and quality for digital transformations.

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