VENDOR SELECTION MATRIX™
OBSERVABILITY AND AIOPS SOLUTIONS

The Top Global Vendors 2023

May 2023

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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 embraced digital transformation and the complexity of IT environments has grown, there has been a corresponding increase in the adoption of Observability and AIOps solutions to help manage these increasingly complex systems. While there is still no unified market and vendors are adding, acquiring, changing, and morphing their current strategy, go-to-market and vision, Observability and AIOps solutions have become more tightly integrated. The goals for IT organizations should be to identify, understand, and resolve issues across their entire technology ecosystem and the combined solutions of Observability and AIOps can automate this journey. For 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.

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

You only live once (YOLO)!

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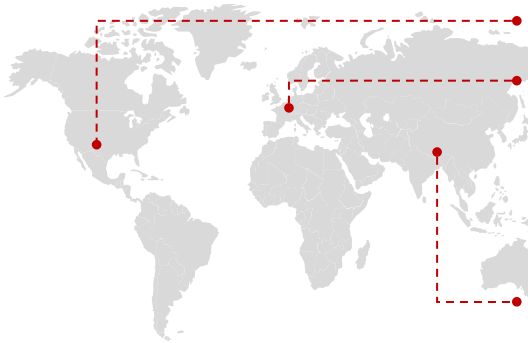
OUR SURVEY DEMOGRAPHICS:
IT AUTOMATION IN GLOBAL ENTERPRISES

Country Breakdown



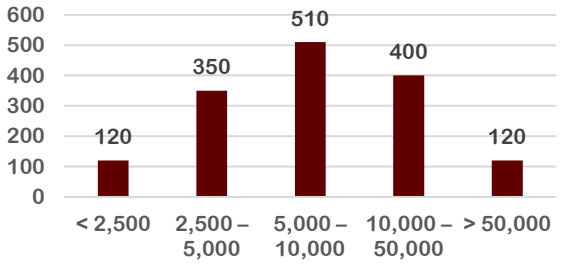
United States	525
Canada	50
DACH	200
United Kingdom	125
France	125
Benelux	50
Nordics	50
Southern Europe	100
Eastern Europe	75
Asia Pacific	200

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.)



Job Title Breakdown

VP IT Infrastructure	160
IT Manager	160
VP IT	125
Chief Information Officer	120
IT Operations Manager	120
VP Service Desk	120
Chief Technology Officer	100
Project Management Office	80
Chief Digital Officer	65
VP IT Shared Services	65
VP Operations	60

Chief Operations Officer	60
VP Technology	50
Sourcing And Vendor Management	40
Business Executive	30
VP IT Financial Management	30
VP Enterprise Architecture	25
Project Manager	25
VP Application Development	20
VP DevOps	20
Chief Financial Officer	15
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

10,000+ Active Enterprise Survey Participants

all with budget responsibility

30 Research Reports Published

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

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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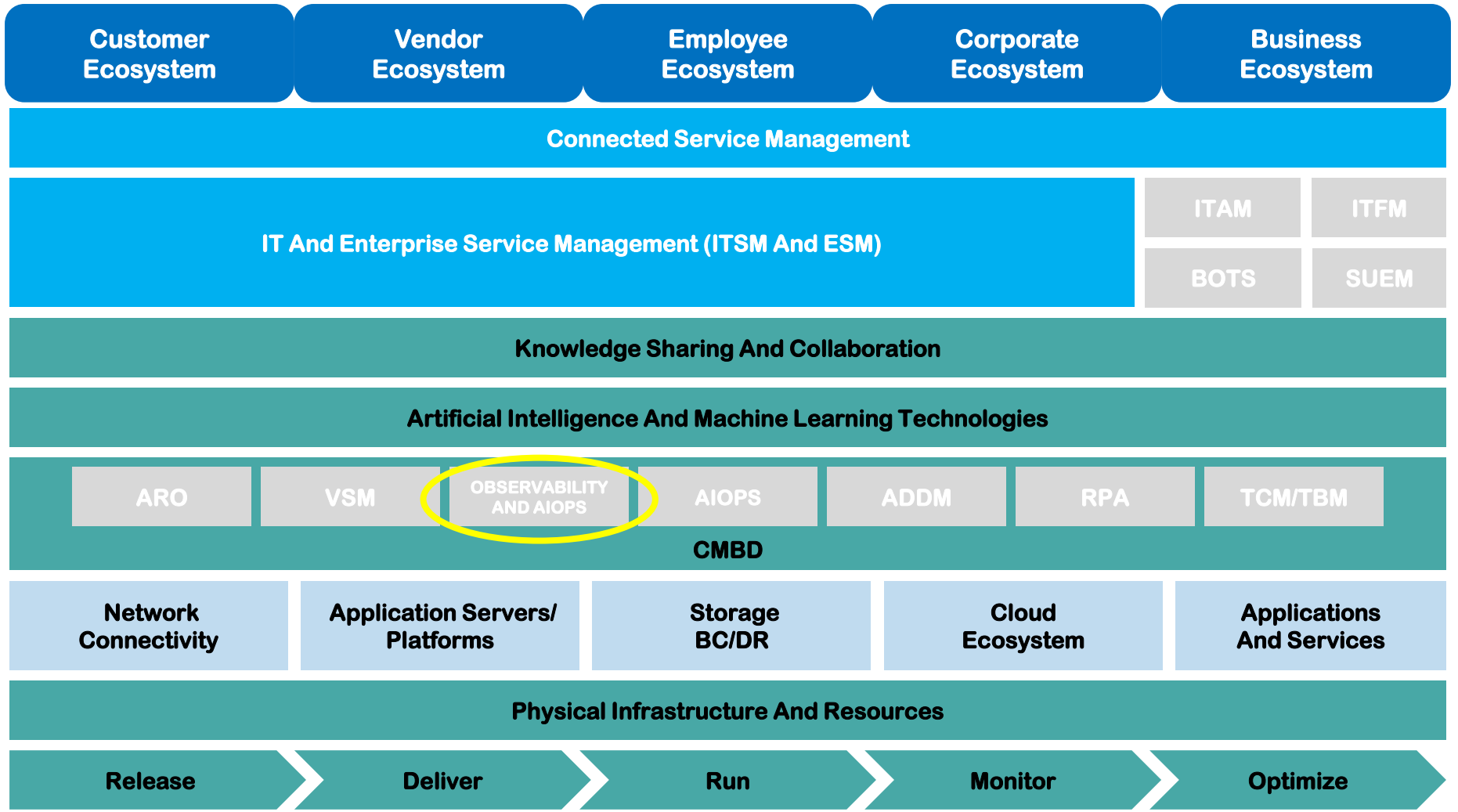
WHAT IS AN OBSERVABILITY AND AIOPS SOLUTION?

- An Observability and AIOps solution provides visibility into a variety of details to pinpoint the probable cause of a problem. These platforms typically use real and historical data from across the infrastructure and applications, such as metrics, events, logs, and traces (MELT). Software solutions that fall into the Observability and AIOps solution category must be able to understand what is happening within a system by observing its outputs.
- The focus of the Observability and AIOps solution is to leverage the data across the entire software delivery value chain and ecosystem, including the macro steps of ideate, build, release and operate in modern hybrid environments.
- The use of Artificial Intelligence (AI) and Machine Learning (ML) helps to analyze the data, present the findings to either predict, alert or advise on issues, and helps the user to make proactive decisions. This subset is the use of AIOps within Observability solutions.
- The sub-processes within software delivery and their associated personas (e.g., IT Operations, DevOps and Site Reliability Engineering) are the primary consumers of Observability and AIOps solutions. The solution should include the following key capabilities:
  - Telemetry collection from distributed data sources as Observability output
  - Analyze Observability output by ingesting many data points across modern hybrid and legacy environments (applications, infrastructure, security, etc.)
  - Integrates with existing tools or other existing management domain solutions
  - Leverages synthetic and real-user monitoring
  - Correlates customer and business metrics with application and infrastructure performance
  - Leverages machine learning and AI to analyze the volume of metrics (this is optional as much of this is part of AIOps solutions).

THE IT AUTOMATION MARKETEXTURE



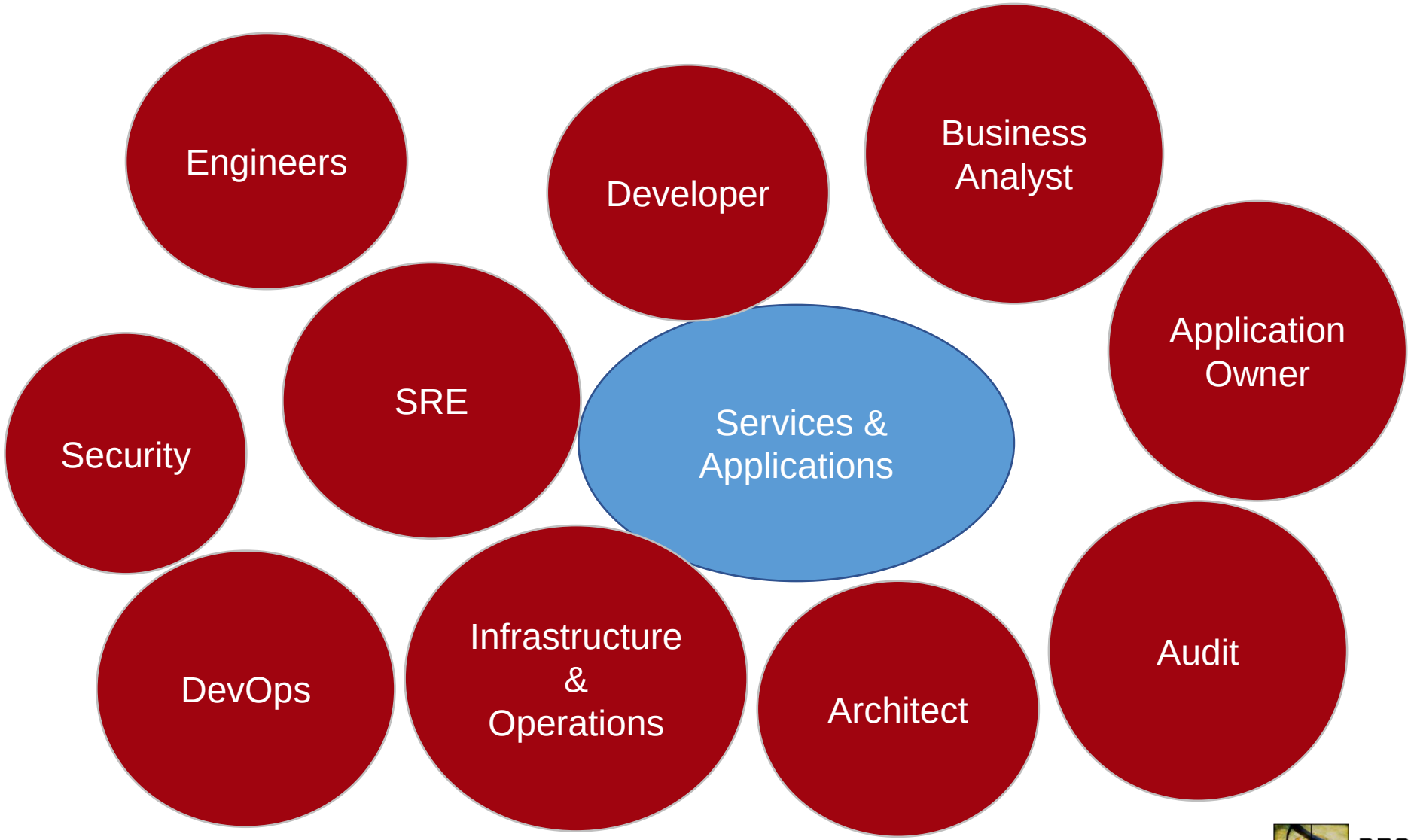
IT Automation solutions are necessary for a modern digital operating model.

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.

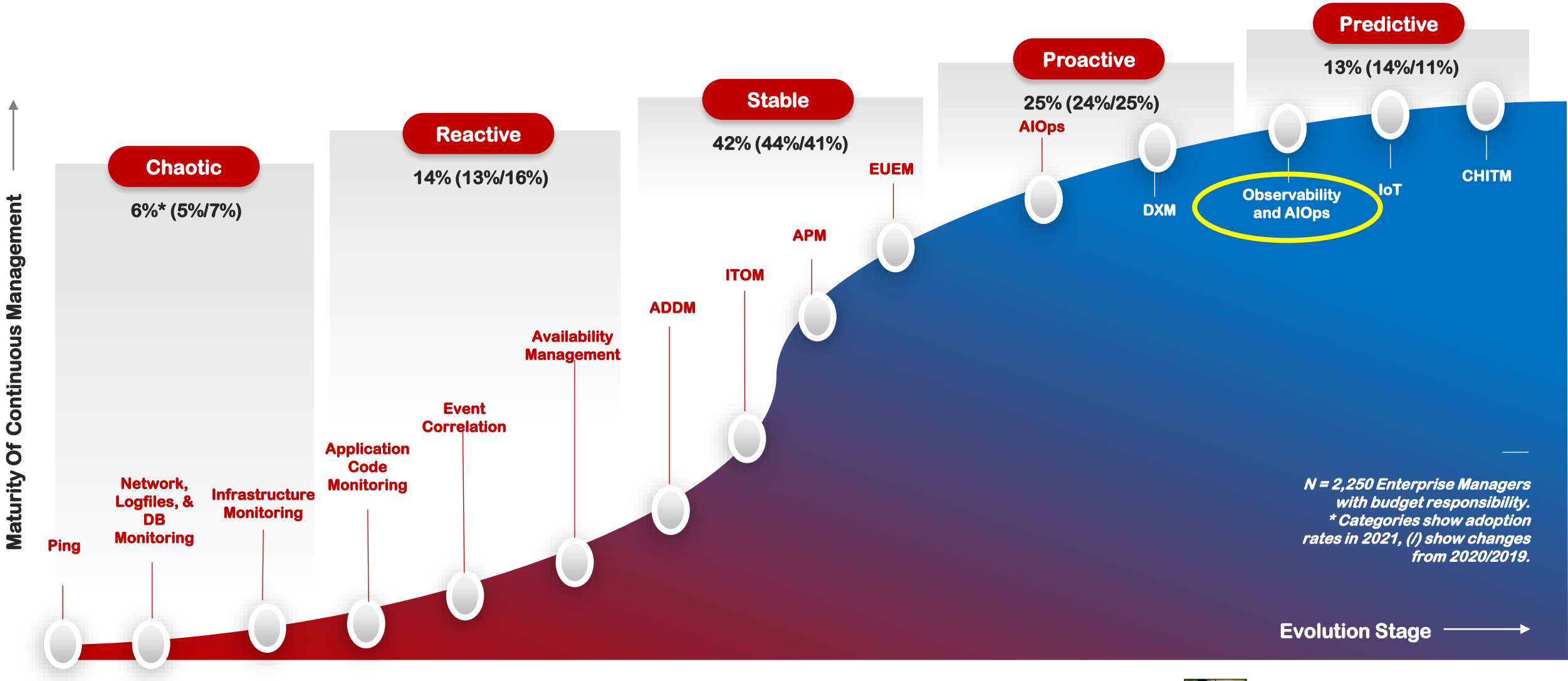
CONTINUOUS MANAGEMENT (CM)

VISIBILITY NEEDS ACROSS IT AND BUSINESS ROLES



CONTINUOUS MANAGEMENT (CM)

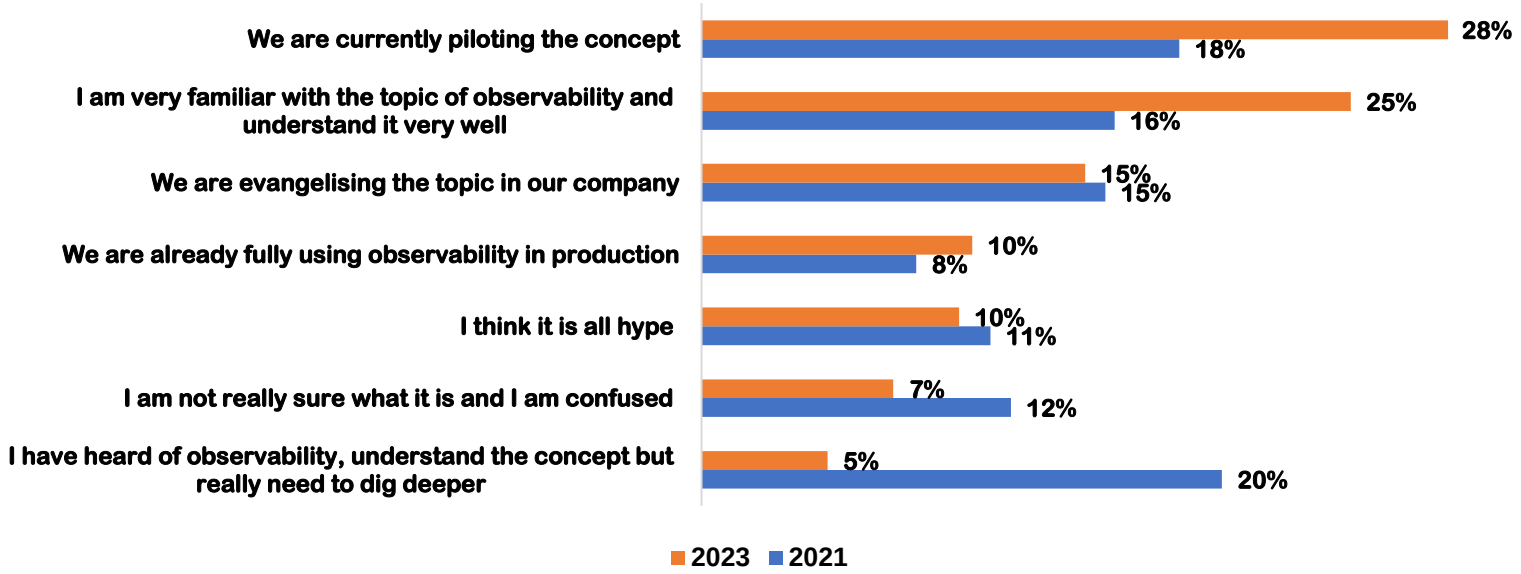
MATURITY S-CURVE 2021



All acronyms are defined in the report Appendix

RESEARCH:

OBSERVABILITY IN 2023 SHIFTS FROM CONCEPTUAL UNDERSTANDING TO EVANGELIZING AND PILOTS



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

Question:
What would you say about the current state of the Observability software market?

The understanding and actual usage has shifted towards understanding it and piloting since 2021:

28% are currently piloting Observability within their organization.

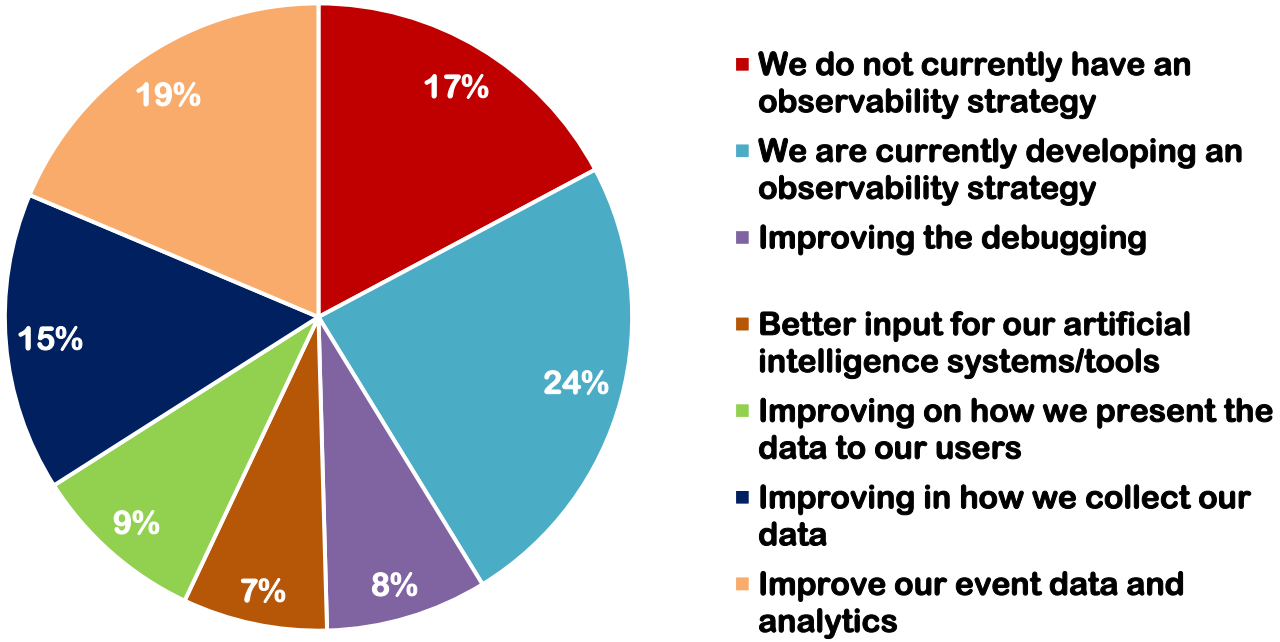
25% are familiar with the topic and understand it well.

13% are evangelizing the usage of Observability.

10% of survey respondents are fully using Observability in production.

RESEARCH:

OBSERVABILITY STRATEGIES ARE A MIXED BAG, SOME ONGOING AND SOME VERY SPECIFIC



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

Question:
What is your number one priority related to your current Observability strategy?

Strategies around Observability are currently being developed by 24% of global survey respondents.

17% do not have an Observability strategy. Our thinking is that those enterprise teams might not yet have clear understanding of its benefits.

Additionally, some very specific strategies exist. Some are wrapped around better data collection to improve other processes and tasks.

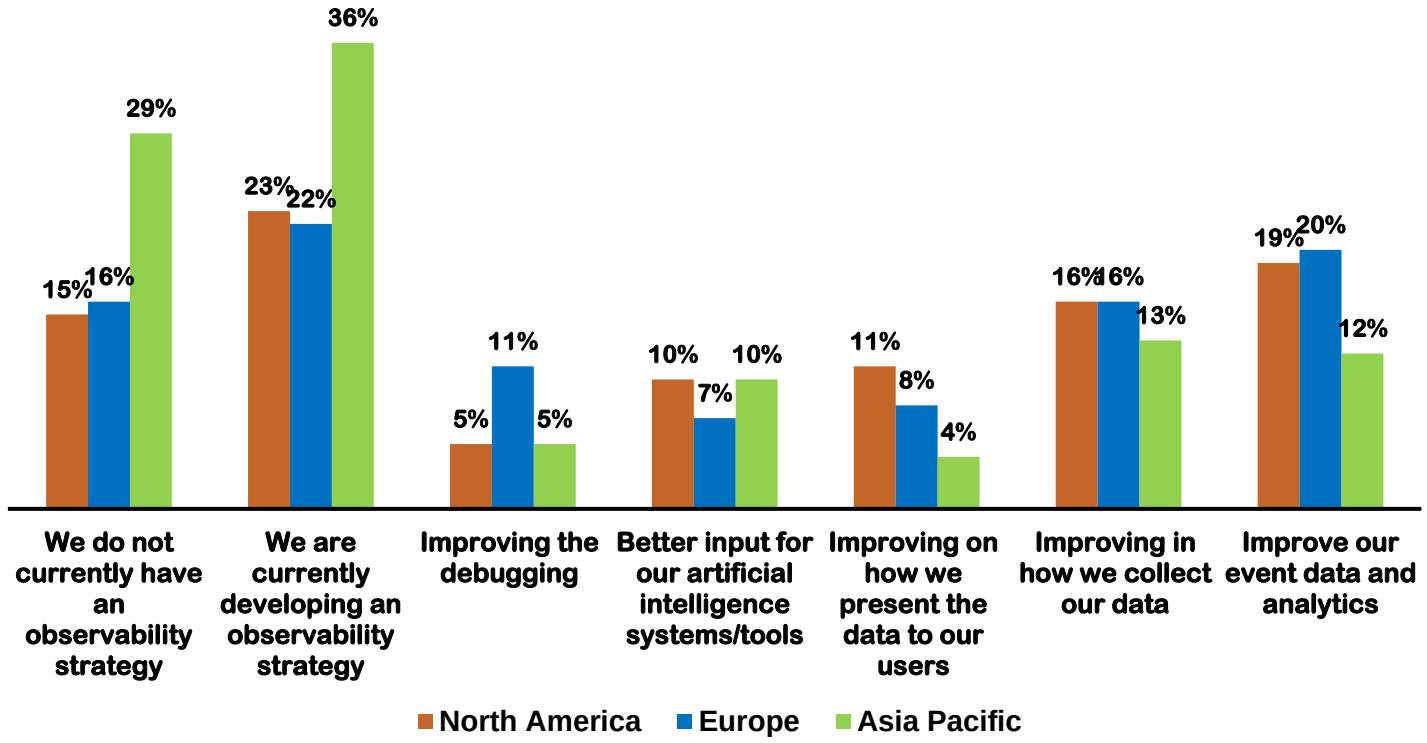
19% state that their biggest priority in terms of Observability is to improve their event and analytics data.

15% confirm that a key priority within their Observability strategy is to improve how data is collected.

Presenting better data is also important be it to the users, for debugging or feeding into AIOps for proactive insights.

RESEARCH:

THERE ARE REGIONAL DIFFERENCES AROUND AN OBSERVABILITY STRATEGY



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

Question:
What is your number one priority related to your current Observability strategy?

Regional differences exist not only in the relative stage of enterprises Observability strategy but also across the priorities. All have in common that there is focus on improvements.

North America enterprises are further along in terms of their Observability strategy already working on key goals such as improving event data, analytics, and how they collect or present data.

European enterprises, while their strategy is like those enterprises in North America, one key difference is that improvements around debugging is a higher priority within their Observability strategy.

Asia Pacific are behind the strategy development with most enterprises still developing an Observability strategy.

INSIGHTS: TOP MARKET TRENDS 2023 OBSERVABILITY AND AIOPS SOLUTIONS

Start developing your Observability strategy now.

Modern IT systems are increasingly distributed, involving microservices, containers, and serverless architectures. This creates a highly dynamic environment where components scale, change, or fail constantly. Keeping track of these rapidly evolving systems can be difficult, requiring sophisticated monitoring tools that can handle the scale and complexity. Those organizations who already have developed and are in the midst of Observability are able to address the complexity, changes and scales of the digital tech stack. Other IT organizations will follow.

Machine learning is an essential part atop of Observability.

Different roles across IT require different insights to determine next steps. The challenges of the complex environment and the data volume and data diversity can be solved through correlation and providing contextual information around events and incidents. Advanced analytics, machine learning, and artificial intelligence can help in identifying patterns, anomalies, and relationships among the data, enabling teams to make better-informed decisions. AIOps use cases have blurred the line between the Observability and AIOps platforms.

Observability is serving multiple roles towards their goals.

Because of the different roles and different maturity levels across IT and business organizations today, Observability use cases are abundant and include monitoring, troubleshooting, performance optimization, capacity planning, security and compliance, continuous improvement, understanding user behaviour. It is essential for data-driven decision making serving different roles across IT and the business teams.

INSIGHTS: TOP MARKET TRENDS 2023 OBSERVABILITY AND AIOPS SOLUTIONS

Observability is a critical practice to be applied across the entire software development lifecycle.

Observability as a practice, provides insights into the behavior and performance of complex systems by collecting, analyzing, and making data visible it can be included in plan, build, deploy and run phases. During plan, the expected behavior and performance can be understood before built. In the build phase, Observability can monitor code quality and more for reliability, during the deploy phase bottlenecks and issues which might cause problems in production and in the run phase, monitoring the performance, health and behaviors of the systems.

The slow merge of Observability and AIOps topics across the vendor platforms.

The vendor market of Observability today is highly competitive and rapidly evolving. It includes a wide range of vendors, from large technology companies to startups, offering a variety of solutions for monitoring and managing complex systems. While a lot of consolidation happened in 2021 (Datadog acquired Sqreen, AppDynamics, a Cisco company, acquired Moveworks, Splunk acquired TruSTAR, New Relic acquired Pixie Labs, Dynatrace acquired SpectX) in 2023 many vendors are adding AIOps to their Observability platforms either merging products or shifting their strategy.

The manager of managers (MoM) is crucial and here to stay.

The manager of managers (MOM) has always been a trend in the monitoring and management space but has gained new fans and followers. As Observability and AIOps have gained traction managing the complex, distributed systems and data volumes continue to grow, MoM plays a crucial role in consolidating and managing multiple monitoring and management tools to provide a holistic view of the IT and business environment. Simply the MoM is enabling the improvement of operational efficiency.

VENDOR SELECTION MATRIX™

OBSERVABILITY AND 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
BMC SOFTWARE	BMC Helix Operations Management with AIOps
BROADCOM	Broadcom DX Operational Intelligence
CISCO APPDYNAMICS	AppDynamics
DATADOG	Datadog Cloud Monitoring Platform
DYNATRACE	Dynatrace Platform
OPENTEXT*	OpenText Operations Bridge
OPSRAMP**	OpsRamp Platform
SERVICENOW	ServiceNow IT Operations Management and ServiceNow Cloud Observability (formerly Lightstep Observability)
SPLUNK	Splunk Observability Cloud
STACKSTATE	StackState Platform
SUMO LOGIC	Sumo Logic Continuous Intelligence Platform

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

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* In January 2023, OPENTEXT completed the acquisition of MICRO FOCUS.
** In May 2023, HPE completed the acquisition of OPSRAMP.

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.

VENDOR SELECTION MATRIX™

OBSERVABILITY AND AIOPS SOLUTIONS
THE TOP GLOBAL VENDORS 2023

Vendor Quick Facts

VENDOR NAME	MARKET PRESENCE	GROWTH RATE	CUSTOMER TRACTION	GOOD TO KNOW
BMC SOFTWARE	Big	High	Strong	Provides end-to-end visibility to shift IT towards proactiveness.
BROADCOM	Big	High	Strong	Provides comprehensive visibility, insights, and automation for managing IT ecosystems.
CISCO APPDYNAMICS	Big	High	Strong	Unifies its solutions and tchnologies to benefit the partners and customers.
DATADOG	Medium	High	Good	Provides real-time observability across modern technology stacks.
DYNATRACE	Big	Very High	Strong	Delivers precise answers and intelligent automation for unified observability and security.
OPENTEXT*	Big	High	Strong	Offers a comprehensive and intelligent platform that helps IT organizations to work proactively.
OPSRAMP**	Medium	Very High	Good	Enables IT service availability and performance across hybrid environments.
SERVICENOW	Big	Very High	Good	Aims to deliver end-to-end visibility and insights across modern digital ecosystems.
SPLUNK	Big	Very High	Strong	Offers a data platform providing insights into IT operations, security, and business performance.
STACKSTATE	Small	Very High	Strong	Accelerates the democratization of remediation and debugging for software engineers.
SUMO LOGIC	Medium	Very High	Good	Provides comprehensive visibility and insights to enable IT organizations to detect and resolve issues faster.

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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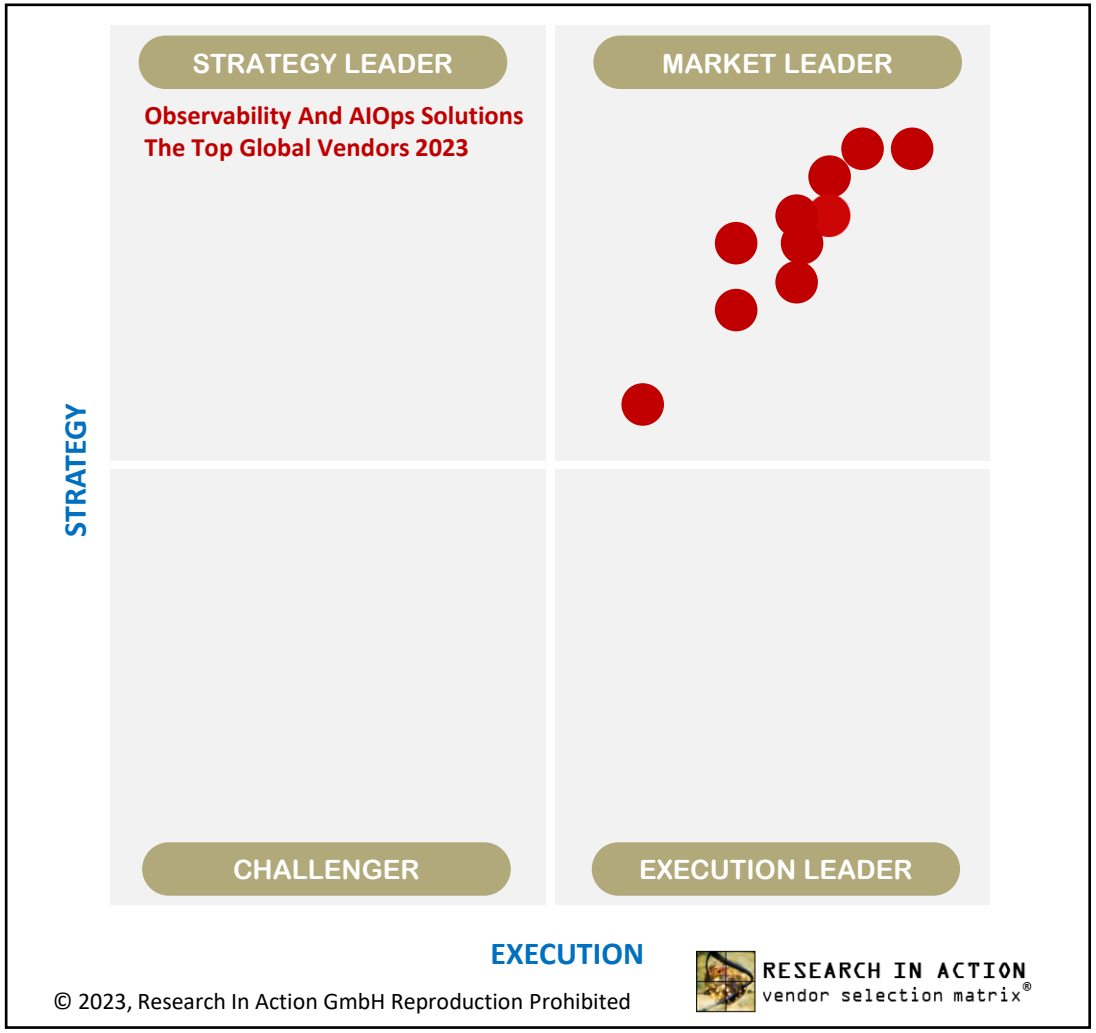
VENDOR SELECTION MATRIX™

OBSERVABILITY AND AIOPS SOLUTIONS
THE TOP GLOBAL VENDORS 2023



THE TOP VENDORS (LISTED ALPHABETICALLY)

- BMC SOFTWARE
- BROADCOM
- CISCO APPDYNAMICS
- DATADOG
- DYNATRACE
- OPENTEXT*
- OPSRAMP**
- SERVICENOW
- SPLUNK
- STACKSTATE
- SUMO LOGIC

* In January 2023, OPENTEXT completed the acquisition of MICRO FOCUS.
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VENDOR SELECTION MATRIX™

OBSERVABILITY AND AIOPS SOLUTIONS

Broadcom is a market leader in Observability and AIOps solutions providing comprehensive visibility, insights, and automation for managing IT infrastructure, applications, and networks.

GENERAL

In recent years, Broadcom has focused on expanding its software business through organic growth fueled by strategic acquisitions. Notable acquisitions include CA Technologies (2018) and Symantec's enterprise security business (2019), which have bolstered its portfolio in enterprise software, security, and DevOps. It has created Broadcom Software as a division of Broadcom. Broadcom Software and its solutions are present in 80% of Fortune 500 customers, and some of its solutions have enjoyed a 50% growth rate year over year. In May 2022, Broadcom announced the intention to acquire VMware. This acquisition is pending.

BOTTOM LINE

Innovations within its AIOps platform, improvements in customer onboarding and the continued strength of its monitoring technologies have delivered some great wins. And its zero-touch experience for deployment and monitoring has advanced its Observability and AIOps solution stack to be highly scalable with modern analytics and rich monitoring for enterprise and public sector customers managing distributed applications, infrastructure, networks and cloud environments.

VENDOR SELECTION MATRIX™
OBSERVABILITY AND AIOPS SOLUTIONS

Broadcom is a market leader in Observability and AIOps solutions providing comprehensive visibility, insights, and automation for managing IT infrastructure, applications, and networks.

STRATEGY

Broadcom's strategy continues to accelerate the ability for its clients to monitor and manage their distributed IT environments with its open, scalable platform. The company's Observability evolution and strategy continues to deliver new capabilities, such as the Observability Advisor, impact analysis and expansions on cloud native monitoring. New dashboards that are contextual and dynamic enable a wide range of roles within IT to improve the reliability and resilience of their applications and services. The observe-engage-act imperative resonate across large and small enterprises and managed service providers. Broadcom has achieved the highest score in our Recommendation Index.

EXECUTION

Its development of specific use cases supported by machine learning, continued investment in its unified data model, and the open and extensible connectivity and integration with existing management solutions has enabled its customers to leverage existing investments and achieve speed to value for Observability and AIOps deployments. The company's focus on customer centricity with an aligned channel and partner strategy has paid off. Our surveyed customers have given Broadcom the highest score for customer satisfaction.

NOTES:

- *Scale Explanation: 1 (Low) To 5 (High).*
- *Potential numerical deviations due to rounding.*
- *The Research In Action Recommendation Index is collected and calculated by asking the survey participants: "Would you recommend this vendor in this market to your peers - Yes or No?".*

STRATEGY	RESULT
Vision And Go-To-Market	4.50
Innovation And Differentiation	4.50
Viability And Execution Capabilities	4.50
Recommendation Index	4.75
	4.56

EXECUTION	RESULT
Breadth And Depth Of Solution Offering	4.75
Market Share And Growth	4.00
Customer Satisfaction	4.75
Price Versus Value Ratio	4.50
	4.56

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.

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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