

Intelligent ITOps Services 2021–2022 RadarView Augmenting the automation journey from AIOps to NoOps

October 2021

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1

The maturity of AIOps in IT service delivery model is growing, as it has become increasingly important to enhance collaboration, predictability, data aggregation and correlation, anomaly detection, and compliance across the IT infrastructure.

2

Avasant's interactions with enterprise digital leaders indicate that AIOps is now integral to their digital transformation blueprints. However, their endeavors are coming to fruition later than expected, as rigid IT infrastructures are hindering the orchestration of autonomous operations within a complex hybrid IT environment.

3

The Intelligent ITOps Services 2021–2022 RadarView will help enterprises understand the evolution of this space and the critical role that service providers play in this ecosystem.

4

Avasant evaluated 45 platform providers through a rigorous methodology across key dimensions of product maturity, partner ecosystem, and investment and innovations to recognize 24 providers that brought the most value to the market over the last 12 months.

5

This report also highlights the key trends in the market and Avasant's viewpoint on the direction of the industry over the next 12 to 18 months.



Executive summary

Defining Intelligent ITOps Services

Intelligent ITOps services comprise a set of platforms, tools, templates, and frameworks driven by artificial intelligence/machine learning (AI/ML), automation, and analytics to empower an IT team align business services with IT infrastructure across the value chain as shown below. Intelligent ITOps services are responsible for enabling autonomous monitoring, management, and control of IT infrastructure.

IT service management	<ul style="list-style-type: none"> ▪ Incident management ▪ Problem management ▪ Change and release management ▪ SLA management ▪ Service request management ▪ IT knowledge management ▪ Configuration management ▪ Help desk/user self-service ▪ Vulnerability scanning and patch management ▪ Event management ▪ Runbook automation ▪ Program and project management ▪ Vendor and contract management ▪ Service catalog management ▪ User access management
Application management services	<ul style="list-style-type: none"> ▪ Production support (AI DevOps) ▪ Application maintenance ▪ Application enhancement ▪ Cloud native application monitoring management ▪ Hybrid cloud application monitoring and management ▪ Data management and movement ▪ Integration services ▪ Business intelligence (BI)/analytical reporting ▪ Data governance
Performance and capacity optimization and planning	<ul style="list-style-type: none"> ▪ Measurement, monitoring, and performance management of IT infrastructure components* ▪ Dynamic capacity planning and optimization ▪ Availability management ▪ Edge and cloud computing ▪ End-to-end application performance monitoring and management
Asset life cycle management	<ul style="list-style-type: none"> ▪ Software asset management (assets which play vital roles in data processing, collaboration, and data access) ▪ Hardware asset management (servers, database management systems [DBMS], network devices, and power [uninterruptable power supply (UPS), power distribution unit (PDU), and generators]) ▪ End-user computer assets (PCs, laptops, monitors, and printers) ▪ Configuration management ▪ Budget management

*IT infrastructure components include server, data center, storage, backup, network, and cloud infrastructure

Key enterprise intelligent ITOps services trends shaping the market



70% of IT downtime is unplanned and can be eliminated using AI and automation

- Enterprises are moving from reactive to proactive IT operations by leveraging intelligent automation to reduce unplanned IT downtime. Banking and retail sectors are at the forefront of this transition.
- About 60% of IT operations management contracts leverage AIOps, compared to traditional monitoring, primarily for event correlation and analysis, unified incident management, automated remediation, preventative maintenance, and full-stack observability.

Progressive firms are transitioning from AIOps to NoOps

- Currently less than 10% of IT operations in an enterprise environment are autonomous. However, this is expected to rise to 30%–40% in the next 3–4 years as enterprise IT infrastructure evolves with end-to-end infrastructure visibility and seamless management of hybrid and multicloud environments.
- Enterprises are architecting extreme, autonomous IT infrastructure (NoOps) through investments in hybrid multicloud observability, zero-touch monitoring and resolution, and infrastructure as code.

Managing niche IT functions in an as-a-service model is the fastest-growing area

- While infrastructure as a service is the most commonly adopted service model, attributing to 41% of the share in intelligent ITOps projects, SaaS stands at 15% and is growing faster with a 58% YOY growth rate.
- In the past 12 months, niche SaaS models such as workplace as a service, decarbonization as a service, and AIOps as a service have emerged.

Proprietary provider platforms are driving rapid adoption of intelligent ITOps

- About 45%–50% of ITOps contracts leverage service provider proprietary tools and platforms. Hence, about 40% of their intelligent ITOps investments are allocated to asset development including new platforms and solution accelerators, intellectual property, patents, and industry-specific assets.
- This is leading to rapid industrialization of advanced intelligent automation solutions, including zero-touch/low-touch/self-service solutions, site reliability services, and self-healing platforms.

Recommendations for enterprises

Invest in full-stack observability tools to augment AIOps capabilities

- A full-stack observability tool can collect and contextualize a wide scope of data types (technical data, customer experience, and business KPIs) and enable monitoring of a range of operations across development, testing, and production.
- This data can be seamlessly connected to automation and analytics tools, supporting AIOps to draw patterns from the deep relationships and dependencies between data points.

Manage disconnect between business and IT goals through AI-based BizOps

- IT teams primarily focus on business and technology-based SLAs and not the end-to-end value contributed by the individual IT components of the service. This causes a disconnect between IT and business goals leading to significant costs and lost opportunities.
- An AI-driven BizOps solution can provide a data-driven approach to decision making that ties IT outputs to business results, automates processes, and provides continuous insight and collective intelligence.

Converge monitoring silos to address risks in a distributed work environment

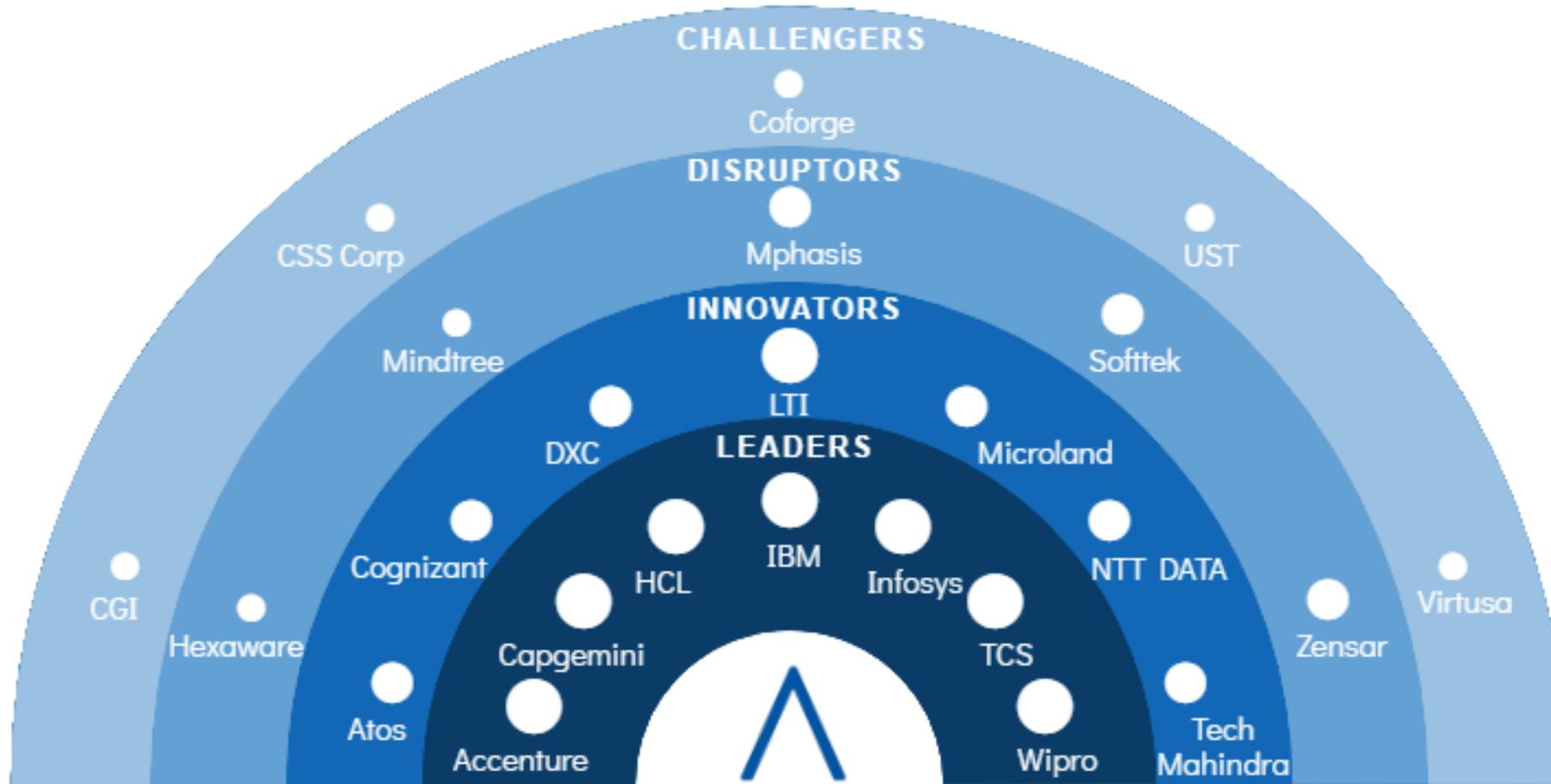
- Remote and distributed work environments require new levels of resiliency from local networks and infrastructure to deliver a reliable and consistent employee experience.
- Converge monitoring silos across DevOps, NetOps, and SecOps to address potential risks connected to performance, reliability, and security and enable site-reliability engineers to build a flexible work environment.

Realign operational roles impacted by automation and AIOps

- About 35%–40% of enterprise IT operational spending is allocated to personnel. A majority of these roles, such as IT service desk agent, database administrator, and cloud and infrastructure engineer, can be repurposed with the emergence of intelligent automation.
- Invest in innovative roles such as DataOps engineer for automation of data workflows, data steward for master data management, and multicloud integrator for managing a multicloud environment.

Avasant recognizes 24 top-tier providers supporting the enterprise adoption of intelligent ITOps services

Product maturity ○ ○ ○

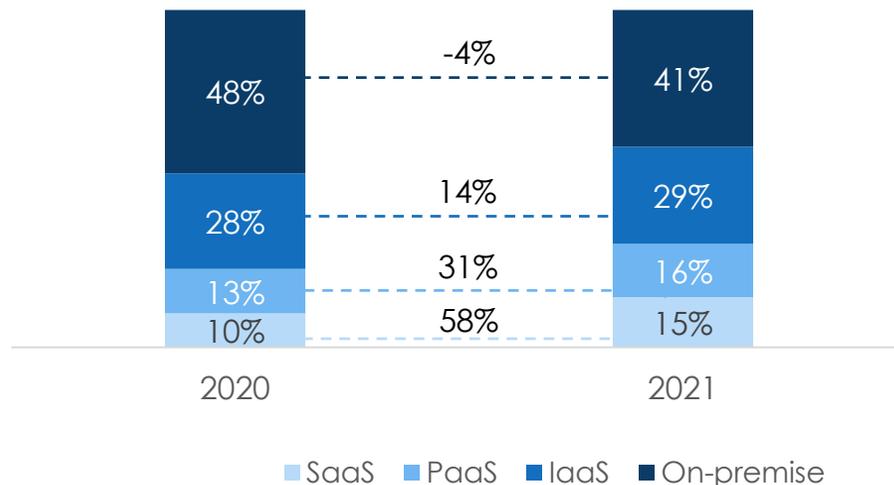


AVASANT

Lay of the land

While IaaS is the most commonly adopted service model, SaaS is growing at a faster pace with a 58% YOY growth rate

Intelligent ITOps project split by infrastructure architecture



SaaS models have garnered most traction with a YOY growth rate of 58%. The following technology trends are further driving the demand of SaaS solutions:



Data-driven SaaS management: With increased remote work, most SaaS solutions have introduced online visibility, including centralized advanced analytics and feature-level insights into how employees use and engage with cloud-based applications. It helps IT leaders determine the business value delivered by all applications in use.



AI-based SaaS offerings: AI-based chatbots for customer service, advanced neural networks for anomaly detection, and ML algorithms for pattern recognition are some key examples of how AI is enabling built-in self-recovery and enhancing customization and personalization in SaaS-based offerings.



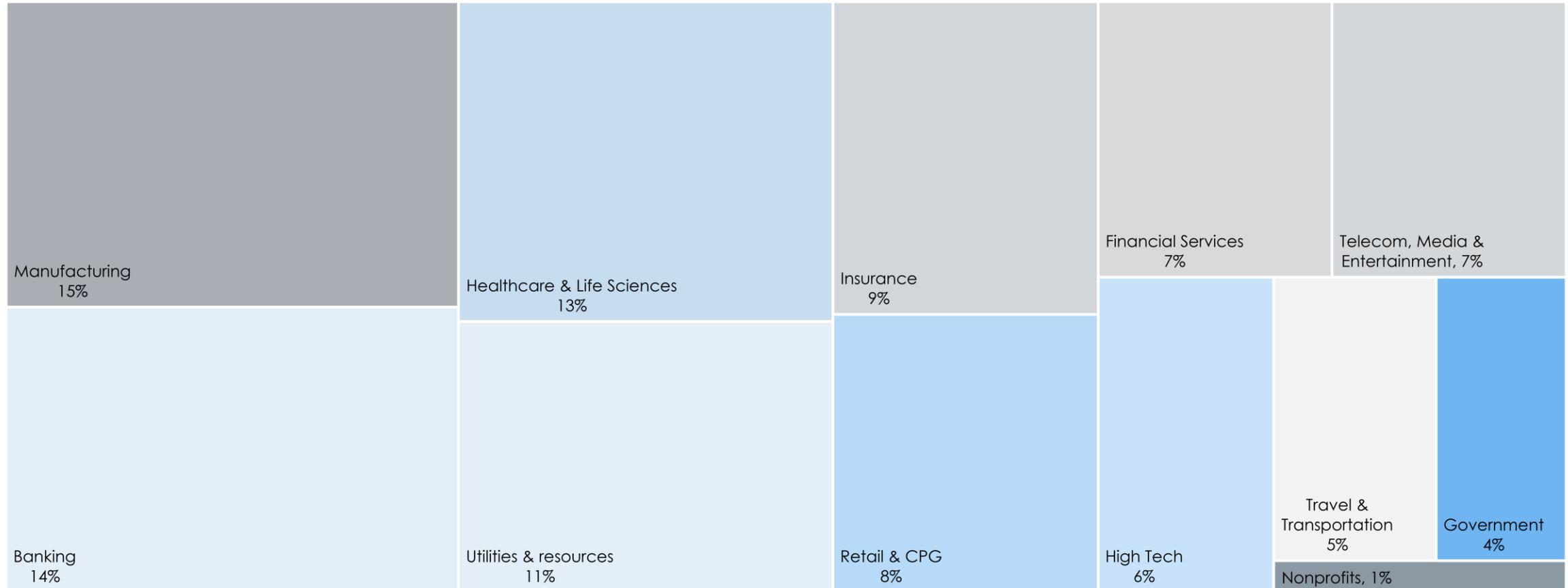
Mobile-first approach: SaaS-based solution providers are focusing on mobile-first design and development, as devices and screens require a unique set of features and functionality to enable dynamic dashboarding and critical workplace tools.



Automation in the cloud: Leading SaaS providers are offering end-to-end automation capabilities in the cloud across process mapping, workflow designing and management, content storage and sharing, and data capture and analysis.

Intelligent ITOps emerges as a key area of spend for retail and banking

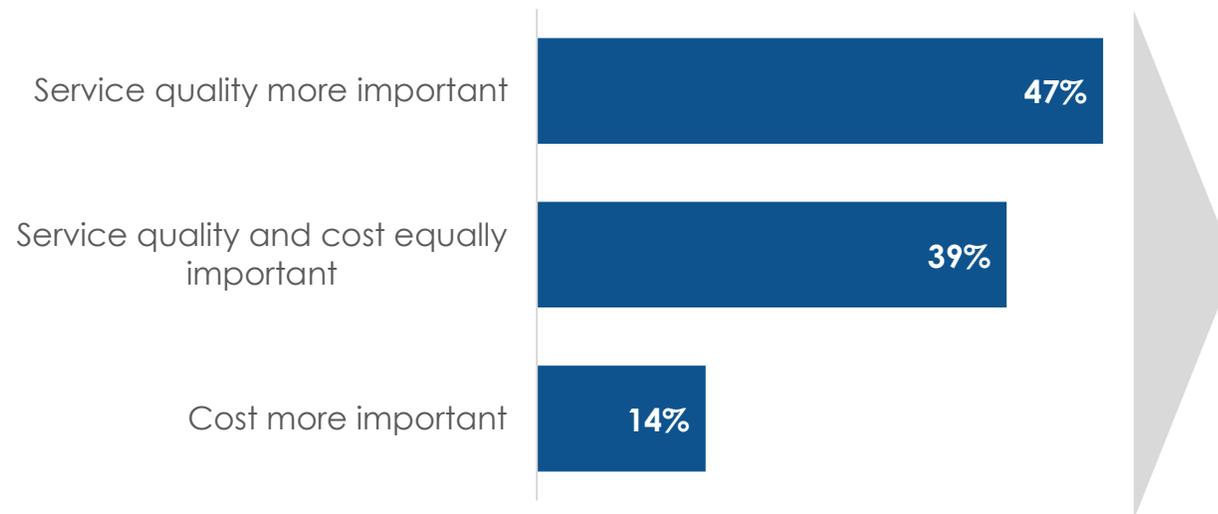
With banking and retail accelerating their path to digitalization, there is a pressing need to retire legacy systems, integrate applications, and consolidate channel silos.



Enterprises are exploring new business KPIs to derive maximum value from their ITOps services contracts

During COVID-19, enterprises reduced outsourcing due to declining revenues. With the revival of the economy in 2021, the emphasis is shifting towards improving the quality of IT services. About 34% of enterprises believe service quality is more important than cost, followed by 39% of companies who believe cost and service quality are equally important.

Importance of lowering costs vs. improving service across enterprises

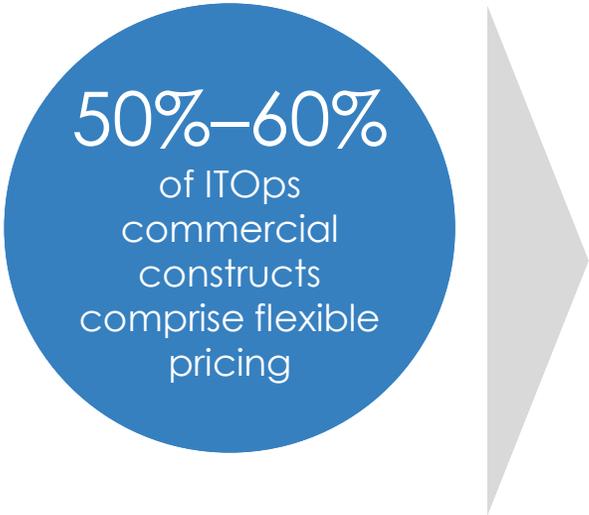


New KPIs introduced in last 12 months

-  % of fully autonomous executions
-  % of E2E business process monitoring
-  Unplanned downtime reduction
-  Observability index
-  Business service availability
-  End user self-help index
-  Cloud experience index
-  Mobility experience index
-  User experience with digital tools
-  Line of business impact

In the past 12 months, pricing models catering to niche IT needs have accelerated

Many as-a-service pricing models that are a combination of outcome and consumption-based pricing are emerging to cater to specific enterprise needs. Listed below are key as-a-service pricing models that have gained traction in the past 12 months.



50%–60%
of ITOps
commercial
constructs
comprise flexible
pricing



Workload automation as a service is a plug n play, cloud-based subscription model for automating job scheduling, batch processing, database backup, security scanning, and other repetitive IT functions.



AI Ops as a service enables real-time discovery and monitoring of IT environments with pricing based on the nodes being observed and managed. In some cases, it also observes the environment external to the customer's IT, such as public cloud infrastructure.



Decarbonization as a service offers SaaS solutions covering climate change strategy, target setting, emissions calculations, digital decarbonization assessments, and innovative industry solutions such as digital twins, decarbonization level agreements, or low-carbon data centers.



Identity as a service comprises cloud-based identity and access management solutions such as single sign-on, adaptive multi-factor authentication, and user provisioning and lifecycle management.



Workplace as a service involves leasing digital workplace services such as virtual desktops, application virtualization, unified end-device management, and mobile device management.



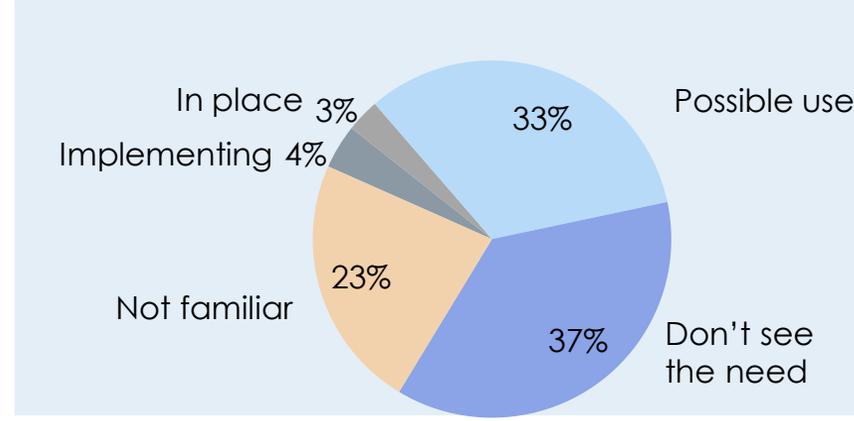
Network as a service simplifies network complexity as a third party manages the networking infrastructure with hardware platforms such as servers, routing, storage, and switching devices.

IT teams are reducing the cost with self healing and low-code solutions

An autonomous infrastructure will not only lead to cost savings but also result in data accuracy and security and enhanced uptime and mean time to recovery.

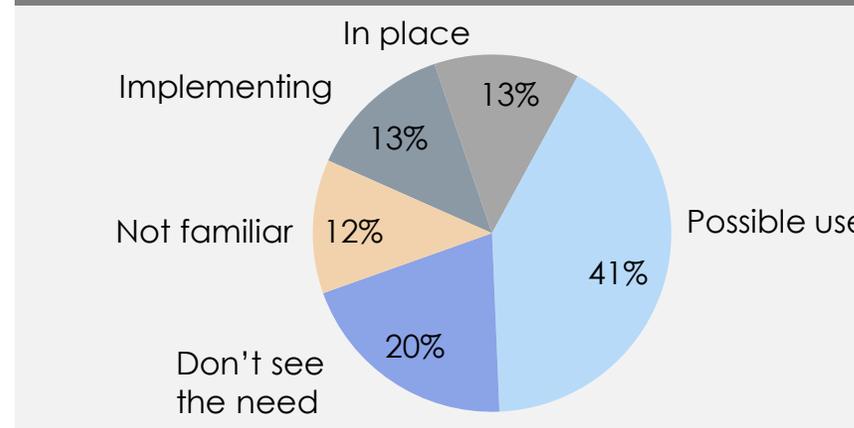
35%–40%
of the IT
operational
spending is
allocated to
personnel

Adoption trends in self-healing systems



- Most IT environments operate in silos and manage numerous endpoints, making it difficult to gain end-to-end visibility and quickly identify the root cause.
- Hence, the use of ML algorithms and automation to predict, detect, and respond to IT operations issues is gaining traction among enterprises.
- Enterprises such as Alaska Airlines and Worldpay have deployed self-healing systems to reduce turnaround time, mean time to recovery, and automate assignment and classification of

Adoption trends in no-code/low-code platforms



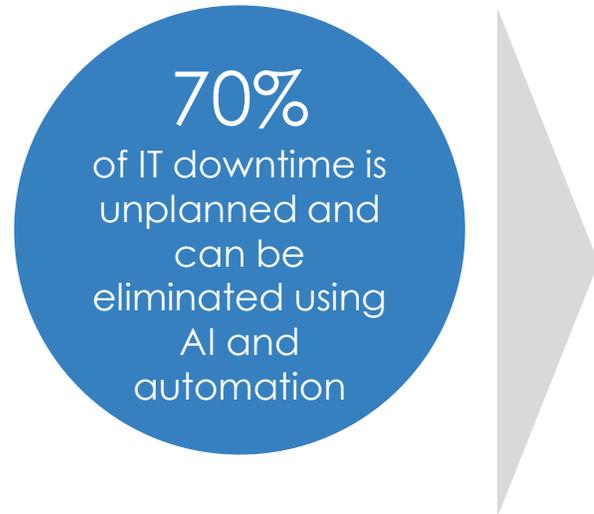
- Low-code/no-code development platforms are primarily used for streamlining and automating repetitive low-value tasks. They are cost-effective and reduce the barriers to software development.
- Examples of such applications include project management, database management, and legacy migration applications.
- Enterprises such as Morrison & Foerster and Kelly Roofing have deployed low-code platforms to save man-hours and to enhance data reconciliation and software migration process.

Companies are moving from a reactive to a proactive IT strategy to reduce unplanned IT downtime

Examples of enterprises using intelligent automation to reduce IT downtime:

Enterprise	Solution partner	Description
Travis Perkins 	 dynatrace	<ul style="list-style-type: none"> Travis Perkins reduced website downtime by two-thirds and the time taken to resolve performance issues by 75% using AI and automation capabilities from Dynatrace.
carhartt 	 APPDYNAMICS <small>part of Cisco</small>	<ul style="list-style-type: none"> Carhartt saved millions of dollars by preventing service outages and reduced overhead and operating costs by USD 500k by deploying a full-stack observability solution from AppDynamics.
 JOHNSON MORGAN & WHITE <small>NEVER SETTLE FOR LESS</small>	 connections <small>for BUSINESS</small>	<ul style="list-style-type: none"> Through an integrated and proactive managed IT service called ConnectCare, Connections for Business helped Johnson, Morgan & White eliminate downtime. It resulted in 99% uptime resulting in higher productivity.
A US-based deep-discount retailer	 tcs	<ul style="list-style-type: none"> TCS designed and deployed a customized IT service management framework at a US-based deep-discount retailer to optimize operational performance through higher incident resolution rates and reduced downtime.
A financial services company	 blazeclan	<ul style="list-style-type: none"> A financial services company deployed BlazeClan's Cloud Management Platform and SLA-driven automated managed services. It ensured zero downtime and 100% availability of AWS infrastructure.
 hbf	 bmc	<ul style="list-style-type: none"> HBF Health Limited eliminated downtime and reduced costs by deploying BMC's Next Generation Technology (NGT) suite of solutions. It reduced the test data refresh cycle from two days to two hours.

70%
of IT downtime is unplanned and can be eliminated using AI and automation



Artificial intelligence is emerging as a useful lever in the IT toolkit to enable autonomous IT operations

Examples of how enterprises are using AIOps to transform their IT operations:

60%
of IT operations
management
contracts
leverage AIOps
compared to
traditional
monitoring

Enterprise	Primary objective	Description
 VESCA	Automated remediation	<ul style="list-style-type: none"> VESCA deployed Splunk's Data-to-Everything platform to automate data analysis and incident management for proactive problem-solving and 24/7 service. It decreased the incident response workload by 99% and reduced incident management resources by 86%.
 Kroger	Full stack observability	<ul style="list-style-type: none"> Kroger deployed Dynatrace's AI and automation capabilities for full-stack observability into their IT environment in a single view and to identify reasons behind performance anomalies. It reduced the number of support tickets by 99%.
 TIVO	Event correlation and analysis	<ul style="list-style-type: none"> TiVo Corporation deployed BigPanda Autonomous Operations platform to detect and remediate issues faced by its NOC team The NOC team processes over 16,000 weekly alerts but now deals with only 200 incidents every week, reflecting an 80% correlation rate.
 Ascham School	Preventative maintenance	<ul style="list-style-type: none"> Ascham School deployed LogicMonitor's monitoring platform to monitor its network, firewalls, threat alerts, and 60 printers across campus, along with helpdesk metrics. It reduced the number of critical alerts from 500 to 40 and infrastructure-related network tickets by 50% in 90 days. It also increased team productivity by 60%.
 AMERICAN EAGLE OUTFITTERS	Unified incident management	<ul style="list-style-type: none"> American Eagle Outfitters deployed PagerDuty's AIOps platform to modernize and standardize its approach to incident response across the organization. It resulted in unified incident management and laid the foundation for advancing event Intelligence capabilities to better understanding patterns in the monitoring data.

Progressive enterprises are transitioning their IT environment from AIOps to NoOps for extreme automation



Less than 10% of enterprise IT operations are autonomous. However, it is expected to rise to 30%–40% in the next three to four years as IT infrastructure evolves.

Capabilities	Organization	Description
Hybrid and multicloud observability	 BEACHBODY	Beachbody's IT team deployed Dynatrace's Software Intelligence Platform across 250 hosts distributed across a mix of on-premises infrastructure and cloud-native architecture for instant observability across its entire infrastructure.
	 KeyBank	Keybank is enabling autonomous cloud operations by leveraging end-to-end monitoring and advanced automation capabilities from Dynatrace. It offers visibility across a full stack – from infrastructure performance to end-user experience.
Site reliability engineering (SRE)	A US-based airline	A US-based airline deployed Sofftek's SRE tools and processes to reduce downtime, drive efficiency, and accelerate delivery. It eliminated 20% of tickets, 15% of incidents, and 50% of complex tickets.
	An energy technology firm	An energy technology firm implemented DevOps solutions and performed root cause analyses through site-reliability engineering services provided by Mphasis. It automated AWS cloud deployments and reduced cloud deployment time.
Self-healing	 swisscom	Swisscom developed a test automation framework and tools with automated server monitoring and self-healing for infrastructure issues. The automation enabled 80% faster time to market for software releases with reduced human efforts.
	A US-based semiconductor firm	A US-based semiconductor processing equipment company developed self-healing workflows, automating about 650 incidents per month. It auto-created and routed 98% of monitored incidents and automated 60% of incidents.
Infrastructure-as-code	 uex	UEx Health Insurance implemented a set of infrastructure-as-code (IaC) scripts based on the AWS Cloud Development Kit to automate deployment of new backend systems. It enabled reusability of IaC scripts across regions for better resilience.
	 rapyder Making CLOUD work for you	Rapyder Cloud Solutions implemented an open-source infrastructure-as-a-code software tool called Terraform to codify infrastructure provisioning onto the public cloud. It offered flexibility to launch the infrastructure on demand.
Zero-touch monitoring and resolution	 Alaska AIRLINES	Alaska Airlines implemented a zero-touch monitoring solution developed by Zensar for knowledge management systems and web apps. It automated event management, monitoring, and incident creation and increased reliability by 95%.
	A US-based medical company	A US-based medical company deployed AIOps using ServiceNow, Moogsoft, and DRYICE iAutomate for zero-touch resolution. It saved up to 82,000 man-hours and MTTR by 88%.

Low levels of automation and lack of visibility across IT infrastructure is a top concern for IT teams



Severity	Typical challenges	How to resolve
Rigid IT infra with no/low automation	<ul style="list-style-type: none">• Orchestrating autonomous operations within a complex hybrid IT environment• IT teams have adopted automation practices that are not standardized or scalable across business units	<ul style="list-style-type: none">• Build an automation-first experience through capabilities such as AIOps and site reliability engineering• Adopt low code/no code automation to democratize access to intelligent automation technologies
Hybrid cloud monitoring and spend management	<ul style="list-style-type: none">• Lack of consolidated performance data across the application stack and hybrid cloud environments• Poor financial management with overshooting of cloud budgets, sprawl of cloud resources, and limited cost visibility	<ul style="list-style-type: none">• Use cloud-native monitoring services for end-to-end hybrid cloud visibility.• Use tools that offer public cloud cost comparison, usage visibility, budget configuration, and recommendations
IT noise reduction	<ul style="list-style-type: none">• Manual aggregation of disparate data distributed across multiple siloed monitoring tools• Lack of monitoring alerts with operational and topology data	<ul style="list-style-type: none">• Use AI-based correlation of different logs/events/sources for detection of anomalies and actionable alerts• Aggregate alerts and data from various observability and monitoring tools into a consistent format for insights
Cost reduction	<ul style="list-style-type: none">• Lower profitability due to the pandemic has compelled enterprises to focus on reduced cost• Enterprises expect outsourcing vendors to reduce pricing or share benefits due to hybrid workplace model	<ul style="list-style-type: none">• Make use of advanced automation, self-service, and self-healing solutions can provide better year-on-year savings• Leverage asset-based managed services to deliver business outcomes using next-gen technologies

New tech trends in intelligent ITOps space are on the horizon



5G adoption is accelerating demand for automated security remediation

As 5G adoption increases, the need for continuous network monitoring and incident resolution will rise as the devices directly connected to the network will open opportunities for more attacks. Using AIOps, systems can perform continual reassessments and set off alarms if a parameter is breached.

A hybrid work model will compel IT teams to adopt SD-WAN

With a distributed workforce, the network edge is expanding. It is raising concerns around management of multicloud environments and work from home. IT teams will accelerate adoption of SD-WAN to avoid disruptions associated with network re-engineering.

Full-stack observability data will become crucial to maximize AIOps efforts

Full-stack observability will break silos across monitoring tools and seamlessly connect monitoring data to the enterprise automation platform and other data analytics tools. This will enhance AIOps capabilities to draw insights and dependencies between the data points.

IT monitoring will become centralized using intelligent automation

As enterprises move to a hybrid environment, their ability to automate system performance data on-premise or cloud and consolidate multiple dashboards into a single console will be crucial.

A distributed cloud environment will become essential for edge computing

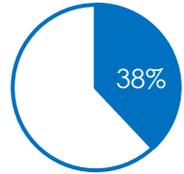
Location-based resources from public cloud providers will eliminate the need to manage and maintain disparate edge sites. Hence, with the increased adoption of edge computing the demand for distributed cloud offerings will also rise.

Service providers are making notable investments to support enterprises in their intelligent ITOps journey



Planned investments in next 12 months:

Key investments undertaken by service providers in 2020:



Asset Development

- New offerings, IP, and patents
- Solution accelerators, and industry-specific assets development, prototypes



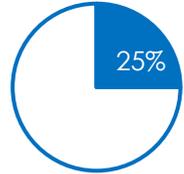
Launched TCS CogniX to drive AI-based human machine collaboration across IT infra



Added 400 new automation artifacts to Polycloud Platform V2.0 for autonomous network



Launched a self-healing platform called AIMiLiO



Human capital development

- Certifications and trainings
- Creative hiring and upskilling of resources



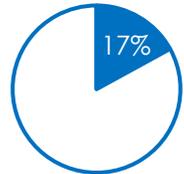
Launched a Data Academy with Multiverse to provide data analytics training to its workforce



Launched Softtek U Talks to educate university students on topics - BPM and IT automation



Established a team of about 5,000 site reliability engineering-trained resources



Leveraging ecosystem

- Increasing partner collaboration
- Crowdsourcing, hackathons
- CoEs and joint labs



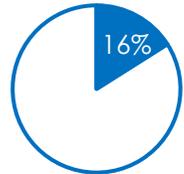
Acquired Linium, a ServiceNow partner to for expertise in cloud-based customized workflows



Partnered with Cavisson to offer an outcome-based managed services model



Received Data Analytics Services Partner specialization as part of Google Cloud Partner Program



GTM enablement

- New channels development
- New product road map and marketing initiatives
- Geographic expansion



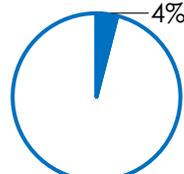
Partnered with VMware to create the Accenture VMware Business Group



Established a delivery center in Colombia with 150 professionals to augment presence in LATAM



Aims to move ~65% of enterprise projects to a MinimalOps-based model over next four years



Inorganic expansion

- Acquisitions
- Strategic investments



Acquired Turbonomic to boost AIOps capabilities for hybrid cloud environments



Acquired Cuelogic Technologies to augment cloud-native product development capabilities



Established Decarbonization Center of Excellence to support firms in net-zero carbon emissions

Providers are investing in self-enabling and advanced automation solutions to enable autonomous IT infra for clients



SRE capabilities for better convergence of development and operations



TATA CONSULTANCY SERVICES

- TCS has built a team of about 5,000 SRE-trained resources to support over 110 accounts. It has over 50 ongoing SRE engagements to reduce code/functionality defects and support services by 30%–50%.



Softtek

- As part of its operations automation approach, Softtek offers DIEGO SRE CMP, a centralized monitoring platform to improve the mean time to detect by 95% and reduce manual reporting labor by 30%.



Automation opportunity assessment framework

Infosys

- Using its web-based automation maturity assessment framework, Infosys helps clients determine the level of automation in various activities & identifies the automation opportunities and availability of automation tools in the enterprise.

HCL

- HCL offers the IONA platform, an 80+ points assessment tool to measure maturity of an automation project. This tool covers all critical aspects of automation projects, including discovery, design, build, test, and operations.



Zero-touch/low-touch/self-service capabilities

MICROLAND

- As part of Microland's MinimalOps framework, it is investing in capabilities such as SmartCloudOps to enable low-touch cloud management with IaC, AIOps, and bot-based resolution.

HCL

- HCL offers DRYiCE NetBot, a workflow-driven network automation product to automate the entire enterprise network life cycle from day zero provisioning to management to seamless orchestration.

Provider tools are becoming fundamental components of the engagement for cost efficiency and best-of-breed capabilities

Examples of big-ticket ITOps implementations that leverage provider tools and platforms:

45%–50%
of ITOps
contracts
reference service
provider
proprietary tools
and platforms

Provider platform	Enterprise	Description
		<ul style="list-style-type: none"> Blekinge Regional Council deployed IBM Watson AIOps Event Manager application and Compose Collection modules for dynamic event management and alert routing. It minimized manual handling of alarms and incidents.
	A European bank	<ul style="list-style-type: none"> A European bank deployed Zensar's AIOps platform called The Vinci to monitor the IT environment and automation of ITSM processes. It enabled 40% end-to-end automated resolution and reduced operational noise by 75%.
	A US-based medical technology company	<ul style="list-style-type: none"> A US-based medical technology company deployed DRYiCE iAutomate to manage its heterogeneous IT infrastructure and application landscape. It improved MTTR by 50% and SLA adherence by 20%. Additionally, end-to-end automation helped improve the accuracy rate of resolutions.
		<ul style="list-style-type: none"> Wipro implemented its service management framework called Service NXT™ to optimize IT operations and infrastructure at Bristol Water. It enabled self-service capabilities and reduced the cost associated with support services by 30%.
	A global media conglomerate	<ul style="list-style-type: none"> LTI deployed its suite of Mosaic platform, including Mosaic Automation and Mosaic AI, at a global media conglomerate for the operational transformation of its infrastructure. It enabled AI-based self-healing, which reduced MTTR by 50%, and alerts by 65%.



RadarView overview

Avasant's Intelligent ITOps Services 2021–2022 RadarView assesses providers across three critical dimensions:



Practice maturity

- This dimension considers the current state of the provider's intelligent ITOps practice in terms of its strategic importance for the provider, the maturity of their offerings and capabilities, and client engagement.
- The width and depth of the client base, usage of proprietary/outsourced tools and platforms, and quality of talent and execution capabilities are all important factors that contribute to this dimension.

Partner ecosystem

- This dimension assesses the nature of the ecosystem partnerships that the provider has entered into, the objective of the partnership (for example, codevelopment and co-innovation), its engagement with solutions providers, startup communities, and industry associations.
- It evaluates the joint development programs around offerings, go-to-market approaches, and the overall depth in partnerships are all important aspects.

Investments and innovation

- This dimension measures the strategic direction of investments and resultant innovations in the offerings and commercial model and how it aligns with the future direction of the industry.
- Critical aspects of this dimension include both organic and inorganic investments toward capability and offering growth, technology development, and human capital development, along with the innovative solutions developed with strategic partners.

Research methodology and coverage

Avasant based its analysis on several sources:

Public disclosures Publicly available information such as Securities and Exchange Commission (SEC) filings, annual reports, quarterly earnings calls, and executive interviews and statements.

Market interactions Discussions with enterprise executives leading digital initiatives and influencing IA tool vendor selection and engagement.

Vendor input Inputs collected as of March 2021 through an online questionnaire and structured briefings in May–June 2021.

Of the 45 intelligent ITOps service providers assessed, the final 24 featured in this RadarView for 2021–2022 are:



Note: Assessments for Accenture, Atos, CGI, Coforge, Cognizant, CSS Corp, DXC, Hexaware, IBM, Mindtree, Mphasis, NTT DATA, UST, Virtusa, and Wipro were conducted based on public disclosures and market interactions only.



Intelligent ITOps Services 2021–2022 RadarView

Reading the RadarView

Avasant recognizes intelligent ITOps service providers in four classifications:



Leaders show consistent excellence across all key dimensions of the RadarView assessment (product maturity, enterprise adaptability, and innovation road map) and have had a superior impact on the market as a whole. These vendors have shown true creativity and innovation and have established trends and best practices for the industry. These vendors have proven their commitment to the industry and are recognized as thought leaders in the space that set the standard for the rest of the industry to follow. Leaders display a superior quality of execution and a reliable depth and breadth across verticals.



Innovators show a penchant for reinventing concepts and avenues, changing the very nature of how things are done from the ground up. Unlike leaders, innovators have chosen to dominate in a few select areas or industries and distinguish themselves based on superior innovation. These radicals are always hungry to create pioneering advancements in the industry and are actively sought after as trailblazers redefining the rules of the game.



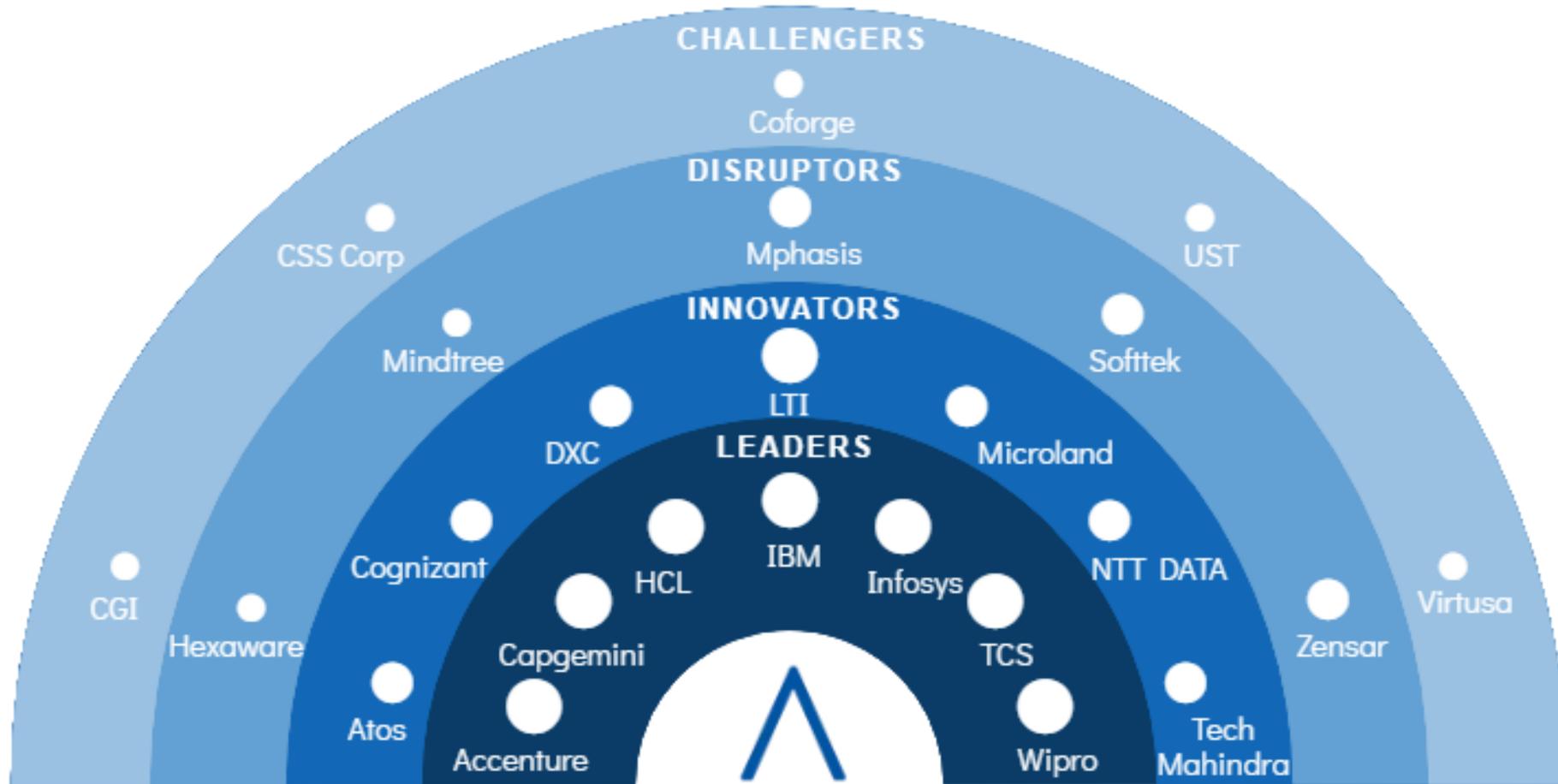
Disruptors enjoy inverting established norms and developing novel approaches that invigorate the industry. These vendors choose to have a razor-sharp focus on a few specific areas and address those at a high level of granularity and commitment, which results in tectonic shifts. While disruptors might not have the consistent depth and breadth across many verticals like leaders or the innovation capabilities of innovators, they exhibit superior capabilities in their areas of focus.



Challengers strive to break the mold and develop groundbreaking techniques, technologies, and methodologies on their way to establishing their unique position. While they may not have the scale of vendors in other categories, challengers are eager and nimble and use their high speed of execution to great effect as they scale heights in the industry. Challengers have a track record of delivering quality projects for their most demanding Global 2000 clients. In select areas and industries, challengers might have capabilities that match or exceed those of vendors in other categories.

Intelligent ITOps Services 2021–2022 RadarView

Product maturity ○ ○ ○



AVASANT

Infosys Profile

Infosys: RadarView profile

Infosys



Practice overview

- Practice size: 78,307+
- Active clients: 1,626+
- External certifications: 25,342+
- Delivery highlights: Presence in 50 countries through 120 delivery centers

20
ITOps CoEs
established
(March 2021)

14,000+
Microbots
(to date)

Client case studies

- Implemented Infosys LEAP at a UK-based oil and gas company to develop an application management platform with self-service and straight-through processing capabilities. It enabled 100% regulatory compliance. Reduced TCO by USD 12.8M and FTE strength by 17%.
- Deployed Polycloud ECR AIOps solution at a financial company to automate the classification of over 50,000 emails based on business application and context. It resulted in zero missed email notifications and SLA violations.
- Implemented its Intelligent Automation Assistant at a retail company for SLA management and auto-classification of 1,800 monthly incidents. Resolution time per incident reduced from 35 to 2.5 minutes, and auto-resolution of 35% incidents is expected.
- Automated over 10 IT operation towers at a US-based semiconductor processing equipment company to develop self-healing workflows, automating about 650 incidents per month. It auto-created and routed 98% of monitored incidents and automated 60% of incidents.

Key IP and assets

- Infosys LEAP platform: A zero-touch application management service platform
- Infosys Polycloud: A vendor-agnostic platform for hybrid cloud infra management
- Infosys Intelligent Assistant: A tool for auto-classification and resolution of tickets using NLP
- Infosys Cobalt: A catalog for multicloud transformation and managed services

Key partnerships

Technology partners

Sample clients

- A UK-based oil and gas company
- A financial company
- A retail company
- A US-based semiconductor processing equipment company
- The government of India
- An oil and gas company
- A US-based managed healthcare services provider
- A US-based fast-food company

Industry coverage

Banking
Financial services
Government
Healthcare & life sciences
High-tech
Insurance
Manufacturing
Nonprofits
Retail & CPG
Telecom, media & entertainment
Travel & transportation
Utilities & resources

- Practice maturity ★★★★★
- Partnership ecosystem ★★★★★
- Investments & innovation ★★★★★

Delivering zero-touch operations through predictive, preventive, and self-healing capabilities. Investing in reusable cloud assets and a bot library.

Darker color indicates higher industry concentration: ●●●●●

Analyst insights

Practice maturity



- With expertise across technology and domain, Infosys has developed a mature ITOps practice that embeds AI, analytics, and automation across all IT services including cloud and infrastructure management, application maintenance and migration, and modernization.
- It offers over 14,000 microbots that can be converted to workerbots and digital workers, with a reusability score of 50% and 30%, respectively. Workerbots perform microtasks such as ticket management and database health checks, while digital workers perform complex decision-making activities such as procurement requests and accounts payable processing.
- It helps clients determine the level of automation for various activities across the life cycles of multiple projects using its web-based automation maturity assessment framework. It helps in identifying the automation opportunities and the availability of automation tools in the enterprise.
- It reduces time-to-market by using a repository of over 200 cloud-first solution blueprints, delivered through Infosys Cobalt. For instance, it has built an AI-based solution called Infosys Enterprise Service Management Café over the ServiceNow cloud platform that delivers implementations 40%–50% faster.

Partnership ecosystem



- To deliver best-in-class IT solutions, Infosys has established partnerships with Dynatrace, Splunk, Broadcom and AppDynamics for AIOps (observability and telemetry) capabilities; UiPath, Automation Anywhere, and Blue Prism for RPA; and Nvidia, Apptio, Cisco, and Pega for cloud automation and governance.
- It has joint product development and GTM strategies with leading technology providers such as IBM, Google, Microsoft, AWS, and ServiceNow. Key initiatives include establishing innovation labs for Azure services including data analytics, collaboration, and content, offering Infosys Cobalt solutions on Google cloud, and building 11 API-based integration adapters and 10 utilities and widgets to augment ServiceNow's product capabilities.

Investments and innovation



- To enable 100% zero-touch operations, Infosys is investing in IP, solution accelerators, and reusable repositories to deliver self-healing bots and predictive and preventive algorithms. It has invested in over 25,000 reusable cloud assets and plans to increase its bot library from 7,000 to 25,000 in 2021.
- As of 2021, Infosys has been granted 465 patents, with 157 pending. These cover a variety of intelligent offerings including Infosys Analytics Workbench (a self-service analytics platform) and Infosys Genome (a deep domain data management and analytics platform).
- It has added 400 new automation artifacts to Polycloud Platform V2.0 with a focus on autonomous network and cloud operations. It plans to add features such as asset discovery and tagging, quantum computing cloud, and intelligent workload placement by the end of Q3 2021.

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