

Europe Operational Intelligence - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Europe Operational Intelligence Market size is estimated at USD 0.85 billion in 2024, and is expected to reach USD 1.25 billion by 2029, growing at a CAGR of 7.95% during the forecast period (2024-2029).

Key Highlights

- The need for data quality control, data discovery, and data visualization is forcing companies to deploy operational intelligence software. On-premises ESB and BPM (Business Process Management) solutions are well suited for vertical scalability while integrating with an organization's complex internal systems and architectures.
- In Europe, various industries are adopting big data analytics and the Internet of Things (IoT), in turn propelling the growth of the operational intelligence market. However, the high cost of operational intelligence tools is restraining the operational intelligence market growth. The deployment of OI tools and their complex programming becomes a costly affair for business enterprises. As a result of factors like the high-cost factor and the requirement of skilled professionals to operate the software, the market growth could be better in the region.
- Many industries are spending on their digital infrastructures. Also, many European countries are investing heavily in their digital infrastructure. Still, private and public initiatives have been launched to fill the skills gap and accelerate the rate of cloud adoption. During the epidemic, 53% of enterprises in the European Union that had previously implemented advanced digital technology increased their investment in digitalization. This is compared to 34% of non-digital EU enterprises that used the crisis as an opportunity to begin investing in their digital transformation.
- Cloud adoption is expected to gain significant market share due to additional benefits such as scalability, cost-saving, accessibility, and centralized service. For instance, in August 2022, GE Healthcare and Amazon Web Services (AWS) announced the first European cloud deployment of Edison True PACS at the Royal Orthopaedic Hospital NHS Foundation Trust in Birmingham. The project aims to provide radiologists with intelligent productivity tools that would help them increase their reading speed,

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minimize errors, improve diagnostic precision, and make more confident diagnoses.

-Europe had the highest adoption rate of cloud services. According to Eurostat, the region's statistics agency, there has been significant growth in businesses migrating to the cloud. In its published report "Cloud Computing Statistics on the Use by Enterprises" report, the agency reported the 23% EU-wide growth in businesses migrating to the cloud was led by Malta (65%), Cyprus (50%), Hungary (50%), Germany (45%), and the United Kingdom (45%). According to NetApp, the hybrid cloud infrastructure is Europe's most preferred cloud deployment method.

-Moreover, the major benefit of an OI implementation is that operational problems and opportunities can be addressed as they arise or even before they occur, as in predictive maintenance. Operational intelligence also enables business leaders and employees to make more informed and better decisions every day. Ultimately, increased visibility and insight into business operations, if managed properly, can lead to increased revenue and competitive advantage over competitors.

-The COVID-19 pandemic significantly impacted the European operational intelligence market. Many businesses faced disruptions and had to adapt their operations. Some sectors, like healthcare and logistics, saw increased demand for operational intelligence solutions to manage challenges. However, economic uncertainties led to budget constraints for technology investments in other industries.

Europe Operational Intelligence Market Trends

Rise in Real-time Analytics & Decision Making Across End-user Industries Drive Operational Intelligence Market

- The rising need for real-time analytics & decision-making and the surge in demand for operational intelligence (OI) from various end-user industries have driven market growth. The rising incorporation of data-driven technologies across various industries is mainly driving the operational intelligence market in Europe. Also, both the private and public sector enterprises are investing in digital and data-driven technologies, thereby propelling the growth of the Operational intelligence market in the country.

- The growth of the Internet of Things has given rise to operational intelligence applications for analyzing sensor data collected from production machines, pipelines, elevators, and other devices. This enables predictive maintenance actions aimed at detecting potential equipment failures before they occur. Different types of machine data, such as server, network, and website logs, also power OI applications and are analyzed in real-time to look for security threats and IT operational issues.

- Increased adoption of a business intelligence system that can operate in real-time has driven the demand for an operational intelligence system. For instance, in November 2022, IBM released a new suite that integrates business intelligence, planning, budgeting, and forecasting capabilities in a single location and a hub where users can examine analytics assets created with tools from other suppliers.

- The impact of operational intelligence in a data-driven world is clear and rising significantly. Enterprise operational executives worldwide agreed that predictive decision based on real-time data is one of the most significant drivers impacting their businesses.

Cloud Deployment Hold the Significant Market Share

- Automation and intelligent systems are implemented to perform pivotal operational functions, providing a crucial database to organizations. Making the organization Agile and resilient with an Intelligent cloud requires an hour to stay relevant in the world of disruptive digital trends. Due to this, an increasing number of regional banks are migrating their data, processes, and infrastructure to the cloud to benefit from cloud implementation, which further eases the integration of enterprise applications.

- Digital transformation has become ubiquitous, and it is impacting the way organizations respond to changing customer needs. Organizations are appointing CDOs (chief digital officers) and CIOs (chief innovation officers) to drive their digital movements to

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deliver quick-to-market solutions.

- Based in Germany, SAP SE focused on providing successful business outcomes. For instance, SAP took over Coresystems AG, a Switzerland-based cloud-based workforce management software developer. The acquisition bolsters SAP's offerings of customer service software. The company also forms strategic partnerships and collaborations to boost the adoption of its products and offerings.

Europe Operational Intelligence Industry Overview

The European operational intelligence market exhibits moderate competitiveness, with both small and large vendors facilitating enhanced visibility and insights into business operations, empowering companies to formulate data-driven decisions. Key industry players include Axway Inc., IFS AB, Software AG, and SAP SE, among others. Notable competitive developments are as follows:

In March 2023, OpenText revealed a strategic collaboration with Bayer to streamline digital operations. In this initiative, Bayer will implement OpenText Business Network Cloud Enterprise as a pivotal solution for B2B integration within the consumer health and pharmaceutical divisions. The aim is to boost agility and operational efficiencies.

In August 2022, Pyramid Analytics, a provider of decision intelligence platforms, introduced the United Kingdom Public Sector Practice. This novel division was established to introduce the transformative potential of augmented analytics to public departments, agencies, and organizations across the UK. Decision intelligence, driven by AI and machine learning, holds the promise of revolutionizing the delivery of crucial public services in Europe's public sector markets, including healthcare, utilities, and transportation.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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