

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

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Report description:

The North America Operational Intelligence Market size is estimated at USD 1.57 billion in 2024, and is expected to reach USD 2.73 billion by 2029, growing at a CAGR of 9.5% during the forecast period (2024-2029).

The need for data quality management, discovery, and visualization compels businesses to adopt operational intelligence software. On-premise ESB and BPM (business process management) solutions are well suited for vertical scalability while integrating an enterprise's complex internal systems and architecture.

Key Highlights

- Operational intelligence (OI) is a form of dynamic, real-time business analytics that delivers insights into business and IT operations. These solutions provide enterprises with the opportunity to streamline the process of data collection and analysis. Enterprises can monitor and troubleshoot in real-time and improve their security and compliance methods, thereby speeding up the delivery of their services to customers.
- Enterprises cannot tap the full potential of the available data for making decisions using traditional analytical tools, such as business intelligence and data warehouse tools. These conventional information management systems cannot analyze the data in any practical and actionable way due to their high volume and diversity.
- Cisco Systems estimates that around 42% of all data generated will likely be from machines, including sensors, networks, security systems, servers, storage, and applications. Real-time data analytics can influence the IoT and Big Data capabilities to enhance business operations.
- Moreover, the challenge of interoperability between different devices and platforms has complicated issues for businesses, as it is challenging to connect dynamic applications, services, and data. Therefore, the shift to cloud solutions helps enterprises address their current integration challenges while giving them the manageability, scalability, and reliability they need for the future.

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-Further, the spread of COVID-19 accelerated the adoption of operational intelligence tools. Organizations had to adopt digitally enabled solutions to accelerate the performance of operations seamlessly while working remotely.

North America Operational Intelligence Market Trends

Cloud Accounts for Significant Market Share

- Cloud deployment is expected to hold a prominent market share owing to the added benefits, such as cost-saving, accessibility, scalability, and centralized service. It is also expected that more than 83% of the enterprise workload will be in the cloud, out of which 41% of the enterprise workload will be run on public cloud platforms. Another 20% will be private-cloud-based, while 22% will rely on hybrid-cloud adoption.
- According to the survey by Flexera, cloud strategy is increasingly focused on hybrid instead of public and private. A hybrid cloud is a new norm for businesses delivering products and services. According to Flexera, the hybrid cloud penetration rate increased to 72% in 2023.
- Moreover, cost-effectiveness plays a crucial role in driving cloud adoption for operational intelligence. Cloud providers offer a pay-as-you-go model, eliminating the need for substantial upfront investments in hardware and infrastructure. This allows businesses to allocate resources efficiently, investing in operational intelligence tools as necessary. The cloud's elasticity ensures that organizations only pay for the resources they consume, making it an attractive option for companies looking to optimize their operational intelligence efforts while managing costs.
- Furthermore, the speed and agility of cloud-based operational intelligence solutions are invaluable in today's fast-paced business landscape. Real-time data analysis enables organizations to make informed decisions on the fly, respond swiftly to changing market conditions, and identify emerging trends. The cloud's distributed architecture and advanced analytics capabilities empower businesses to derive actionable insights from diverse data sources in record time.

Retail is Expected to Account For Significant Market Share

- The adoption of AI in the retail industry automates retail-related processes with lesser manual work, faster delivery, better customer and order management, and streamlined operations, all of which eventually reduce costs.
- Moreover, retail infrastructure is complex and distributed and includes POS (point of sale), checkout terminals, self-checkout units, PCs, and back-office servers. Thus, the increasing dependency on IT, ranging from wholesalers and distributors to manufacturers and suppliers, demands an integrated infrastructure that enables a seamless retail value chain. This caters to the growth of operational intelligence.
- According to Oxford Economics, 83% of large retailers consider digital transformation a core business goal. Oxford also highlighted the traction from small and midsize retailers ((59%) and their belief in digital transformation. In the era where digital transformation is gaining traction, the market studied is expected to grow along with the retail sector's inclination to transform.
- Additionally, the retail sector is increasingly witnessing the adoption of cloud-based solutions, as they integrate several verticals, like inventory and order processing, thus improving the restocking capabilities.
- Furthermore, with cloud computing, retailers may have enterprise-wide supply chain visibility. Recently, Gap Inc. adopted cloud technology across its global operations for its Intermix brand. The fashion retailer has deployed cloud services provided by Oracle, with solutions comprising retail merchandising, integration, and inventory management.

North America Operational Intelligence Industry Overview

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The North American operational intelligence market is marked by fragmentation and fierce competition, featuring a wide range of vendors, both large and small, that offer comprehensive visibility and insights into business operations. This enables companies to make informed, data-driven decisions. Notable key players in this dynamic market include Vitria Technology Inc. and Splunk Inc., among others.

In May 2023, SAP SE announced a strategic collaboration with IBM. Under this partnership, SAP will be integrating IBM Watson technology into its solutions. This integration is set to empower SAP SE in delivering advanced AI-driven insights and automation, accelerating innovation, and enhancing user experiences throughout its extensive solution portfolio.

In August 2022, the National Rural Telecommunications Cooperative (NRTC) unveiled the general availability of its operational intelligence platform. This platform is characterized by its vendor-agnostic analytics capabilities, designed to optimize the operations of broadband providers. Leveraging real-time data analysis and machine learning, this platform proactively identifies subscriber issues and potential service disruptions, enabling providers to address these concerns before they impact users.

Additional Benefits:

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

Table of Contents:

1 INTRODUCTION

- 1.1 Study Assumptions and Market Definition
- 1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET INSIGHT

- 4.1 Market Overview
- 4.2 Industry Attractiveness - Porter's Five Forces Analysis
 - 4.2.1 Threat of New Entrants
 - 4.2.2 Bargaining Power of Buyers
 - 4.2.3 Bargaining Power of Suppliers
 - 4.2.4 Threat of Substitute Products
 - 4.2.5 Intensity of Competitive Rivalry

5 MARKET DYNAMICS

- 5.1 Market Drivers
 - 5.1.1 Growing Need for Real Time Data Analytics
 - 5.1.2 Increasing Adoption of Big Data Analytics and the Internet-of-Things (IoT)
- 5.2 Market Restraints
 - 5.2.1 Combining Data from Multiple Data Sources

6 MARKET SEGMENTATION

- 6.1 By Deployment Type

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- 6.1.1 Cloud
- 6.1.2 On-premise
- 6.2 By End-user Vertical
 - 6.2.1 Retail
 - 6.2.2 Manufacturing
 - 6.2.3 BFSI
 - 6.2.4 Government
 - 6.2.5 IT and Telecommunication
 - 6.2.6 Military and Defense
 - 6.2.7 Transportation and Logistics
 - 6.2.8 Healthcare
 - 6.2.9 Energy and Power

7 COMPETITIVE LANDSCAPE

- 7.1 Company Profiles
 - 7.1.1 Vitria Technology Inc.
 - 7.1.2 Splunk Inc.
 - 7.1.3 SAP SE
 - 7.1.4 Inside Analysis (The Bloor Group)
 - 7.1.5 Software AG
 - 7.1.6 Schneider Electric SE
 - 7.1.7 Rolta India Limited
 - 7.1.8 SolutionsPT Ltd
 - 7.1.9 IBENOX Pty Ltd
 - 7.1.10 Turnberry Corporation
 - 7.1.11 HP Inc.
 - 7.1.12 OpenText Corporation

8 INVESTMENT ANALYSIS

9 MARKET OPPORTUNITIES AND FUTURE TRENDS

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