Omdia Universe: CloudOps, 2025

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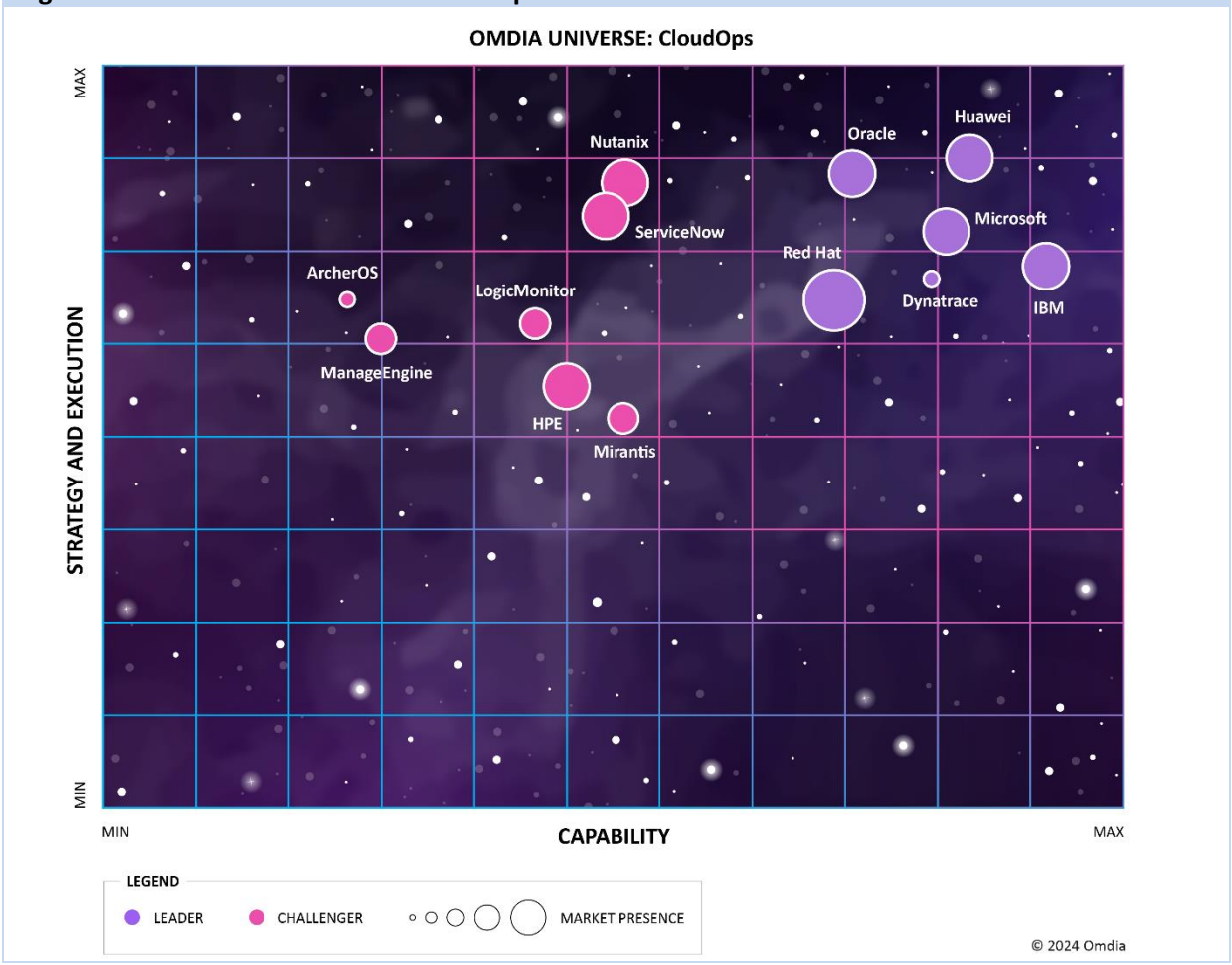
Summary

Catalyst

The IT operational landscape has spawned many new terms over recent years, and CloudOps is yet another term that has found its way into the IT operations lexicon. CloudOps is used to describe the operational management of the current IT infrastructure reality, namely everything from on-premises infrastructure to public cloud. This report evaluates the leading solutions in this market and compares them to Omdia's core capabilities model.

Figure 1: The Omdia Universe for CloudOps



Source: Omdia

All the leading vendors identified by Omdia were approached to provide input to this study. Some declined because their solutions were not comprehensive enough, they did not have the resources to complete the assessment, or the offering was not going to be released in time for the publication of this report. However, in Omdia's opinion, the vendors included here offer the current leading solutions available to customers (see **Figure 1**). One high-profile omission from this year's Universe is VMware. The VMware Aria Operations solution has undergone a directional change and has been rebranded to VMware Cloud Foundation Operations. It is now available only as an integrated component of VMware's private cloud stack (VMware Cloud Foundation). Consequently, VMware

Cloud Foundation Operations is not available as a standalone hybrid multicloud management solution.

Omdia view

The reality for many CIOs is that the IT estate is a complex mixture of infrastructure, services, environments, and software. The CIO must manage the delivery of business services from this entire estate. One of the challenges with managing a complex, diverse IT estate involves using multiple management tools, meaning IT operations constantly context switch between these tools. CloudOps evolved to address some of this context switching by delivering a single pane of glass approach to the management of hybrid and multicloud, edge, and on-premises environments. CloudOps does not reduce the management tool count to one but does enable tool consolidation across the FinOps, AIOPs, and ITOM domain expert systems.

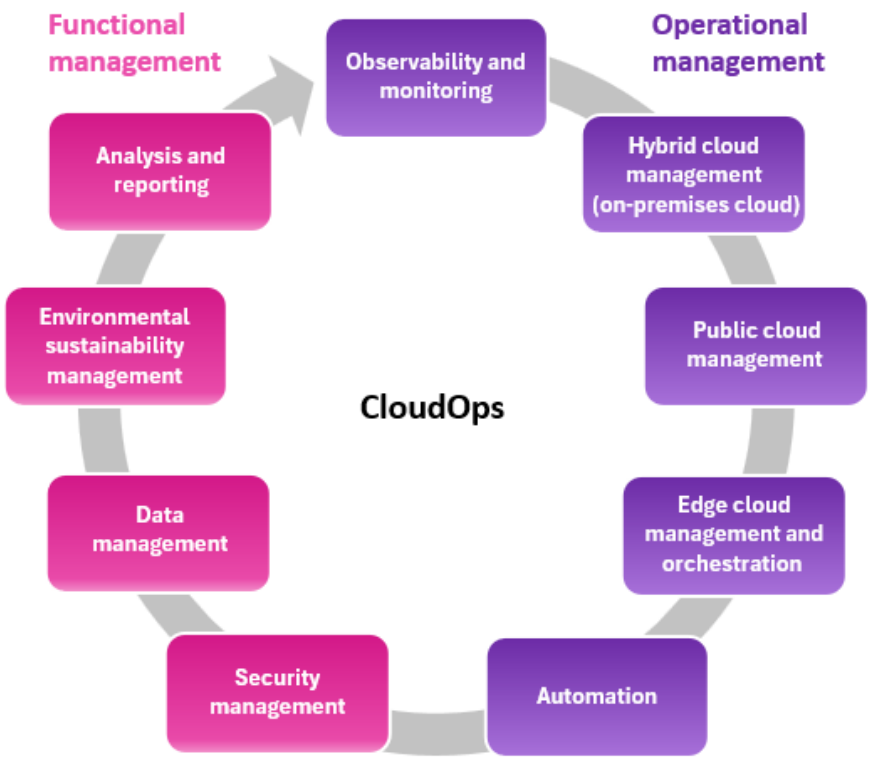
Analyzing the CloudOps universe

Market definition

Omdia defines CloudOps and its role in IT operations departments as an overarching manager of managers. CloudOps has a number of subcategories such as AIOps, FinOps, IT operational management, observability, and hybrid and multicloud management. These subcategories are standalone capabilities that are delivered by many different vendors. CloudOps refers to the combination of these capabilities by a single vendor's solution portfolio. Omdia considers CloudOps as three separate steps on a journey to become a dynamic IT operations department, not just a reactive IT operations department. The first step is to make the cloud and edge visible and then use AI and automation in a proactive way. Finally, it is continuously optimizing the environments to achieve the business goal.

Omdia has categorized the different capabilities of a CloudOps solution into nine subcategories, and these have been used to assess the solutions in this Universe. These nine different subcategories fall into two main groups: operational management and functional management.

Figure 2: What is covered under the CloudOps terminology

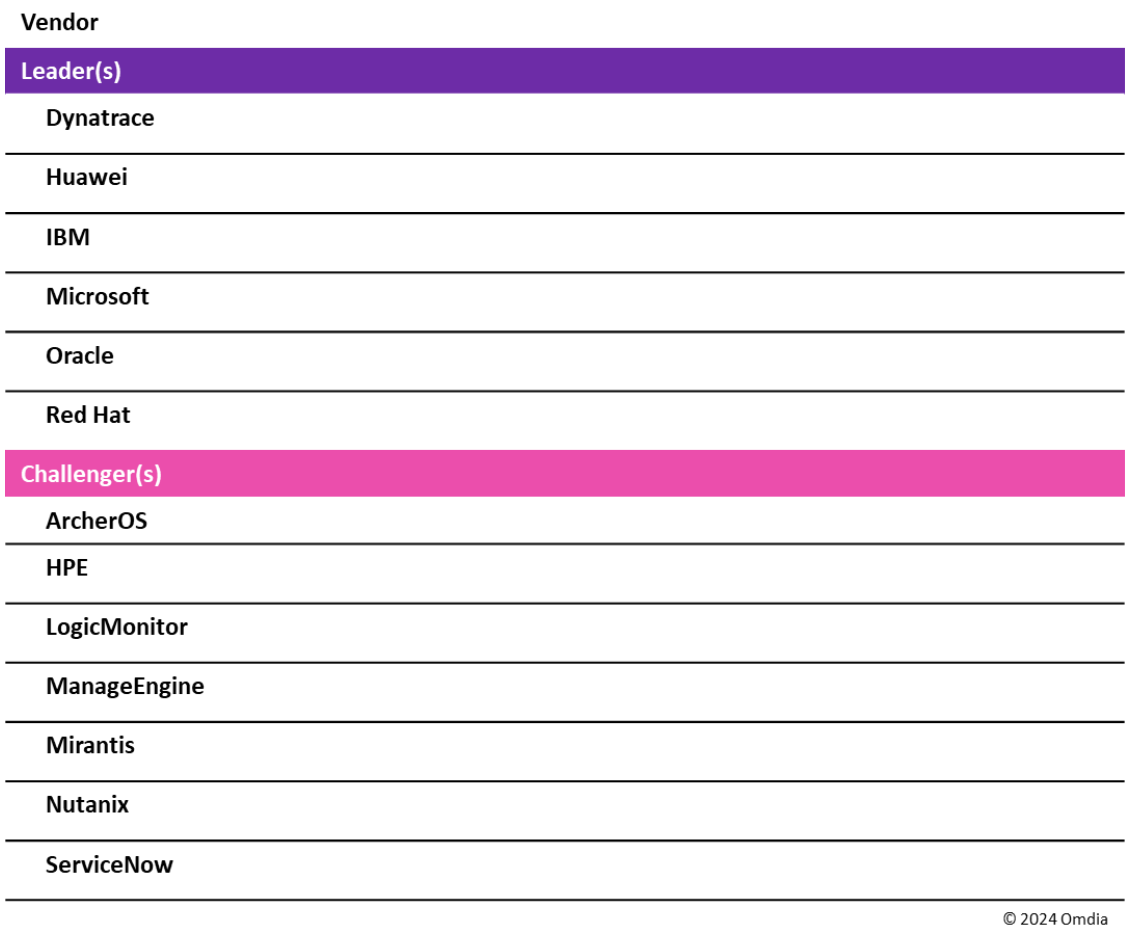


Source: Omdia

Market dynamics

The CloudOps market is a relatively new evolution of the hybrid and multicloud management market. CloudOps covers a wider range of capabilities as it is seen as both a solution (product or service) and a new approach to IT operational management. The evidence from Omdia's survey *2024 State of Edge Computing: How industries are leveraging AI anywhere to unlock modern business* showed most organizations wanted to consolidate the number of management tools they use. This push to consolidate the tools is one of the reasons CloudOps shows continued growth, as its (CloudOps) role is to deliver a simpler user interface (UI) where IT staff with generalist skills can manage a wide range of different environments and perform the majority of the tasks. Products that offer simplification and optimization benefits will typically reach a point where growth would be expected to flatten off owing to market saturation. However, we see continued growth for CloudOps because it is currently a new discipline with the potential to address wider technology management challenges. Omdia's market forecast for CloudOps estimates that the market was worth $ 18.3bn in 2023, which is forecast to rise to over $38bn by 2030.

Figure 3: Vendor rankings in the CloudOps Universe



Source: Omdia

Market leaders

The market leaders (see **Figure 3**) all scored greater than 78% for overall solution capability. Omdia classifies each capability out of a score of 10, and these are further classified as poor, average, and good for solution breadth. In terms of strategy and execution, the leaders all scored greater than 82%. The third criterion was that the leaders all recorded a solution breadth score of over 50% (solution breadth is a calculated score showing the percentage of all scores recorded over the "good" classification). The difference between the leaders and challengers is most clearly seen in **Figure 1**. Another difference between the two classifications is that the leaders accounted for nearly 70% of the top three subcategory scores.

Market challengers

The market challengers all recorded an overall solutions capability score of between 70% and 75%, and the solution breadth score was less than 50%. In terms of strategy and execution, some challengers scored more than the leaders. However, the single biggest differentiator between the categories was that the challengers recorded only 39% of subcategory scores above the cohort average, compared to 61% of the leaders.

Market prospects

There are no market prospects in this report.

Opportunities

CloudOps helps digital transformation. Organizations are transforming themselves to become digital organizations, and this transformation involves both technology and people change. CloudOps has the potential to be used by IT departments as the vehicle for change. It combines both the technology needed to become a digital organization as well as the technology that could change the roles and responsibilities of employees. CloudOps would need the organization to know how its people's roles are going to change; then, it could be adopted to support that change.

Threats

CloudOps will become yet another vendor full-stack solution. The concept of CloudOps was to remain an open platform that could offer a simple way to consume information on a wide range of environments. Effectively, the domain-specific tools link into a single "master" tool that enables the different teams to work using a single UI and avoid the constant need to context switch. However, as the vendors of these domain-specific tools build out their solutions into a CloudOps solution, there will be a temptation to develop a single fully integrated solution. The signs of this are becoming evident as large vendors are acquiring the domain expert capabilities in a series of acquisitions.

Market outlook

The complexity of managing the IT estate is not going to decrease; in fact, it will continue to increase as organizations adopt new technologies such as generative AI (GenAI). The imperative for CIOs is to ensure that as the use of technology by businesses increases, the number of IT staff and the cost of IT do not increase linearly. Ensuring that CIOs can break that linkage will require more automation and optimization capabilities so that the same number of IT staff can manage the increased use of technology. CloudOps is ideally placed to help CIOs ensure that the complexity of technology management can be simplified and can deliver optimization of both resources and cost. Omdia expects the market for CloudOps to grow at a faster rate than that of the general cloud market because currently, only circa 10% of cloud spending is being managed by CloudOps/FinOps capability.

Vendor analysis

ArcherOS (Omdia recommendation: Challenger)

ArcherOS should appear on your shortlist if:

- You are looking for a strong observability and monitoring solution that enables a single pane of glass management of an organization's entire IT estate.

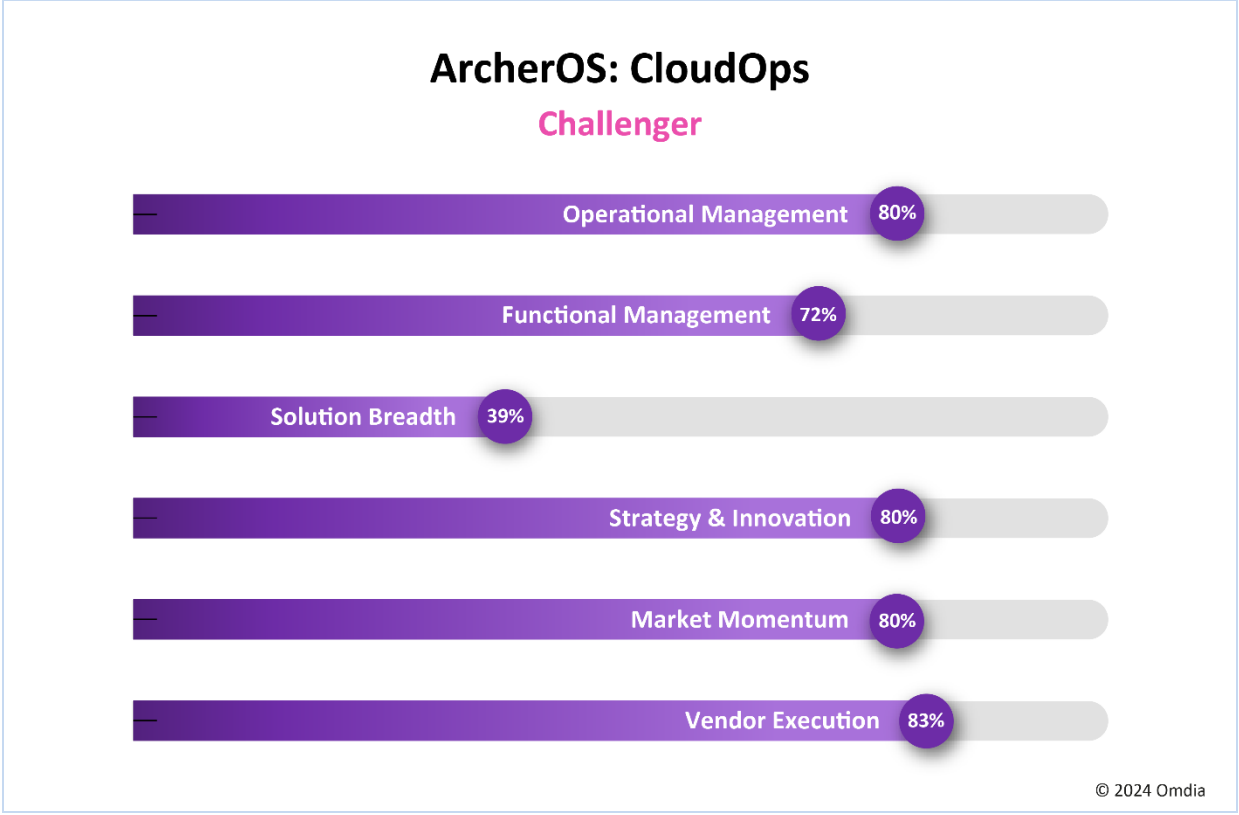
Overview

ArcherOS in its first Omdia Universe on CloudOps is classified as a challenger with an overall unweighted score of 71% for its capabilities and 81% for strategy and execution, but its solution

breadth score was only 38%. ArcherOS offers a unified management capability that covers VMware, bare metal, Kubernetes clusters, and public clouds. The value of ArcherOS is it enables customers to manage resources in all the different environments from a single management portal. One of the most noteworthy features of ArcherOS is its ability to create separate pools of compute and storage resources that are securely isolated from each other. ArcherOS can be expanded by the use of enhancement services that deliver specialty services such as disaster recovery, DevOps, orchestration services, and security. The main reason ArcherOS did not achieve "leader" status was its lack of features covering environmental sustainability management.

Overview

Figure 4: Omdia Universe ratings—ArcherOS



Source: Omdia

Strengths

ArcherOS's strongest subcategory was observability and monitoring, where it scored 89%. ArcherOS has created an end-to-end observability chain that covers physical machines, physical networks, virtual machines, virtual storage, virtual networks, containers, and user processes within virtual machines. Omdia considers that ArcherOS through integrating monitoring data, logs, and events has built a solution that enables customers to process and present this information to a wide audience. ArcherOS supports the sharing of this information in the form of alerts, inspections, predictions, and dashboards. This information allows users to fully leverage monitoring information, achieving comprehensive system observability and intelligent management. A noteworthy capability of ArcherOS was its visibility at a granular level such as its visibility into memory usage, giving ArcherOS the ability to perform memory reclamation on virtual machines (VMs).

ArcherOS's second strongest subcategory was data management, where it scored 88%. At the core of ArcherOS's data management capabilities is ArStor, a high-performance, distributed software-defined storage (SDS) solution that enables customers to create resource pools of storage. These resource pools can be created based on how the customer wants to prioritize its storage. For example, storage can be pooled for performance reasons or reliability reasons; ArcherOS ArStor supports the ability to generate pools to meet business needs. Another capability of ArStor is it can pool mixed flash storage for mixed workloads, which enables customers to extract more value from existing investments. ArStor also has many other features, such as vdisk-level block size settings, unlimited snapshots, and various compression algorithms.

ArcherOS's third strongest subcategory was analysis and reporting, where it scored 86%. ArcherOS demonstrated a noteworthy capability in its number of different standards (more than 15), and the solution has accreditation for the reports it generates. Omdia also liked the fact that ArcherOS supports both dashboard and alerting, as well as supporting both templates and custom reports.

Limitations

ArcherOS's weakest subcategory was environmental sustainability management, which is a new and emerging capability and, therefore, not surprising. However, some vendors in this report have developed a capability in this space, and Omdia expects ArcherOS to include a capability for this in the future.

Dynatrace (Omdia recommendation: Leader)

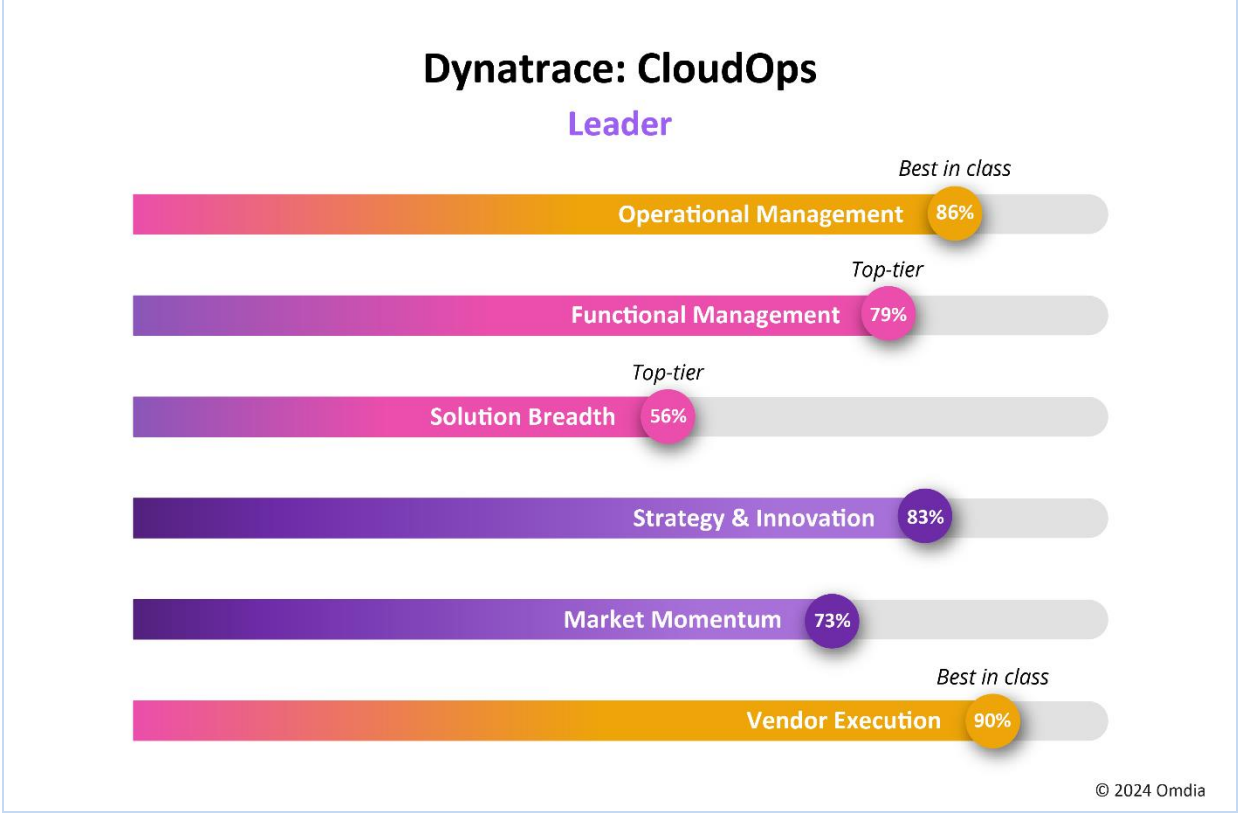
Dynatrace should appear on your shortlist if:

- You are looking for a CloudOps solution from a specialist vendor that outperforms most of the large global IT software vendors.

Overview

Dynatrace is classified as a leader in the Omdia Universe with a total unweighted capability score of 79% and its strategy and execution score of 82%. Dynatrace was strong in all the subcategories, with even its weakest subcategory recording a score of over 70%. In terms of strategy and execution, Dynatrace scored 90% for scale, innovation, and integration. Dynatrace's participation in the Universe was only partial owing to resource constraints. Consequently, it could only provide a relatively low number of customer reviews, which was the reason for Dynatrace's score of 73% for customer experience.

Figure 5: Omdia Universe ratings—Dynatrace



Source: Omdia

Strengths

Dynatrace achieved a joint top subcategory score of 88% in observability and monitoring and hybrid cloud management. In terms of observability and monitoring, Dynatrace offers infrastructure, application performance management (APM), and digital experience monitoring (DEM) as a unified solution, a common data model, with its proprietary OneAgent or open source like OpenTelemetry (OTel). Omdia likes Dynatrace's approach of focusing on the user experience as it combines real user monitoring, synthetic transaction monitoring, and session replay to provide a 360° view into every digital transaction. The real user monitoring (RUM) dashboard in Dynatrace provides contextualized frontend mapped to code-level insights for all an organization's applications, irrespective of technology/programming languages the organization is using, the application architecture deployed, or where the applications are executing, whether in the cloud, on-premises, or hybrid. One significant strength of Dynatrace is it covers more than just the application layer; it also extends into the infrastructure layer. However, Dynatrace goes beyond simple host monitoring; in fact, it provides complete observability across platform as a service (PaaS) and container technologies, process detection and resource utilization, network usage and performance, log monitoring, and even incorporating third-party data and events into its full-stack view. Dynatrace automatically discovers, maps, and monitors every component of an organization's full stack, from the application to the underlying infrastructure and the experience of all users.

In terms of hybrid cloud management, Dynatrace's offering of just a single agent is invaluable. OneAgent sends all captured monitoring data to an organization's monitoring environment for

analysis. A monitoring environment in Dynatrace terms is analogous to an analysis server that provides all application-performance analysis functionality, including all dashboards, charts, reports, and other tools. The Dynatrace architecture enables it to monitor software as a service (SaaS), on-premises, or even US government environments (Dynatrace has moderate Federal Risk and Authorization Management Program [FedRAMP] authorization). Omdia likes the fact that each environment that is monitored with Dynatrace is identified with a unique character string—the environment ID. The Dynatrace application programming interface (API) relies heavily on environment IDs to ensure that it pulls monitoring data from and pushes relevant external events to the correct Dynatrace environments.

Dynatrace's third strongest subcategory was public cloud management, where it scored 87%. The Dynatrace Clouds app enables customers to manage cloud monitoring across different cloud providers and other applications. The app allows customers to observe multiple cloud environments, their instances, resources, cost analysis, health, and optimization, as well as display the results in a single pane of glass. The Dynatrace OneAgent discovers all the components and dependencies in a customer's application environment and, using Dynatrace's patented Smartscape technology, simultaneously builds an interactive map of how everything is interconnected. Dynatrace also supports OTel instrumentation and is also one of the top contributors to the project. Visualizations can be built dynamically and automatically without any need for manual configuration, additional instrumentation, or scripts. Davis CoPilot powers users to build dashboards using natural language, translating questions into queries, and instantly delivering results and visualizations. Smartscape provides 100% end-to-end observability into all application components and dependencies. Dynatrace integrates with AWS (CloudWatch), Azure (Monitor), GCP (Google Cloud Operations), managed Kubernetes, Cloud Foundry, Alibaba, Oracle, IBM, and VMware Tanzu.

Limitations

Like most vendors in this report, Dynatrace's weakest subcategory was environmental sustainability management, where it scored 72%.

HPE (Omdia recommendation: Challenger)

HPE should appear on your shortlist if:

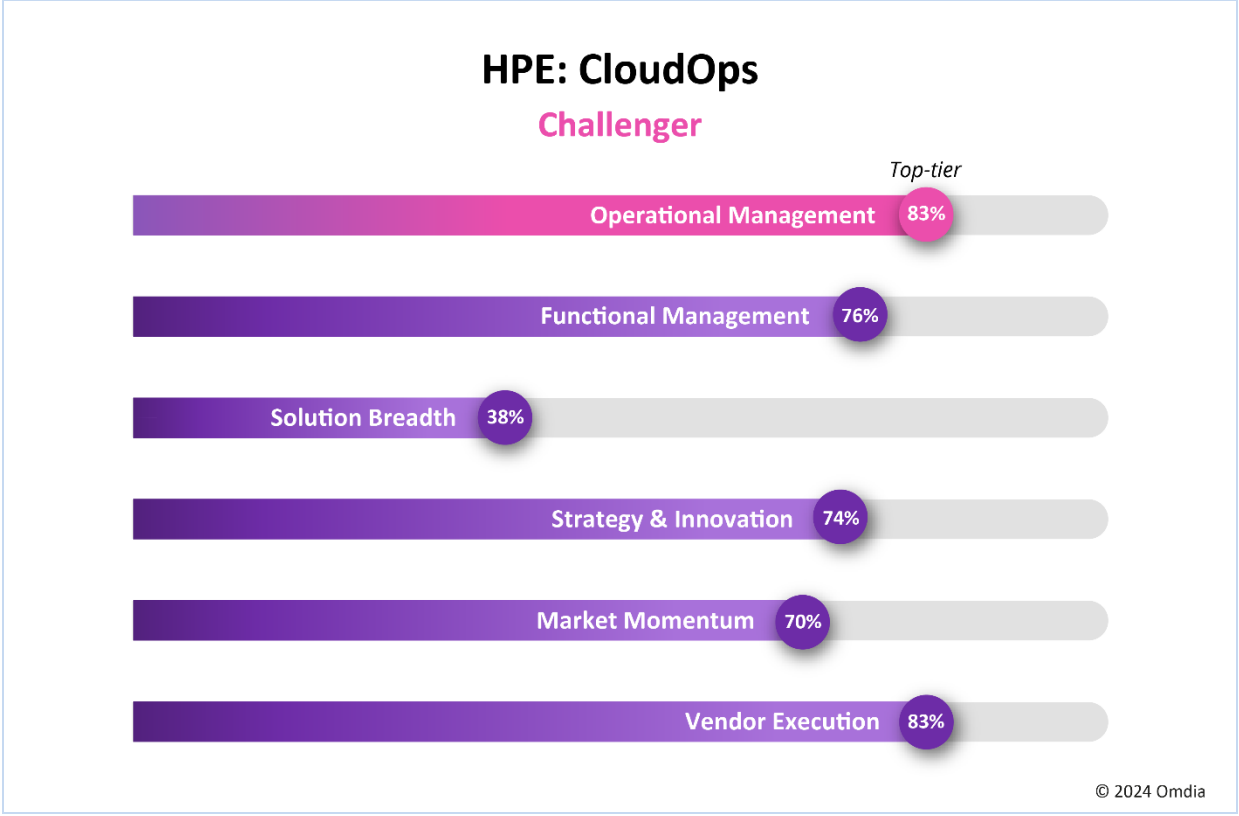
- You are looking for an edge-to-cloud technology vendor with a good all-around capability in technology management.

Overview

HPE is classified as a challenger in this first Omdia Universe on CloudOps with scores of 74% for capabilities and 76% for strategy and execution and with a solution breadth score of 38%. HPE acquired OpsRamp in 2023, enabling HPE to simplify its management of complex IT environments. OpsRamp's software includes hybrid discovery and observability of the entire IT estate from the edge to the data center and to the cloud; AI-driven event management to detect and resolve issues faster while reducing alert noise; and intelligent automation of IT processes to improve IT service quality and efficiency while reducing redundant activities and ensuring audit or compliance policies. This research project was started in June 2024, and at that stage, HPE had not acquired Morpheus Data and was, therefore, not considered part of HPE's submission. Omdia considers that Morpheus Data adds to HPE's CloudOps capabilities, particularly in terms of hybrid cloud management and

orchestration. Omdia cannot definitely state what impact Morpheus Data's inclusion in this research would have yielded, but it is a reasonable assumption that HPE would have a higher score and maybe even a higher classification.

Figure 6: Omdia Universe ratings—HPE



Source: Omdia

Strengths

HPE's joint two strongest subcategories were observability and monitoring and data management, where it scored 88%. In observability and monitoring, HPE automatically discovers resources, and these discovered resources are monitored according to defined resource management policies. When an alerting event that satisfies the management policy occurs, it is handled by the event management and remediation subsystem. Event management involves the following actions, depending on context. One of the approaches to simplify management that HPE has developed uses event aggregation using monitoring templates. These can generate alerts, event suppression for unwanted alerts, and event correlation (correlates similarity-based events and co-occurrence-based events using machine learning [ML]). HPE recently acquired OpsRamp, which provides 360° visibility across the data center, multicloud, and cloud native infrastructure using agent-based, agentless, API-based, and custom monitoring techniques. All the discovery is implemented using an agentless mechanism via HPE's instrumentation, the "OpsRamp Gateway." This is a software appliance hosted in the customer data center. For public clouds, it is a B2B integration using the customer's cloud native API/software development kit (SDK) model. Omdia likes the acquisition of OpsRamp as OpsRamp supports ingestion of telemetry data from Prometheus, metrics, logs, and traces data from OTel. Another key capability is the number of out-of-the-box monitoring templates that capture

behavioral and performance metrics for enterprise applications, servers, networks, storage, and database instances across hybrid and multicloud environments.

In data management, a key strength is that only required data is collected and stored for IT operations management on managed devices and applications. The collected data is limited to device performance metrics, performance and failure events, and configuration information. HPE has strict multi-tenancy controls implemented to ensure strict data isolation between customers is maintained. All data transmitted between the agent and gateway and the cloud is encrypted with TLS v1.2 standards. Resource credentials are stored in the cloud, encrypted using 2048-bit RSA encryption. Personally identifiable information (PII) is not collected. OpsRamp is hosted in colocation facilities provided by two US-based data center providers. Each provider has its own security certifications including serial-attached SCSI (SAS) and Statement on Standards for Attestation Engagements (SSAE).

HPE's third strongest subcategory was hybrid cloud management with a score of 87%. OpsRamp enables customers to view IT assets across hybrid infrastructures in a single interface. This allows customers to manage cloud resources with auto-discovery and hands-free administration of monitoring templates. The dynamic nature of clouds is also catered for as OpsRamp supports the creation of schedules based on how fast cloud environments are changing. Omdia likes the ability to understand how different workloads are performing across the IT environment and stream third-party monitoring metrics, logs, and alarms into OpsRamp for effective management of infrastructure as a service (IaaS) resources. Finally, OpsRamp supports the concept of service maps for applications hosted across multiple cloud services and maintains availability by routing issues to the right teams using alert escalation policies.

Limitations

The weakest subcategory for HPE was environmental sustainability management, which was the weakest average subcategory for the majority of vendors. However, while environmental sustainability management was HPE's weakest subcategory, this does not reflect HPE's position as HPE omitted to include a response to the question "Please explain in general terms how the solution provides environmental sustainability management capabilities," and this affected its score.

Huawei (Omdia recommendation: Leader)

Huawei should appear on your shortlist if:

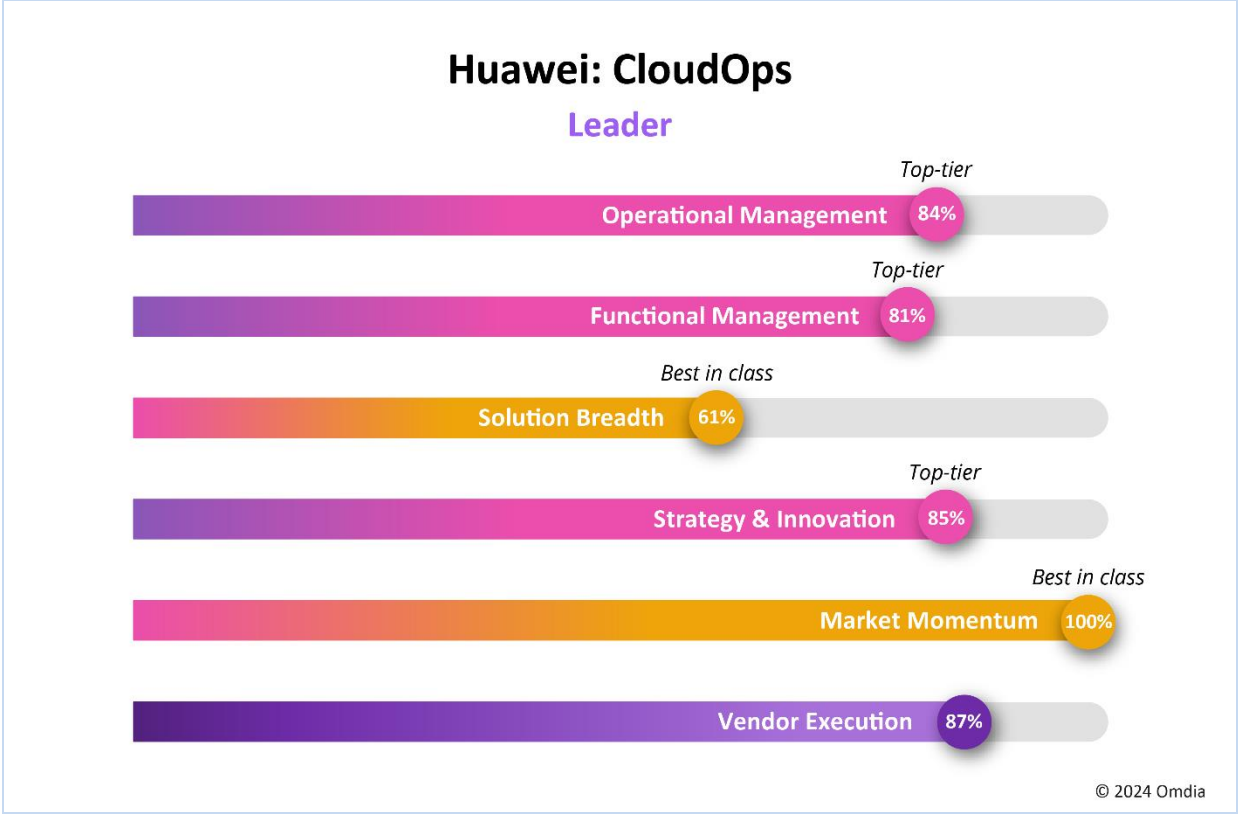
- You are looking for a comprehensive CloudOps solution.

Overview

Huawei is classified as a leader in the Omdia Universe with an unweighted capability score of 79%, a strategy and execution score of 90% (the leading score for strategy and execution), and a solution breadth score of 57%. Huawei also recorded six top three subcategory leading scores, making it the joint top vendor in terms of top three subcategory scores. One of Huawei's key strengths is that it offers both a public cloud and a private cloud capability, delivering a consistent and unified experience. In fact, this unified approach supports agile development for cloud native applications, which enables businesses to be more responsive to market changes and customer demands. Another aspect of Huawei's solution is that it also allows for elastic scaling to meet fluctuating

business needs. However, Omdia considers Huawei's approach to digital sovereignty to be particularly noteworthy. Huawei Cloud Stack addresses the critical need for data security by allowing sensitive information to be stored and processed within the customer's own infrastructure.

Figure 7: Omdia Universe ratings—Huawei



Source: Omdia

Strengths

Huawei's strongest subcategory with 90% was observability and monitoring. Huawei Cloud Stack provides full-stack multidimensional monitoring to provide customers with comprehensive management capability. The full-stack monitoring covers full-stack capabilities for a wide range of resource objects—for example, physical devices, cloud resource pools, cloud services, cloud resources, and applications. The multiple dimension aspect refers to what Huawei uses as the data sources; these include alarms, metrics, logs, and tracing data. Huawei Cloud Stack's ManageOne operates as the cloud management platform (CMP) and plays an important role in both observability and monitoring. Omdia likes how Huawei provides enterprise customers with the unified management of enterprise private cloud resources as well as public cloud resources. Huawei Cloud Stack uses fine-grained authorization by operation, which includes a compliance management capability, and it provides a unified orchestration of cloud resources between Huawei Cloud Stack and Huawei Cloud.

Huawei's second strongest subcategory with 89% was data management. Huawei Cloud Stack monitors and scores data quality from six dimensions: integrity, effectiveness, timeliness, consistency, accuracy, and uniqueness. It automatically detects quality problems and generates quality rules based on sample data. With the help of AI, the efficiency of data quality operation

configuration has been significantly improved. Omdia likes the fact that quality rules can be generated based on data standards. Single-column, cross-column, cross-row, and cross-table analysis is supported. Omdia likes the fact that Huawei compares data from different IT systems line by line, enabled by Huawei Cloud Stack's cross-source engines, which also supports statistical result reconciliation and analysis.

Huawei's third strongest subcategory was security management with a score of 87%. Huawei Cloud Stack launched a brand-new security architecture that contains one center and seven layers of defense, providing an end-to-end solution covering everything from platform security to tenant security. The security operations center, which Huawei calls SecMaster, is like the brain of security. It keeps an eye on all data generated across the platform. Omdia likes the way that SecMaster spots any threats; it takes action immediately. Huawei claims it can help handle 99% of security events automatically. The seven layers of defense cover physical devices, identity authentication, networks, applications, servers, data, and operations and management. Huawei's cloud native security system is combined with security products from ecosystem partners to ensure full-stack security. Huawei DevCloud, one of the most important components of Huawei Cloud Stack's basic solutions, is a one-stop cloud DevOps platform based on the successful practices of Huawei's R&D cloud. The development team uses the cloud service model on demand and performs project management, configuration management, code check, compilation, build, test, deployment, and release in the cloud. Omdia likes Huawei's multilevel organization model that can support up to five levels. Huawei also supports virtual data centers (VDCs) and can attribute these to the multilevel departments of enterprises. Another key security capability is the concept of multidimensional domain-based management. Using this approach, permissions can be isolated by organization, location, and resource type. As previously mentioned, the fine-grained permissions management is supported for cloud management and service operations. Roles can be customized for easier permissions management. Huawei supports standard interconnection with the customer's security protocols. Three typical protocols, LDAP, CAS, and SAML, are delivered preconfigured. Finally, Omdia considers Huawei's unified permissions management worthy of note; this enables users and permissions to be managed centrally, and single sign-on (SSO) is also supported.

Limitations

Huawei's weakest subcategory with 61% was environmental sustainability management. However, this weakness was in line with most of the vendors in the report. In Omdia's view, this is an area of increasing importance that will become a core capability of CloudOps within the next couple of years.

IBM (Omdia recommendation: Leader)

IBM should appear on your shortlist if:

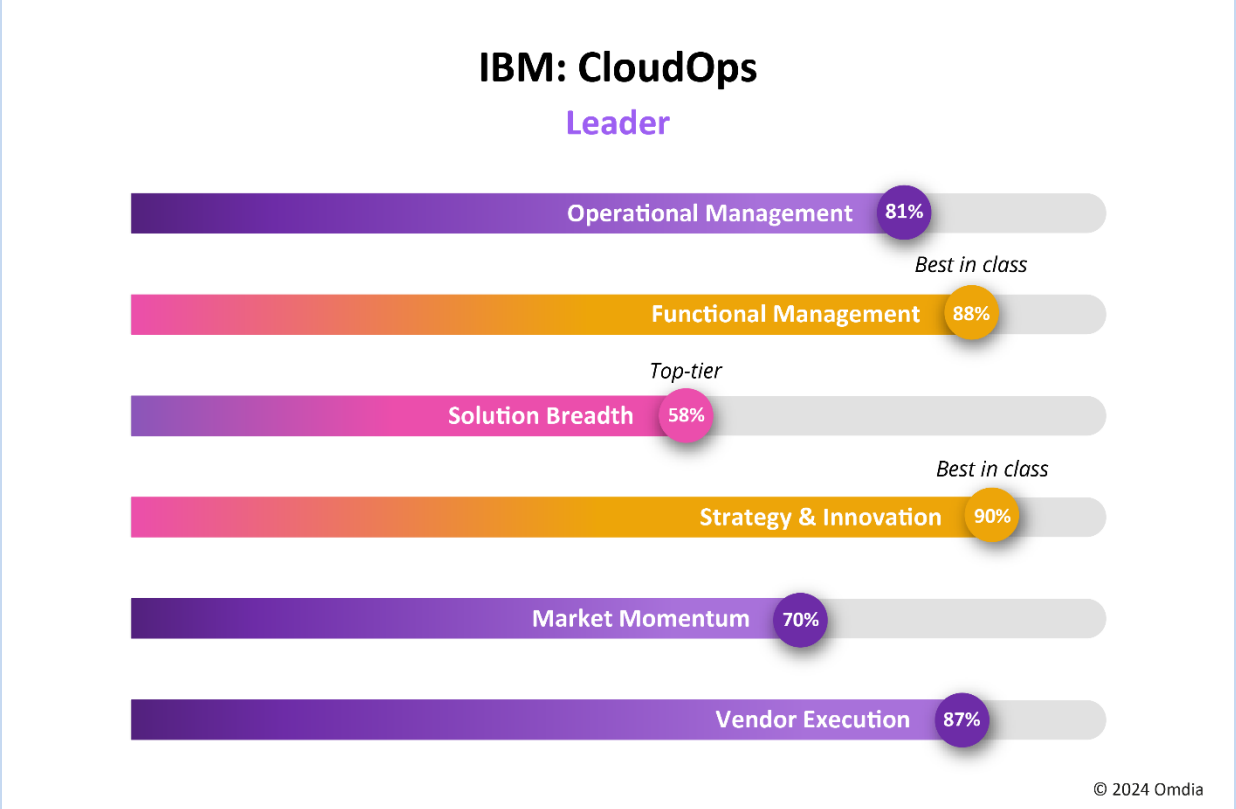
- You are looking for a comprehensive and consistent CloudOps solution from the leader in the Omdia Universe 2025.

Overview

IBM is classified as a leader in the Omdia Universe with an unweighted capability score of 81%, a strategy and execution score of 83%, and a solution breadth score of 58%. IBM is also the clear leader in CloudOps. IBM recorded five top three subcategory scores, and two of these were the top

subcategory scores. IBM also recorded the most consistent score, with the difference between its highest-scoring subcategory and lowest-scoring subcategory being just 15 percentage points.

Figure 8: Omdia Universe ratings—IBM



Source: Omdia

Strengths

IBM's strongest subcategory with 92% was observability and monitoring. Omdia considers IBM Cloud Monitoring a comprehensive solution that enables monitoring of cloud, Kubernetes, and VM infrastructure, applications, and services, including managed service for Prometheus. Omdia also likes the fact that IBM monitors multicloud environments in a single dashboard using agents running on other clouds. One of the areas that observability is just beginning to penetrate in other vendor solutions is observability for Kubernetes. IBM has supported the ability to monitor the status, health, and performance of clusters, workloads, and pods, as well as prioritize issues with actionable insights from live logs and resource manifests with built-in remediation steps for some time. Additionally, customers can optimize resource utilization by understanding cluster capacity and right-sizing workloads. The key aspect Omdia considers worthy of note is IBM's centralized Prometheus monitoring with remote write for scale and long-term retention, and extended monitoring to hundreds of applications and services using Prometheus exporters or custom metrics. IBM provides the ability to identify health and performance issues in bare metal hosts, IBM Cloud VSIs, or other VMs, such as VMware, along with support for zLinux and Windows environments. In conclusion, IBM Cloud Monitoring provides a single operational solution for workloads deployed in a multicloud environment by deploying agents to the resources deployed outside IBM Cloud and sending metrics back to the managed service.

IBM's second strongest subcategory with 90% was environmental sustainability management. IBM was one of a small number of vendors that scored highly in this subcategory. The IBM Cloud Carbon Calculator is an AI-informed capability, based on the greenhouse gases (GHG) protocol available to users via dashboard and API. It enables users to measure, track, manage, and help report carbon emissions associated with the customer's use of IBM Cloud. The offering aims to enable organizations to track and visualize greenhouse gas emissions across various workloads down to the cloud service level. Omdia likes the simplicity with which users can access this, with just a few clicks, to analyze emissions trends and generate insights to make more informed decisions and take timely and specific actions that can further address GHG emissions associated with workloads on the IBM cloud. Users may also use the API to pull GHG data into other sustainability applications for further analysis. This offering complements IBM's existing sustainability solutions with a portfolio of technology and expertise, including the IBM Envizi ESG Suite, IBM Turbonomic, IBM Planning Analytics with Watson, and IBM LinuxONE, all designed to help organizations accelerate sustainability and business objectives.

IBM's third strongest subcategory with 89% was security management. One of the key strengths of IBM's solution is that identity and access management (IAM) roles define allowable actions for a user or service ID within the context of a service. These roles can be mapped to specific permissions or operations, such as calling APIs or accessing dashboards. Actions are mappings of IBM Cloud IAM roles to use cases that require permission to perform certain tasks on resources. Allowable actions change based on the service being accessed because each service defines how a role maps to its use.

Limitations

IBM's weakest subcategory with 76% was public cloud management. IBM's score did not indicate a significant weakness; rather, it was just less comprehensive in how it manages other public clouds than others in this report. However, its score suggests that IBM was above average for public cloud management.

LogicMonitor (Omdia recommendation: Challenger)

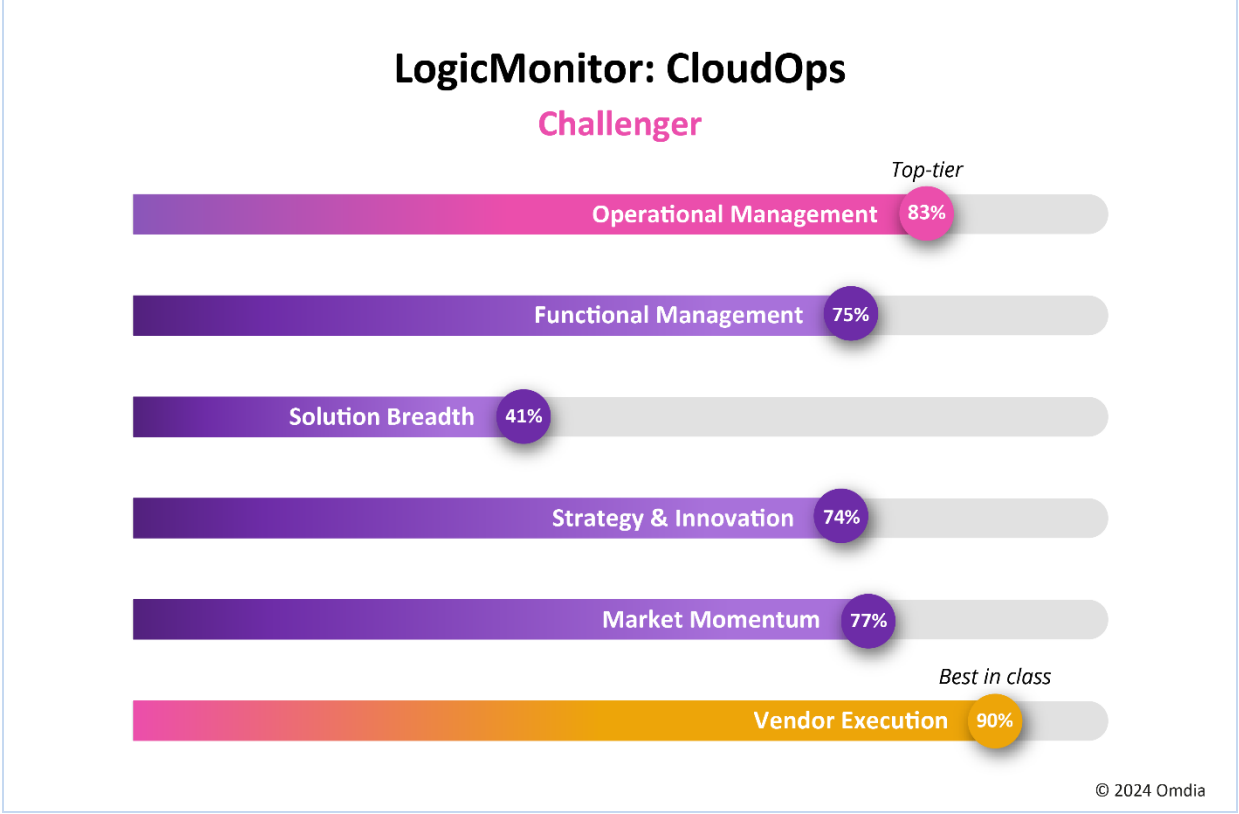
LogicMonitor should appear on your shortlist if:

- You are looking for a CloudOps solution with market-leading automation capabilities.

Overview

LogicMonitor is classified as a challenger in the Omdia Universe for CloudOps. LogicMonitor scored an unweighted total capability score of 73%, a strategy and execution score of 80%, and a solution breadth score of 41%.

Figure 9: Omdia Universe ratings—LogicMonitor



Source: Omdia

Strengths

LogicMonitor's strongest subcategory was automation, where it scored 90%. Omdia considered LogicMonitor to have a good automation offering, but its plans for its capabilities were key to achieving this score. Over the next 12 months, LogicMonitor plans to advance automation through several initiatives. Omdia likes the introduction of automated diagnostics and remediation, which will gather diagnostic data during alerts and enable automated actions like server restarts and disk cleanup, with integrations for tools like Ansible. LogicMonitor has already developed an AI assistant called Edwin AI, and its capabilities will be expanded to improve event correlation, integrate with more third-party systems, and provide enhanced GenAI-powered natural language insights and remediation recommendations. Another key aspect of why LogicMonitor scored so highly was its UI and the planned improvements. By mid-2025, LogicMonitor will streamline workflows, reduce complexity, and support better integration with third-party visualization tools. Additionally, LogicMonitor will develop new GenAI features to further enhance automation and insights.

LogicMonitor's second strongest subcategory was public cloud management, where it scored 84%. LogicMonitor allows users to define service levels in its platform and track the percentage of time those levels are met. It supports calculating and tracking service level indicators (SLIs) across hybrid infrastructure, websites, and applications, helping organizations meet their business objectives. Omdia considers LogicMonitor's key features to be customizable and pre-configured SLI calculations, aggregate SLI tracking through Service Insights, automatic service creation via tracing, and real-time SLA reporting. Additionally, LogicMonitor provides proactive monitoring with AI-driven anomaly

detection, rapid incident response to reduce downtime, and a unified view of IT operations for efficient service-level management. It also offers customizable SLAs and support tiers to meet specific organizational needs, along with cost savings recommendations into AWS and Azure compute and storage resources.

LogicMonitor's third strongest subcategory was observability and monitoring, where it scored 83%. LogicMonitor offers observability through its SaaS-based hybrid observability platform called LM Envision. It provides a single platform for observability across on-premises, hybrid cloud, multicloud, and containerized environments. LM Envision gives organizations visibility into their IT environments through metrics, events, logs, traces, synthetics, and transactions. Omdia likes the fact that LogicMonitor uses an agentless data collection technology that is lightweight and easy to deploy. Customers only need to install a LogicMonitor Collector, which automatically discovers and monitors resources within their IT environments using standard monitoring protocols.

Limitations

LogicMonitor's weakest subcategory was environmental sustainability management with a score of 72%, which was just above the cohort average for the overall lowest-scoring subcategory. However, this is an area where customers are leveraging the platform today, and the company is focusing on developing these capabilities in the coming year, with a special emphasis on helping customers' data center cooling systems to improve energy efficiency, reduce waste, and align to emerging compliance and reporting requirements.

ManageEngine (Omdia recommendation: Challenger)

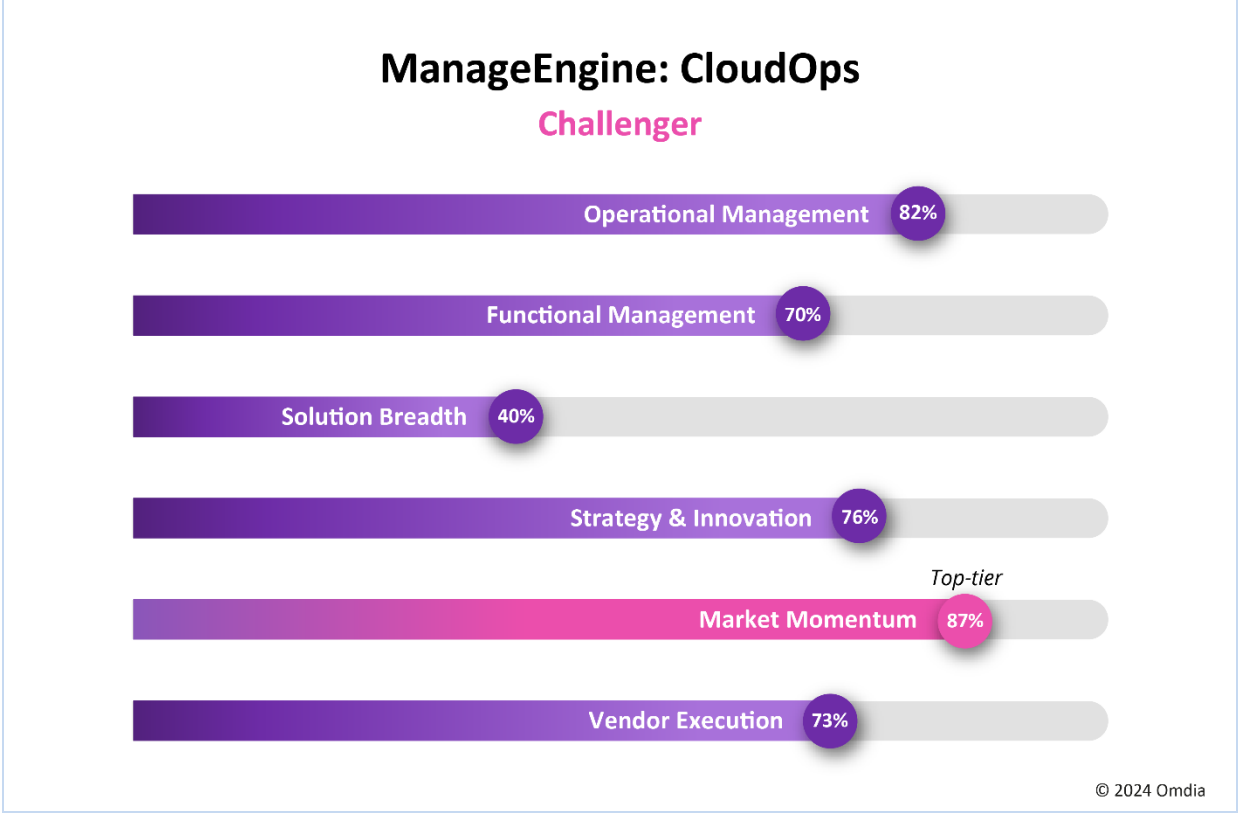
ManageEngine should appear on your shortlist if:

- You are looking for a solution that provides leading observability and monitoring capabilities.

Overview

ManageEngine is classified as a challenger in the Omdia Universe for CloudOps. ManageEngine scored an unweighted capability score of 72%, a strategy and execution score of 79%, and a solution breadth score of 40%. Overall, ManageEngine's performance was solid; it recorded the top three leading scores in a number of subcategories but needs to deliver a more consistent capability across all subcategories if it is to move closer to the leader's classification.

Figure 10: Omdia Universe ratings—ManageEngine



Source: Omdia

Strengths

ManageEngine's strongest subcategory with 93% was observability and monitoring. ManageEngine's full-stack observability solution offers real-time insights based on data, covering the entire infrastructure from network to security layers. It delivers end-to-end visibility across legacy and virtual servers, network devices, cloud and cloud native applications, and cloud services. This enables advanced analytics, proactive issue identification, root cause analysis, and automated workflow remediation. From an observability standpoint, ManageEngine's CloudOps solution provides descriptive visualization for operational trend analysis, resource planning optimization, and AI and ML-powered anomaly detection for addressing potential issues. Omdia considers that the ability for customers to perform infrastructure troubleshooting and incident management more efficiently is a noteworthy strength of ManageEngine. Another capability Omdia likes is ManageEngine's relationship mapping feature, which provides enterprises with comprehensive visibility into their cloud environment, enabling them to identify dependencies across resources. ManageEngine has automated the mapping of these relationships, which fosters a well-orchestrated IT estate, integrated seamlessly with service management tools. This enables enterprises to visualize topologies, quickly identify affected components, and expedite root cause analysis.

ManageEngine's second strongest subcategory with 86% is automation. Omdia considers that ManageEngine's CloudOps solution orchestrates effective incident management across physical and virtual server workloads by centralizing a set of automation activities using its "Alarms Engine." The "Alarms Engine" evaluates the system events and data that correspond to the thresholds configured

and executes over 70 sequential action workflows, including executing scripts, managing resources (such as starting, stopping, or restarting resources), freeing up disk space, etc., on reaching the thresholds. Additionally, administrators can simulate automation and track the progress, run parallel actions on server instances, and get notified on successful execution.

ManageEngine's third strongest subcategory with 82% is hybrid cloud management. One of the areas ManageEngine focuses on from a hybrid cloud management perspective is ensuring business continuity by using its network management capabilities. It delivers this by leveraging topology-level insights and granular performance monitoring, such as latency, error rate, response time, throughput, and more, to understand network behavior and identify potential issues. Besides the abovementioned capabilities, ManageEngine's cross-network monitoring provides comprehensive oversight of critical network components, both in cloud and on-premises environments.

Limitations

ManageEngine's weakest subcategory with 56% was data management. ManageEngine's solution has not yet evolved to provide management of the data layer beyond the basic level. However, Omdia believes this could be addressed by integrating partner solutions with ManageEngine's broader CloudOps solution.

Microsoft (Omdia recommendation: Leader)

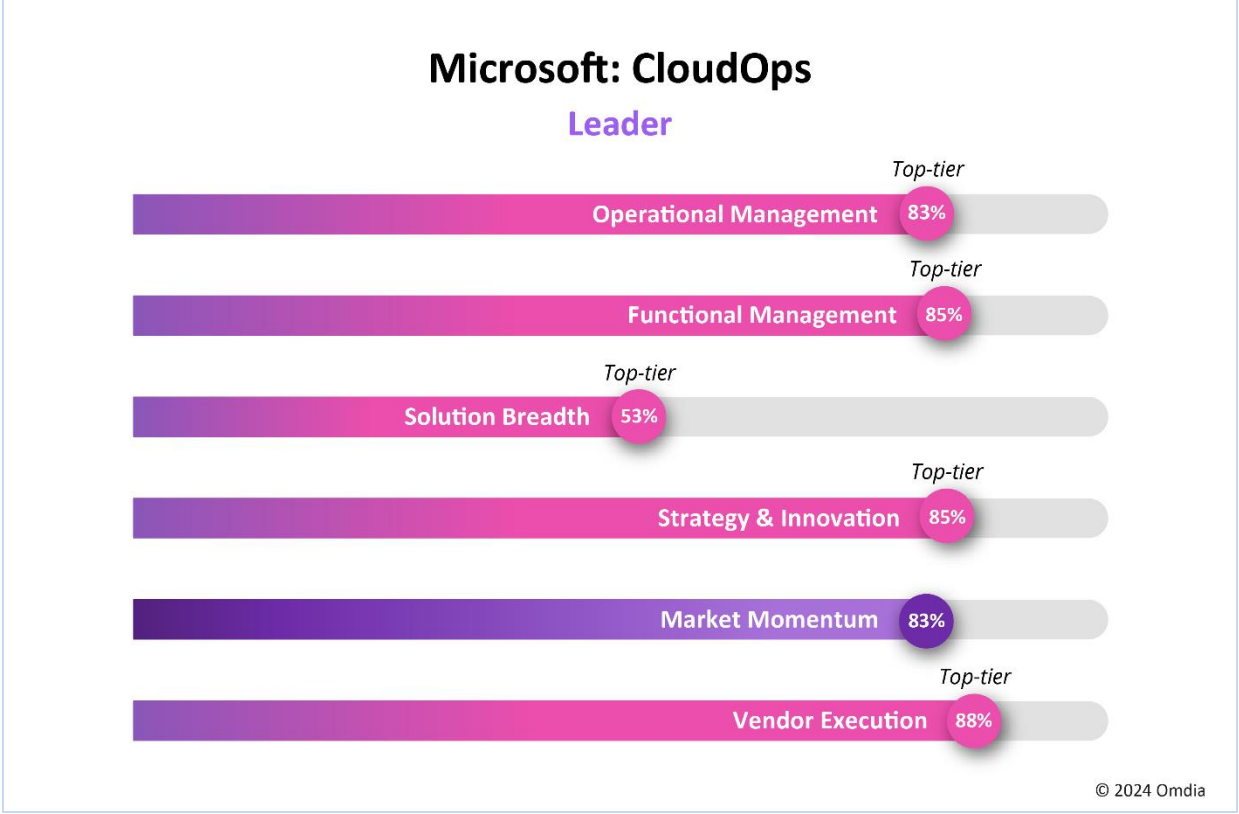
Microsoft should appear on your shortlist if:

- You are looking for a consistent and comprehensive solution provider with the most advanced environmental sustainability management capability.

Overview

Microsoft is classified as a leader in the Omdia Universe with a total unweighted capability score of 79%, a total strategy and execution score of 85%, and a solution breadth score of 51%. Microsoft was one of the most consistent vendors in the Universe in terms of capability scores, with its score's variation being 17 percentage points from the highest to the lowest capability subcategory score. Microsoft was also consistent in strategy and execution metrics, where it scored a total of 85%, with a variance of only 5 percentage points across the three subcategories of market execution, customer experience, and scale and innovation.

Figure 11: Omdia Universe ratings—Microsoft



Source: Omdia

Strengths

Microsoft's strongest subcategory was environment sustainability management, where it scored 91%. Microsoft Cloud for Sustainability includes two plans for Microsoft Sustainability Manager, Microsoft Sustainability Manager Essentials, and Microsoft Sustainability Manager Premium. These plans offer organizations flexibility and choices in sustainability reporting and management. This flexibility enables organizations to ensure that they can align environmental sustainability with their own unique goals. Omdia likes the fact that these plans provide tailored solutions to empower organizations on their sustainability journey. The premium plan covers scope 1, 2, and 3 calculations as well as carbon estimation calculations. With Microsoft Sustainability Manager Essentials, you have access to emissions data for premium categories (scope 3 category 10, 11, 14, and 15), including ingestion of precalculated emissions. Ingestion and calculation capabilities using the underlying activity and reference data sets are part of Microsoft Sustainability Manager Premium and are not available in Microsoft Sustainability Manager Essentials. Omdia likes the free trial capability, and after the trial, if customers purchase Microsoft Sustainability Manager Essentials, premium data will not be displayed in their environment. The data for the premium features is not removed, but it is no longer visible. If you purchase Microsoft Sustainability Manager Premium, the functionality is added back by updating your environment via Power Platform Admin Center or Microsoft Cloud Solution Center.

Microsoft's second strongest subcategory was data management, where it scored 88%. Data collection rules (DCRs) are part of an extract, transform, and load (ETL)-like data collection process

that improves on legacy data collection methods for Azure Monitor. This process uses a common data ingestion pipeline, the Azure Monitor pipeline, for all data sources and a standard method of configuration that is more manageable and scalable than other methods. Some of the key capabilities of Microsoft's solution that Omdia considers to be noteworthy include:

- Consistent method for configuration of different data sources.
- Ability to apply a transformation to filter or modify incoming data before it is stored.
- Scalable configuration options supporting infrastructure as code and DevOps processes.
- Option of edge pipeline in your own environment to provide high-end scalability, layered network configurations, and periodic connectivity.

Microsoft's third strongest subcategory was observability and monitoring, where it scored 85%. Azure Monitor is a comprehensive monitoring solution for collecting, analyzing, and responding to monitoring data from both cloud and on-premises environments. Azure Monitor can be used by customers to maximize the availability and performance of applications and services. Azure Monitor collects and aggregates the data from every layer and component of an organization's environment across multiple Azure and non-Azure subscriptions and tenants. It stores this data in a common data platform for consumption by a common set of tools that can correlate, analyze, visualize, and/or respond to the data. You can also integrate other Microsoft and non-Microsoft tools.

Limitations

Microsoft's weakest subcategory was security management, where it scored 74%, which is not a poor score, but by comparison to some of the other vendors, Microsoft's capabilities were not as comprehensive.

Mirantis (Omdia recommendation: Challenger)

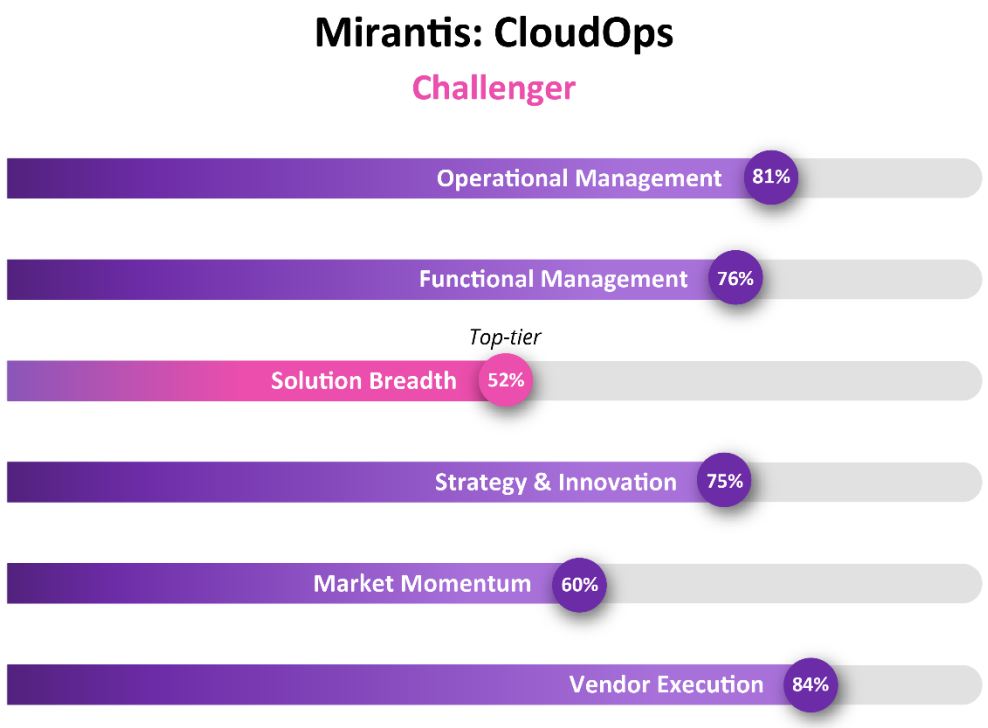
Mirantis should appear on your shortlist if:

- You are looking for an open source based solution that delivers all the required capabilities with top-rated observability and monitoring capability.

Overview

Mirantis is classified as a challenger in Omdia's Universe with an unweighted capability score of 75%, a strategy and execution score of 74%, and a solution breadth score of 52%. Mirantis was the only challenger to score above 50% for its solution breadth and was the top vendor in terms of customer satisfaction scores from the independent survey.

Figure 12: Omdia Universe ratings—Mirantis



Source: Omdia

Strengths

Mirantis's strongest subcategory with 90% was observability and monitoring. Omdia likes the fact that the new generation of Mirantis products (MKE 4 and 2A) are Kubernetes-native systems for composing Kubernetes platforms from 100% open source components. These products offer declarative lifecycle management on any infrastructure, whether it is hybrid, multi-cluster, multicloud, or edge. They let users modify templates and blueprints quickly and easily define complete Kubernetes platforms that are optimized to meet technical and business use cases and requirements. Omdia considers that the management capabilities enabling customers to use Cluster API and Kubernetes operators to build, scale, modify, and update these platforms on any infrastructure are key capabilities. Cluster API supports a range of environments from bare metal and edge devices to private and public clouds. Mirantis's bedrock assumption is that observability and monitoring should be part of every platform under management. Therefore, its portfolio of composable solutions includes the Prometheus stack by default and Mirantis's own fully open source logging/monitoring/alerting solution called StackLight. Mirantis will also work with customers to adapt their preferred monitoring and observability solutions for management using their composable platform frameworks.

Mirantis's second strongest subcategory with 84% was edge cloud management and orchestration. Omdia's research *2024 State of Edge Computing: How industries are leveraging AI anywhere to unlock modern business* (n=1,300) shows the edge will be predominantly Kubernetes-based. Mirantis's 2A solution has been designed and built for Kubernetes environments. By default, 2A

templates can deploy and manage the lifecycle of Kubernetes clusters that have been optimized for near and far edge deployments. 2A builds platforms using k0s Kubernetes (Mirantis's original open source offering), which has zero dependencies and can run X86 or ARM with worker nodes as small as one CPU/vCPU and 0.5GB RAM. k0s also features control plane/worker separation and worker-to-control-plane tunneling, which simplifies networking for customers who want to create edge platforms with centralized control planes and workers anywhere. Omdia likes the fact that 2A enables GitOps-style management of edge platforms and provides continuous reconciliation of platform states to ensure against security and compliance risks and enable cluster self-healing for resilience.

Mirantis's third strongest subcategory with 82% was analysis and reporting. Mirantis provides composable open source components and integrations with private and public cloud services. This enables customers to define platforms that gather logs, metrics, time-series data, cost data, events, etc., transmit it efficiently, and then aggregate it for analysis. This makes the data reportable and actionable; for example, Mirantis provides a complete solution for FinOps, policy management, and governance of platforms.

Limitations

Mirantis's weakest subcategory with a score of 68% was environmental sustainability management. Mirantis's score was above the cohort average.

Nutanix (Omdia recommendation: Challenger)

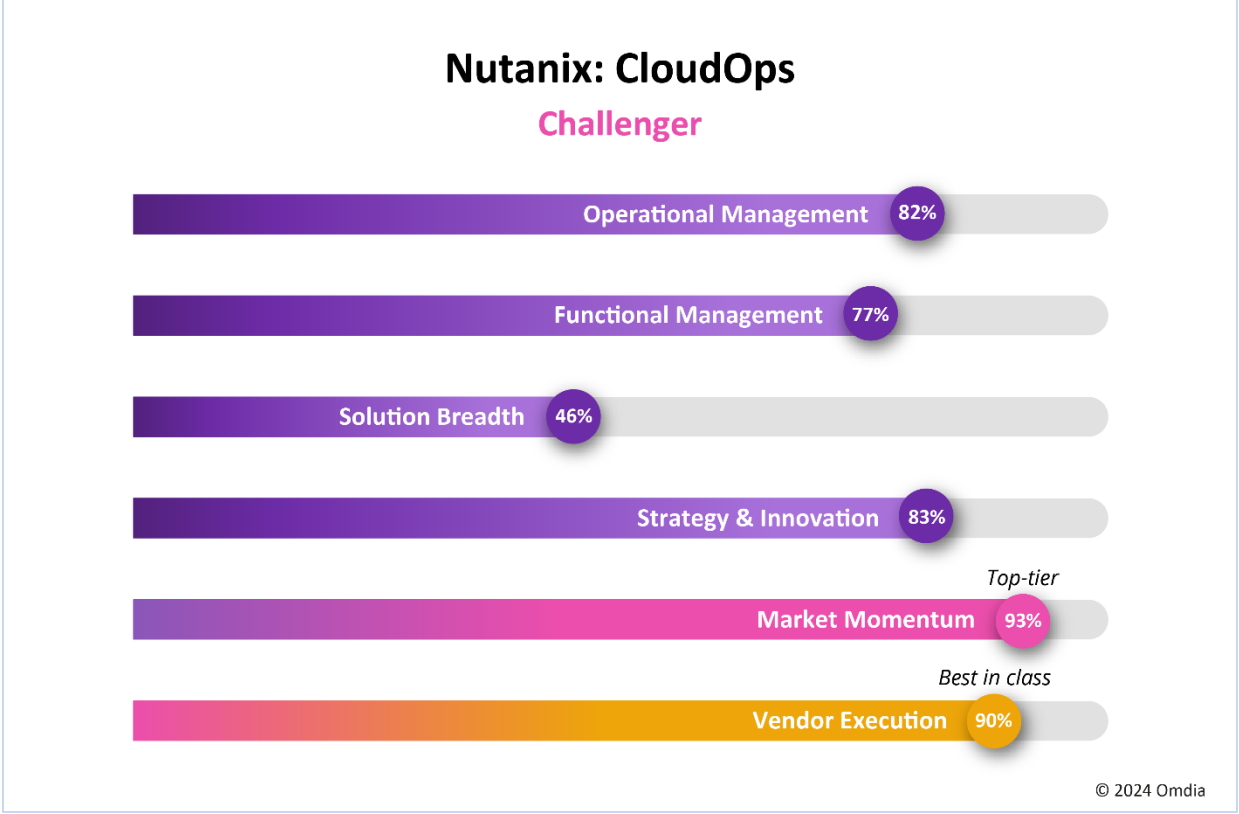
Nutanix should appear on your shortlist if:

- You are looking for strong data management capability as part of a solid CloudOps solution.

Overview

Nutanix is classified as a challenger in Omdia's CloudOps Universe with an unweighted capability score of 75%, a strategy and execution score of 88%, and a solution breadth score of 46%. Nutanix was just a few percentage points short of the leader classification.

Figure 13: Omdia Universe ratings—Nutanix



Source: Omdia

Strengths

Nutanix's strongest subcategory with 92% was data management. Omdia considers Nutanix's propriety software, called "Move," a key capability. "Move" enables customers to transfer workloads and the associated data across different environments. Omdia considers it worth noting that this works between clouds, as well as between on-premises and cloud environments. Nutanix was also the only vendor to fully support all the data management features, from data tiering to data for containers, data resiliency across environments, and the ability to manage the mean time to failure (MTTF) for the entire estate.

Nutanix's joint second strongest subcategory with a score of 85% was public cloud management and automation. In terms of public cloud management, Nutanix supports AWS, Azure, and GCP. Resources from these public clouds can be used to create and manage applications using Nutanix's blueprint and runbook technologies. These technologies allow IT admins to create applications with embedded lifecycle management actions to make deployment and management easy for end users. Nutanix also provides cost governance and security operations (SecOps) capabilities for the public cloud environments. Omdia also likes Nutanix's Multi-Cloud Automated Chargeback & Metering capability. This will automatically map resource consumption to cost centers, and any unassigned spending is tagged for further analysis and allocation. Furthermore, for on-premises resources, Nutanix has the ability to define rate cards at a granular level, based on which resource usage can be allocated back to cost centers.

Nutanix automation is one of the key pillars of its solution in automation. In addition to simple no-code automation capabilities for IT and non-IT users, Nutanix also provides advanced automation capabilities for platform engineering personas and DevOps use cases. With blueprints, customers can create intent-full application designs that have built-in automations for implementing day zero, one, and two operational activities. These automations can be done via a simple user interface or implemented as infrastructure as code.

Limitations

Nutanix's weakest subcategory, with a score of 60%, was environmental sustainability management. Nutanix's score was in line with the cohort average.

Oracle (Omdia recommendation: Leader)

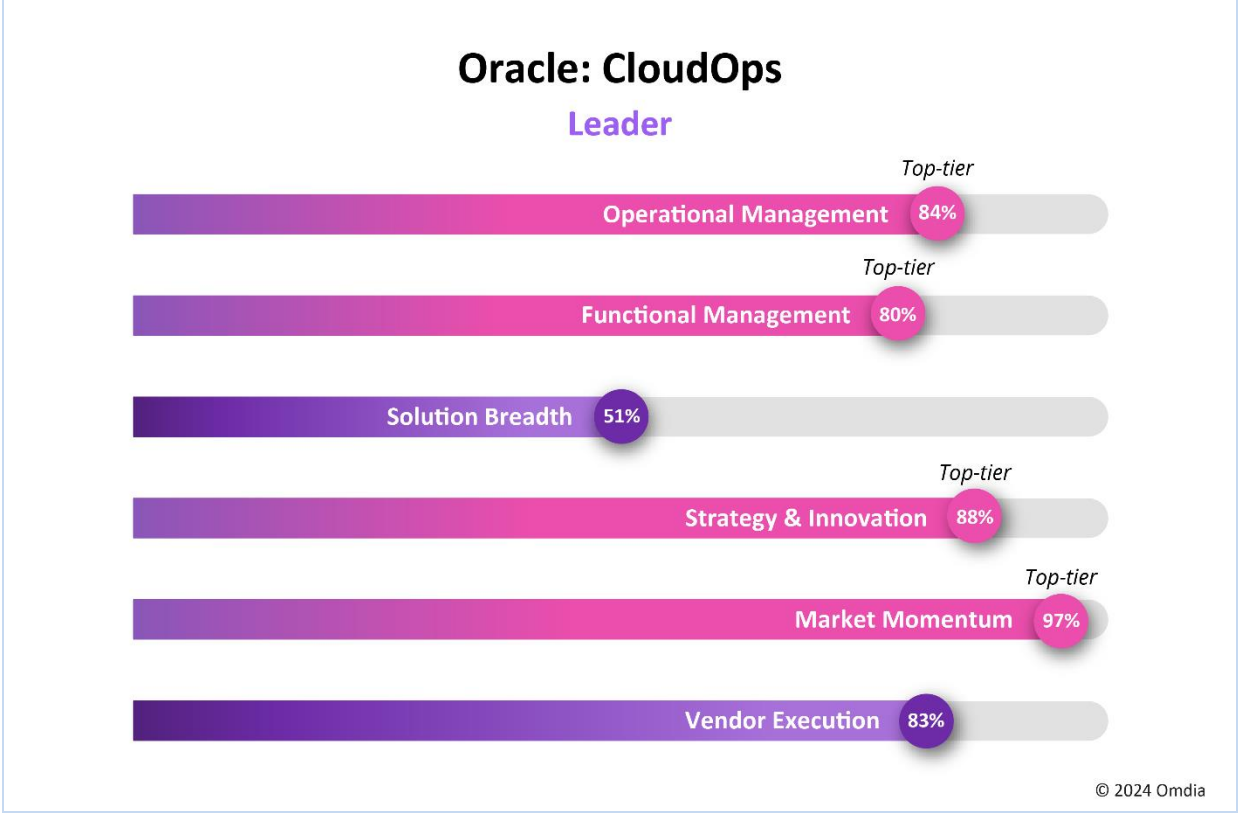
Oracle should appear on your shortlist if:

- You are looking for a strong security-focused CloudOps solution.

Overview

Oracle is classified as a leader in the Omdia CloudOps Universe with a total unweighted capability score of 78%, a strategy and execution score of 89%, and a solution breadth score of just above 50%. Oracle recorded the top three subcategory leading scores, and two of these were the top subcategory scores. Oracle also recorded the highest number of subcategory scores above the cohort average, 89%. An area where Oracle has a significant capability was in terms of its customer experience, where it scored an impressive 97%. Another area where Oracle scored in line with the leading vendors was environmental sustainability management. Oracle Cloud Infrastructure (OCI) offers a variety of tools and services to help customers track and reduce their carbon emissions. One example is Carbon Emissions Analysis, which is a visualization tool that allows commercial OCI customers to track their estimated carbon emissions. Additionally, Oracle Climate Change Analytics Cloud Service is a service that helps financial institutions calculate and analyze the impact of their carbon emissions on their investments.

Figure 14: Omdia Universe ratings—Oracle



Source: Omdia

Strengths

Oracle's strongest subcategory was observability and monitoring with a score of 93%. Oracle's Cloud Observability and Management Platform solution provides customers with the ability to monitor, analyze, and manage multicloud applications and infrastructure environments with full-stack visibility, prebuilt analytics, and automation. Omdia liked the full-stack data collection capabilities that support agent deployment and management capabilities for all environments (multicloud, on-premises, OCI, and cloud native environments). With a single-agent OS deployment, data can be collected for all services. The management agents provide data collection, processing, filtering, and data masking. The agent provides pluggable architecture using metadata-driven extensibility for any type of collection. Collection methods out-of-the-box include REST, JMX, JDBC, OS command, file, and Prometheus scraper. In addition, Oracle offers collection aggregation using a gateway as a single point for traffic to and from OCI and the ability to batch data efficiently with high scalability and resiliency. The management agent also offers data collection time processing, filtering, and masking. The management agent communicates with Oracle's services at fixed intervals to receive collection requests. All communications are initiated from the agent side as part of collection payload delivery. The management agent can also support real-time data collection using fast-work collection requests to collect data on demand at any time.

Oracle's second strongest subcategory with a score of 92% was data management. Oracle includes a deep observability capability in the database layer. Customers can move data in OCI without ingress/egress charges. Customers can also move between OCI and other cloud providers, but there

will be ingress/egress charges unless they are using Oracle Database on Azure or Oracle Database on Google Cloud (or the new AWS solution). The time it takes to move data between cloud providers depends on the throughput of the network connection. Omdia considers Oracle to be very strong in data management owing to its heritage of managing very large databases.

Oracle's third strongest subcategory was security management with a score of 87%. OCI has several security controls that are enforced cloud-wide for all OCI tenancies. This includes protection against distributed denial-of-service (DDoS) attacks, a hardware-based Root of Trust that validates all firmware prior to hardware provisioning, default encryption of all data stored and in transit, and a policy that all access is denied by default. OCI data centers provide strong physical security, and all remote access is carefully monitored with access being granted only as needed. Customers can import their own certificates or leverage the Oracle-provided certificates. For public endpoints, DigiCert is the trusted root certificate. For private endpoints, customers can leverage Oracle's internal certificates, which are trusted within OCI.

Limitations

Oracle's weakest subcategory was environmental sustainability management with a score of 58%. While this was the weakest performing subcategory, Oracle, as previously stated, has an environmental sustainability management offering that delivers the features organizations currently need. For example, its carbon emissions calculations provide resource-level granularity. The calculation method is spend-based and takes resource utilization and multiplies it by a previously determined carbon emissions factor. The subcategory looks specifically at the management of environmental sustainability, but Oracle has made commitments on how it is responding to the environmental sustainability challenge. Omdia considers its Design for the Environment (DfE) program an example of how Oracle is approaching the wider topic. DfE enables engineers to take environmental impacts into consideration during the design stage. The program aims to identify opportunities to achieve circular economy goals while meeting functional requirements. Oracle believes that sustainability efforts should begin early in the design process and the DfE program is centered on three KPIs: design for recyclability, design for reuse, and design for energy efficiency. Beyond this, Oracle has also pledged to power all Oracle Cloud regions worldwide with 100 percent renewable energy by 2025 and has already achieved this target in 16 regions worldwide, including all Europe, Middle East, and Africa (EMEA) cloud regions.

Red Hat (Omdia recommendation: Leader)

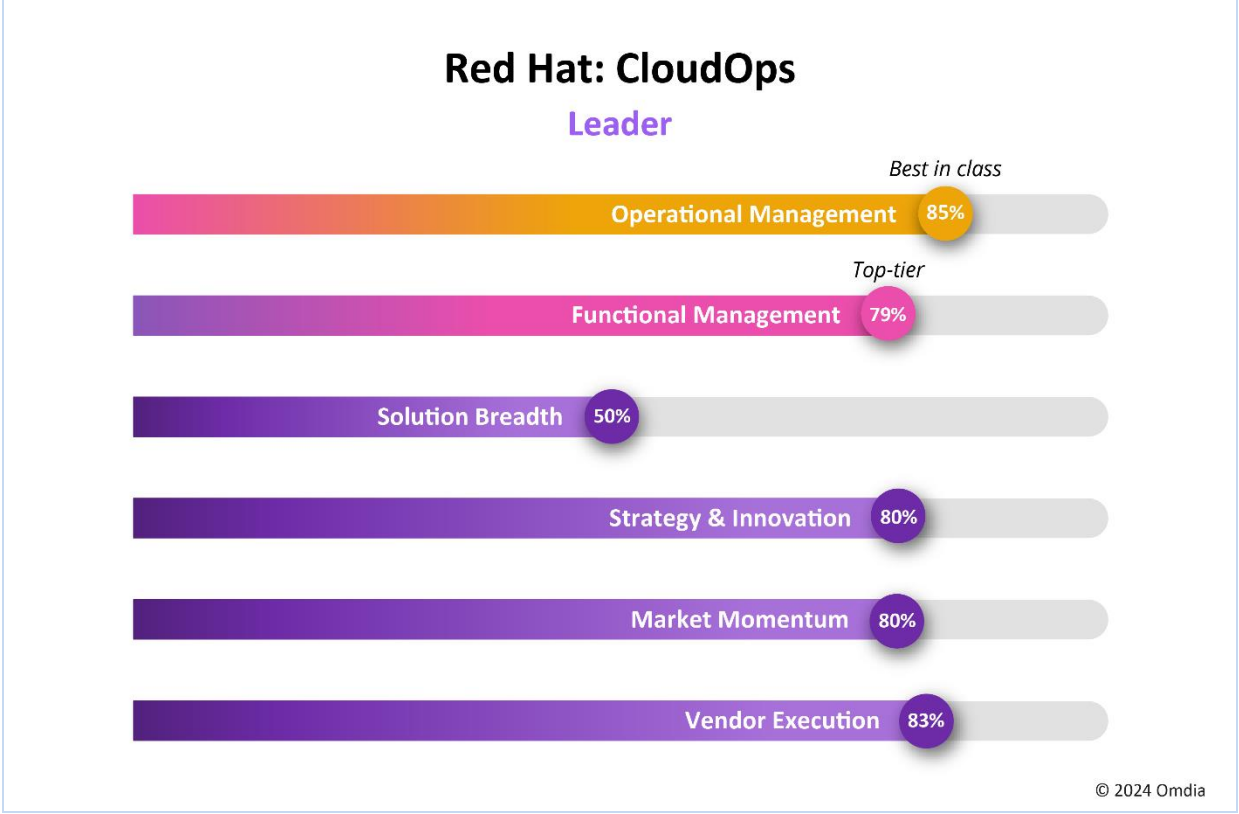
Red Hat should appear on your shortlist if:

- You are looking for an open source technology-based vendor with CloudOps capability that delivers market-leading automation.

Overview

Red Hat is classified as a leader with a total unweighted capability score of 78%, an execution and strategy score of 81%, and a solution breadth score of 50%. Red Hat is known for its leading open source technologies in the automation and observability markets. IBM acquired Red Hat in 2019 and has kept Red Hat separate from IBM. Testament to this is that both IBM and Red Hat have submitted entries for this Universe.

Figure 15: Omdia Universe ratings—Red Hat



Source: Omdia

Strengths

Red Hat's strongest subcategory with a score of 88% was automation. Red Hat Ansible Automation Platform is an end-to-end automation solution that helps enterprises configure systems, deploy software, and orchestrate advanced workflows across teams and IT environments. Ansible does this for a wide range of environments, from data centers, across clouds, to edge locations. Omdia likes the fact that Ansible Automation Platform includes all the tools needed to implement enterprise-wide automation, including an event-driven solution, analytics, content tools, and playbooks. It allows IT teams to centralize and control the IT infrastructure with a visual dashboard, role-based access control, and other features that help reduce operational complexity. Omdia considers the access to a Red Hat subscription, where customers get certified content from Red Hat's robust partner ecosystem, access to hosted management services, and life cycle technical support to be particularly noteworthy. Using this service, customers can create, manage, and scale automation across the entire organization.

Red Hat's second strongest subcategories were observability and analysis and reporting with a score of 86%. In observability and monitoring, Red Hat OpenShift Observability is a comprehensive set of observability capabilities that provides deep insights into the performance and health of OpenShift-based applications and infrastructure across any footprint. Red Hat covers all the core capabilities of any observability and monitoring solution. Red Hat enables customers to monitor the health and performance of applications running on Red Hat OpenShift by collecting and forwarding log events. Red Hat also supports distributed tracing so that customers can track, observe, and understand

service requests and transactions so as to optimize performance. Omdia calls out Red Hat's network observability capability, which enables customers to observe and analyze network traffic flows, assist with troubleshooting connectivity issues, and help optimize network performance of the clusters.

In terms of analysis and reporting, Red Hat OpenShift collects telemetry and configuration data about an organization's cluster and reports it to Red Hat by using the Telemeter Client and the Insights Operator. Telemetry is the term that Red Hat uses to describe the information being sent to Red Hat by the OpenShift Telemeter Client. Lightweight attributes are sent from connected clusters to Red Hat to enable customers to perform subscription management automation, monitor the health of clusters, assist with support, and improve customer experience. The Insights Operator gathers Red Hat OpenShift configuration data and sends it to Red Hat. The data is used to produce insights into potential issues that a cluster might be exposed to. These insights are communicated to cluster administrators on OpenShift Cluster Manager Hybrid Cloud Console.

Limitations

Red Hat's weakest subcategory was environment sustainability management, where it scored 61%. Omdia likes the cloud native capabilities Red Hat has developed in the form of the kube-green operator. Kube-green is an operator that helps reduce the CO2 footprint of an organization's Kubernetes clusters. It is a Kubernetes add-on that automatically shuts down and starts up some of an organization's resources at designated times when they are not required. It suspends resources during off-hours to help reduce CO2 emissions. Red Hat needs to extend this capability beyond just cloud native environments.

ServiceNow (Omdia recommendation: Challenger)

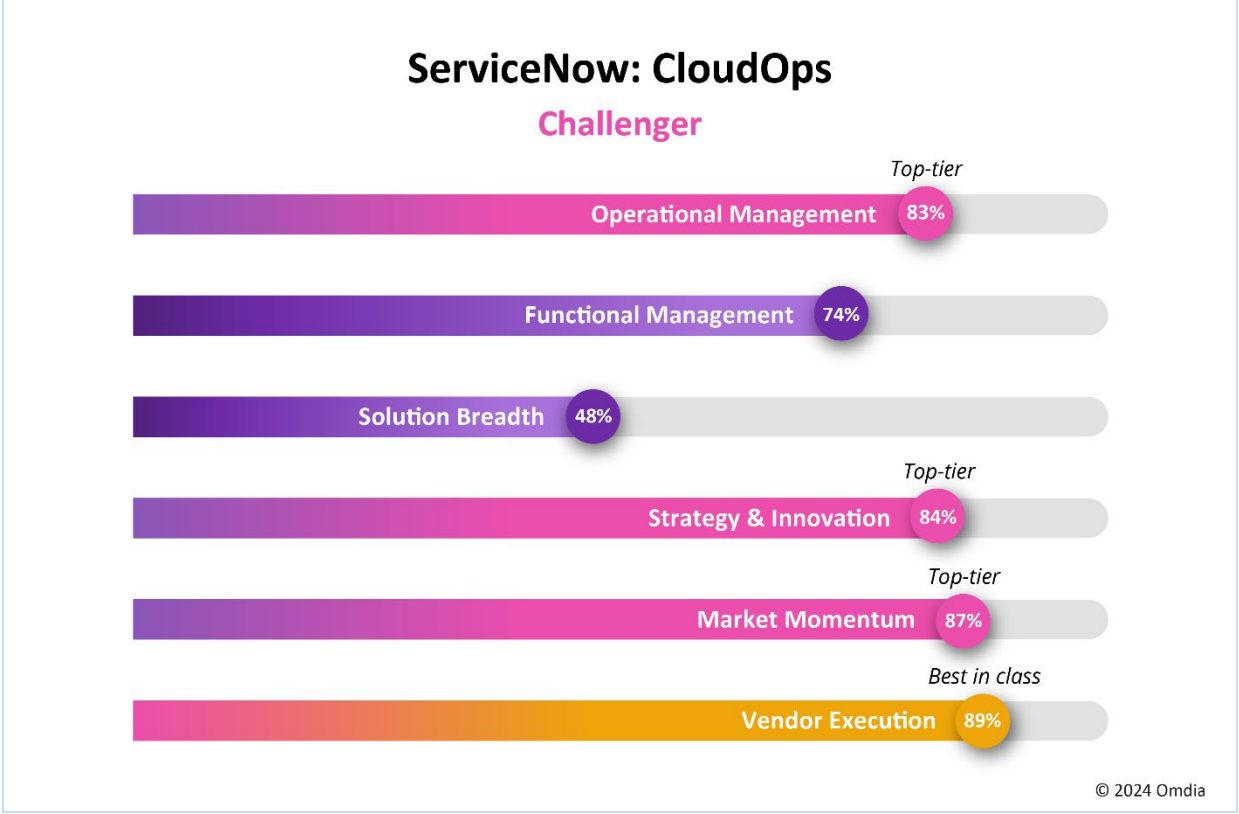
ServiceNow should appear on your shortlist if:

- You are looking for a platform that can integrate other aspects of CloudOps into the same unified experience beyond just the technical capabilities.

Overview

ServiceNow is classified as a challenger in the Omdia Universe with an unweighted capability score of 75%, a strategy and execution score of 85%, and a solution breadth score of 48%. ServiceNow was only a few percentage points away from the leader criteria, and Omdia considers that some of the enhancements that are planned for the platform in 2025 would probably elevate ServiceNow to the leader classification. ServiceNow also recorded one top subcategory leading score, which is rare for a challenger in an Omdia Universe.

Figure 16: Omdia Universe ratings—ServiceNow



Source: Omdia

Strengths

ServiceNow's strongest subcategory with 89% was public cloud management. Omdia considers that ServiceNow has one of the most comprehensive approaches to managing public cloud environments. For existing cloud workloads, ServiceNow can discover them via an agent-based or agentless approach. Cloud Discovery collects the logical data centers associated with the account, as well as any subaccounts. ServiceNow can also discover via the master cloud accounts or via regions to match the customer's own processes. ServiceNow can discover resources, OS, capacity, dependencies, and more using APIs. It can also use IP-based discovery, which uses the meta-data collected from service account-based discovery to collect more detailed information. This method provides data on installed software, process information, transmission control protocol (TCP)/IP connections, etc. Omdia considers ServiceNow's Service Graph Connectors, which it has developed for the major cloud service providers, to be noteworthy in enabling customers to populate the configuration management database (CMDB) with the currently deployed workloads. For cloud native Kubernetes workloads and microservices, ServiceNow uses OTel-based ingestion that ensures streaming management of ephemeral resources. Finally, for newly deployed workloads, Cloud Service Catalog can ensure provisioning, deployment, and tracking of all the provisioned resources in the CMDB.

ServiceNow's second strongest subcategory with a score of 88% is observability and monitoring. ServiceNow's observability and monitoring solution ingests data from first- and third-party data sources to provide a holistic, end-to-end view of service performance as it traverses the application

stack. As previously mentioned, ServiceNow uses the Service Graph Connector for OTel, which enables ServiceNow to provide real-time insights into the underlying performance of any cloud native infrastructure as well as traditional infrastructure. This approach ensures customers have an understanding of the underlying impact of infrastructure on performance. ServiceNow's observability and monitoring includes AI-powered platform capabilities that will help customers with their IT transformation to modernize IT operations.

ServiceNow's third strongest subcategory with a score of 85% was environmental and sustainability management. The ServiceNow ESG Management solution offers a comprehensive approach to environmental sustainability management by integrating various functionalities that help organizations track, manage, and report on their sustainability metrics. This solution is designed to facilitate the planning and execution of sustainability initiatives across the enterprise. Omdia particularly likes two of these capabilities. First, it allows organizations to track their carbon footprint. The solution offers insights into the carbon footprint from various sources, including data centers and hardware assets, helping organizations identify areas for improvement. Second, it enables energy and resource management. Omdia thinks the ability to track energy consumption, greenhouse gas emissions, and water usage provides a holistic view of the environmental impact of IT operations.

Limitations

ServiceNow's weakest subcategory with a score of 57% was security management, where it lacked some capabilities such as intrusion detection and helping deal with a DDOS attack. These capabilities are typically delivered by specialist security solutions, but Omdia is seeing operational security capabilities being part of CloudOps solutions.

Appendix

Methodology

Omdia's rigorous methodology for the Universe product involves the following steps:

- Omdia analysts perform an in-depth review of the market using Omdia's market forecasting data and Omdia's enterprise insights survey data.
- Omdia creates a matrix of capabilities, attributes, and features that it considers to be important now and in the next 12–18 months for the market.
- Vendors are interviewed and provide in-depth briefings on the current solutions and future plans.
- Analysts supplement these briefings with other information obtained from industry events and user conferences.
- The Universe is peer-reviewed by other Omdia analysts before being proofread by a team of dedicated editors.

Inclusion criteria

The vendor must have a CloudOps solution that covers all the categories identified by Omdia. As this is an emerging market, the vendor must also be in the top 20 identified by Omdia for this market.

Further reading

CloudOps Forecast, 2024–30 (December 2024)

Cloud Services Tracker 2024 (July 2024)

IT Enterprise Insights: IoT, Cloud, AI, 5G, and Sustainability – 2024 (October 2023)

IT Operations Survey – 2023 (June 2023)

Omdia Horizons 2023 (May 2023)

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Omdia Consulting

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