



Intelligent ITOps Services 2025-2026 RadarView™ Excerpt

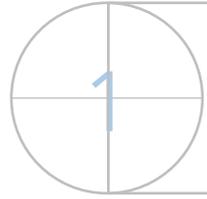
AI agents lay the foundation for self-managing IT environments

December 2025

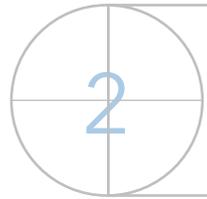
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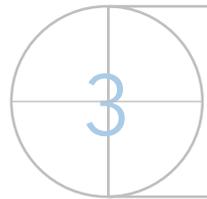
About the Intelligent ITOps Services 2025-2026 Market Insights report



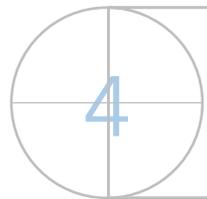
The *Intelligent ITOps Services 2025-2026 Market Insights* is a companion report to *Intelligent ITOps Services 2025-2026 RadarView*. While the RadarView report concentrates on evaluating service providers, this report takes a broader perspective, offering a comprehensive overview of the current state of the ITOps services market and Avasant's outlook on its future trajectory.



Amid growing interest in the ITOps services space in recent years, this report aims to inform key stakeholders, including enterprises, service providers, and ITOps leaders, about the major trends shaping this dynamic landscape. It explores the primary growth drivers, evolving strategic priorities, and the broader transformation of the ITOps ecosystem.



This report is based on detailed data collected through ongoing market interactions, surveys, and executive discussions with enterprises and service providers. Avasant's extensive experience in real-world ITOps engagements further reinforces the insights and analysis.



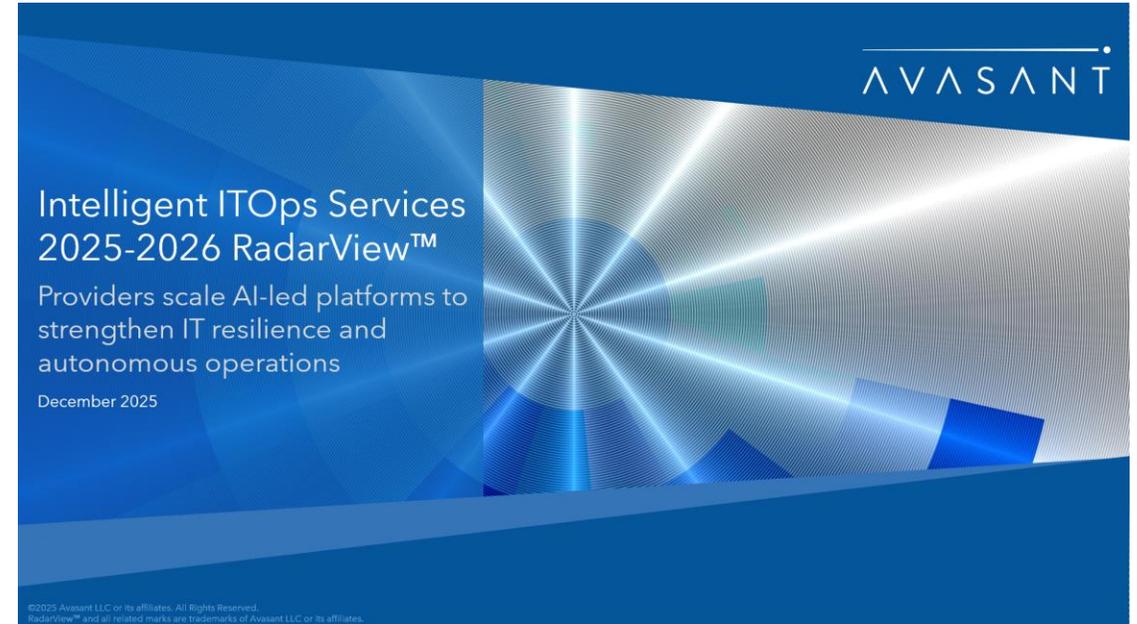
The *Intelligent ITOps Services 2025-2026 Market Insights* report equips stakeholders with a deep understanding of the current landscape and future trajectory of the ITOps services market, serving as a valuable tool for strategic planning and decision-making.

Key reports of Avasant's Intelligent ITOps Services research



Market Insights™ 2025-2026

This report provides a comprehensive overview of the ITOps landscape. It delves into the current state of the market, analyzes recent trends shaping the industry, and offers a perspective on the future outlook for the ITOps services industry.



RadarView™ 2025-2026

This report examines how leading service providers are delivering ITOps services. It covers key supply-side trends and features a deep-dive analysis of providers that Avasant has recognized for their excellence and innovation in the space.



Executive summary

Defining intelligent ITOps services

Intelligent ITOps services comprise a set of platforms, tools, templates, and frameworks driven by AI/ML, automation, and analytics to empower an IT team and align an organization's business services with IT operations. Intelligent ITOps services enable autonomous monitoring, management, and control of IT infrastructure across the value chain through the following use cases:

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 and management▪ Hybrid cloud application monitoring and management▪ Data management and migration▪ Integration services▪ Business intelligence/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 (for assets that play vital roles in data processing, collaboration, and access)▪ Hardware asset management (servers; database management systems; network devices; and power, that is, uninterruptable power supply, power distribution unit, and generators)▪ End-user computer assets (PCs, laptops, monitors, and printers)▪ Configuration management▪ Budget management

*IT infrastructure components include servers, data centers, storage, backup, network, and cloud infrastructure.

Key enterprise intelligent ITOps service trends shaping the market

Rising cross-domain service orchestration needs and fragmented app stacks are positioning ITSM and AMS at the core of ITOps transformation initiatives

- Almost 61% of ITOps projects are centered on IT service and application management as enterprises focus on streamlining cross-domain service workflows, fixing fragmented application stacks, strengthening IT compliance, and meeting data sovereignty requirements. Last year, this figure was 46%.
- This growth is primarily being driven by banking, telecom, media and entertainment, and manufacturing sectors, which account for 50% of total ITOps implementations, focusing on IT threat observability, infrastructure performance optimization, and cloud cost optimization.

Rising operational demands across IT service, application, and infrastructure management are accelerating enterprise adoption of agentic AI

- Rising operational complexity across IT service, application, and infrastructure layers is accelerating enterprise adoption of agentic AI, with 17% of implementations already in production to improve incident response, automate routine decisions, and strengthen service reliability.
- Enterprises are targeting high-impact use cases such as automated incident triage, incident categorization, log and telemetry analysis, anomaly detection, application recovery assistance, and knowledge-driven self-service improvements.

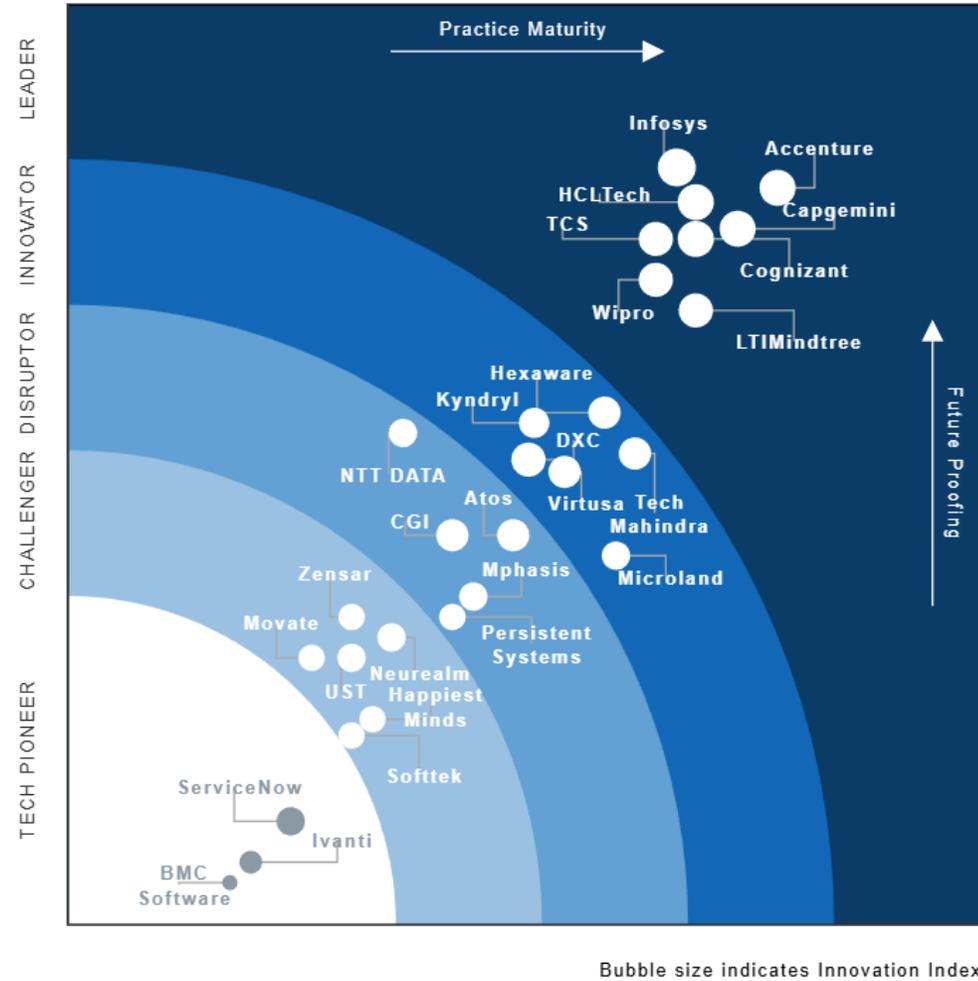
About 22% of IT managed services contracts quantify Gen AI benefits, signaling a shift from tech integration to outcome-driven, KPI-linked projects

- About 22% of IT managed services contracts now reference GenAI, showing that enterprises are using it to reduce L1/L2 effort through automated diagnostics, improve accuracy in incident handling, and speed recovery from operational issues.
- This increase in IT contracts mentioning Gen AI as a separate item over the last year is primarily driven by enterprises adopting new XLA-based KPIs and flexible commercial models such as outcome, output, and as-a-service pricing.

Growing observability and security gaps are driving platform vendors to embed Gen AI and agentic automation across the ITOps stack

- With rising blind spots across cloud workloads, data pipelines, and network edges, enterprises are prioritizing stronger observability and faster response to security-linked service disruptions.
- Platform vendors are responding with integrated observability and SecOps capabilities by embedding Gen AI and AI agents to improve issue correlation and remediation and focusing on application performance management, network optimization, end-user experience monitoring, and threat detection.

Avasant recognizes 28 top-tier providers offering ITOps services



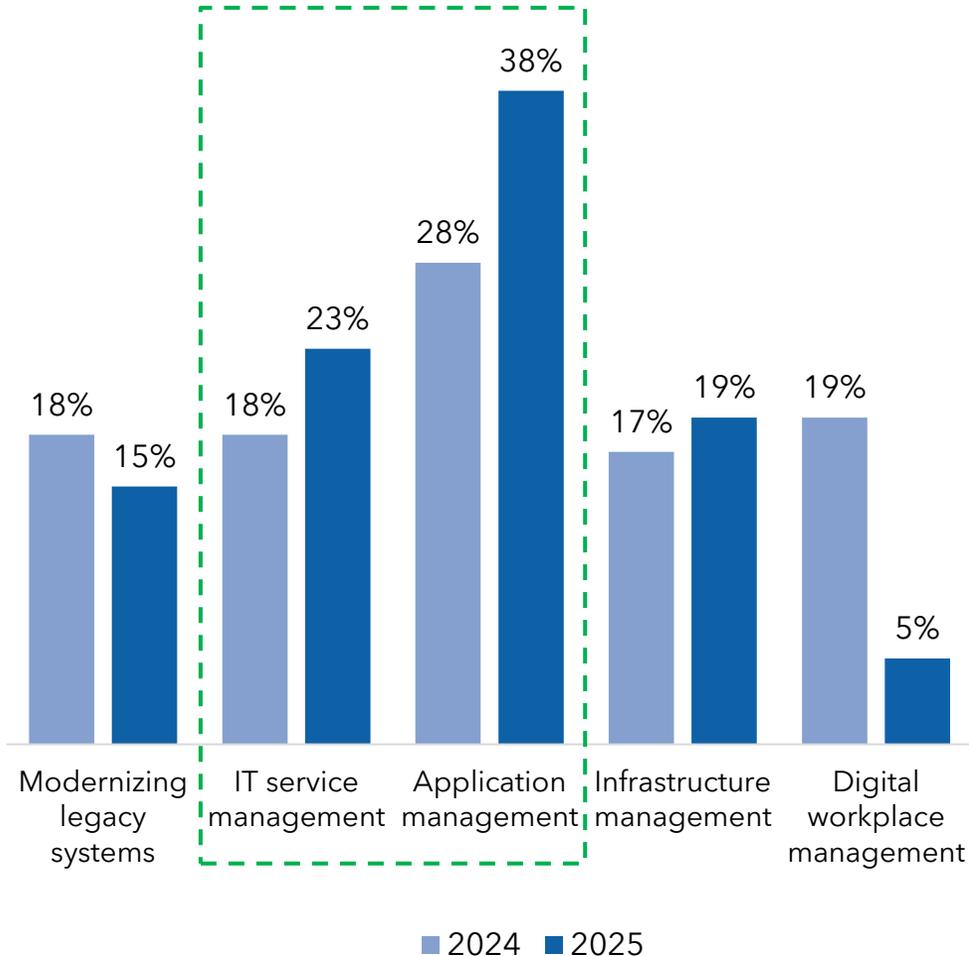
Note: Please refer to Avasant's Intelligent ITOps Services 2025-2026 RadarView™ for detailed insights on the service providers and supply-side trends.



State of the market

Rising cross-domain service orchestration needs and fragmented app stacks are positioning ITSM and AMS at the core of ITOps transformation initiatives

Intelligent ITOps project split by IT transformation project type*



Note: This percentage represents the distribution of 2,675 ITOps clients across industries.

AMS: Application management services

Sources: Avasant Research; Avasant Intelligent ITOps Services RadarView Survey, August 2025–November 2025

Key factors contributing to growth of ITSM projects



- Enterprises are evolving from IT service management (ITSM) to enterprise-wide service orchestration, where one ITSM platform connects workflows across HR, finance, procurement, and IT.
- For instance, new-hire onboarding triggers HR record creation, IT access provisioning, and procurement laptop allocation, reducing system silos and manual hand-offs.



- With hybrid cloud and distributed application environment, service issues span multiple towers such as infrastructure, network, security, application support, and service management.
- Organizations are leveraging ITSM platforms to correlate incidents across workflow dependencies, automate cross-team escalations, and accelerate root-cause resolutions across the hybrid stack.

Key factors contributing to growth of application management projects



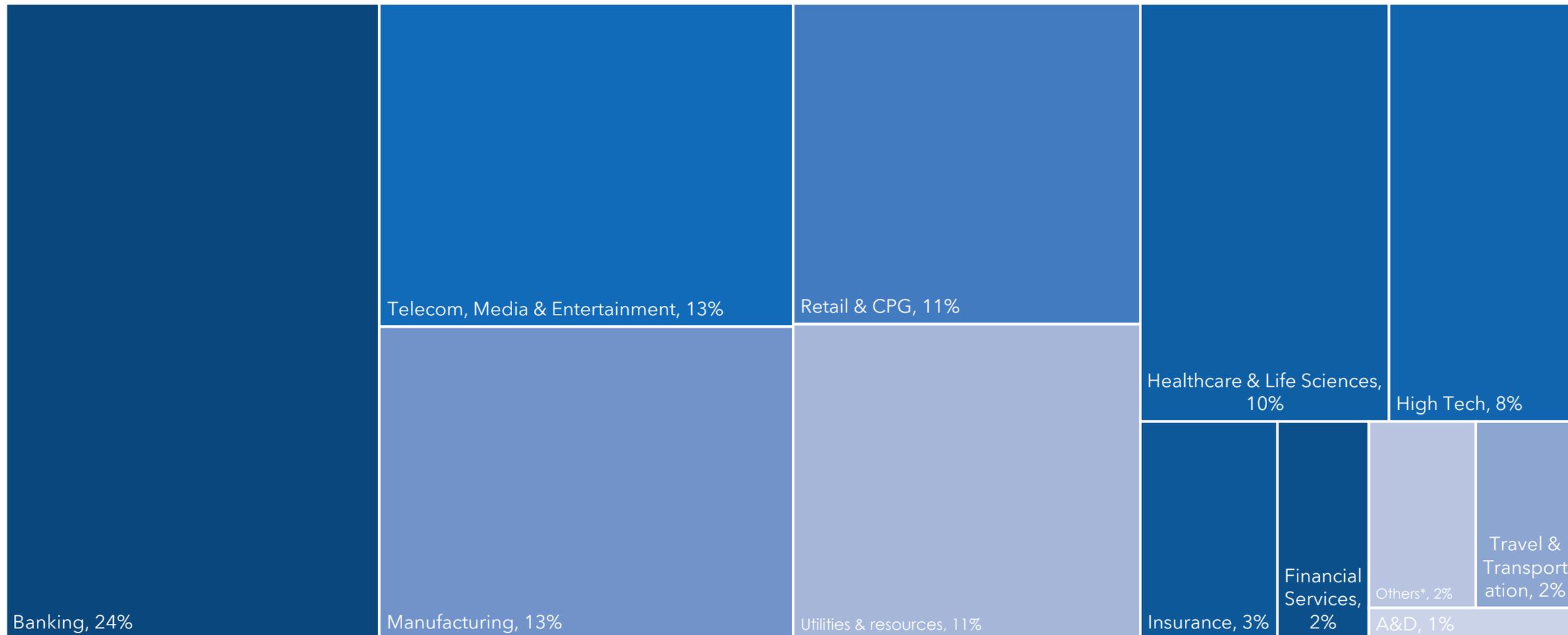
- Integration gaps across the application stack are creating fragmented data, inconsistent workflows, and limited visibility, making it difficult for IT teams to manage applications effectively.
- As a result, firms are expanding efforts to strengthen API gateways and deploy unified monitoring tools.



- With tightening data sovereignty rules, industry regulations, and application audit expectations, enterprises must now patch and govern applications more rigorously.
- This has led to a surge in application management initiatives for standardizing application updates, enforcing configuration controls, and reducing operational risk across distributed environments.

Banking, TME, and manufacturing industries account for nearly half of ITOps demand, with increased investments in resilient service operations

These industries lead in ITOps adoption due to their reliance on complex, interconnected platforms and the need for proactive detection, AI-driven resolution, and consistent service delivery for business continuity.



Note: This percentage represents the distribution of 2,675 ITOps clients across industries. Others include nonprofits, professional services, and government.

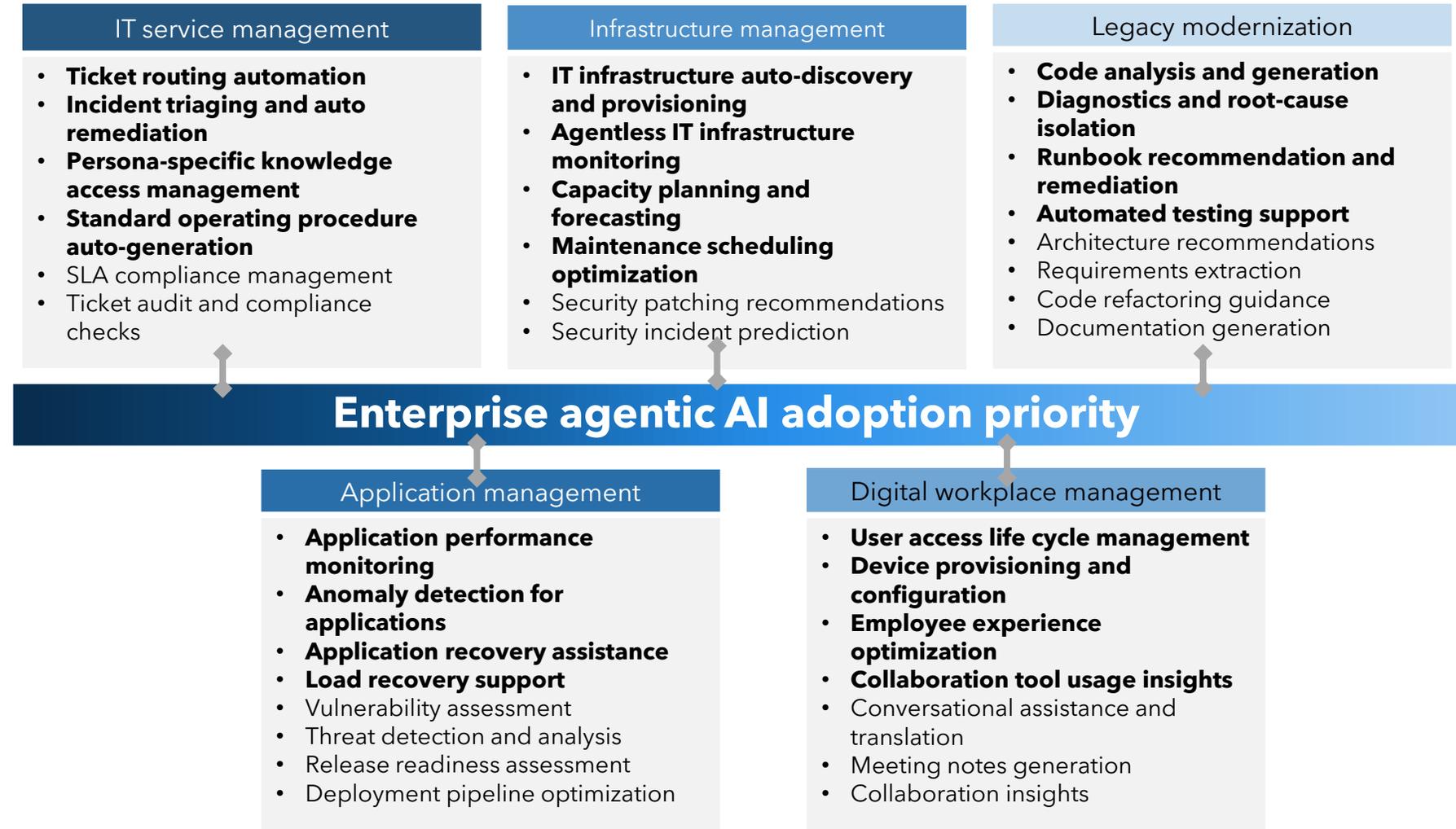
A&D: Aerospace and defense

Sources: Avasant Research; Avasant Intelligent ITOps Services RadarView Survey, August 2025–November 2025

Rising operational demands across IT service, application, and infrastructure management are accelerating the enterprise adoption of agentic AI

About 17% of enterprise agentic AI implementations in the ITOps space are in the production stage, with IT service, application, and IT infrastructure management being the top priorities for enterprises.

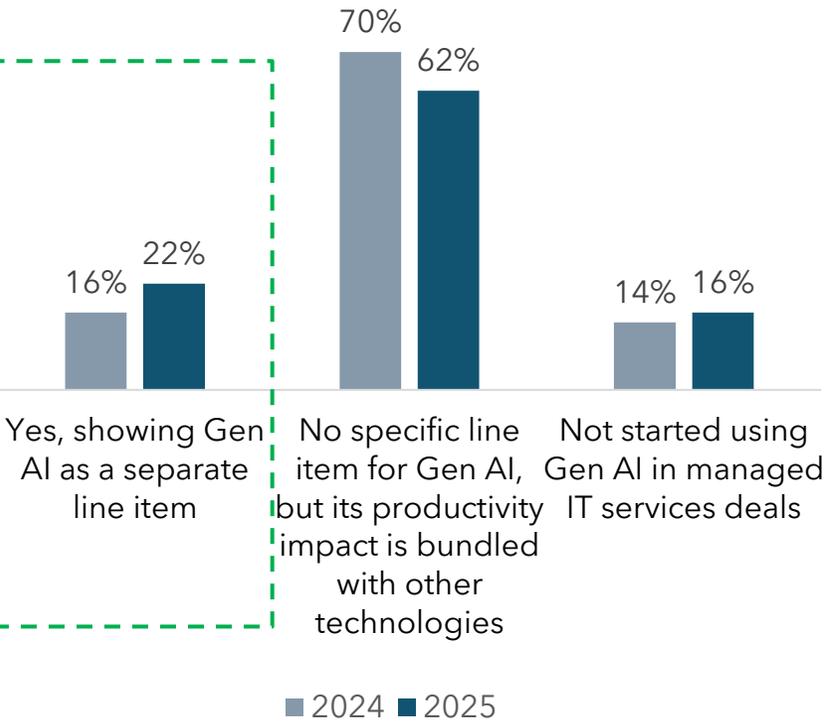
~17%
of enterprise agentic AI implementations in the ITOps space are in the production stage.



As enterprises begin scaling agentic AI in ITOps, particularly across service management and application operations, compliance and governance frameworks must also evolve to manage agent-driven actions, enforce privilege safeguards, and maintain end-to-end observability across the agent life cycle

Nearly 22% of IT managed services contracts quantify Gen AI benefits, up from 16% last year, signaling a shift from tech integration to outcome-driven, KPI-linked projects

Gen AI productivity benefits as part of IT managed services contracts



Enterprise	Use case	Gen AI productivity	Implementation description
 An IT services organization	Incident triage automation	40% reduction in mean time to resolve tickets	Utilized Gen AI to enhance incident recommendations, log analysis, and knowledge generation.
 A global payment services provider	Internal query resolution	60%-85% effort reduction	Deployed a Gen AI-based chatbot to resolve internal queries, surface answers through federated search, and reduce L1 support effort.
 A US-based insurance company	Infrastructure modernization and cloud migration	30% reduction in database costs	Leveraged Gen AI to accelerate modernization workflows, streamline cloud migration, and optimize database footprints.
 A financial services firm	Code optimization	40% cost savings	Designed a Gen AI-driven solution to accelerate code transformation, streamline backend redesign, and auto-generate test cases.
 A furniture retailer	Store onboarding workflows	50% reduction in store onboarding time	Implemented a Gen AI solution to streamline store onboarding, accelerate inbound delivery processing, and enhance operational efficiency.
 A telecom company	Software development acceleration	35%-45% reduction in manual effort	Created Gen AI-enabled coding workflows, accelerating development tasks, standardizing code quality, and reducing manual effort across the software life cycle.

Increasing operational blind spots across applications, networks, and user experience are driving demand for end-to-end telemetry

83%
organizations reported at least one cloud breach in the past 18 months.

Recent outages, including the CrowdStrike-Windows incident, revealed gaps in cloud recovery processes and third-party dependencies, triggering phishing and malware activity and highlighting the need for unified telemetry that links infrastructure behavior to user experience and security outcomes.

Observability areas	Platform vendor	Description
Cloud infrastructure monitoring	 paloalto NETWORKS	In October 2025, Palo Alto launched advanced AI-driven cloud and application security solutions that identify misconfigurations, exposed credentials, and high-risk code-cloud interactions across multicloud environments.
Application performance monitoring	 new relic.	New Relic introduced mobile Session Replay, enabling teams to visually reconstruct user sessions and correlate user interface (UI) interactions with backend telemetry to diagnose system checkout failures, UI glitches, and latency issues in real time.
Network telemetry		In October 2025, F5 strengthened its network telemetry capabilities by integrating NVIDIA BlueField-4 data processing unit within its network management suite to capture high-frequency traffic signals, packet flows, and latency metrics for deeper visibility across large-scale AI workloads.
DevSecOps	 sonarqube	In September 2025, SonarQube introduced a new module to strengthen supply chain security in CI/CD pipelines by analyzing how custom code interacts with open-source components and adding capabilities for vulnerability and license risk detection.
End-user experience monitoring	 DATADOG	Datadog launched real-time user monitoring capabilities that include full visibility into every user session, correlation of frontend behavior with backend logs and traces, and detection of JavaScript errors and performance bottlenecks.

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Future outlook

The next phase of ITOps will be defined by adaptive automation, AI-native security operations, open and sovereign cloud ecosystems



Neuroscience-driven AIOps

- As enterprises struggle with highly distributed IT environments, they are turning to neuroscience-inspired AIOps models that learn and interpret event patterns similar to neural systems.
- By pairing predictive AI with Gen AI to detect emerging anomalies and propose remediation paths, these systems enable earlier incident intervention and significantly reduce manual triage effort.



AI-native security operations

- High frequency of security incidents and manual investigation cycles is driving demand for architectures that can analyze endpoint, cloud, and identity-based alerts faster and support tasks such as triage, correlation, and initial response.
- For instance, CrowdStrike's AI-native SOC uses Gen AI to unify data and enable conversational investigations, pushing security operations toward more automated and context-aware threat response.



SRE driven infrastructure orchestration

- SRE is becoming a de facto layer within ITOps, embedded into daily infrastructure operations to standardize reliability practices across hybrid environments, spanning provisioning, configuration, and incident response.
- With the convergence of Gen AI and SRE, infrastructure orchestration is becoming more autonomous. LLMs translate high-level intents into infrastructure-as-code scripts and correlate distributed logs to surface root-cause hypotheses.



Open private cloud architectures

- As enterprises modernize private cloud estates, they need open architectures that operate across diverse hardware and networking models without locking workloads into proprietary stacks.
- This is leading to modular open private cloud ecosystems that improve platform portability, streamline life cycle operations, and give IT teams greater flexibility to build and scale infrastructure.



Sovereign cloud platforms

- With rising geopolitical uncertainty and stricter data sovereignty mandates, enterprises need cloud environments that ensure jurisdictional control over data management and governance.
- Sovereign cloud platforms provide regionally governed and policy-aligned environments that maintain operational consistency across hyperscalers and on-premises deployments while supporting controlled workload mobility.



Edge IT infrastructure monitoring

- The rapid expansion of edge locations, remote users, and latency-sensitive AI workloads is making edge monitoring a critical ITOps requirement, as traditional centralized tools lack visibility into the source of performance issues. For instance, NETSCOUT's Smart Edge Monitoring combines synthetic transactions with packet-level analytics at user and edge locations to pinpoint whether performance issues stem from the client, network, cloud, or application layer.

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LTIMindtree profile

LTIMindtree: RadarView profile



Practice maturity ★★★★★

Future proofing ★★★★★

Leverages the BlueVerse platform to accelerate AI-driven automation. Is expanding presence in Saudi Arabia through strategic partnerships.

Practice overview		Client case studies		
<ul style="list-style-type: none"> Practice size: 15,000+ Active clients: N/A External certifications: 9,000+ certified professionals Delivery highlights: 150+ locations across 40+ countries 		<ul style="list-style-type: none"> Delivered IT transformation services for an American Fortune 500 energy provider to streamline IT service management. This reduced mean time to resolution by 20%-30%, decreased downtime, and enabled cost savings through app deduplication. Implemented BlueVerse for a global elevator solutions manufacturer to modernize IT operations, unify knowledge, and automate incident management across applications. It reduced MTTR by 20%-25%, automated 28% of service requests, and minimized manual errors. Deployed AWS Cloud Adoption Framework for an insurance company to modernize applications and migrate mainframe workloads to the cloud. It reduced database costs by 30%, achieved CAPEX/OPEX savings of 40%, and improved application availability to 99.9%. Implemented ServiceNow ITSM with LTIMindtree Agentic-AI-in-a-Box for a Fortune 500 residential energy provider in northeastern US. It delivered a 25% productivity gain, generated \$5.28M in savings over 29 months, and achieved a 312% AI ROI with a seven-month payback period. 		
\$101M-\$250M ITOps services revenue, YTD March 2025	11%-20% Practice revenue growth, YTD March 2025	Key IP and assets		Key partnerships
<ul style="list-style-type: none"> iMIM: A Gen AI tool for automating incident management APPM: A tool that identifies IT problems and tracks resolution value AI Radar: A tool that maps emerging AI technologies for strategic decisions TRACER: A framework that ensures AI compliance BlueVerse: A platform to accelerate AI-driven IT modernization 		Tool Partners 		Sample clients <ul style="list-style-type: none"> An American Fortune 500 energy provider A global elevator solutions manufacturer An insurance company A Fortune 500 residential energy provider A North America-based wealth management SaaS solutions provider A US-based investment and insurance services firm A North America-based financial solutions provider A multinational banking and financial services firm
				Industry coverage
				<ul style="list-style-type: none"> Banking Financial services Government Healthcare & life sciences High-tech Insurance Manufacturing Nonprofits Retail & CPG Telecom, media & entertainment Travel & transportation Utilities & resources

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



LTIMindtree: RadarView profile

Analyst insights

Practice maturity



- LTIMindtree's Intelligent ITOps practice delivers AI-native, agent-driven operations, encompassing IT service management, application management, performance and capacity optimization, and IT asset life cycle governance. It leverages autonomous AI agents, predictive monitoring, automated workflows, and integrated knowledge and governance frameworks to enable end-to-end IT operations.
- It has developed a catalog of agentic AI solutions across IT operations, covering AI-first workplace services, multichannel IT agents, modernization and engineering, performance and capacity optimization, and cloud and asset governance. These solutions streamline incident triaging, knowledge and service management, application modernization, and DevOps and FinOps tasks.
- It offers resilient and cost-effective hybrid cloud infrastructure solutions, leveraging generative and predictive AI to strengthen digital foundations, enhance system resilience, boost user productivity, and enable advanced cloud and data platform integration.
- It leverages over 200 auto-remediation bots to perform self-service and agent-led runbook tasks, accelerating IT service operations and reducing manual effort.

Future proofing



Partner ecosystem

- In September 2025, LTIMindtree partnered with ServiceNow to drive large-scale digital transformation in Saudi Arabia and the broader MENA region, integrating generative AI, agentic AI, and industry-specific platforms while building local workforce capabilities.
- In May 2025, it partnered with Aramco Digital to launch NextEra, a next-generation IT services company in Saudi Arabia, focused on offering AI, automation, cloud services, and industry-specific solutions.
- It is codeveloping multicloud, edge-to-cloud, and AI-powered infrastructure solutions with HPE and Dell, leveraging GreenLake and APEX platforms.

Investments and innovation

- LTIMindtree is expanding its BlueVerse Marketplace by launching new agents for software development and IT operations and investing in agentic AI innovation to accelerate adoption across software development, IT operations, and business domains.
- It is investing in scaling ITOps across APAC, Europe, and North America through regional CoEs to ensure regulatory and cultural alignment.
- Allocating over \$40M toward strengthening its ITOps capabilities, it is prioritizing asset development through investments in proprietary automation tools, AI-driven frameworks, and human capital enhancement by upskilling its workforce in agentic AI, autonomous operations, and specialized roles.

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Appendix:
About RadarView

The Intelligent ITOps Services 2025-2026 RadarView assesses service providers across the following dimensions

Practice maturity

- This dimension considers the current state of a provider's ITOps practice in terms of its strategic importance for the provider, the maturity of its offerings and capabilities, and client engagement.
- The crucial aspects in this dimension are the width and depth of the client base, usage of proprietary/outsourced tools and platforms, and quality of talent and execution capabilities.

Future proofing

This dimension evaluates how the provider is preparing for the future by combining initiatives across domain/partner ecosystem and investments and innovations defined below:

- *Domain/Partner Ecosystem*: This dimension assesses the nature of the provider's partner ecosystem, the objectives of the partnerships (codevelopment and co-innovation), and engagement with solutions providers, startup communities, and industry associations. Vital aspects in this dimension are joint development programs around offerings, go-to-market approaches, and the overall depth of the partnerships.
- *Investment and Innovation*: This dimension measures the strategic direction of the provider's investments and resultant innovations in the offerings and commercial model and how it aligns with the future direction of the industry. The critical aspects of this dimension include both organic and inorganic investments toward capability and offering growth, technology development, and human capital development, along with innovative solutions developed with strategic partners.

Note: As innovation becomes a critical provider selection criteria for enterprises, we have also included an "Innovation Index" in the RadarView representation. This index is derived from the provider's investments in IP, technology partnerships, domain partnerships, service and model changes, and training and development. It also incorporates market feedback about the provider's innovative approaches during engagements.

Research methodology and coverage

Avasant based its analysis on several sources:

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

Market interactions Discussions with enterprise executives leading digital initiatives and influencing provider selection and engagement

Provider inputs Inputs collected through an online survey and structured briefings between August 2025 and November 2025

Of the 41 service providers assessed, the following are the final 28 providers featured in the *Intelligent ITOps Services 2025-2026 RadarView*:

Note: Assessments for Accenture, Atos, BMC Software, CGI, DXC, Happiest Minds, HCLTech, Hexaware, Ivanti, Kyndryl, MicroLand, Movate, Mphasis, NTT DATA, Persistent Systems, ServiceNow, Softtek, TCS, Tech Mahindra, UST, Wipro, and Zensar were conducted based on public disclosures and market interactions only.

Reading the RadarView

Avasant has recognized service providers in five classifications:



Leaders show consistent excellence across all key dimensions of the RadarView assessment (practice maturity, partner ecosystem, and investments and innovation) and have had a superior impact on the marketplace. These providers have shown true creativity and innovation and have established trends and best practices for the industry. They have proven their commitment to the industry and are recognized as thought leaders in their space, setting 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 a few select areas or industries and distinguish themselves through 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 providers 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 a unique position. While they may not have the scale of the providers 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 the providers in other categories.



Tech Pioneers are platform-first providers reshaping services through technologies, ecosystem orchestration, and long-term bets. These providers demonstrate strong future-proofing capabilities, marked by significant investments in next-gen technologies, differentiated IP, and deep innovation pipelines. Tech Pioneers exert influence through their ability to shape customer road maps, catalyze new service models, and accelerate market transitions. While their service delivery maturity may still be evolving, their impact lies in their role as catalysts, introducing new paradigms, enabling rapid experimentation, and driving early adoption of transformative capabilities.

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