IDC MarketScape

IDC MarketScape: Worldwide Observability Platforms 2025 Vendor Assessment

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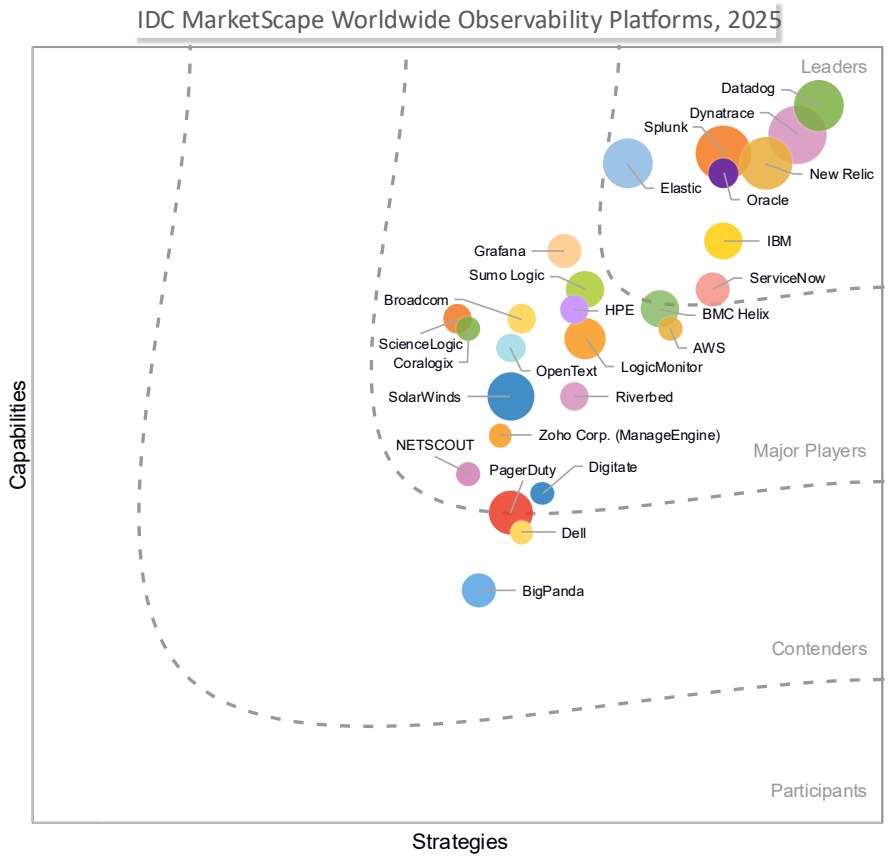
THIS EXCERPT FEATURES ORACLE AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Observability Platforms Vendor Assessment



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See the Appendix for detailed methodology, market definition, and scoring criteria.

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Observability Platforms 2025 Vendor Assessment (Doc # US53004325).

IDC OPINION

IDC's *AIOps and Observability Survey, 4Q24* (IDC #US53121425, January 2025) found that:

- 100% of organizations share their "observability" data across teams.
- 43% of organizations indicate that poor collaboration with other teams prevents them from identifying performance problems.
- 37% of organizations struggle with scaling, and 33% struggle with integration in their current observability tools.

These findings are consistent with similar IDC studies; in general, observability tools are seen as necessary tools for collaboration within organizations, but something seems to be missing.

What's the Problem?

Simply put, observability tools allow individuals and teams to perceive the digital estate, thereby creating a context for individual decisions, from which we approve actions to proceed. This passive framing of the traditional OODA (observe, orient, decide, act) leaves the industry with some serious gaps:

- To perceive is not to observe; observation implies actively gathering information from many sources.
- To contextualize is not to orient; orientation implies both a personal and a shared understanding of what the observations imply and the limits (ethical, moral, technical, practical, cultural, personal, etc.) one operates under.
- To approve is not to decide; decision implies a vector, direction, and speed toward some desired outcome.
- To proceed is not to act; action requires intention, focus, and the use of means to create ends.

So, how did we get here?

The Rising Signal Tide

Observability platforms today came into being as the exponential complexity IT pundits love to predict finally exceeded our human capacity to understand. The engineers working on them focused, rightly, on signal processing (sifting through the exponentially increasing telemetry data for useful signal) across the exponentially complexifying digital estate. In time, this evolved into a kind of signal intelligence, linking the processed signal together into an understandable context. In systems circa 2025, this goes as far as suggesting "root causes," most often the proximate technical cause of a given anomaly from "known good" behavior.

This focus on signal processing has left real-world users in a bind. As they try to lead their teams through the next big transformation, they find themselves struggling with key concepts like "collaboration," "innovation," "ecosystem," and "partnership." This is caused by many things outside of the vendor's control. Some of it, however, comes back to the lack of orientation — the tendency of observability vendors to present the "root cause" and "correlations" while assuming that human teams working within the presented context have a shared mental model, a set of cognitive tools that help them to work together and create solutions.

Without that shared mental model (orientation rather than contextualization), the teams are forced to proceed, restoring toward a hoped for known good state, rather than innovating and directing the estate toward a desired outcome.

Amidst a Tsunami of Change

As the complexity of the technical and social environment increases, vendors have responded by increasing their pace of release. New features compile upon new challenges and new data sources in an ever upward spiral. Multiple interviews with executives brought up concerns related to this problem — an inability to focus on meaningful transformation, outdated documentation, and even occasional professional service engagements that failed due to not knowing how the latest features interacted with current environments.

This pace of change is endemic to the IT industry as a whole and greatly exacerbated by the technology (AI) intended to tame it. It remains to be seen whether the observability platform vendors will come up with a way to address the problem within their own, constrained, space.

What's Next?

There is an open question whether observability platform vendors are required to address the problem of digital decisions or the tsunami of change at all. It may well be enough to own signal processing and context, leaving orientation and decision-taking,

action, and impact assessment to another vendor. It may well be "good enough" to create and share a context, letting teams and leaders, managers, and executives focus on developing shared objectives, orientation, and decision-making.

However, during IDC's research to create this IDC MarketScape, interviewed executives indicated that the most important aspect of these platforms was not the tool or technology but the partnership they had with the vendor. This partnership must extend beyond the traditional nostrums. Executives repeatedly expressed an interest in co-development, in partners working together with other partners, and with a shared sense of purpose and a clear destination for the work.

In other words, executives look for observability platform vendors to play a key role in helping them create the orientation framework for their teams. Even more importantly, they are intentionally bringing vendors close into the leadership process, asking for and receiving help inculcating the orientation framework and practice for their individual enterprise directly into the tools used to manage the digital estate.

A vendor may choose not to take advantage of this opportunity, but they should also not be surprised if the vendors that do outperform and outlast them.

Moving Toward an Observability Practice

This narrative of partners and partnerships suggests that there is a leadership gap in the industry. In specific, the toil of the years has made the formalization of practice, the guiding framework that shapes decision-making, planning, and execution in IT, something of a hobgoblin. The concept has become associated either with incompletely implemented external frameworks (Agile, DevOps, ITSM, etc.) or with tedious paper-pushing exercises that create infinitely process documents and little in the way of useful outcomes.

In practice, this has led to either defaulting to whatever practice is incorporated into the vendor's tools or fragmented/informal cognitive models with a handful of "heroic" actors who bring all the pieces together into a coherent solution. In turn, this creates a great deal of organizational tension and decision challenges, especially when teams are moving at speed and under high cognitive load. This "informal practice" is highly prevalent, often embedded, and difficult to articulate beyond a handful of amorphous principles.

Leadership will need to prioritize the "soft" skills required to create and maintain an informal, de facto practice that can rapidly adapt to changing circumstances. This requirement sits at the heart of IDC's findings about the importance of social, political, and creative skills in the "skills shortage" related to the rise of AI-fueled IT business and IT operations in particular.

What About AIOps?

The promise of AIOps was to reshape the way that IT operated using signal processing and triggered automations. Although not fundamentally wrong, the idea essentially ignored that IT operations (regardless of methodology) have always been automated. We no longer balance the electrical resistance of Ethernets by turning screws; we don't write machine code. Continuous automation was always the name of the game.

AIOps, then, has to be something more than signal processing and automated signal response. That's just table stakes in the operations game. Instead, it needs to be a fundamental reimagining of what it means to run a digital enterprise in a digital estate, one where the complexity is tamed for human use and directed toward human ends.

This specific IDC MarketScape addresses the observability side of "observability and AIOps," as the capabilities and strategies needed to move toward an **AI**-fueled **Op**eration**s (AIOps)** future is somewhat different than what is needed to excel at observability. This research will be codified through an *IDC TechBrief: AIOps* (forthcoming) and the following *IDC MarketScape: Worldwide AIOps 2026 Vendor Assessment* (forthcoming).

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

Vendors were selected for this IDC MarketScape based on the following criteria:

- Operate and have clients in more than one geographic market (Americas, EMEA, Asia/Pacific, etc.)
- Provide the ability to manage metrics, logs, traces, and events from objects in the digital estate to one degree or another
- Apply machine learning and other techniques to intelligently sort signal from the exponentially increasing telemetry available in digital estates
- Have developed an ecosystem of partnerships enhancing operational functionality
- Have an extended market presence sufficient to indicate they can sustain a mission-critical technology system for at least five years
- Have at least $100 million in revenue

ADVICE FOR TECHNOLOGY BUYERS

Observability vendors, for better or for worse, are key players in the enterprises' digital estate. They gather the signal from multiple sources, sort it for relevance, and integrate it into a somewhat shared context from which staff make decisions in near-real time.

An executive faced with making decisions about their observability posture should consider the following:

- The executive should appoint two champions. Select one person who is good at bridging gaps between teams and another with a strong generalized technical background. This duo should be responsible for the decision-driven and technically driven aspects of observability, respectively.
- Tools consolidation is the evergreen program; constantly in motion, never done. Instead of tools consolidation, ask each team to determine what they need to collaborate with the teams they work with. Allow teams to work together, with guidance, to determine if their current tooling actually meets their collaboration needs.
- Orientation is a cognitive process — it requires people to talk, think, and work together toward a common goal with a nurtured understanding of what is acceptable. AI and "AIOps" are participants in this process — thus the constant focus on trust and explainability — but only one of many possible participants.
- One of the most important participants in the orientation process is the observability platform vendors. Their assumptions, beliefs, decision-making approaches, and parameters are built into the fabric of their platforms. This makes them a key strategic partner for you, one that should be willing to engage in co-development and work with you and your teams.

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

Oracle

Oracle is positioned in the Leaders category in this 2025 IDC MarketScape for worldwide observability platforms.

Oracle provides comprehensive observability capabilities through Oracle Cloud Infrastructure (OCI) Observability and Management platform, delivering unified metrics, logs, traces, and digital experience monitoring across enterprise applications and infrastructure. The platform serves enterprise customers globally, with full coverage across North America, South America, EMEA, and Asia/Pacific regions through Oracle's extensive cloud infrastructure footprint spanning 50 regions and sovereign cloud deployments.

Strengths

Oracle demonstrates strength in enterprise-scale observability with integration across its comprehensive cloud and database portfolio. The platform excels through unified data collection via the Universal Management Agent with OpenTelemetry support, comprehensive filtering and enrichment capabilities, and seamless integration with over 100 out-of-the-box connectors across hybrid environments. Oracle's observability architecture benefits from native correlation with Oracle Cloud Infrastructure services, enabling automatic discovery and dependency mapping while providing cost-aware analytics that integrate billing data with performance metrics for real-time optimization recommendations.

The vendor showcases business impact capabilities through sophisticated IT-to-business correlation features. OCI Observability and Management enables comprehensive business health monitoring by correlating technical telemetry with quantifiable business metrics such as transaction volume, revenue impact, and customer experience indicators. The platform automatically enriches incidents with business context through unified tagging and provides service-aware alerting that prioritizes issues based on customer impact rather than technical severity alone, supporting end-to-end business service mapping from infrastructure through applications.

Oracle's artificial intelligence and automation capabilities are built on multi-algorithm AI/ML backbone and proactive operations framework. The platform leverages advanced analytics including predictive modeling, anomaly detection with explainable AI features, and comprehensive SLO management with breach prediction capabilities. Oracle's automation framework includes extensive prebuilt libraries with governance controls, approval workflows, and comprehensive audit trails, while the agentic AI strategy road map demonstrates a commitment to autonomous operations evolution.

The company's global infrastructure and ecosystem position provides strategic advantages through pervasive worldwide coverage with strong local depth across all major regions. Oracle's 25,000-partner Oracle PartnerNetwork ecosystem with marketplace integration, extensive certification programs, and comprehensive professional services creates multiple pathways for customer success. The platform benefits from Oracle's substantial R&D investments, continuous innovation in cloud-native technologies, and strategic alignment with emerging trends including AI observability, sustainability metrics, and regulatory compliance requirements across multiple jurisdictions.

Challenges

Oracle faces complexity challenges in deployment and operational management despite its comprehensive capabilities. Enterprise implementations may require three to four months with specialized Oracle expertise, and the platform's extensive feature set can present cognitive load challenges for operations teams transitioning from simpler monitoring solutions. While Oracle provides out-of-the-box setup, training, and certification programs, the learning curve for maximizing advanced features like AI-driven analytics and business impact correlation requires significant investment in skills development and organizational change management.

The vendor encounters perceptual challenges in multicloud heterogeneous environments where customers seek vendor-neutral observability solutions. Oracle's strength in Oracle-centric architectures may be perceived as limitation by organizations prioritizing open standards portability or requiring integration with non-Oracle cloud platforms and applications. The platform's pricing model, while flexible, includes minimum platform commits and consumption-based components that may create TCO unpredictability for organizations without established Oracle relationships.

Developer ecosystem extensibility, while present through APIs and marketplace integration, represents another area where Oracle could improve, particularly in the area of open source contributions. Similarly, the company's AI model and agent observability capabilities, while present through integration with OCI Data Science platform and model governance features, may require additional support for comprehensive ML stack monitoring, vector database telemetry, and agentic workflow tracing. Organizations implementing advanced AI applications may require supplementary solutions for complete AI system observability coverage beyond Oracle's current integrated offerings.

Consider Oracle When

Consider Oracle when an enterprise has significant Oracle technology investments and seeks unified observability across Oracle Cloud Infrastructure, database, and application portfolios while requiring comprehensive business impact correlation and global support coverage.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

Given the weighting and scoring methodologies used, readers should pay particular attention to the "center line," where vendors have balanced their tactical capabilities with their strategic vision, and demonstrate the ability to do so consistently over time.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

The observability platforms market is a submarket of the larger IT operations management (ITOM) functional market.

Observability platforms deliver end-to-end visibility by unifying metrics, events, logs, traces, and experience data to accelerate troubleshooting and underpin AI-assisted IT operations across complex, hybrid estates.

These platforms actively observe by collecting multisignal telemetry from heterogeneous sources and environments, creating complete, queryable evidence

rather than passive perception alone. They orient stakeholders through shared context — topology, dependencies, and business service mapping — within governance guardrails that make explicit ethical, technical, and organizational limits. They prioritize and orchestrate choices via SLOs, business impact analysis, and decision orchestration rather than simple approvals. Leading offerings execute safeguarded remediation through runbooks, approvals, and AI-guided workflows that are auditable and reversible to minimize risk.

Platforms in this space typically provide data collection, real-time monitoring, root cause analysis, business impact analysis, decision orchestration, and automated remediation evaluated for scale, openness, and developer extensibility to align technical signals with business outcomes.

LEARN MORE

Related Research

- *IDC PlanScape: Mapping the Invisible — The IDC Enterprise Skills Assessment Framework* (IDC #US53431926, September 2025)
- *Preparing Enterprise AI-Ready Infrastructure for Agentic-Driven Disruption: Impacts and Opportunities 2025–2027* (IDC #US53299325, April 2025)
- *IDC PlanScape: An Enterprise Skills Framework for Human-AI Collaboration* (IDC #US52959425, February 2025)

Synopsis

This IDC study for the inaugural 2025 IDC MarketScape for observability platforms examines 26 vendors dedicated to providing enterprises with the ability to observe and orient within their digital estates. It also explores the changing dynamics between enterprises and vendors, along with emerging requirements for signal intelligence and management. This is part one of two; a companion piece on AI-fueled operations (AIOps) is forthcoming.

"Observation and orientation are key elements of the decision-making process," said Shannon Kalvar, research director, Enterprise Systems Management, Enterprise Client Platforms, Observability, and AIOps at IDC. "Observing the digital estate, then, is key to making meaningful decisions about the activities of modern, digital businesses. Observability platforms are, therefore, no longer just esoteric IT tools – they are the foundation of digital decision-making at scale."

ABOUT IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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