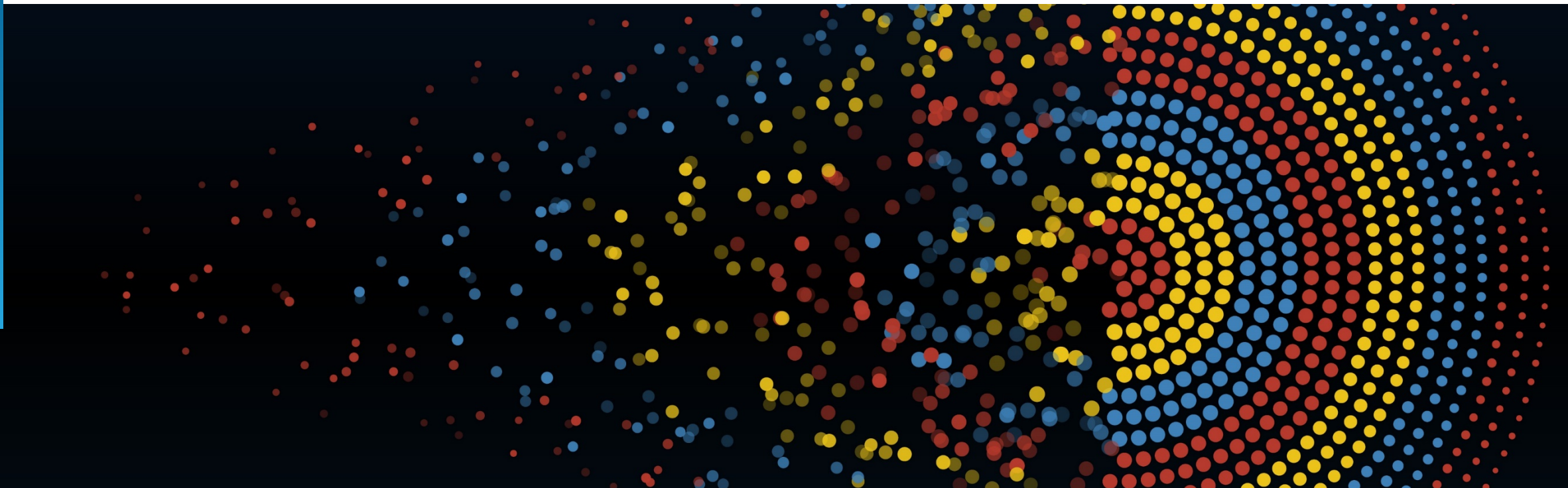


Machine Learning Operations (MLOps) – Technology Provider Landscape with Products PEAK Matrix® Assessment 2022

September 2022: Complimentary Abstract / Table of Contents



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Background and scope of research

As data volumes increase exponentially, enterprises are adopting AI and ML capabilities to gain business insights and make decisions. However, enterprises face several challenges in deploying ML models to production at scale. As a result, enterprises are leveraging MLOps to decouple deployment cycles from model development to improve the quality and relevance of model results and achieve business-oriented outcomes and improved experiences for stakeholders. MLOps is a growing market, rapidly evolving in terms of product features, architecture, training and support, deployment options, partner ecosystem, and commercial models. Technology providers can help enterprises to succeed in their AI/ML transformation journey by implementing MLOps across the enterprise.

In this research, we present an assessment and detailed profiles of 18 technology providers featured on the MLOps Products PEAK Matrix®. Each provider profile provides a comprehensive picture of its size and scope of business, product capabilities, partnerships, domain investments, and case studies. The assessment is based on Everest Group’s annual RFI process for the calendar year 2022, interactions with leading MLOps providers, client reference checks, and an ongoing analysis of the MLOps products market.

This report includes the profiles of the following 18 leading MLOps technology providers featured on the MLOps Products PEAK Matrix:

- **Leaders:** DataRobot, Google Cloud Platform (GCP), and Microsoft Azure
- **Major Contenders:** Alteryx, Amazon Web Services (AWS), Cloudera, Databricks, Dataiku, Domino Data Lab, H2O.ai, IBM, Iguazio, Katonic, RapidMiner, and SAS
- **Aspirants:** Aible, dotData, and Minitab

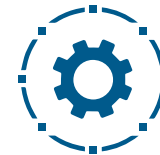
Scope of this report



Geography
Global



Providers
18 leading MLOps technology providers



Products
Machine Learning Operations (MLOps)

Overview and abbreviated summary of key messages

This report examines the global AI/ML market and evaluates the positioning of MLOps technology providers on the Everest Group PEAK Matrix®. It provides insights into changing market dynamics, technology provider capabilities, and Everest Group’s remarks on technology providers’ key strengths and limitations.

Some of the findings in this report, among others, are:

AI/ML market landscape

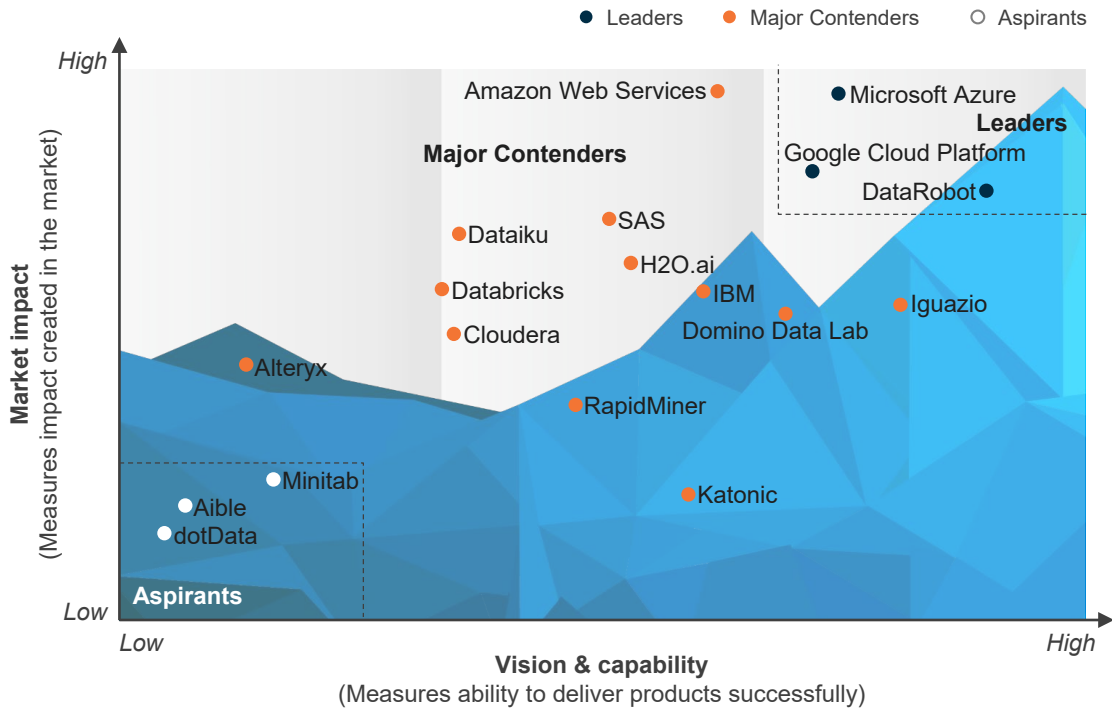
- As digital transformation is becoming a major theme across enterprises, AI adoption is expected to scale across enterprises with more than 25% enterprises investing in extensive AI/ML implementation in the coming years
- Enterprises face several developmental and operational challenges while scaling their AI initiatives, which can be overcome by utilizing MLOps across the ML life cycle
- The ML life cycle consists of model development and operationalization. MLOps includes technology capabilities for model deployment, model monitoring, and collaboration and platform management

Technology provider characteristics

- Based on the extent of capability development and technology providers’ market impact, we see three segments of MLOps technology providers (further examined in the full report)
- DataRobot, GCP, and Microsoft Azure are the current leaders in the global MLOps products market, with several other technology providers emerging as major contenders and aspirants
- Leaders possess strong technical capabilities across the entire ML life cycle, augmented by a solid partnership ecosystem, responsive support functions, and well-developed user community
- Major Contenders have a strong base of satisfied clientele within their sweet spots in the MLOps stack. They have a strong vision and are expanding their market presence and product portfolio to drive greater competition in the area
- Aspirants are focusing on creating solutions beyond their niche areas of expertise. While they are limited by scale to cater to the requirements of large global players, they have been pro-actively investing in upgrading their flagship proprietary offerings to drive MLOps engagements

This study offers three distinct chapters providing a deep dive into key aspects of MLOps market; below are three charts to illustrate the depth of the report

Machine Learning Operations (MLOps) Products PEAK Matrix® Assessment 2022¹



¹ Assessments for Aible, Alteryx, Amazon Web Services (AWS), Cloudera, Databricks, Dataiku, dotData, Google Cloud Platform (GCP), H2O.ai, IBM, Microsoft Azure, RapidMiner, and SAS exclude technology provider inputs on this particular study and are based on Everest Group's estimates that leverage its proprietary Transaction Intelligence (TI) database, ongoing coverage of technology providers' public disclosures, and interaction with buyers. For these companies, Everest Group's data for assessment may be less complete

Source: Everest Group (2022)

Capability assessment

Illustrative example

Measure of capability: ☐ Low ● High

Providers	Market impact				Vision & capability					
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support	Overall
Provider 1	●	●	●	●	●	●	●	●	●	●
Provider 2	☐	●	●	●	☐	●	●	●	●	●
Provider 3	☐	●	●	●	●	●	●	●	●	●
Provider 4	☐	●	●	●	●	●	●	●	●	●
Provider 5	●	●	●	●	●	●	●	●	●	●
Provider 6	●	☐	●	●	●	●	●	●	●	●
Provider 7	●	☐	●	●	●	●	●	●	●	●
Provider 8	●	☐	●	●	●	●	●	●	●	●

Everest Group's remarks on providers

Illustrative example

Measure of capability: ☐ Low ● High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support	Overall
●	●	●	●	●	●	●	●	●	●

Strengths

- Provider 1 offers a cloud-based solution across the ML life cycle that provides a pay-as-you-go service with easy deployment and maintenance
- Its drag and drop capability allows users to create flowcharts, understand the model workflow, and experiment with limited coding expertise

Limitations

- Provider 1's product works best in cloud environments. Enterprises working with on-premise, multi-cloud, and hybrid environments should evaluate the product's capabilities before implementing
- The platform requires a steep learning curve, and lacks extensive documentation, tutorials, and help tools to aid new users

Research calendar

Data & Analytics

■ Published
 ■ Planned
 ■ Current release

Reports title	Release date
Augmented Data Management: Leveraging the Power of Artificial Intelligence to Handle the Data Deluge	October 2021
Analytics and AI Services Specialists PEAK Matrix® Assessment 2021	November 2021
Driving Enterprise Business Transformation with Next-generation Data Management	December 2021
Advanced Analytics & Insights (AA&I) Services PEAK Matrix® Assessment 2022	December 2021
Machine Learning Operations (MLOps): the Foundation of an Enterprise Built on Artificial Intelligence (AI)	January 2022
Data and Analytics (D&A) Services State of the Market Report 2022	January 2022
Analytics and AI Services Specialists – Service Provider Compendium 2022	February 2022
Artificial Intelligence (AI) Services PEAK Matrix® Assessment 2022	March 2022
Artificial Intelligence (AI) Service Provider Compendium 2022	March 2022
Accelerating the Value of Data in Life Sciences	March 2022
Harnessing the Power of Analytics and AI in Medicine: Life Sciences Enterprises Revamping Processes to Improve Patient Outcomes	May 2022
Data and Analytics (D&A) – PEAK Matrix Assessment 2022	August 2022
Machine Learning Operations (MLOps) – Technology Provider Landscape with Products PEAK Matrix® Assessment 2022	September 2022
The Multi-Cloud Era and the Associated Data Challenges	Q3 2022
Data Labelling and Annotation Services	Q3 2022

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