A new star in the northern sky

Elisa Industriq is entering the stage of Operational Intelligence. What's behind this important market and what impact could the technology leader have – will Elisa Industriq serve as a guiding light? Dr BERNHARD D. VALNION asks.

Operational Intelligence is a data-driven approach that provides real-time insights into business operations, enabling organizations to make informed decisions as quickly and efficiently as possible

The global market for Operational Intelligence is on a clear growth trajectory. This applies to the cloud deployment segment as well as to corresponding on-premises offerings. In 2023, Analysys Mason, for example, estimated this market at 5.1 billion euros in size and projects it to reach 7.7 billion by 2027 – growing at a remarkable CAGR of 11 percent (1).

What makes the market so attractive? Operational Intelligence is an umbrella term for collecting, analyzing, and processing of real-time operations data to monitor system health and pre-emptively reduce issues. Traditional Operational Intelligence approaches were primarily focused on IT operations: Data and metrics related to servers, networks, application deployments, configurations, and IT security. As a response to the challenges of our time, Operational Intelligence has been expanded to cover the connectivity of assets in general, sustainability, efficiency enhancements, and reliability / safety – it is also about (end-to-end) digitalization of the shopfloor in all industrial sectors in the sense of

- Connectivity: Aggregation and analysis of data across enterprise applications to enable appropriate action and reaction.
- Sustainability: Execution of sustainability programs based on the establishment of robust smart monitoring of resources and assets.
- Efficiency: Increasing performance by sorting through mountains of data (eliminating false alarms or nuisance alarms) and introducing dashboards that consolidate information derived from extended networks.
- Robustness / reliability / safety: Deployment of technologies to maximize safety and reliability by means of high-precision automation and control, training and simulation, generation of what-if scenarios, robust remote management, predictive maintenance, managed services, and advanced analytics.

Operational Intelligence is a data-driven approach that provides real-time insights into business operations, enabling organizations to make informed decisions quickly and efficiently. Leveraging advanced analytics, machine learning, and data integration tools, this approach enables businesses to monitor, analyze, and act on operational data from various sources, including sensors, transactional systems, and social media feeds. This comprehensive visibility into operations allows for the detection of anomalies, the optimization of processes, and the swift response to changing conditions.

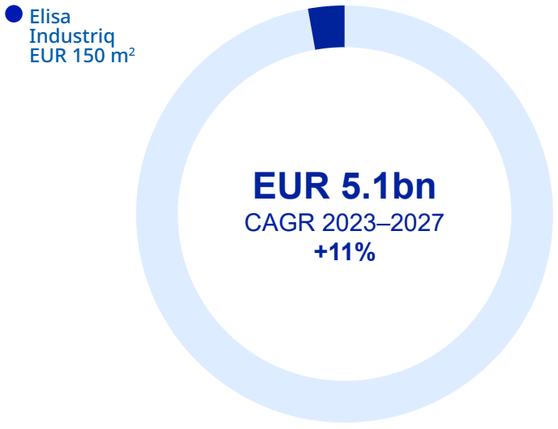
This market is currently dominated by vendors such as Splunk, SAP, Axway, and Siemens. With the new brand 'Elisa Industriq', Elisa Oyj (Helsinki, Finland) aims to become one of the leading system providers – a 'new star in the cosmos' of Operational Intelligence. Thanks to Elisa's acquisitions and the systematic development and expansion of its own expertise, the outlook is favorable.

The underlying equation to operational intelligence is rather simple: The less we consume, the more we can save money – not only to please

financial analysts. Just think about climate change, which requires massive resource conservation. Climate change is a major threat already causing system damage to urban and natural infrastructure and inducing global economic losses of over 500 billion US dollars (2). The enabling impact of operational intelligence is much needed.

Milestones of success

The annals of Elisa go back to 1882 when telegraph mechanic Daniel Johannes Waden received permission to establish a telephone company in Helsinki. In the mid-1990s, Elisa began acquiring a greater stake in the network provider Radiolinja, ultimately leading to a complete merger. This Finnish network provider holds a significant milestone in telecommunications history, having transmitted the world's first GSM phone call and launched the first commercial GSM service in 1991. In 2007, Elisa set a new benchmark in telecommunications history by becoming the first operator to launch a 3G/UMTS900 network for commercial use. In 2011, Elisa was the first company to open a 4G network for commercial use, and in 2016, 4G population coverage was already 98 percent in Finland. A year later, Elisa started the erection of a 5G network, and in 2019, the 5G readiness enabled the firm to be among the first companies worldwide to launch a commercial 5G network. In 2023 Elisa introduced the first Distributed Energy Storage (DES) solution in telecom infrastructure worldwide.



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Source: Analysys Mason 2023

Knowledge systematically captured and reused

Over the years, Elisa's experts have focused on optimizing internal processes and developing solutions for stable network operations. They have also strategically pooled their knowledge to offer it to external clients. A significant amount of data was collected and analyzed by the international digital services part of Elisa, comprising Elisa Polystar for telecom software, Elisa IndustrIQ for industrial software and an internal start-up, Elisa Distributed Energy Storage, for energy storage optimization.

Since March 6, 2025, Elisa has consolidated these businesses under a unified brand, Elisa Industriq (3). Its financial results will be reported in its own segment under Elisa. This strategic consolidation positions Elisa Industriq as the go-to brand for software solutions that provide Operational Intelligence, emphasizing the importance of artificial intelligence and machine learning: "Elisa Industriq has been born out of Elisa's forward-thinking and innovative data-driven approach for managing, operating, and maintaining mobile telephone networks. Based on the great successes in automation and analytics, and in applying artificial intelligence (AI) and machine learning (ML) applications in the telecom industry, Elisa expanded its expertise into the manufacturing industry", as to read on the corporate website (4). Elisa Industriq now wraps up specialized expert brands to deliver tailored solutions across key sectors:

- camLine: Delivering manufacturing excellence and quality intelligence for the semiconductor and electronics industries.
- sedApta: Enabling flexible, integrated supply chain planning and execution for demand-driven production.
- Elisa Polystar: Driving automated assurance and network optimization for telecom operators.
- TenForce: Elevating operational, worker, and process safety.

- CalcuQuote: Integrating supply chain solutions for electronics manufacturing.
- Distributed Energy Storage: Optimizing energy storage operations for smarter, sustainable energy systems.

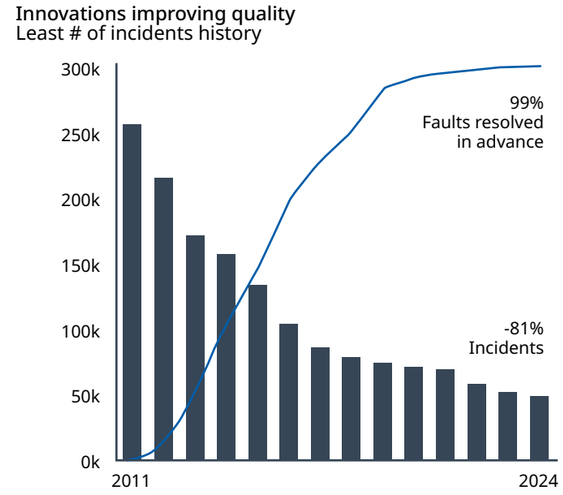
Concrete sectors include battery and chemical manufacturing, food & beverage production, and high-tech / machinery / equipment manufacturing. Corresponding tailor-made solutions are dedicated to health / safety / environment (HSE) management, manufacturing operations / execution systems (MOM / MES), supply chain management, and quality management. Clients can be found in configure-to-order / high-tech manufacturers and telecom operators.

Elisa Industriq has a history of strategic growth, marked by a series of acquisitions. These include CalcuQuote in 2020, camLine in 2021, majority stake in TenForce in 2021, Romaric, Leanware and sedApta in 2024, and most recently, iCADA (via camLine in January 2025).

Expanding Ecosystem

The signs point to growth, and not just for Elisa Industriq. The prerequisites are solid, and the goals are ambitious, as Henri Korpi, Executive Vice President of Elisa Industriq, explains in a background briefing. Given that the Operational Intelligence market is still in its early stages and therefore still manageable in size, the signs are good.

Last year, This market is currently dominated by vendors such as Splunk, SAP, Axway, and Siemens. achieved organic growth of 10+ percent, although its last quarter exceeded this figure at 27 percent. Mr. Korpi is aware of the risks involved, including geopolitical ones. However: “The ongoing digital transformation of the manufacturing sector is a trend that is projected to persist for several years.” The company is currently engaged in rigorous internal discussions regarding strategies to accelerate growth. It’s fair enough to say that Elisa Industriq, with a proforma revenue of approximately 150 million euros, is a relatively small business unit. However, Mr Korpi anticipates double-digit growth over the next few years.



Elisa was able to reduce conflicts in network operations by 81 percent between 2011 and 2024. Elisa Industriq also intends to share such profound expertise with its clients in the manufacturing industry *Source: Elisa 2025*

There are still significant manufacturing hubs, for example in Germany, the UK, France, or the Nordics, where Elisa Industriq's presence is relatively limited. And then there is the special feature of the US market: Henri Korpi assumes that the ongoing political tensions between China and the US will persist. The US economy will continue to allocate substantial resources to its own critical infrastructure, such as the semiconductor industry. Apple alone plans to invest hundreds of billions in manufacturing capacity in the US. Additionally, Asia presents significant business opportunities. "There is no doubt that our products are highly competitive. We find ourselves in a unique position, where growth is expected of us. The solution lies in: We aim to expand by broadening the scope of our commercial operations across regions. We are committed to ongoing product development, with a focus on incorporating advanced AI and simulation capabilities into our portfolio," Mr Korpi stresses.

The company's client list includes approximately 2 000 manufacturing companies, from multinational corporations (MNC) like Continental or Schaeffler, to small-to-medium-sized businesses (SMB) that offer contract manufacturing services in the electronics manufacturing sector. The latter are firms with sales ranging from several hundred million to double-digit billion euros. These companies have expressed a strong interest in enlisting the services of a one-stop IT vendor. However, a key challenge shared by all clients is addressing the pressing issue of the growing shortage of skilled professionals.

Cross-company growth opportunities

The introduction of a consolidated technology platform, as demonstrated by Dassault Systèmes with its 3DEXPERIENCE offerings, can certainly help to expand Elisa Industriq's footprint within its client base. This consolidation of solutions enables enhanced interoperability between diverse technologies, paving the way for novel business models in the cloud computing arena. SaaS, PaaS, and Data Analytics as a Service are just a few examples of the new business models that this bundling of solutions fosters.

For example: A recent collaboration between Elisa Industriq's business unit camLine and a battery technology innovator theion showcases the transformative potential of AI-driven Operational Intelligence solutions. By employing state-of-the-art AI tools, the partnership accomplished a noteworthy 98% reduction in R&D test times, from 42 days to just 15 hours, while maintaining a prediction accuracy of 99.8%. Additionally, the AI-driven root cause analysis enabled the early detection of production anomalies, facilitating the implementation of corrective actions and minimizing downtime. This case exemplifies how Elisa Industriq's expertise in data science and AI can be applied to drive significant efficiency gains and accelerate innovation in the manufacturing sector, supporting clients in their digital transformation journey.

Conclusion

Elisa has amassed considerable expertise in data science for mobile data. This expertise aligns seamlessly with the needs of manufacturing clients. However, it is essential for these companies to be willing to share their data, which requires a new level of trust. This collaboration presents a mutually beneficial opportunity for both parties. The user companies would benefit from increased data insights in a shorter timeframe, while Elisa Industriq would experience growth in its client base.

Pushing boundaries in industry with innovation and trust

The disruptive nature of AI is well understood. Implementing end-to-end processes with AI support requires expertise and trust. Trust, especially when pioneering new approaches to enhance competitiveness, must be earned. Interview with **Henri Korpi, Executive Vice-President, Elisa Industriq**, the international sofware solutions unit of Elisa Oyj.

Why has Elisa Industriq decided to focus its business creating Operational Intelligence for your customers?
For our company, it was essential to define the essence of our unified group. Given the integration of multiple businesses under Elisa Industriq, it was imperative to establish a unified direction that reflects both our expertise and our ambition. We recognized that the business we are in, and the one we aspire to lead, is centered on assisting customers in enhancing their operations through the application of intelligence. Operational Intelligence for us means leveraging industrial expertise with cutting-edge AI innovation. It is how we enable businesses to operate smarter, faster, and more efficiently.

Our group's services are currently utilized by over 2 000 companies worldwide, spanning the manufacturing, telecommunications, and energy sectors. Each industry has its unique complexities, but the common thread is clear: enhanced intelligence leads to enhanced operations.

What does this mean in practice and how does Operational Intelligence create value for your clients?
Our strategy for growth is based on three key pillars: First, we continuously advance our industrial expertise. Second, we push the boundaries of AI-driven innovation. Third, we foster long-term, strategic partnerships with our clients. By integrating these elements, we facilitate the comprehensive utilization of digital transformation, enabling our clients to achieve operations that are smarter, more efficient, and future-proof. Elisa Industriq delivers business value by helping companies reduce costs, improve quality, and drive growth. Let me give you a real-world example: By leveraging our AI capabilities, we enabled a battery manufacturing startup to reduce R&D testing time by a remarkable 98%.

What sets Elisa Industriq's approach to Operational Intelligence apart from others in the industry?
Numerous other vendors assert that they offer comprehensive solutions. Their approach often involves a one-size-fits-all solution. We adopt a different approach, grounded in pragmatism and a realistic understanding of the business world. Our unique selling points lie in our core competencies in automation, analytics, and AI, which we subsequently offer to our clients. We understand our clients' operations intimately, focusing on select industries rather than a broad approach. We collaborate closely with our clients, leveraging our expertise to make the most significant impact where it matters most. Our Operational Intelligence approach is a pragmatic and practical strategy to help businesses succeed.

Thank you for the interview!
Questions: Dr Bernhard D. Valnion

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