



IT Infrastructure Services Automation – Market Trends and Services PEAK Matrix™ Assessment 2018: Become AI Aware or Fall Behind

Cloud & Infrastructure Services (CIS)

Market Report – July 2018 – Complimentary Abstract / Table of Contents

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Custom research capabilities

- Benchmarking | Pricing, delivery model, skill portfolio
- Peer analysis | Scope, sourcing models, locations
- Locations | Cost, skills, sustainability, portfolio – plus a tracking tool
- Tracking services | Service providers, locations, risk
- Other | Market intelligence, service provider capabilities, technologies, contract assessment

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- **Introduction and overview**
 - **Background and scope of the research**
 - **Research methodology**
- IT infrastructure services automation market trends
- PEAK Matrix™ for IT infrastructure services automation
- Profiles of IT infrastructure services automation providers
- Appendix

Background of the research

Background of the research

- IT infrastructure services automation is high on the agenda of enterprises and service providers alike. However, most enterprises are yet to derive commensurate benefits from their automation investments and lack a long-term transformational roadmap
- The IT infrastructure services landscape is undergoing a significant shift, driven by digitalization. As the focus shifts from cost efficiency to digital enablement, organizations need to reimagine the IT infrastructure services model to deliver the necessary back-end agility, flexibility, and fluidity. Automation, analytics, and Artificial Intelligence (AI) have the potential to enable this desired level of adaptability within IT infrastructure services
- In this research, we discuss the latest IT infrastructure services automation market trends and present the assessment and detailed profiles of 20 IT service providers featured on the IT infrastructure services automation PEAK Matrix. Each service provider profile gives a comprehensive picture of their IT infrastructure services automation vision & strategy, technology & services capabilities, and innovation & investments
- The assessment is based on Everest Group's annual Request For Information (RFI) process conducted in Q1 and Q2 2018, interactions with leading IT infrastructure services automation service providers, and analysis of the IT infrastructure services automation marketplace

Scope of this report

- **Services:** IT infrastructure services automation
- **Geography:** Global
- **Service providers:** 20 leading IT infrastructure services automation providers

This report includes profiles of the following 20 service providers on the IT infrastructure services automation PEAK Matrix:

- **Leaders:** DXC Technology, HCL Technologies, IBM, TCS, and Wipro
- **Major Contenders:** Accenture, CGI, Cognizant, CSS Corp, GAVS Technologies, Genpact, Infosys, Microland, Mphasis, NTT DATA, Tech Mahindra, and Zensar
- **Aspirants:** Hexaware, NIIT Technologies, and Syntel

First principles of Service Delivery Automation (SDA)

1

Automation – at its most basic level – must utilize technology to replace a series of human actions. Correspondingly, not all technologies provide automation, and replacing a single human action with technology (e.g., a mathematical equation in a spreadsheet) is not automation. At the same time, automation can be done by degrees, but some steps will still require human interaction.

2

Much automation is already embedded in software systems (e.g., linking client information across marketing and supply chain systems); however, since it is part of the normal feature-functionality of a system, it is generally not considered as automation, but simply a more powerful system(s).

3

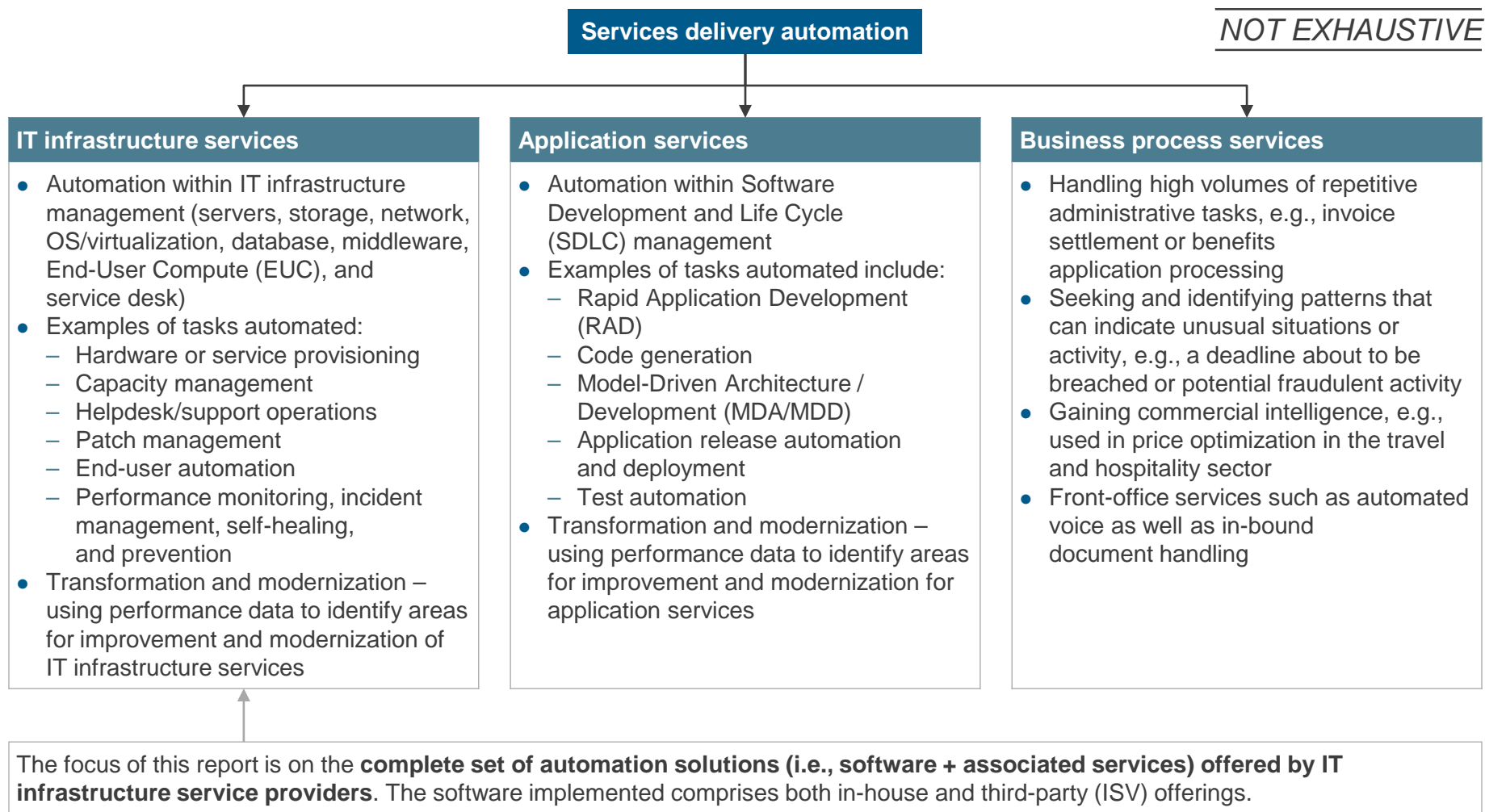
Automation for IT is very different than for business processes:

- In IT, automating is generally addressed by improving the core functionality and is handled by IT system management tools. Further, these activities are owned by central IT, which is naturally incented to create more efficient IT operations
- In business processes, system limitations are generally much more difficult to overcome, and follow a process that stretches across many systems in the organization. As such, the business case for significant system change is generally unappealing. Finally, the benefits of improved processes accrue to the business and are hard to quantify with a Return On Investment (ROI) that can motivate central IT groups to invest their resources

4

Cognitive computing is a breakthrough in automation. Traditional automation uses GUI-based workflows and scripts to automate routine human IT tasks. This has further progressed to self-learning systems or autonomies with particular relevance in the infrastructure services space. Cognitive computing, although at infancy, represents the next horizon, as automation not only replicates human behavioral characteristics while executing judgment-intensive IT and business processes, but also creates the potential to spawn new businesses for IP-owners and enterprises.

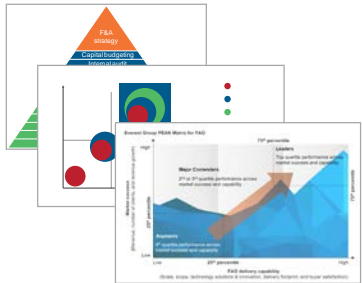
This report focuses on IT infrastructure services automation and offers insights into prominent IT service providers operating in this space



Our research methodology is based on four pillars of strength to produce actionable and insightful research for the industry

- Market thought leadership
- Actionable and insightful research
- Syndicated and custom research deliverables

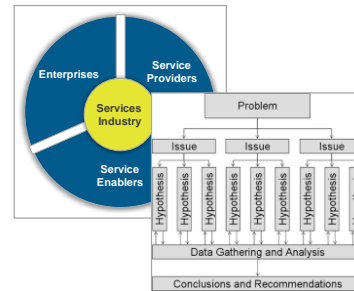
Robust definitions and framework
(PEAK Matrix, market maturity, and technology adoption/investment)



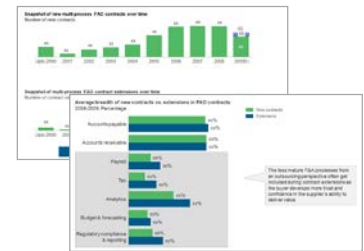
Primary sources of information
(Annual contractual and operational RFIs, service provider briefings, and market feedback)



Diverse set of market touchpoints
(Ongoing interactions with key stakeholders, input from a mix of perspectives and interests, as well as support via data analysis and thought leadership)



Fact-based research
(Data-driven analysis with expert perspectives, trend analysis across market adoption, contracting, and service providers)



- Annual RFI process and interaction with leading IT infrastructure and cloud service providers
- Dedicated team for IT infrastructure and cloud services adoption trends
- Over 25 years of experience in advising clients on global services decisions
- Executive-level relationships with buyers, service providers, technology providers, and industry associations

Everest Group's IT infrastructure services automation research is based on four key sources of proprietary information

- Proprietary database of IT service contracts of major IT service providers with IT infrastructure services scope of work (updated annually)
- The database tracks the following elements of each contract:
 - Buyer details including size and signing region
 - Contract details including service provider, contract type, TCV and ACV, service provider FTEs, start and end dates, duration, and delivery locations
 - Scope details including share of individual buyer locations being served in each contract, Line of Business (LoB) served, and pricing model employed

- Proprietary database of IT service providers (updated annually)
- The database tracks the following for each service provider:
 - Revenue and number of FTEs
 - Revenue split by region
 - Number of clients
 - Location and size of delivery centers
 - FTE split by different lines of business
 - Technology solutions developed

- **Service provider briefings**
 - Vision and strategy
 - Key strengths and improvement areas
 - Annual performance and future outlook
 - Emerging areas of investment

- **Buyer reference interviews, ongoing buyer surveys, and interactions**
 - Drivers and challenges for adopting IT infrastructure services automation
 - Assessment of service provider performance
 - Emerging priorities
 - Lessons learnt and best practices

Service providers assessed

 accenture

 CGI

 Cognizant

 CSS CORP

 DXC.technology

 GAVS

 genpact
Transformation Happens Here

 HCL

 HEXAWARE

 IBM®

 Infosys®

 MICROLAND®

 Mphasis
Unleash the Next

 NIIT
technologies

 NTT DATA

 SYNTEL
Consider IT Done®

 TATA CONSULTANCY SERVICES

 Tech Mahindra

 wipro

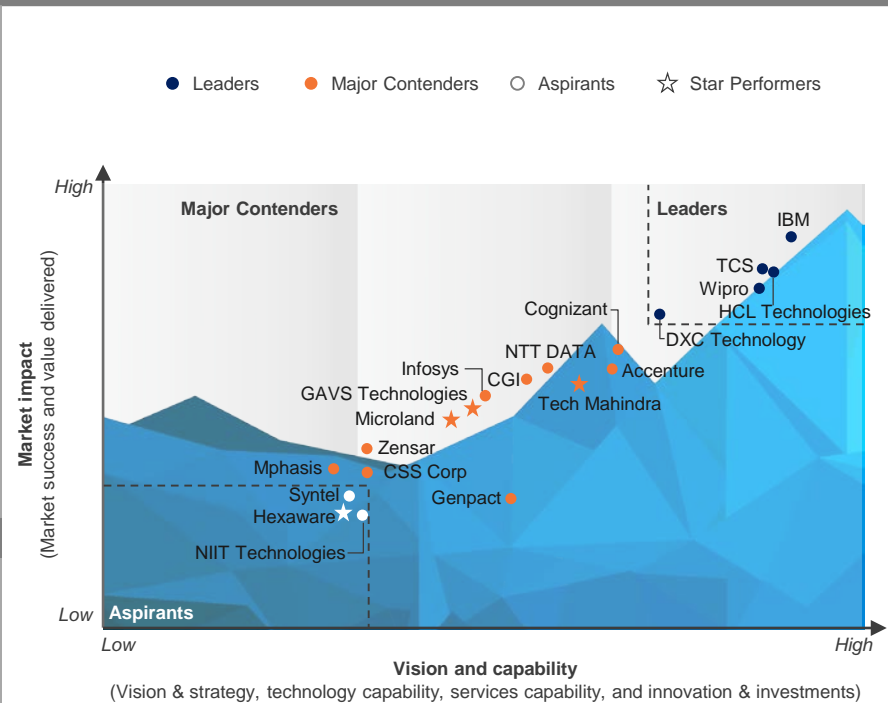
 ZenSar
TECHNOLOGIES
Your Transformation Partner

Note: Assessment for CGI and Infosys excludes service provider inputs in this particular study and is based on Everest Group's estimates that leverage Everest Group's proprietary Transaction Intelligence (TI) database, ongoing coverage of these service providers, service provider public disclosures, and interaction with buyers

Confidentiality: Everest Group takes its confidentiality pledge very seriously. Any information, that is contract-specific, will be presented back to the industry only in an aggregated fashion

The report focuses on the IT infrastructure services automation market trends and presents the assessment and detailed profiles of 20 IT service providers

Everest Group PEAK Matrix™ for IT Infrastructure Services Automation 2018



Notes Assessment for CGI and Infosys excludes service provider inputs for this particular study and is based on Everest Group's estimates that leverage Everest Group's proprietary Transaction Intelligence (TI) database, ongoing coverage of these service providers, service provider public disclosures, and interaction with buyers

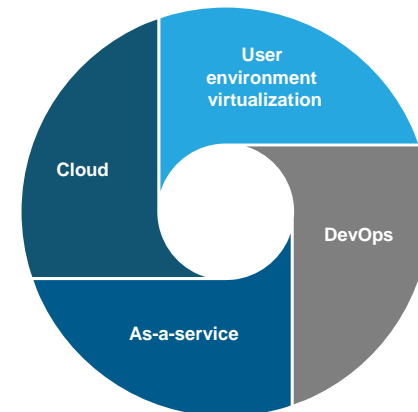
Capability assessment

Illustrative example

Measure of capability: ● High ○ Low

| Service provider | Market impact | | | | Vision & capability | | | | |
|--------------------|-----------------|---------------|-----------------|---------|---------------------------|----------------------------|--------------------|---------------------|---------|
| | Market adoption | Portfolio mix | Value delivered | Overall | Scope of services offered | Innovation and investments | Delivery footprint | Vision and strategy | Overall |
| Service provider 1 | ● | ○ | ● | ● | ● | ○ | ○ | ○ | ○ |
| Service provider 2 | ○ | ○ | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| Service provider 3 | ○ | ○ | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| Service provider 4 | ○ | ○ | ○ | ○ | ● | ○ | ○ | ○ | ○ |
| Service provider 5 | ○ | ○ | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| Service provider 6 | ○ | ○ | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| Service provider 7 | ○ | ○ | ○ | ○ | ○ | ○ | ● | ○ | ○ |
| Service provider 8 | ○ | ○ | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| Service provider 9 | ○ | ○ | ○ | ○ | ○ | ○ | ○ | ○ | ○ |

New-age IT delivery models



This IT infrastructure services automation compendium report has 20 IT service provider profiles focusing on their IT infrastructure services automation solutions, partnerships, and recent investments

XYZ | IT infrastructure services automation profile

Overview

XYZ's vision revolves around digital transformation driven through automation and smart machines, driving user experience, and resource optimization through its ABC Framework. It seeks to bring automation as part of L1/L2/L3 activities and automate the entire CI/CD/CT processes that are also a part of the cloud environment. It aims to enable assessment and migration to the target cloud platform with zero downtime and zero data loss. Additionally, XYZ claims that it has been successful in early implementation of instrumentation and end-user environment, thereby achieving enhancement in end-user experience.

Strengths

- Internal IP/solutions (e.g., ABC, DEF, and GHI) are witnessing increasing traction within existing clients and delivering meaningful automation benefits
- Clients have appreciated XYZ's flexibility to contextualize solutions and its readiness to make investments for the client to ensure significant value addition

Areas of improvement

- Clients believe that XYZ has strong capabilities around monitoring and alerting, but needs to enhance its end-to-end automation capabilities to help in issue remediation without human intervention
- Proof points around building and executing on large-scale comprehensive transformation roadmaps are still limited in number

Proprietary solutions (representative list)

| Solution | Details |
|----------|---|
| XXXX | Enables classification of alerts into primary/secondary tiers and establishes a relationship between them. Uses alert correlation rules to group alerts that are related |
| XXXX | Monitors configuration changes. Has 125 built-in pre-configured ready-to-use workflows to avoid manual intervention in monitoring applications, servers, and databases |
| XXXX | An integrated suite of solutions that can monitor across the end-user to the storage layer. Provides user experience index, root cause analysis, and application health index |
| XXXX | Desktop virtualization engine that offers a cloud-ready platform to deliver end-to-end functionality for public and private cloud |
| XXXX | Environment-as-a-Service (EaaS) tool that enables provisioning of servers, platform services, and application services in an automated way |
| XXXX | Automatically discovers the inventory of relevant network devices, nodes, and servers in an environment and stores it in the Configuration Management Database (CMDB) |

Partnerships (representative list)

| Partner | Details |
|---------|---|
| XXXX | Gold partnership in which XYZ leverages XXXX and XXXX to create data models and algorithms using infrastructure data to provide predictive insights. Automates data science, thereby reducing the need for training data; provides predictive and prescriptive analysis |
| XXXX | Working on a white-labeling partnership to build an automation platform. Enables customers to reduce manual IT processes, thus enhancing productivity |
| XXXX | Signed a white-labeling partnership to implement DaaS (Desktop-as-a-service) solution for customers |

Recent activities (representative list)

| Development | Details |
|---------------------------------------|---|
| Collaborative innovation and research | Ideates for joint research in the field of AI in IT infrastructure management. This includes collaboration in terms of physical space, platforms, and people from IIT-Madras in India and XYZ |
| XYZ learning academy | Avenue for employees to enhance knowledge on the latest technology trends including automation |

Source: Everest Group (2018)



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EGR-2018-X-R-XXXX

1

Research calendar – Cloud and infrastructure services

Published
 Planned
 Current release

Flagship CIS reports

Release date

| | |
|--|------------------|
| Top 30 IT Security Trailblazers: Rise of the “Digital” Security Paradigm | January 2018 |
| Digital Workplace Services – Market Trends and PEAK Matrix™ Assessment | June 2018 |
| IT Infrastructure Services Automation – Market Trends and Services PEAK Matrix™ Assessment 2018: Become AI Aware or Fall Behind | July 2018 |
| AI Stands to Make IT Infrastructure Services “Invisible” | Q3 2018 |
| IT Security Services – Market Trends and PEAK Matrix™ Assessment | Q3 2018 |
| Cloud Enablement Services – Market Trends & PEAK Matrix™ Assessment | Q3 2018 |
| Cloud Identity and Access Management (IAM) Trailblazers | Q4 2018 |
| Software Defined Infrastructure (SDI) Solutions – Market Trends & PEAK Matrix™ Assessment | Q4 2018 |

Thematic CIS reports

| | |
|--|---------------|
| Upcoming Contract Renewals – Infrastructure Services | February 2018 |
| Enterprise Pulse | March 2018 |
| Enterprise Primer For Artificial Intelligence & Machine Learning | Q3 2018 |
| BigTech Wars – Container Orchestration | Q3 2018 |
| Viewpoint – Demystifying IT Infrastructure Services Automation | Q3 2018 |
| Viewpoint – Security Services Automation and Analytics: Hype vs. Reality | Q3 2018 |

Note: For a list of all CIS reports published by us, please refer to our [website page](#)

Additional ITS research references

The following documents are recommended for additional insight into the topic covered in this research. The recommended documents either provide additional details or complementary content which may be of interest

1. **Digital Workplace Services – Market Trends and PEAK Matrix™ Assessment: Enterprise’s Wish is Not Service Provider’s Command!** ([EGR-2018-29-R-2659](#)); 2018. This report focuses on the latest digital workplace services market trends and presents the assessment and detailed profiles of 20 IT service providers featured on the digital workplace services PEAK Matrix. The report also discusses in detail the existing confusion in the market in terms of what digital workplace entails and how the market participants should strategize to move toward a true digital workplace
2. **Upcoming Contract Renewals - Cloud & Infrastructure Services 2018** ([EGR-2018-29-R-2555](#)); 2018. The report “Upcoming Contract Renewals – Infrastructure Services” includes data and insights specific to deals nearing end of term, expanding on analysis of ITS and BPS deals nearing end of term by buyer geography and buyer industry, trends in IS and bundled deal renewals by buyer industry, buyer geography, and service provider category, and analysis of infrastructure services contract renewals by scope across geographies

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